



MARIN COUNTY MARKET UPDATE

SEPTEMBER 2025





VANGUARD PROPERTIES

MARKET UPDATE

MARIN COUNTY | SEPTEMBER 2025

As we enter the fall selling season, historically one of the busiest times of the year, Marin's housing market is showing renewed energy. The median sales price rose 3.9% year over year, while the median days on market shortened by three days to 28. Although the number of properties sold was down 7.3%, the broader picture is encouraging. Lower mortgage rates, tighter inventory, and strong buyer competition are setting the stage for an active fall.

Perhaps the most encouraging development is on the financing side. Freddie Mac reported the 30-year fixed-rate mortgage fell 15 basis points from last week, the largest weekly drop in the past year. This decline is creating new opportunities for buyers to re-enter the market or expand their purchasing power. The shift is already fueling stronger demand, helping to offset the slower pace that characterized the summer months and building momentum for the months ahead.



SINGLE FAMILY HOMES

AUGUST 2025

Median Sales Price	\$1,535,000 ↑
Days on market	28 ↓
\$ / SQ. FT.	\$820 ↑
# For Sale On Last Day Of Month	315 ↓
Went Into Contract	156
Properties Sold	127 ↓

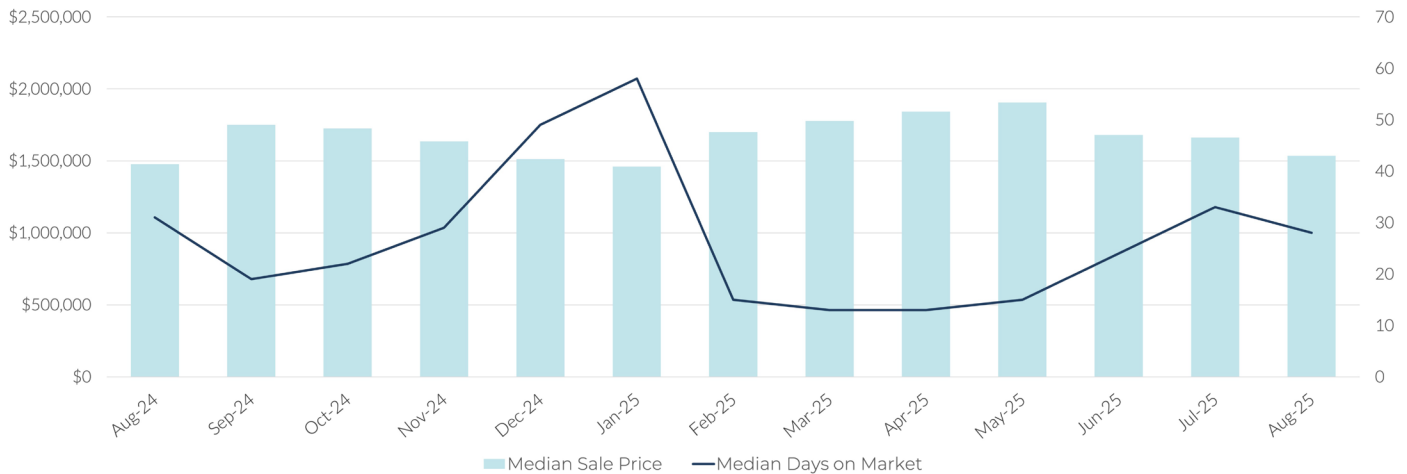


MARIN COUNTY MARKET UPDATE

SEPTEMBER 2025

SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **-7.7%**

DAYS ON MARKET: **-5 days**

YEAR-OVER-YEAR COMPARISON

"...the broader picture is encouraging. Lower mortgage rates, tighter inventory, and strong buyer competition are setting the stage for an active fall."

