

The background of the cover is a photograph of a park. In the foreground, there is a large, modern sculpture made of several tall, curved, metallic blades that resemble flames or sails, standing in a shallow pool of water. The water reflects the sculpture and the sky. In the middle ground, there is a paved walkway with several park benches and a bicycle rack. A car is parked on a street in the background, and a dense line of trees separates the park from a residential area with houses visible on a hill in the distance. The sky is clear and blue.

MARIN COUNTY MARKET UPDATE

Q3 2025





VANGUARD PROPERTIES

MARKET UPDATE

MARIN COUNTY | Q3 2025

As we move through the fall selling season, Marin's housing market continues to show healthy momentum and stability. While some metrics reflect a steadier pace than last year, the overall picture is encouraging — demand remains resilient, pricing is firm, and more inventory is giving buyers a little breathing room without tipping the market out of balance.

In the single-family home segment, the median sales price rose 3.4% year over year to \$1,650,000, signaling ongoing buyer confidence in Marin's long-term value. Homes are still moving at a steady clip, with the median days on market at 27, just three days longer than last year. The median price per square foot edged down only 0.2% to \$829, showing price stability even as activity normalizes from last year's highs.

The number of homes that went into contract decreased 2.1% to 466, and sales dipped slightly by 1.1%, but inventory levels rose 25.5% year over year, giving buyers more options after several years of tight supply. Despite that, competition remains solid — 37.4% of homes sold over asking, and sellers still received an average of 100.1% of list price. With Months Supply of Inventory (MSI) at 2.4, the market remains in lightly competitive territory, leaning toward balance but still favoring sellers in many pockets.

The recent easing in mortgage rates is helping reinforce this stability. Freddie Mac reported that rates have drifted lower in recent weeks, hitting their lowest levels in nearly a year. This shift is giving both buyers and sellers renewed confidence to make moves before year-end.

Overall, Marin's market is showing the kind of steady, sustainable growth that reflects long-term health rather than volatility. Well-priced homes continue to draw attention quickly, while expanding inventory is allowing motivated buyers to re-engage. As fall progresses, Marin is positioned for a strong finish to 2025.



SINGLE FAMILY HOMES

Q3 2025

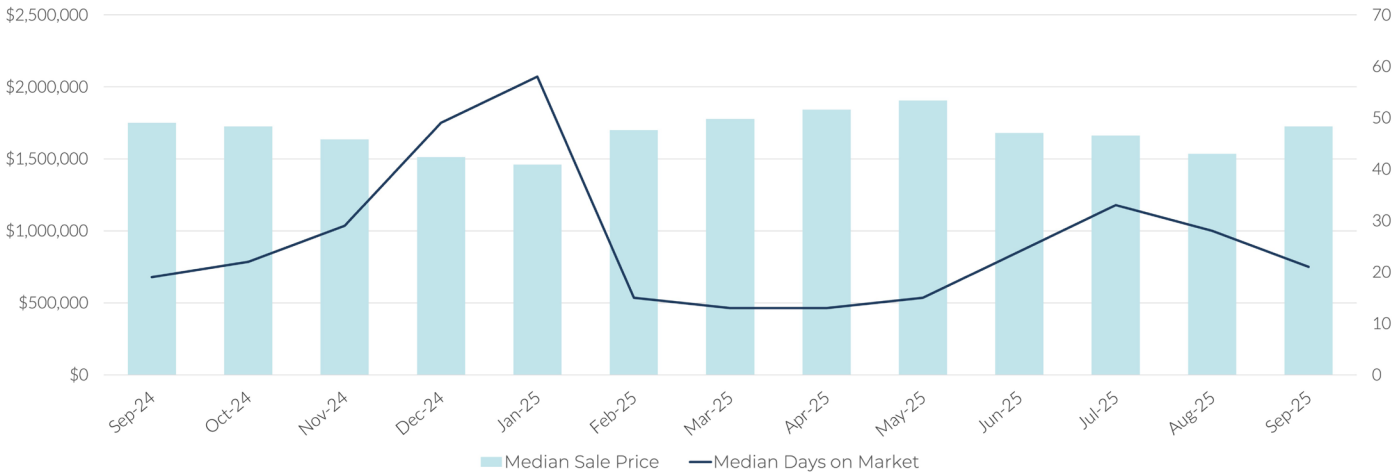
Median Sales Price	\$1,650,000 ↑
Days on market	27 ↑
\$ / SQ. FT.	\$829 ↓
# For Sale On Last Day Of Month	389 ↓
Went Into Contract	466 ↓
Properties Sold	463 ↓

