

Marin County Market Report

2025

COMPASS

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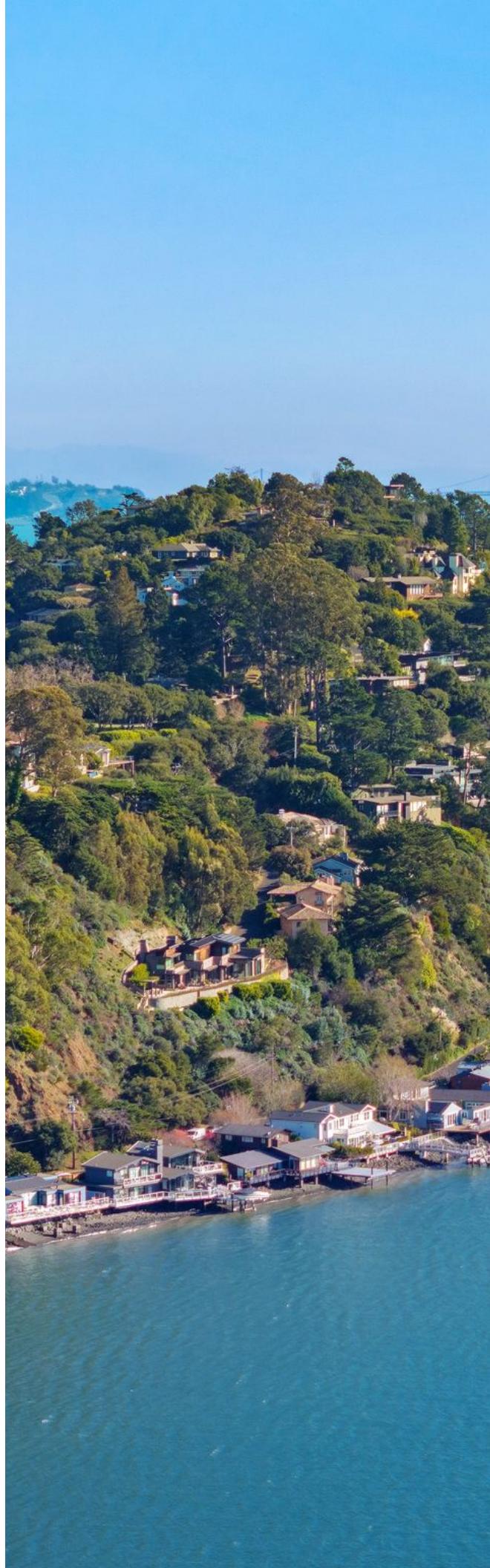
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Market Overview 2025

As we look back at the 2025 market data for Marin County, the real estate landscape reflects a year of adjustment rather than uniform momentum, shaped by broader economic conditions, interest rate shifts, and evolving market dynamics.

Nationally, existing-home sales rose 1.4%, signaling modest gains in activity as the market found its footing. In Marin County, total home sales increased 4.73% from the prior year—outpacing the national trend—but this growth was uneven, with performance differing by price point and location.

Throughout this report, we examine how the market evolved across Marin County. The pages that follow present pricing, sales volume, and time-on-market statistics for each area, showing where activity increased, where it moderated, and how market pace varied across the county.





Housing Market Outlook 2026

As we move into 2026, the national housing landscape is poised to settle into a more balanced and predictable rhythm. Mortgage rates will continue to respond to broader economic forces, but increased stability should support steady buyer engagement across key markets. Strong employment fundamentals and a persistent desire for homeownership remain powerful tailwinds, encouraging buyers and sellers alike to make decisions with greater clarity, purpose, and strategy.

