



Marin County Real Estate Market Dynamics by City, Town & Region

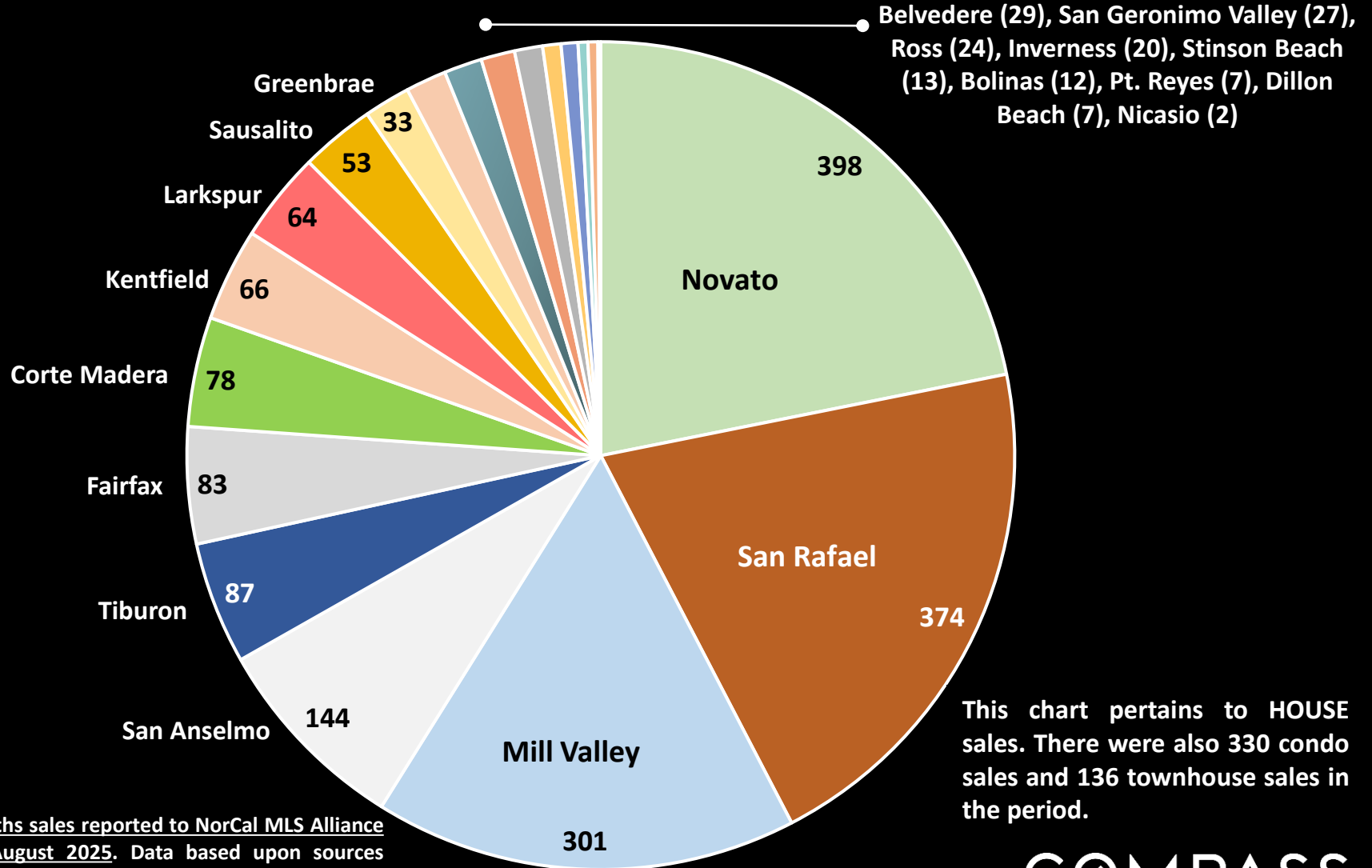
12-month sales data, which eliminates seasonality from statistical calculations, and provides a larger data set, but may lag short-term changes.

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Marin County Home Sales

12 Months House Sales by Market*

New sales are reported constantly.



*12 months sales reported to NorCal MLS Alliance by mid-August 2025. Data based upon sources deemed reliable, but may contain errors and subject to revision. All numbers approximate.

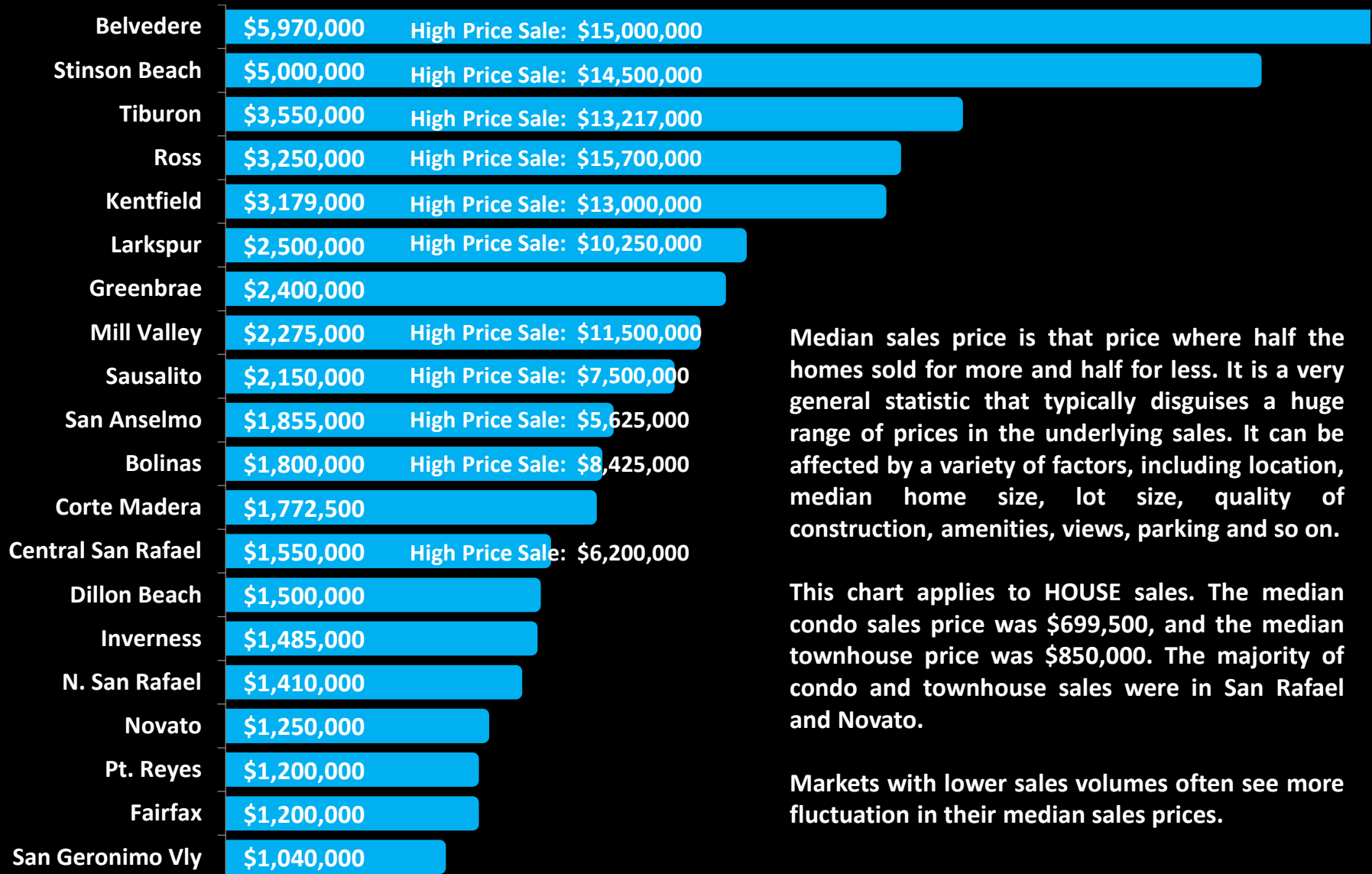
This chart pertains to HOUSE sales. There were also 330 condo sales and 136 townhouse sales in the period.