MARIN COUNTY MARKET UPDATE

Q3 2025

SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **+12.4%**

DAYS ON MARKET: **-7 days**

YEAR-OVER-YEAR COMPARISON

"...the median sales price rose 3.4% year over year to \$1,650,000, signaling ongoing buyer confidence in Marin's long-term value."

	MEDIAN		
	Q3-2025	Q3-2024	%Δ
Sales Price	\$1,650,000	\$1,595,000	+3.4%
Days On Market	27	24	+12.5%
\$ / SQ. FT.	\$829	\$831	-0.2%

	TOTAL		
	Q3-2025	Q3-2024	%Δ
Went Into Contract	466	476	-2.1%
Properties Sold	463	468	-1.1%
# For Sale Last Day of Month	389	310	+25.5%
% Of Properties Sold Over List	37.4%	39.7%	-5.8%
% Of List Price Received (Average)	100.1%	100.8%	-0.7%

MARIN COUNTY MARKET UPDATE

Q3 2025

YEAR-OVER-YEAR REGION COMPARISON

REGION	HOMES SOLD (TOTAL)			DAYS ON MARKET (MEDIAN)			SALE PRICE (MEDIAN)		
	Q3 2025	Q3 2024	%Δ	Q3 2025	Q3 2024	%Δ	Q3 2025	Q3 2024	%Δ
Belvedere	7*	6*	▲ 17%	28	39	▼ 28%	\$5,700,000	\$5,475,000	▲ 4%
Corte Madera	19*	24*	▼ 21%	17	13	▲ 31%	\$2,000,000	\$1,887,500	▲ 6%
Fairfax	29*	18*	▲ 61%	29	23	▲ 26%	\$1,205,000	\$1,250,000	▼ 4%
Greenbrae	7*	13*	▼ 46%	21	8	▲ 163%	\$1,725,000	\$2,775,000	▼ 38%
Kentfield	23*	16*	▲ 44%	40	21	▲ 90%	\$2,900,000	\$3,550,000	▼ 18%
Larkspur	14*	16*	▼ 13%	27	39	▼ 31%	\$2,867,500	\$2,404,000	▲ 19%
Mill Valley	67	64	▲ 5%	16	23	▼ 30%	\$2,300,000	\$2,054,000	▲ 12%
Novato	85	115	▼ 26%	31	25	▲ 24%	\$1,195,000	\$1,240,000	▼ 4%
Ross	8*	5*	▲ 60%	8	78	▼ 90%	\$3,297,500	\$2,180,000	▲ 51%
San Anselmo	28*	36*	▼ 22%	21	19	▲ 11%	\$1,692,500	\$1,449,750	▲ 17%
San Rafael	102	104	▼ 2%	28	22	▲ 27%	\$1,399,000	\$1,422,500	▼ -2%
Sausalito	16*	14*	▲ 14%	42	40	▲ 5%	\$2,072,500	\$1,900,000	▲ 9%
Stinson Beach	5*	5*	0%	47	28	▲ 68%	\$4,998,000	\$3,800,000	▲ 32%
Tiburon	26*	15*	▲ 73%	20	35	▼ 43%	\$3,537,500	\$2,800,000	▲ 26%
MARIN COUNTY	463	468	▼ 1%	27	24	▲ 13%	\$1,650,000	\$1,595,000	▲ 3%