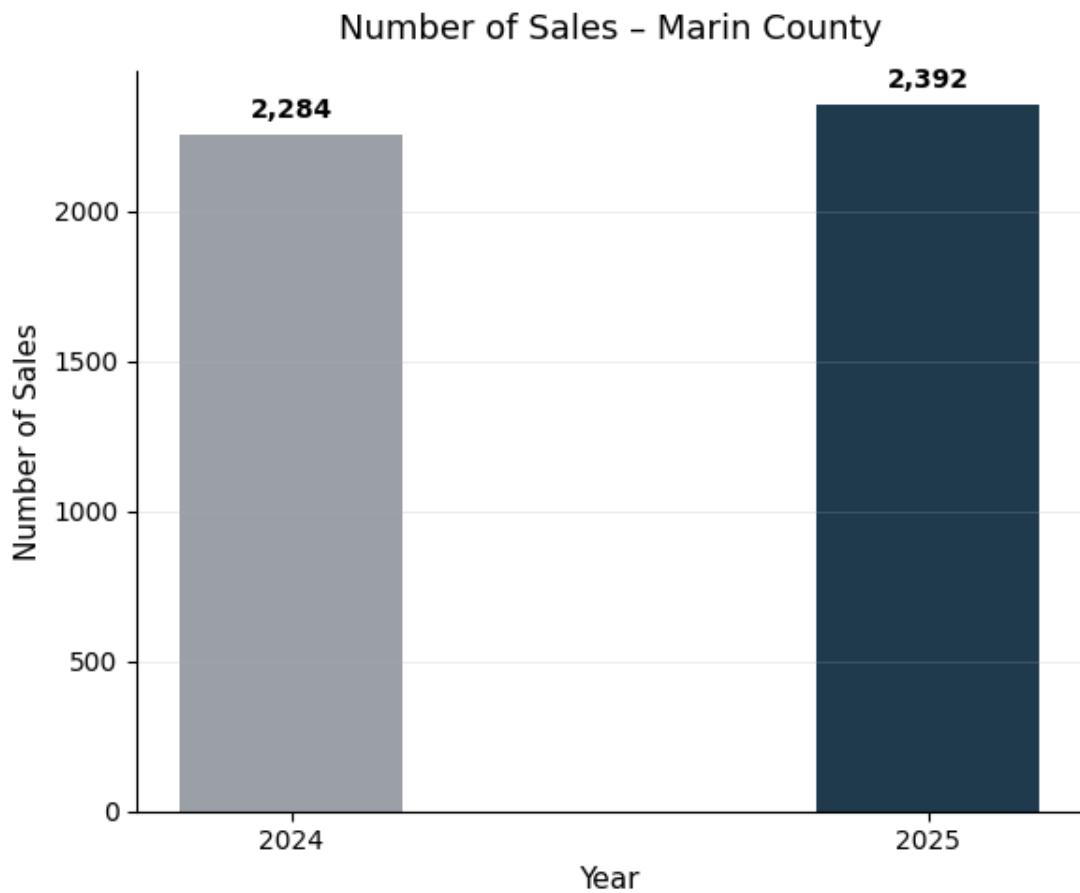
At the same time, 2026 marks the early wave of a significant technological transformation. Rapid advances in artificial intelligence are beginning to elevate how market data is interpreted, how opportunities are uncovered, and how savvy real estate decisions are ultimately made. This shift will increasingly reward those who combine human expertise with the precision of modern analytics.

Here in Marin County, the year ahead promises measured momentum and meaningful opportunity. Demand remains resilient—especially for well-located, high-quality homes that deliver the lifestyle buyers continue to prioritize. In a market defined by nuance, competition, and discerning expectations, success in 2026 will be anchored in three things: unmatched local expertise, pricing that reflects both market intelligence and property uniqueness, and strategic presentation that captures attention in all the right ways.

As Marin's #1 market leader, I remain committed to delivering the insight, guidance, and results that continue to set the standard in our community.

Marin County

As we review the Marin County housing market from 2024 to 2025, local trends reflect both unique regional dynamics and broader national housing patterns. Over the past year, total home sales in Marin increased by approximately 4.73%, rising from 2,284 transactions in 2024 to 2,392 in 2025 — indicating that buyer activity held up well despite broader market headwinds and interest rate pressures.



