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MARIN COUNTY MARKET UPDATE

Q2 2025





VANGUARD PROPERTIES

MARKET UPDATE

MARIN COUNTY | Q2 2025

Marin County's housing market remained strong and active through the second quarter of 2025. Buyers stayed engaged, sales volume grew, and homes continued to sell at a brisk pace despite a rise in inventory. While price growth was essentially flat compared to a year ago, demand held firm, signaling a competitive but slightly more balanced market.

The median sales price ticked up 0.1% year over year to \$1,802,508. Homes continued to move quickly, with a median of just 17 days on the market, two days longer than last year but still among the fastest in the Bay Area. The number of properties that went into contract rose 6.8% to 612, while closed sales jumped 11.2% to 606, a sign that buyers remain motivated. Inventory increased meaningfully, with 44.3% more homes for sale on the last day of the quarter compared to Q2 of last year. Despite that jump, the months supply of inventory stayed relatively low at 2.0, still reflecting a seller-favorable environment. Nearly half of all homes (49.2%) sold over asking, and sellers received an average of 102.2% of list price, slightly down from last year but still strong by historical standards. Price per square foot dipped just 1.3% to \$904.

Mortgage rates have been trending downward in recent weeks. Freddie Mac reported that the average 30-year fixed mortgage rate dropped to 6.67%, the fifth consecutive weekly decline and the largest since March. This shift is giving buyers a bit more room to maneuver and could encourage more movement in the months ahead.

While summer typically brings a seasonal slowdown, Marin's market remains active. With demand holding steady, new listings on the rise, and rates moving in a more favorable direction, buyers and sellers alike may find opportunities



SINGLE FAMILY HOMES

Q2 2025

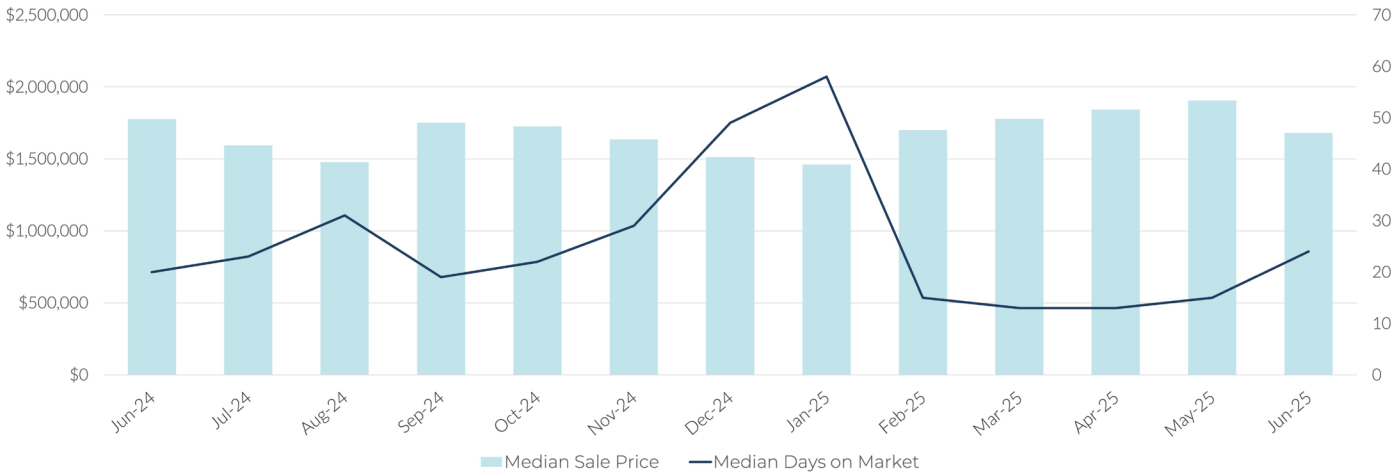
| | |
|--------------------------------------|---------------|
| Median Sales Price | \$1,802,508 ↑ |
| Days on market | 17 ↑ |
| \$ / SQ. FT. | \$904 ↓ |
| # For Sale On Last Day Of Quarter | 381 ↑ |
| Went Into Contract | 612 ↑ |
| Properties Sold | 606 ↑ |