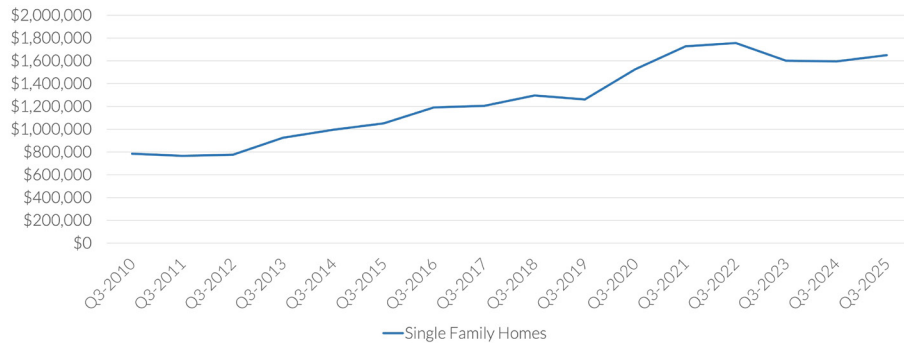
* Denotes small sample size; Use caution when interpreting results. Sources: SFAR Super Regional MLS & BrokerMetrics. Property types covered: Single-family. Only property data posted on the MLS is covered. All information is deemed reliable, but not guaranteed for accuracy. All data is subject to errors,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

MARIN COUNTY MARKET UPDATE

Q3 2025

YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

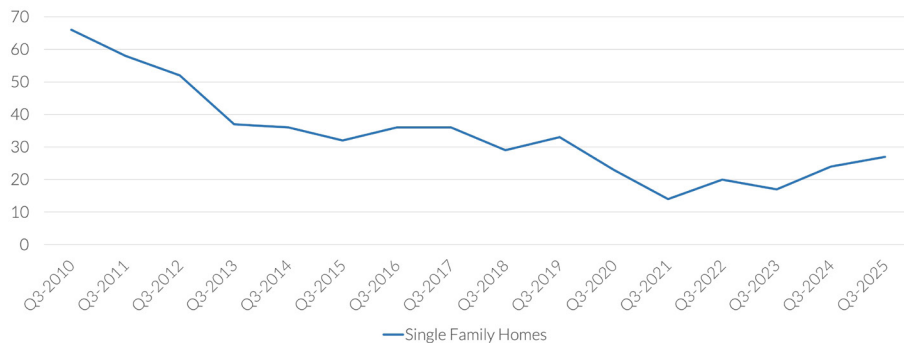


Single Family Residences

\$1,650,000

+3.4% change year-over-year

MEDIAN MARKET TIME

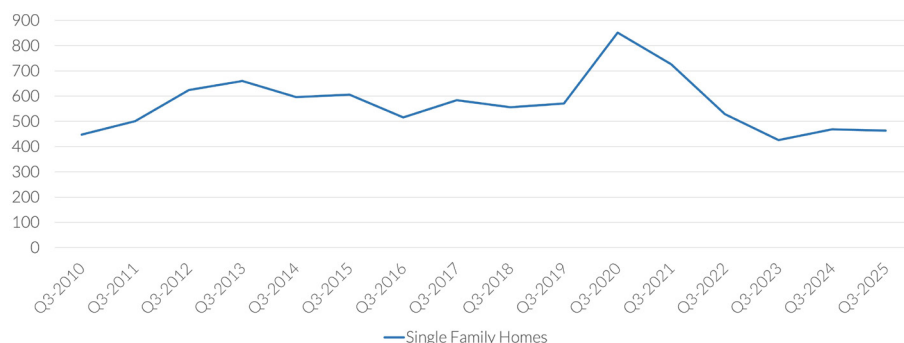


Single Family Residences

27 days

+3 day change year-over-year

NUMBER OF SALES



Single Family Residences

463

-1.1% change year-over-year