MARIN COUNTY | MARKET METRICS (2024-2025)

Metric	2024	2025
Median Sales Price	\$1,488,500	\$1,450,000
Maximum Sales Price	\$13,950,000	\$43,500,000
Average Days on Market	41	45
Number of Sales	2,284	2,396

Median sales price does not reflect a \$73M transaction involving four single-family homes in Belvedere.

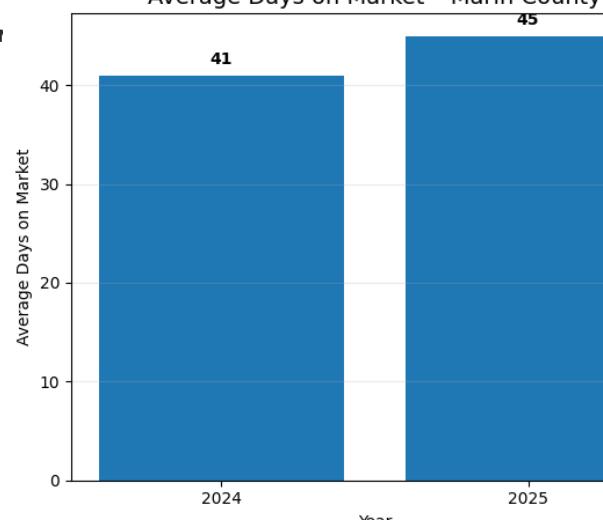


Key Market Indicators - Marin County

AVERAGE DAYS ON MARKET | MARIN COUNTY

CITY	2024	2025	YEAR-OVER-YEAR CHA
Belvedere	68	73	+7.4%
Corte Madera	28	32	+14.3%
Fairfax	31	42	+35.5%
Greenbrae	27	37	+37%
Kentfield	28	33	+17.9%
Larkspur	31	41	+32.3%
Mill Valley	34	34	0%
Novato	42	43	+2.4%
Ross	36	19	-47.2%
San Anselmo	29	36	+24.1%
San Rafael	44	52	+18.2%
Sausalito	44	53	+20.5%
Tiburon	43	43	0%

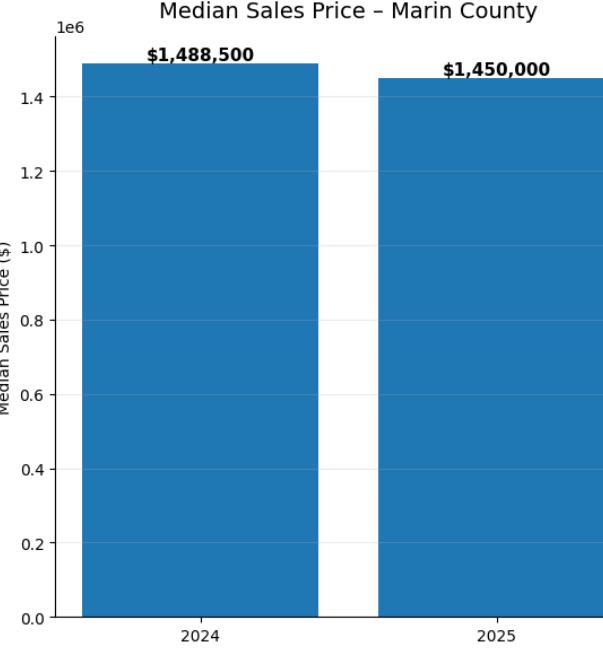
Average Days on Market - Marin County



MEDIAN SALES PRICES | MARIN COUNTY

CITY	2024	2025	YEAR-OVER-YEAR
Belvedere	\$5,280,000	\$5,800,000	+9.9%
Corte Madera	\$1,759,875	\$1,687,500	-4.1%
Fairfax	\$1,185,000	\$1,125,000	-5.1%
Greenbrae	\$2,187,500	\$2,400,000	+9.7%
Kentfield	\$3,050,000	\$3,000,000	-1.6%
Larkspur	\$1,850,000	\$1,647,500	-11%
Mill Valley	\$2,106,000	\$2,050,000	-2.7%
Novato	\$1,100,000	\$1,065,000	-3.2%
Ross	\$2,500,000	\$3,100,000	+24%
San Anselmo	\$1,540,000	\$1,725,000	+12%
San Rafael	\$1,275,000	\$1,249,500	-2%
Sausalito	\$1,468,000	\$1,782,575	+21.4%
Tiburon	\$2,862,500	\$3,250,000	+13.5%

