

A scenic view of a park with large trees and a red building in the background. The image is used as a background for the report cover.

MARIN COUNTY MARKET UPDATE

SEPTEMBER 2026





VANGUARD PROPERTIES

MARKET UPDATE

MARIN COUNTY | SEPTEMBER 2026

Marin County's single family home market finished August with faster sales, stronger competition and higher prices than a year ago. Median time on market fell 32.1% to just 19 days, nine days faster than last August and the third fastest August pace in the historical data going back to 2010. Buyers continued to move quickly, helping the market maintain its momentum through the final weeks of summer.

Competition strengthened alongside that faster pace. The share of homes selling above asking rose 31.2%, reaching 47.5% of sales compared with 36.2% a year earlier. Sellers received an average of 102.9% of list price, up from 99.4% last August. That shift from an average discount to an average premium underscores a stronger negotiating position for sellers, with nearly half of completed transactions closing above the asking price.

Closed sales climbed 26.0% to 160, the highest August total since 2022. Meanwhile, available inventory remained below last summer's level, with 262 single family homes for sale at month's end, down 16.8% from 315. More completed transactions alongside fewer available homes point to a tighter market than a year ago. New contract activity was more measured, declining 7.1% to 145, making the pace of newly signed agreements an important indicator to watch as the fall market unfolds.

Pricing reflected that competitive environment. The median sales price increased 14.7% to \$1,760,583, the highest August reading in the historical series dating back to 2010. Median price per square foot also rose 6.3% to \$872. While changes in the mix of homes sold can influence both measures, these gains add to the evidence of firmer pricing than last summer. Median price was essentially unchanged from July, and median market time held steady at 19 days, suggesting that August preserved much of July's strength.

Recent economic reports offer additional encouragement. Marin's unemployment rate stood at 4.2% in July, below the comparable statewide rate of 5.3%, according to the California Employment Development Department's August release. Meanwhile, CBRE's August 18 report found that the Bay Area's pool of workers with AI expertise grew by more than 20,000 over the past year to nearly 99,000, maintaining its position as North America's largest AI talent hub. That concentration of skilled workers offers a promising foundation for regional housing demand as Marin enters the fall selling season.



SINGLE FAMILY HOMES

AUGUST 2026

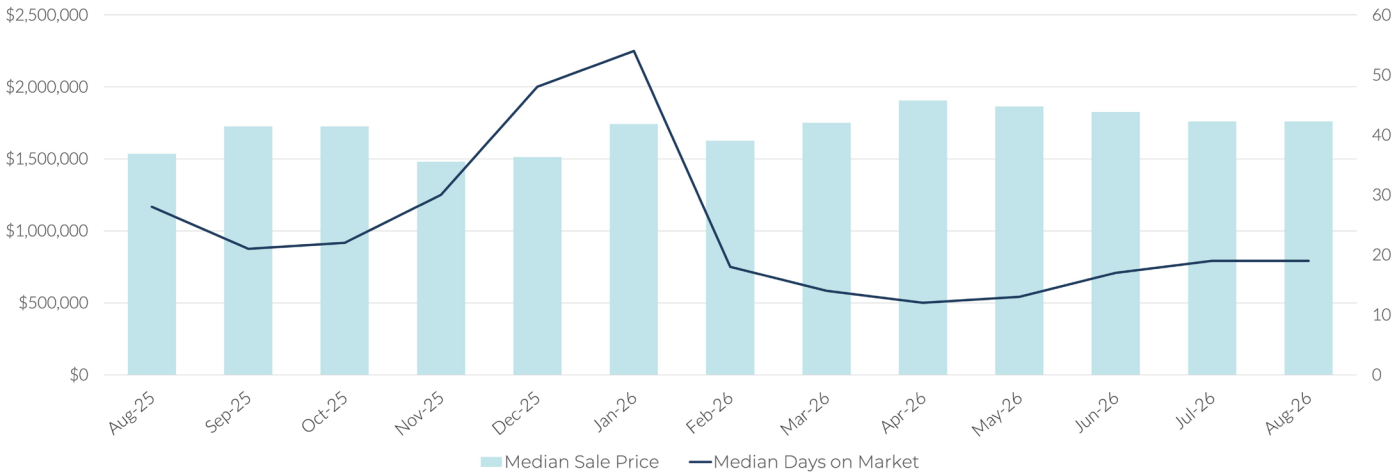
Median Sales Price	\$1,760,583 ↑
Days on market	19 ↓
\$ / SQ. FT.	\$872 ↑
# For Sale On Last Day Of Month	262 ↓
Went Into Contract	145 ↓
Properties Sold	160 ↑