	MEDIAN		
	AUG-2025	AUG-2024	%Δ
Sales Price	\$1,535,000	\$1,476,900	+3.9%
Days On Market	28	31	-9.7%
\$ / SQ. FT.	\$820	\$815	+0.6%

	TOTAL		
	AUG-2025	AUG-2024	%Δ
Went Into Contract	156	156	0.0%
Properties Sold	127	137	-7.3%
# For Sale Last Day of Month	315	337	-6.5%
% Of Properties Sold Over List	36.2%	33.6%	+7.7%
% Of List Price Received (Average)	99.4%	99.9%	-0.5%

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SEPTEMBER 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%

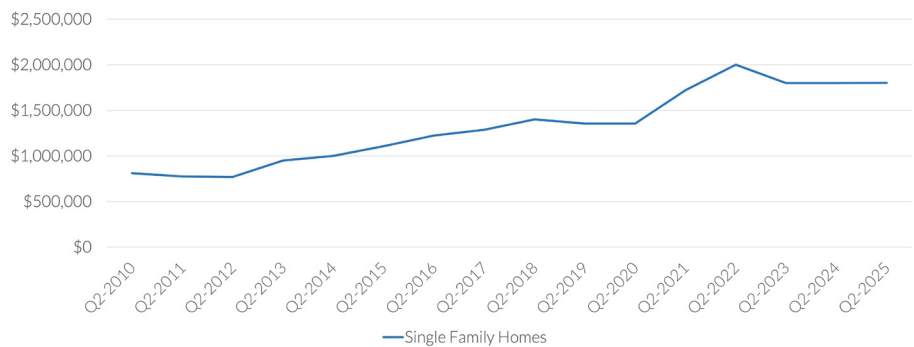
* Denotes small sample size; Use caution when interpreting results. Sources: SFAR Super Regional MLS & BrokerMetrics. Property types covered: Single-family. Only property data posted on the MLS is covered. All information is deemed reliable, but not guaranteed for accuracy. All data is subject to errors,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

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YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

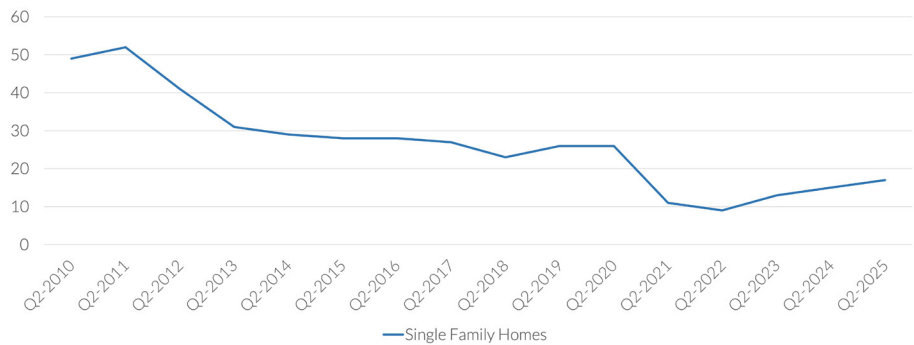


Single Family Residences

\$X

X.X% change year-over-year

MEDIAN MARKET TIME

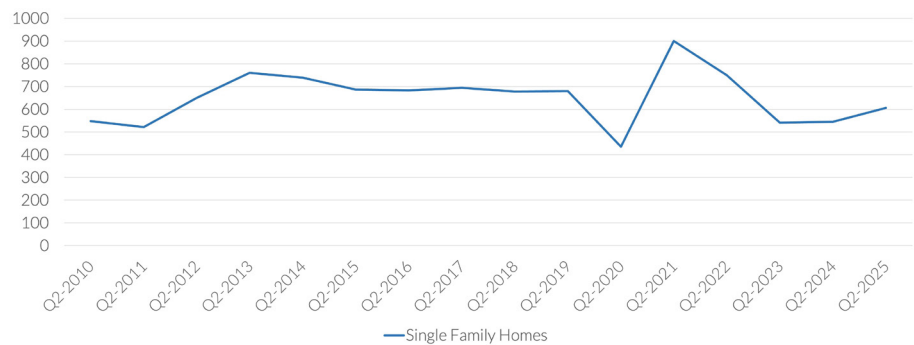


Single Family Residences

X days

X day change year-over-year

NUMBER OF SALES



Single Family Residences

X

X.X% change year-over-year

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