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Marin County Market

Median House Sales Prices & High Sales, \$5 Million+*

12 Months Sales*



Median sales price is that price where half the homes sold for more and half for less. It is a very general statistic that typically disguises a huge range of prices in the underlying sales. It can be affected by a variety of factors, including location, median home size, lot size, quality of construction, amenities, views, parking and so on.

This chart applies to HOUSE sales. The median condo sales price was \$699,500, and the median townhouse price was \$850,000. The majority of condo and townhouse sales were in San Rafael and Novato.

Markets with lower sales volumes often see more fluctuation in their median sales prices.

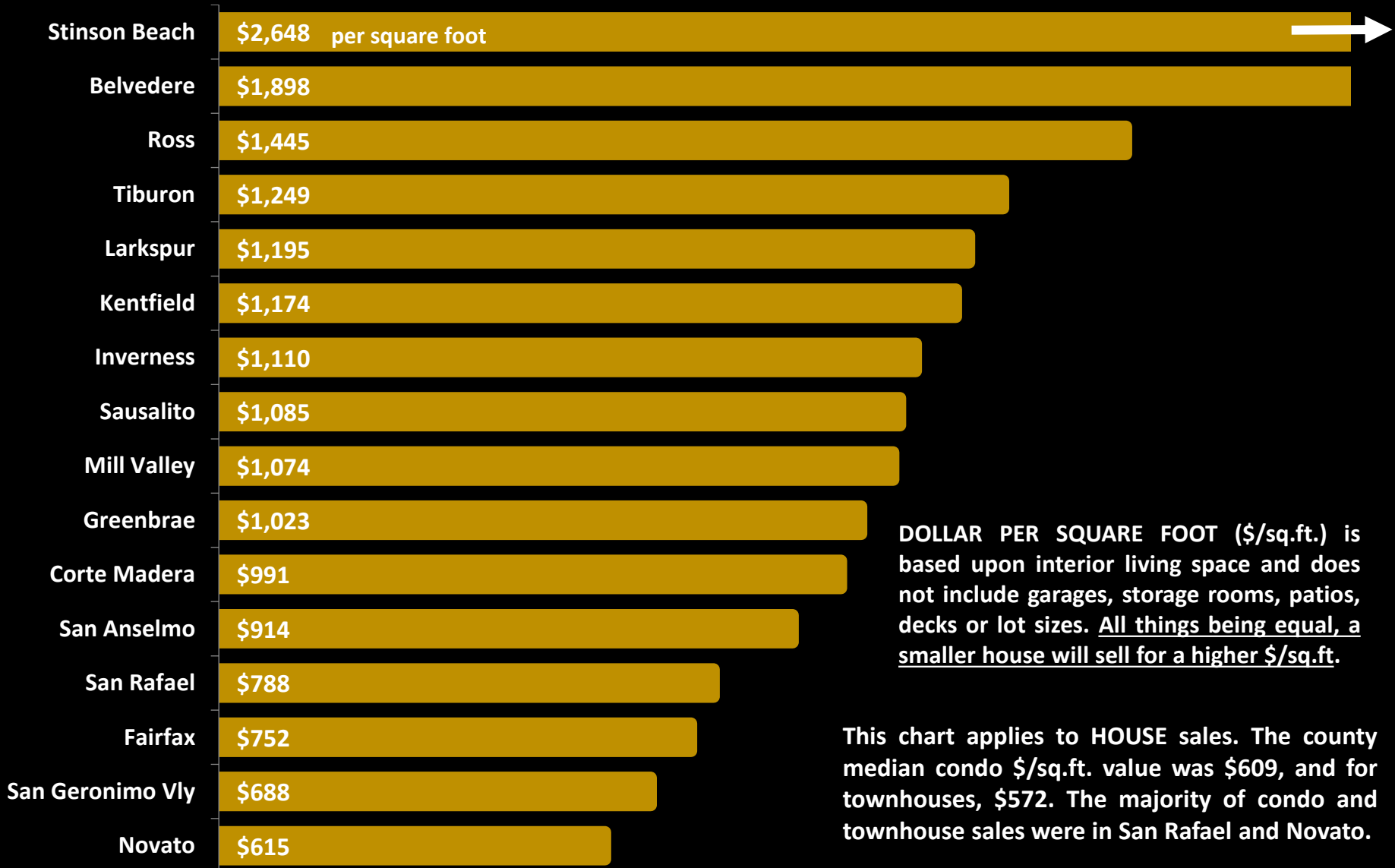
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Marin County Home Values