MARIN COUNTY MARKET UPDATE

Q2 2025

SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **-11.8%**

DAYS ON MARKET: **+9 days**

YEAR-OVER-YEAR COMPARISON

"The number of properties that went into contract rose 6.8% to 612, while closed sales jumped 11.2% to 606, a sign that buyers remain motivated."

| | MEDIAN | | |
|----------------|-------------|-------------|--------|
| | Q2 2025 | Q2 2024 | %Δ |
| Sales Price | \$1,802,508 | \$1,800,000 | +0.1% |
| Days On Market | 17 | 15 | +13.3% |
| \$ / SQ. FT. | \$904 | \$916 | -1.3% |

| | TOTAL | | |
|---------------------------------------|---------|---------|--------|
| | Q2 2025 | Q2 2024 | %Δ |
| Went Into Contract | 612 | 573 | +6.8% |
| Properties Sold | 606 | 545 | +11.2% |
| # For Sale Last Day of Quarter | 381 | 264 | +44.3% |
| % Of Properties Sold Over List | 49.2% | 56.5% | -12.9% |
| % Of List Price Received (Average) | 102.2% | 103.0% | -0.8% |

MARIN COUNTY MARKET UPDATE

Q2 2025

YEAR-OVER-YEAR REGION COMPARISON

| REGION | HOMES SOLD (TOTAL) | | | DAYS ON MARKET (MEDIAN) | | | SALE PRICE (MEDIAN) | | |
|---------------|-----------------------|---------|-------|----------------------------|---------|--------|------------------------|-------------|-------|
| | Q2 2025 | Q2 2024 | %Δ | Q2 2025 | Q2 2024 | %Δ | Q2 2025 | Q2 2024 | %Δ |
| Belvedere | 9* | 9* | ▲ 0% | 56 | 30 | ▲ 87% | \$4,750,000 | \$5,077,000 | ▼ 6% |
| Corte Madera | 22* | 26* | ▼ 15% | 19 | 9 | ▲ 111% | \$1,887,500 | \$1,950,000 | ▼ 3% |
| Fairfax | 27* | 24* | ▲ 13% | 19 | 12 | ▲ 58% | \$1,200,000 | \$1,272,500 | ▼ 6% |
| Greenbrae | 13* | 17* | ▼ 24% | 14 | 8 | ▲ 75% | \$2,425,000 | \$1,850,000 | ▲ 31% |
| Kentfield | 21* | 30* | ▼ 30% | 17 | 12 | ▲ 42% | \$3,176,625 | \$3,175,000 | ▲ 0% |
| Larkspur | 19* | 22* | ▼ 14% | 9 | 12 | ▼ 25% | \$2,730,000 | \$2,857,500 | ▼ 4% |
| Mill Valley | 100 | 83 | ▲ 20% | 9 | 12 | ▼ 25% | \$2,345,000 | \$2,405,000 | ▼ 2% |
| Novato | 121 | 108 | ▲ 12% | 21 | 17 | ▲ 24% | \$1,335,000 | \$1,350,215 | ▼ 1% |
| Ross | 12* | 9* | ▲ 33% | 9 | 11 | ▼ 18% | \$3,325,000 | \$4,762,000 | ▼ 30% |
| San Anselmo | 53 | 40* | ▲ 33% | 14 | 14 | 0% | \$1,998,000 | \$1,637,500 | ▲ 22% |
| San Rafael | 129 | 115 | ▲ 12% | 20 | 18 | ▲ 11% | \$1,525,000 | \$1,575,000 | ▼ 3% |
| Sausalito | 20* | 13* | ▲ 54% | 17 | 27 | ▼ 37% | \$2,522,500 | \$2,375,000 | ▲ 6% |
| Stinson Beach | 3* | 3* | 0% | 34 | 23 | ▲ 48% | \$6,900,000 | \$4,000,000 | ▲ 73% |
| Tiburon | 37* | 25* | ▲ 48% | 25 | 30 | ▼ 17% | \$3,675,000 | \$4,050,000 | ▼ 9% |
| MARIN COUNTY | 606 | 545 | ▲ 11% | 17 | 15 | ▲ 13% | \$1,802,508 | \$1,800,000 | 0% |