MARIN COUNTY MARKET UPDATE

SEPTEMBER 2026

SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **No change**

DAYS ON MARKET: **No change**

YEAR-OVER-YEAR COMPARISON

"Marin County's single family home market finished August with faster sales, stronger competition and higher prices than a year ago."

	MEDIAN		
	AUG-2026	AUG-2025	%Δ
Sales Price	\$1,760,583	\$1,535,000	+14.7%
Days On Market	19	28	-32.1%
\$ / SQ. FT.	\$872	\$820	+6.3%

	TOTAL		
	AUG-2026	AUG-2025	%Δ
Went Into Contract	145	156	-7.1%
Properties Sold	160	127	+26.0%
# For Sale Last Day of Month	262	315	-16.8%
% Of Properties Sold Over List	47.5%	36.2%	+31.2%
% Of List Price Received (Average)	102.9%	99.4%	+3.5%

MARIN COUNTY MARKET UPDATE

SEPTEMBER 2026

SINGLE FAMILY RESIDENCES

REGION	HOMES SOLD (TOTAL)			DAYS ON MARKET (MEDIAN)			SALE PRICE (MEDIAN)		
	Q2-2026	Q2-2025	%Δ	Q2-2026	Q2-2025	%Δ	Q2-2026	Q2-2025	%Δ
Belvedere	13*	9*	▲ 44%	12	56	▼ 79%	\$6,500,000	\$4,750,000	▲ 37%
Corte Madera	28*	22*	▲ 27%	8	19	▼ 58%	\$2,125,000	\$1,887,500	▲ 13%
Fairfax	35*	27*	▲ 30%	14	19	▼ 26%	\$1,260,000	\$1,200,000	▲ 5%
Greenbrae	18*	13*	▲ 38%	12	14	▼ 14%	\$2,592,500	\$2,425,000	▲ 7%
Kentfield	16*	21*	▼ 24%	9	17	▼ 47%	\$3,825,000	\$3,176,625	▲ 20%
Larkspur	20*	19*	▲ 5%	13	9	▲ 44%	\$3,620,000	\$2,730,000	▲ 33%
Mill Valley	116	100	▲ 16%	9	9	0%	\$2,630,000	\$2,345,000	▲ 12%
Novato	136	121	▲ 12%	21	21	0%	\$1,299,000	\$1,335,000	▼ 3%
Ross	16*	12*	▲ 33%	10	9	▲ 11%	\$5,000,000	\$3,325,000	▲ 50%
San Anselmo	66	53	▲ 25%	9	14	▼ 36%	\$1,735,000	\$1,998,000	▼ 13%
San Rafael	150	129	▲ 16%	14	20	▼ 30%	\$1,600,000	\$1,525,000	▲ 5%
Sausalito	16*	20*	▼ 20%	8	17	▼ 53%	\$2,975,000	\$2,522,500	▲ 18%
Stinson Beach	9*	3*	▲ 200%	24	34	▼ 29%	\$3,825,000	\$6,900,000	▼ 45%
Tiburon	44*	37*	▲ 19%	10	25	▼ 60%	\$3,461,000	\$3,675,000	▼ 6%
MARIN COUNTY	713	606	▲ 18%	13	17	▼ 24%	\$1,865,000	\$1,802,508	▲ 3%