Median House \$/Sq.Ft. Values*

12 Months Sales*



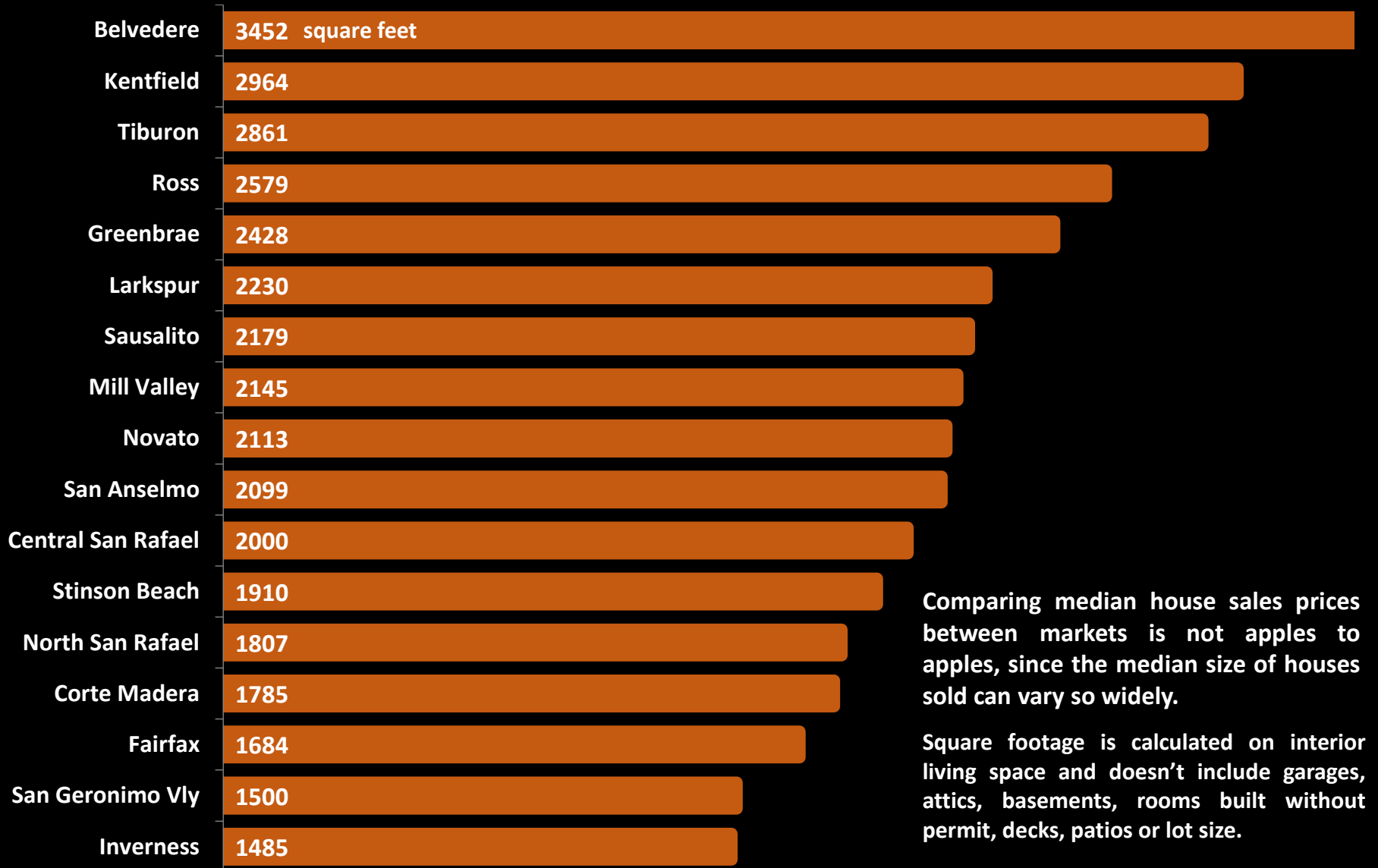
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Marin County Home Size

Median House Square Footage*

12 Months Sales*



Comparing median house sales prices between markets is not apples to apples, since the median size of houses sold can vary so widely.

Square footage is calculated on interior living space and doesn't include garages, attics, basements, rooms built without permit, decks, patios or lot size.

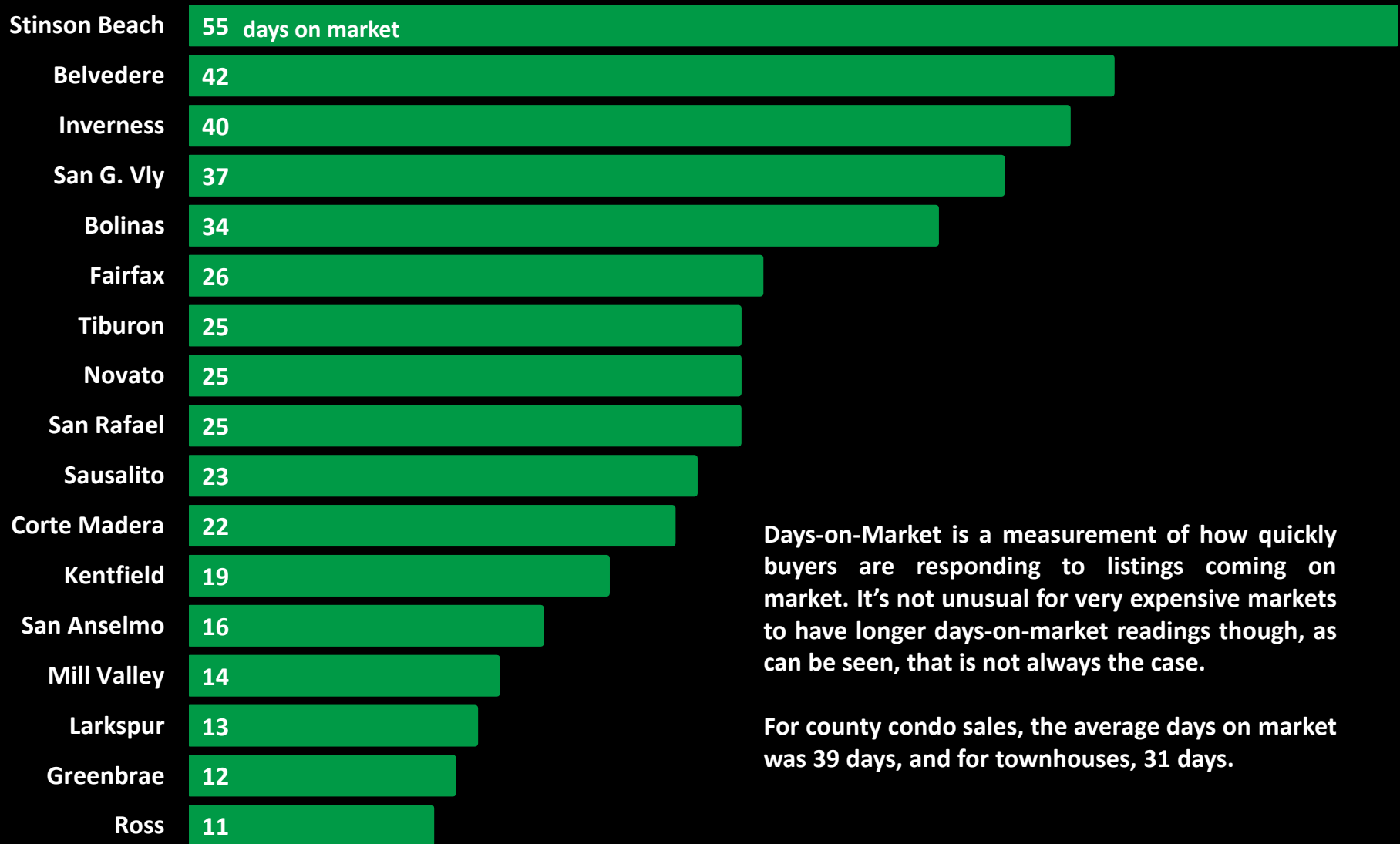
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Marin County House Market – Speed of Sale

Median Days on Market Prior to Acceptance of Offer*

12 Months Sales*



Days-on-Market is a measurement of how quickly buyers are responding to listings coming on market. It's not unusual for very expensive markets to have longer days-on-market readings though, as can be seen, that is not always the case.

For county condo sales, the average days on market was 39 days, and for townhouses, 31 days.