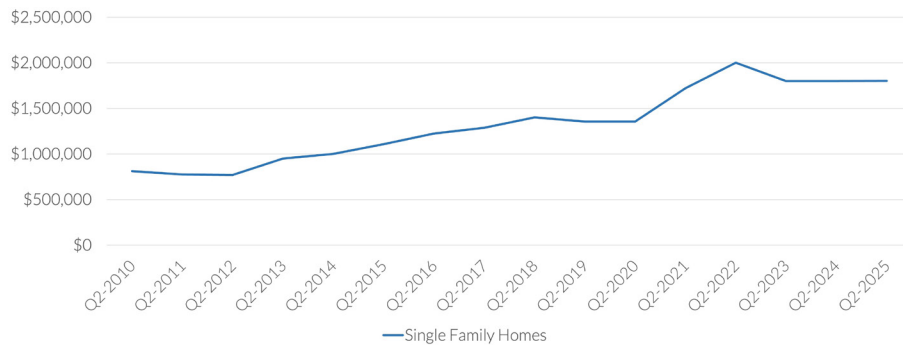
* Denotes small sample size; Use caution when interpreting results. Sources: SFAR Super Regional MLS & BrokerMetrics. Property types covered: Single-family. Only property data posted on the MLS is covered. All information is deemed reliable, but not guaranteed for accuracy. All data is subject to errors, omissions, revisions, and is not warranted. ©2025 Vanguard Properties. All rights reserved. Equal Housing Opportunity. DRE No. 01486075

MARIN COUNTY MARKET UPDATE

Q2 2025

YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

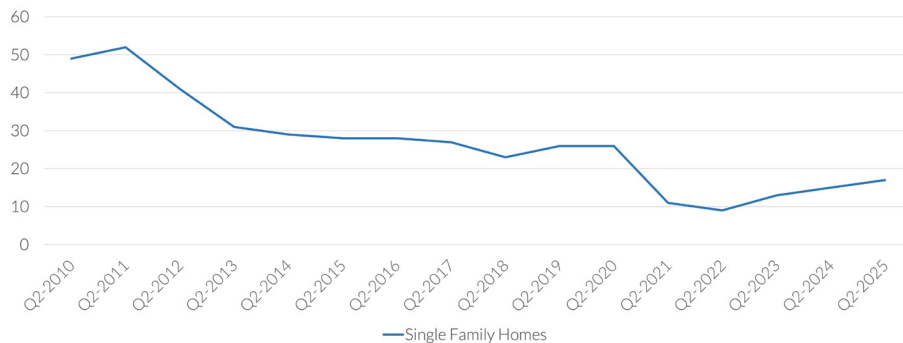


Single Family Residences

\$1,802,508

+0.1% change year-over-year

MEDIAN MARKET TIME

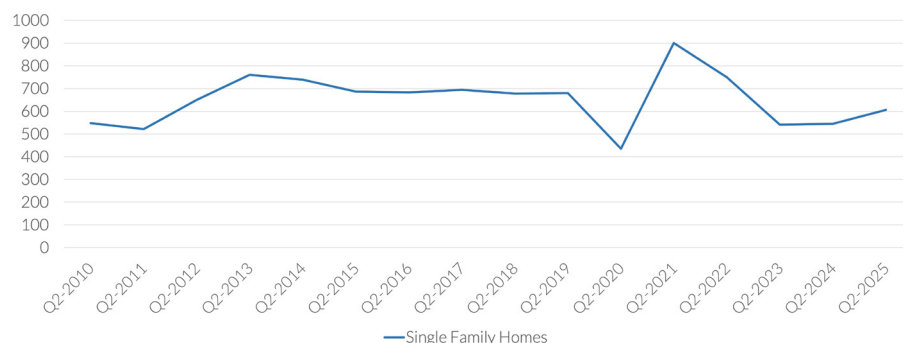


Single Family Residences

17 days

+2 day change year-over-year

NUMBER OF SALES



Single Family Residences

606

+11.2% change year-over-year