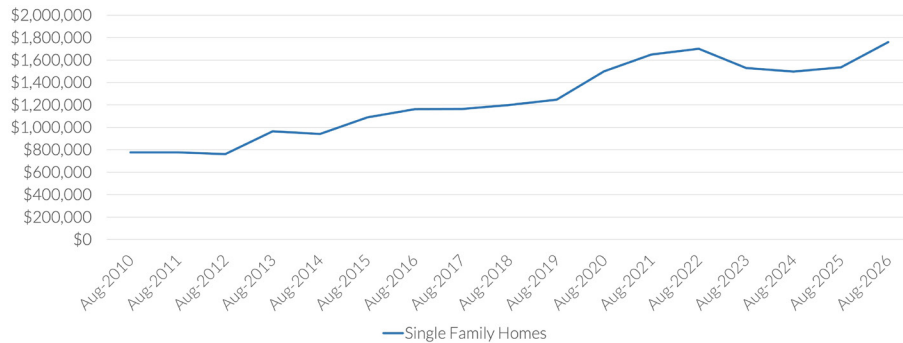
* Denotes small sample size; Use caution when interpreting results. Sources: SFAR Super Regional MLS & BrokerMetrics. Property types covered: Single-family. Only property data posted on the MLS is covered. All information is deemed reliable, but not guaranteed for accuracy. All data is subject to errors, omissions, revisions, and is not warranted. ©2026 Vanguard Properties. All rights reserved. Equal Housing Opportunity. DRE No. 01486075

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YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

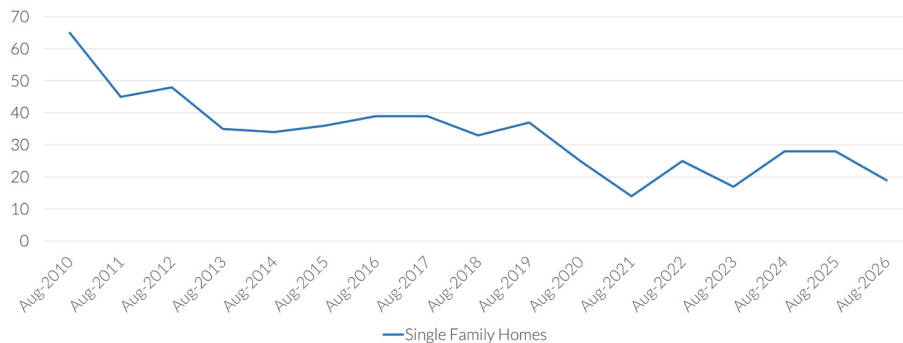


Single Family Residences

\$1,760,583

+14.7% change year-over-year

MEDIAN MARKET TIME

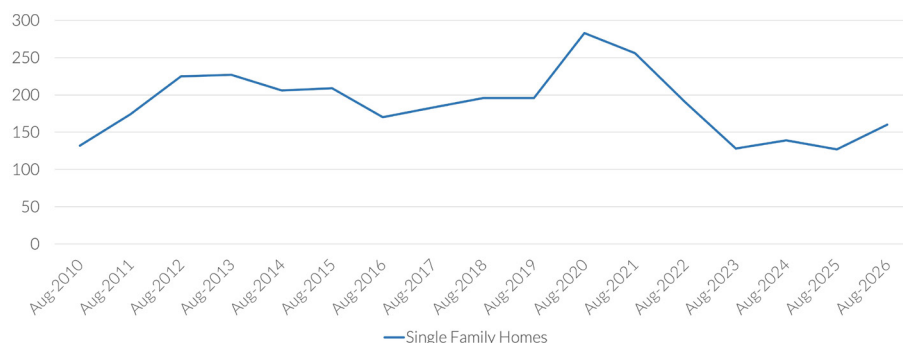


Single Family Residences

19 days

-9 day change year-over-year

NUMBER OF SALES



Single Family Residences

160

+26.0% change year-over-year