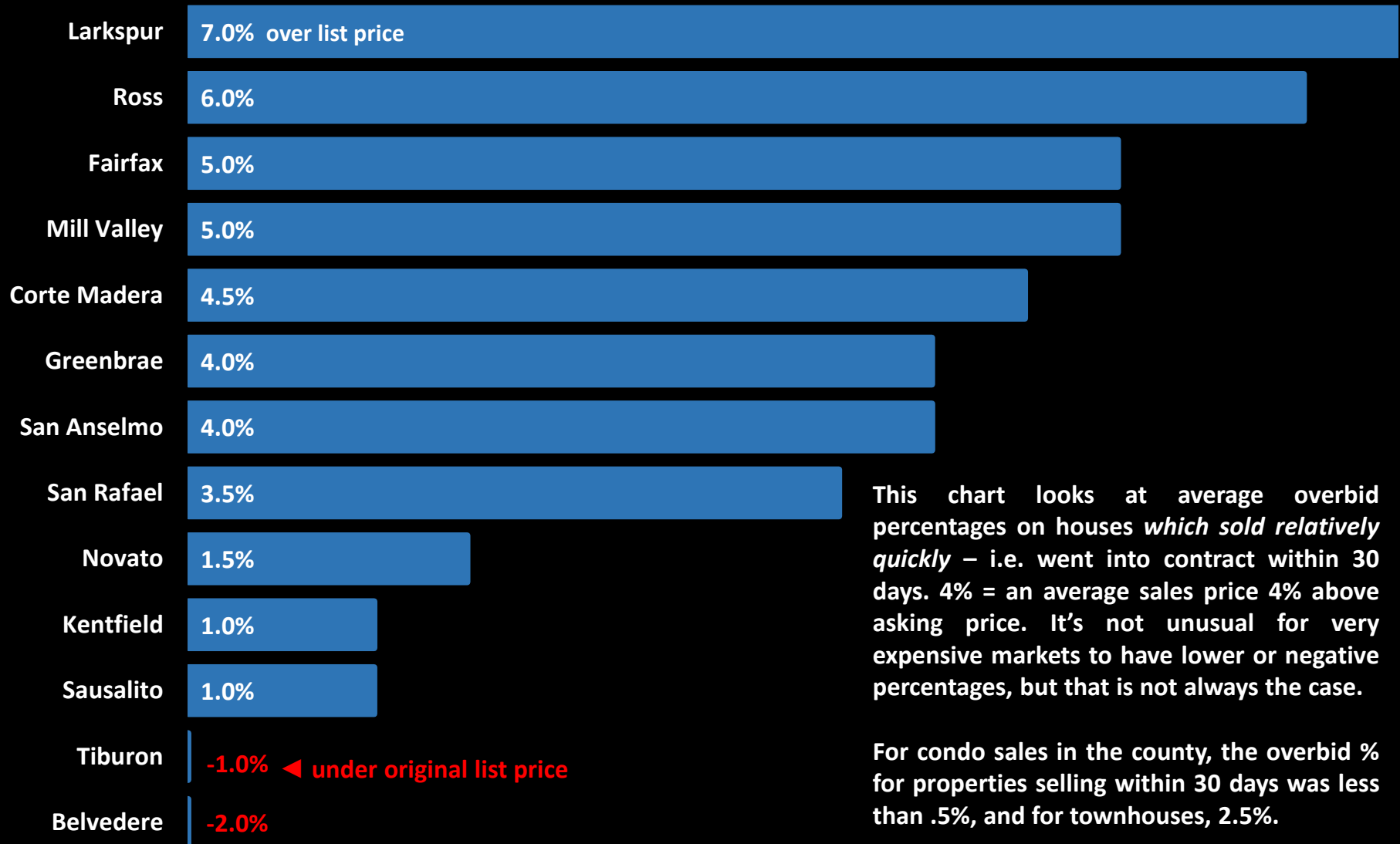
*12 months sales reported to NorCal MLS Alliance by mid-August 2025. Data derived from sources deemed reliable, but may contain errors and subject to revision. Not all sales are reported to MLS. All numbers approximate.

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Marin County: Overbidding Asking Price

For Those Listings Accepting Offers Within 30 Days*

12 Months Sales*

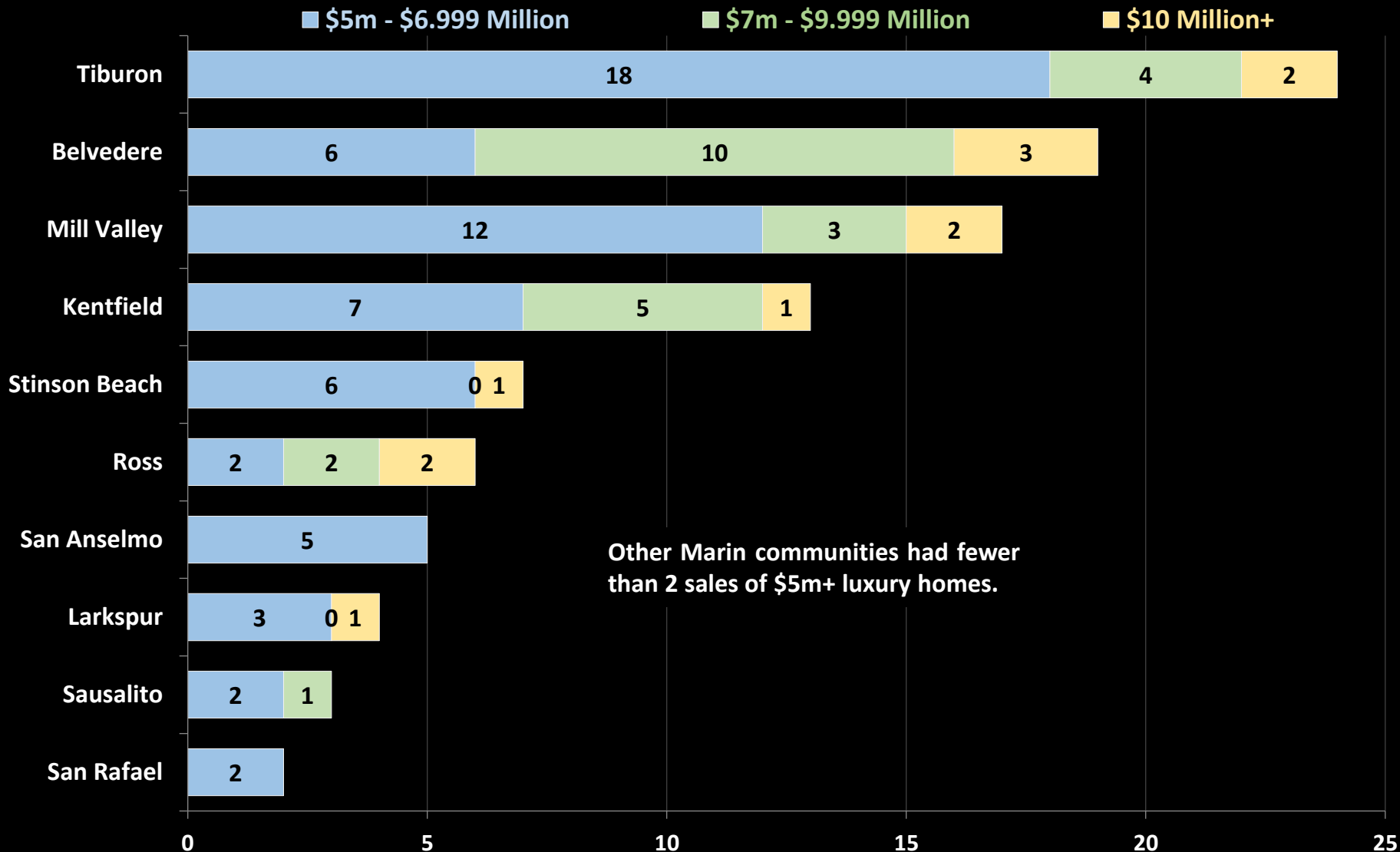


*12 months sales reported to NorCal MLS Alliance by mid-August 2025. Data derived from sources deemed reliable, but may contain errors and subject to revision. Not all sales are reported to MLS. Percentages rounded and all numbers approximate.

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Marin Luxury Home Market*

Homes Selling for \$5,000,000+, 12 Months Sales*



*12 months sales by MLS Area reported to NorCal MLS Alliance by late July 2025. Not all luxury home sales are reported to MLS. Data from sources deemed reliable but may contain errors and subject to revision. All numbers approximate. New sales activity is reported constantly.

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Bay Area Median House Values by County

12 Months Sales By Bedroom/Bath Count*

How these values apply to any particular home is unknown without a specific comparative market analysis.

	4 Bedroom, 3 Bath Houses			5+ Bedroom, 4+ Bath Houses, 3000+ sq.ft.		
County In alphabetical order	Median Sales Price	Median Square Footage	Median Dollar per Square Foot	Median Sales Price	Median Sq.Ft./ Median Lot Size	Median Dollar per Square Foot
Alameda County	\$1,650,000	2196 sq.ft.	\$740/sq.ft.	\$2,772,500	3910 sq.ft. .25 acre	\$693/sq.ft.
Contra Costa	\$1,050,000	2339 sq.ft.	\$469/sq.ft.	\$2,535,500	3939 sq.ft. .35 acre	\$619/sq.ft.
More Expensive Marin County	\$2,840,000	2594 sq.ft.	\$1124/sq.ft.	\$5,000,000	4280 sq.ft. .44 acre	\$1130/sq.ft.
More Affordable Marin County	\$1,625,000	2462 sq.ft.	\$639/sq.ft.	\$2,625,000	3743 sq.ft. .40 acre	\$659/sq.ft.
Napa County	\$1,155,000	2329 sq.ft.	\$510/sq.ft.	\$2,650,000	4171 sq.ft. .45 acre	\$596/sq.ft.
San Francisco	\$2,160,000	2236 sq.ft.	\$935/sq.ft.	\$4,900,000	4270 sq.ft. .07 acre	\$1202/sq.ft.
San Mateo County	\$2,600,000	2300 sq.ft.	\$1107/sq.ft.	\$5,625,000	4624 sq.ft. .53 acre	\$1281/sq.ft.
Santa Clara County	\$2,260,000	2192 sq.ft.	\$1035/sq.ft.	\$4,545,000	4007 sq.ft. .30 acre	\$1086/sq.ft.
Solano County	\$700,000	2198 sq.ft.	\$319/sq.ft.	\$906,000	3680 sq.ft. .20 acre	\$262/sq.ft.
Sonoma County	\$920,000	2248 sq.ft.	\$423/sq.ft.	\$2,050,000	3809 sq.ft. .69 acre	\$490/sq.ft.

Generally speaking, more expensive Marin refers to county communities from Ross & Kentfield south, while more affordable Marin refers to communities from San Anselmo and San Rafael north.

*Sales reported to NorCal MLS Alliance in the 12 months through late July 2025. Counties contain submarkets of widely varying values. "Fixer-uppers" excluded. Median values fluctuate for reasons besides changes in fair market value. Data from sources deemed reliable, but may contain errors and subject to revision. Numbers approximate, and data constantly changes as new sales occur. Not all sales are reported to MLS.

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Bay Area Median House Values by County

12 Months Sales By Bedroom/Bath Count*

Median value is that value at which half the sales occurred for more and half for less. It is a very general statistic.

	2 Bedroom, 1-2 Bath Houses			3 Bedroom, 2 Bath Houses		
County In alphabetical order	Median Sales Price	Median Square Footage	Median Dollar per Square Foot	Median Sales Price	Median Square Footage	Median Dollar per Square Foot
Alameda County	\$790,000	1066 sq.ft.	\$735/sq.ft.	\$1,160,000	1435 sq.ft.	\$796/sq.ft.
Contra Costa	\$600,000	1012 sq.ft.	\$571/sq.ft.	\$730,000	1440 sq.ft.	\$537/sq.ft.
More Expensive Marin County	\$1,483,000	1225 sq.ft.	\$1278/sq.ft.	\$1,870,000	1635 sq.ft.	\$1128/sq.ft.
More Affordable Marin County	\$1,055,000	1147 sq.ft.	\$898/sq.ft.	\$1,200,000	1560 sq.ft.	\$774/sq.ft.
Napa County	\$800,000	1050 sq.ft.	\$793/sq.ft.	\$830,000	1455 sq.ft.	\$600/sq.ft.
San Francisco	\$1,300,500	1177 sq.ft.	\$1086/sq.ft.	\$1,562,500	1598 sq.ft.	\$978/sq.ft.
San Mateo County	\$1,375,000	1090 sq.ft.	\$1273/sq.ft.	\$1,718,000	1496 sq.ft.	\$1167/sq.ft.
Santa Clara County	\$1,295,000	1059 sq.ft.	\$1200/sq.ft.	\$1,715,000	1380 sq.ft.	\$1237/sq.ft.
Solano County	\$449,000	1252 sq.ft.	\$357/sq.ft.	\$550,000	1420 sq.ft.	\$391/sq.ft.
Sonoma County	\$695,000	1193 sq.ft.	\$588/sq.ft.	\$810,000	1532 sq.ft.	\$540/sq.ft.

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Bay Area Median Condo & Townhouse Values

12 Months Sales By Property Type & Bedroom/Bath Count*

How these values apply to any particular home is unknown without a specific comparative market analysis.

	2 Bedroom, 2 Bath Condos			3 Bedroom, 2-3 Bath Townhouses		
County In alphabetical order	Median Sales Price	Median Square Footage	Median Dollar per Square Foot	Median Sales Price	Median Square Footage	Median Dollar per Square Foot
Alameda County	\$630,000	1067 sq.ft.	\$578/sq.ft.	\$930,000	1516 sq.ft.	\$624/sq.ft.
Contra Costa	\$565,000	1126 sq.ft.	\$508/sq.ft.	\$775,500	1539 sq.ft.	\$517/sq.ft.
More Expensive Marin County	\$909,500	1118 sq.ft.	\$788/sq.ft.	Too few sales		
More Affordable Marin County	\$537,000	1124 sq.ft.	\$496/sq.ft.	\$840,000	1548 sq.ft.	\$503/sq.ft.
Napa County	\$910,000	1157 sq.ft.	\$832/sq.ft.	Too few sales		
San Francisco	\$1,250,000	1183 sq.ft.	\$1035/sq.ft.	Too few sales		
San Mateo County	\$878,000	1184 sq.ft.	\$748/sq.ft.	\$1,483,000	1626 sq.ft.	\$900/sq.ft.
Santa Clara County	\$800,000	1134 sq.ft.	\$708/sq.ft.	\$1,325,000	1570 sq.ft.	\$836/sq.ft.
Solano County	\$392,500	1044 sq.ft.	\$350/sq.ft.	\$552,500	1499 sq.ft.	\$317/sq.ft.
Sonoma County	\$419,000	1044 sq.ft.	\$401/sq.ft.	\$540,000	1333 sq.ft.	\$389/sq.ft.

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[Click Here for Marin County
Home Price Map](#)

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1st Half Median House Sales Prices since 2020

Marin County: Selected Cities*

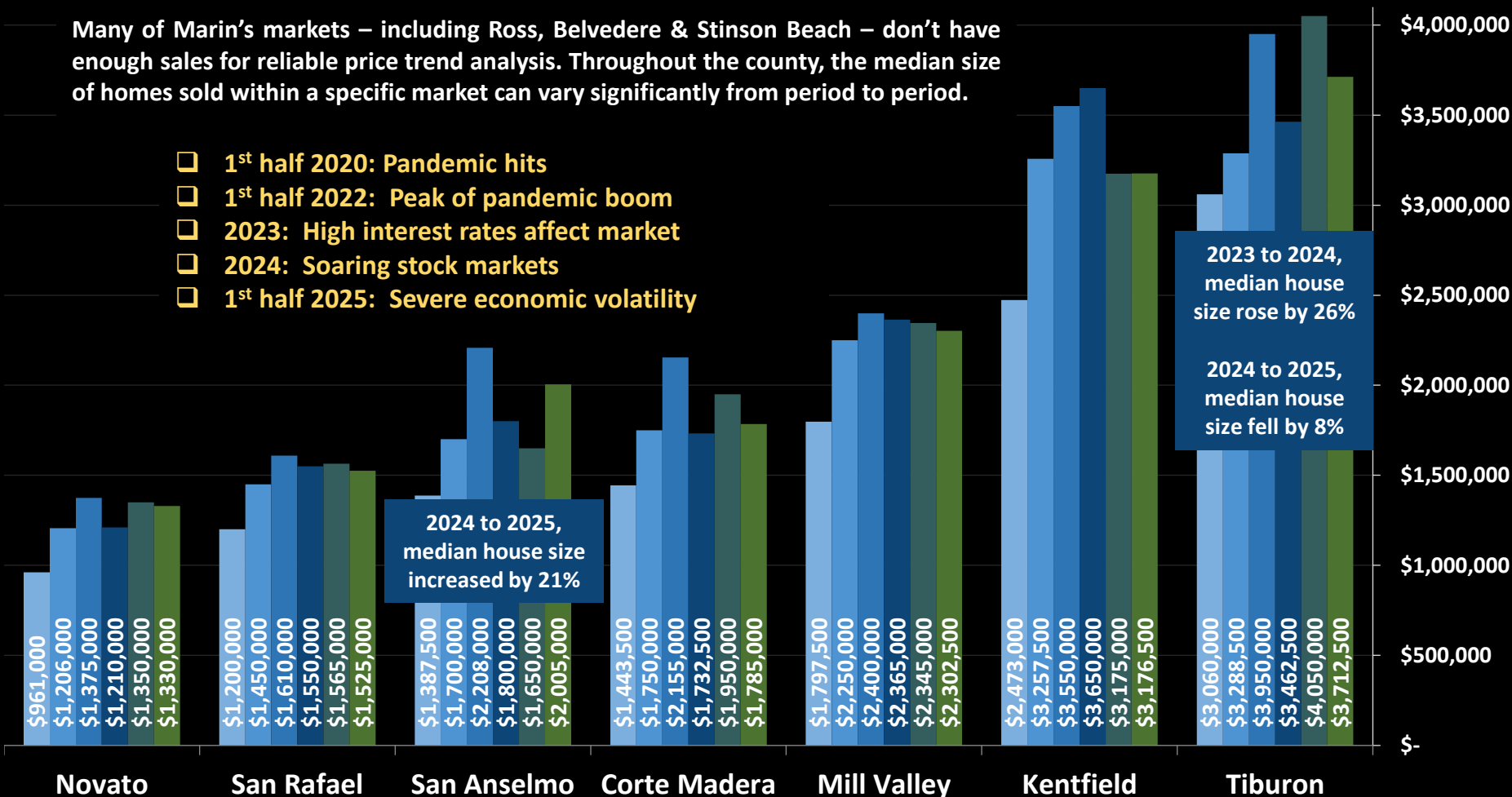
Median Sales Price is that price at which half the sales occurred for more and half for less. Over the longer term, price trends are typically *similar* across different markets within the same county.

■ 2020 ■ 2021 ■ 2022 ■ 2023 ■ 2024 ■ 2025

January-June sales by year: Selected cities with higher sales volumes. Median home size varies widely by city.

Many of Marin's markets – including Ross, Belvedere & Stinson Beach – don't have enough sales for reliable price trend analysis. Throughout the county, the median size of homes sold within a specific market can vary significantly from period to period.

- 1st half 2020: Pandemic hits
- 1st half 2022: Peak of pandemic boom
- 2023: High interest rates affect market
- 2024: Soaring stock markets
- 1st half 2025: Severe economic volatility



*Sales in January through June of each year, by city, as reported to NorCal MLS Alliance by 7/3/25. Median sales prices may be affected by and fluctuate due to other factors besides changes in fair market. Data from sources deemed reliable, but may contain errors and subject to revision. All numbers approximate, and last period may change with late-reported sales.

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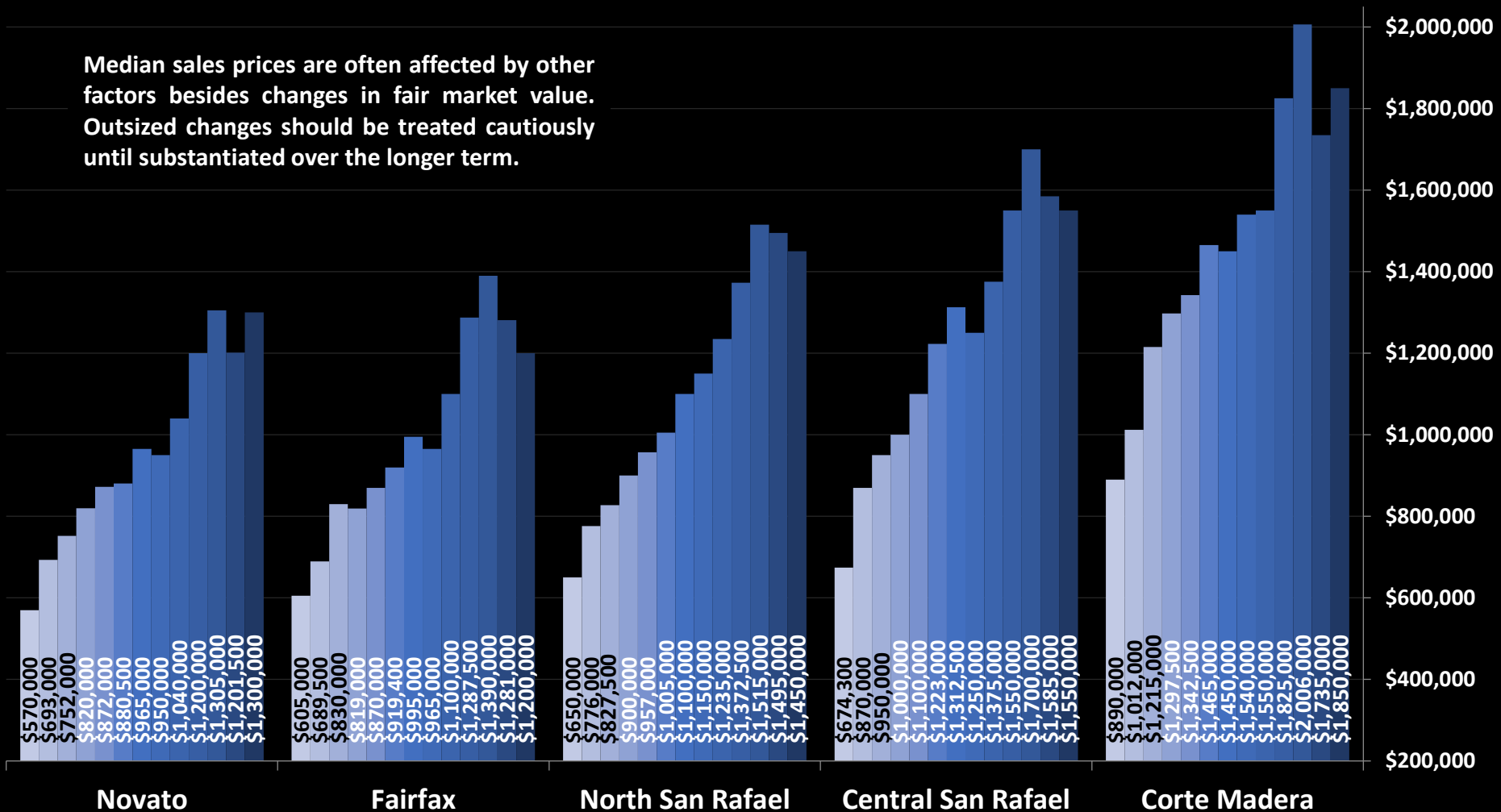
Marin County Home Price Trends – Selected Cities

Annual Median House Sales Prices since 2012

Sales reported to
NorCal MLS Alliance

■ 2012 ■ 2013 ■ 2014 ■ 2015 ■ 2016 ■ 2017 ■ 2018 ■ 2019 ■ 2020 ■ 2021 ■ 2022 ■ 2023 ■ 2024

Median sales prices are often affected by other factors besides changes in fair market value. Outsized changes should be treated cautiously until substantiated over the longer term.



Median sales price is that price at which half the sales occurred for more and half for less. How these prices apply to any particular home is unknown without a specific comparative market analysis. Data from sources deemed reliable, but may contain errors and subject to revision. All numbers are approximate, and may change with late reported sales.

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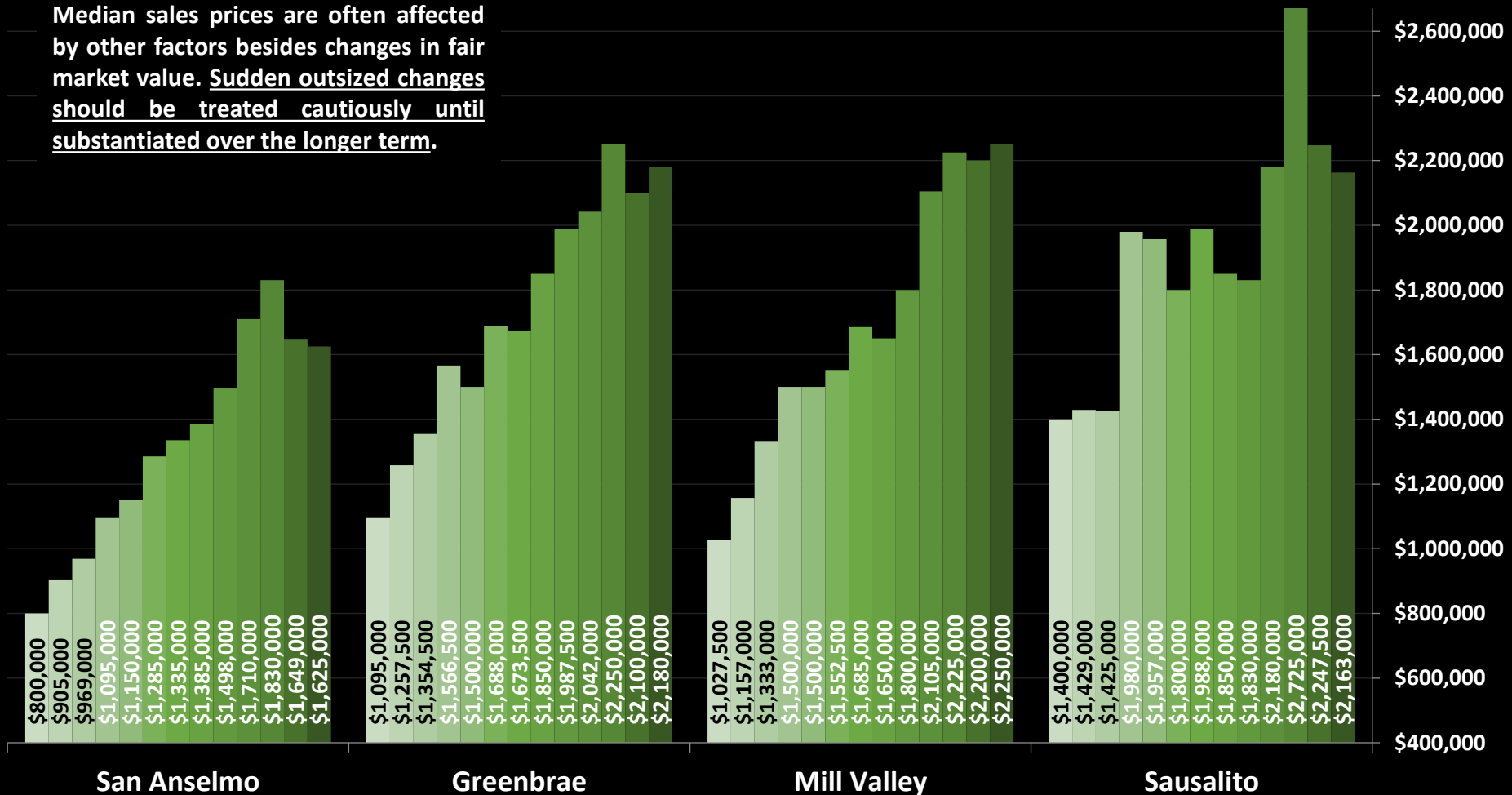
Marin County Home Price Trends – Selected Cities

Annual Median House Sales Prices since 2012

Sales reported to
NorCal MLS Alliance

■ 2012 ■ 2013 ■ 2014 ■ 2015 ■ 2016 ■ 2017 ■ 2018 ■ 2019 ■ 2020 ■ 2021 ■ 2022 ■ 2023 ■ 2024

Median sales prices are often affected by other factors besides changes in fair market value. Sudden outsized changes should be treated cautiously until substantiated over the longer term.



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Marin County Home Price Trends – Selected Cities

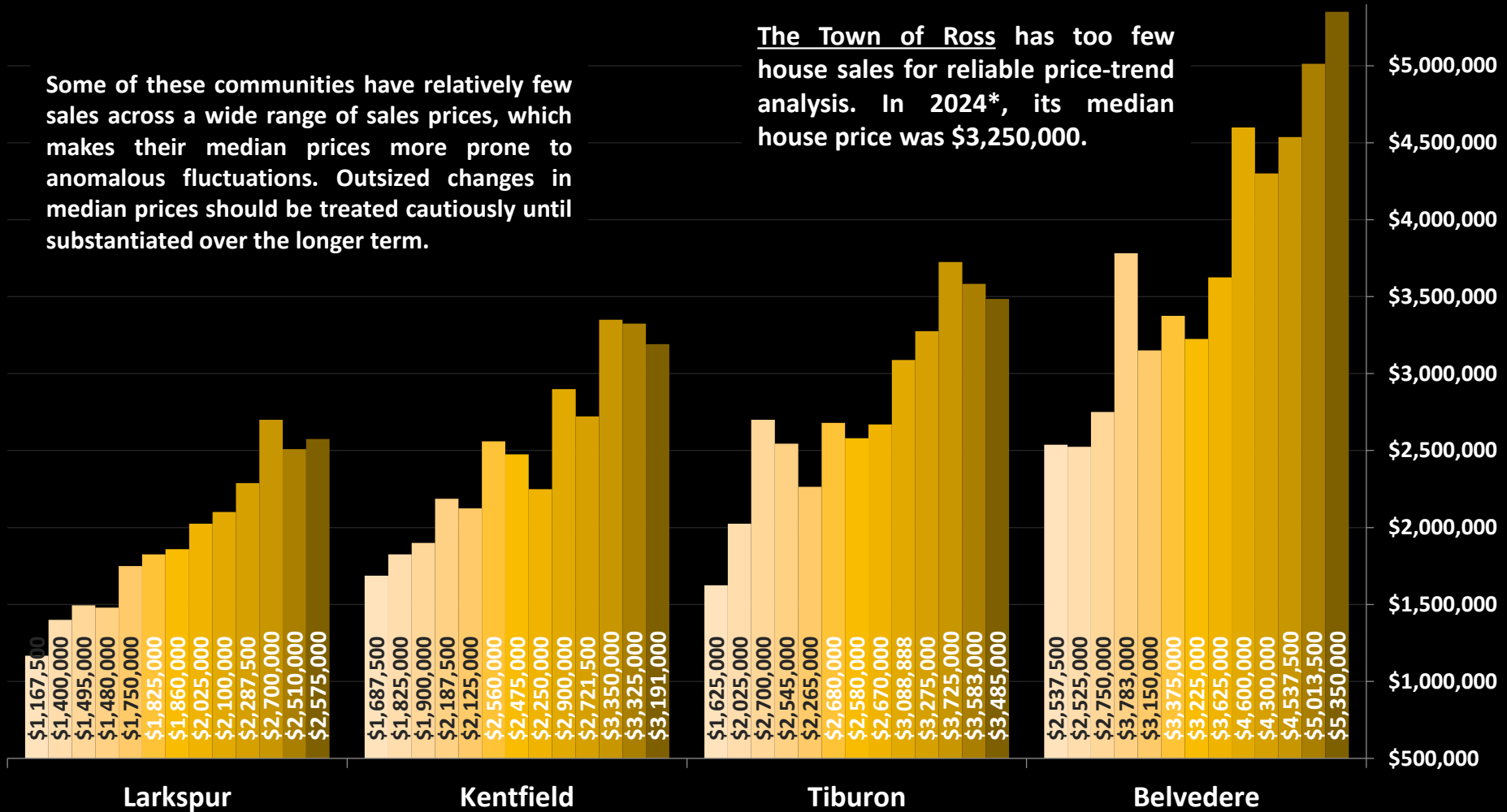
Annual Median House Sales Prices since 2012

Sales reported to
NorCal MLS Alliance

■ 2012 ■ 2013 ■ 2014 ■ 2015 ■ 2016 ■ 2017 ■ 2018 ■ 2019 ■ 2020 ■ 2021 ■ 2022 ■ 2023 ■ 2024

Some of these communities have relatively few sales across a wide range of sales prices, which makes their median prices more prone to anomalous fluctuations. Outsized changes in median prices should be treated cautiously until substantiated over the longer term.

The Town of Ross has too few house sales for reliable price-trend analysis. In 2024*, its median house price was \$3,250,000.



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Statistics are generalities, essentially summaries of widely disparate data generated by dozens, hundreds or thousands of unique, individual sales occurring within different time periods. They are best seen not as precise measurements, but as broad, comparative indicators, with reasonable margins of error. Anomalous fluctuations in statistics are not uncommon, especially in smaller, expensive market segments. Last period data should be considered estimates that may change with late-reported data. Different analytics programs sometimes define statistics – such as “active listings,” “days on market,” and “months supply of inventory” – differently: what is most meaningful are not specific calculations but the *trends* they illustrate. Most listing and sales data derives from the local or regional multi-listing service (MLS) of the area specified in the analysis, but not all listings or sales are reported to MLS and these won’t be reflected in the data. “Homes” signifies real-property, single-household housing units: houses, condos, co-ops, townhouses, duets and TICs (but not mobile homes), as applicable to each market. City/town names refer specifically to the named cities and towns or MLS-defined areas, unless otherwise delineated. Multi-county metro areas will be specified as such. Data from sources deemed reliable, but may contain errors and subject to revision. All numbers to be considered approximate.

Many aspects of value cannot be adequately reflected in median and average statistics: curb appeal, age, condition, amenities, views, lot size, quality of outdoor space, “bonus” rooms, additional parking, quality of location *within* the neighborhood, and so on. How any of these statistics apply to any particular home is unknown without a specific comparative market analysis.

Median Sales Price is that price at which half the properties sold for more and half for less. It may be affected by seasonality, “unusual” events, or changes in inventory and buying trends, as well as by changes in fair market value. The median sales price for an area will often conceal an enormous variety of sales prices in the underlying individual sales.

Dollar per Square Foot is based upon the home’s interior living space and does not include garages, unfinished attics and basements, rooms built without permit, patios, decks or yards (though all those can add value to a home). These figures are usually derived from appraisals or tax records, but are sometimes unreliable (especially for older homes) or unreported altogether. The calculation can only be made on those home sales that reported square footage.

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