Median Sales Price - Marin County



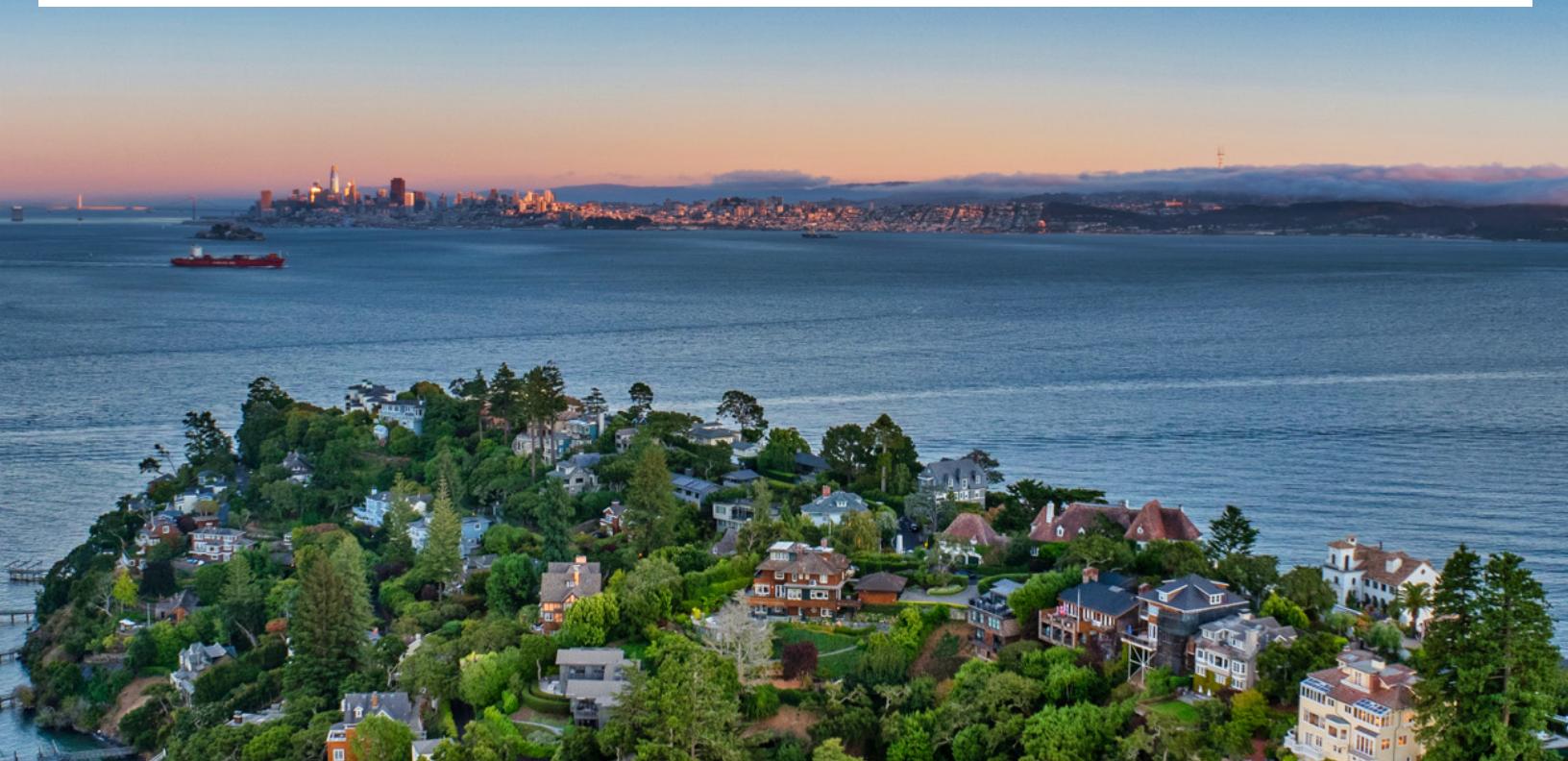
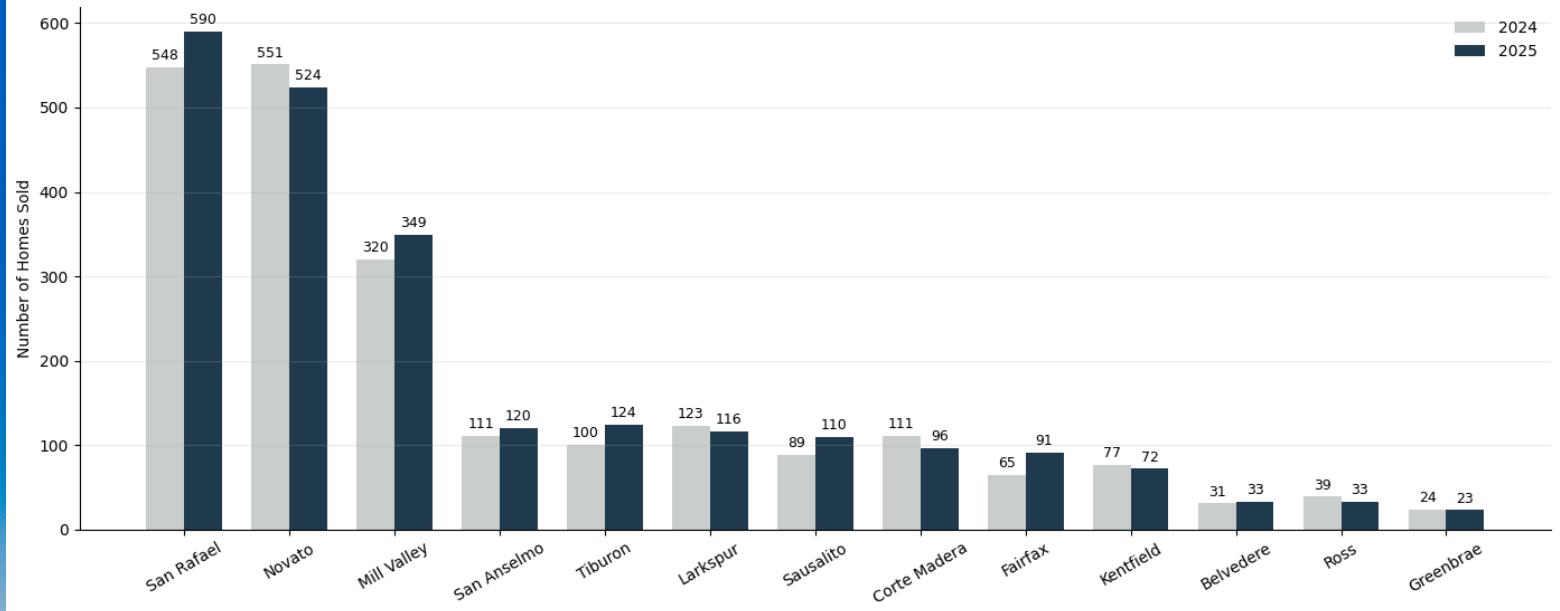
Comparative Markets: Marin County

Sales activity varied by community, reflecting differences in buyer demand, housing mix, and local market conditions. By viewing year-over-year changes side by side, this comparison offers insight into how transaction volume shifted across Marin's towns from 2024 to 2025 and where market activity gained or eased over the past year.

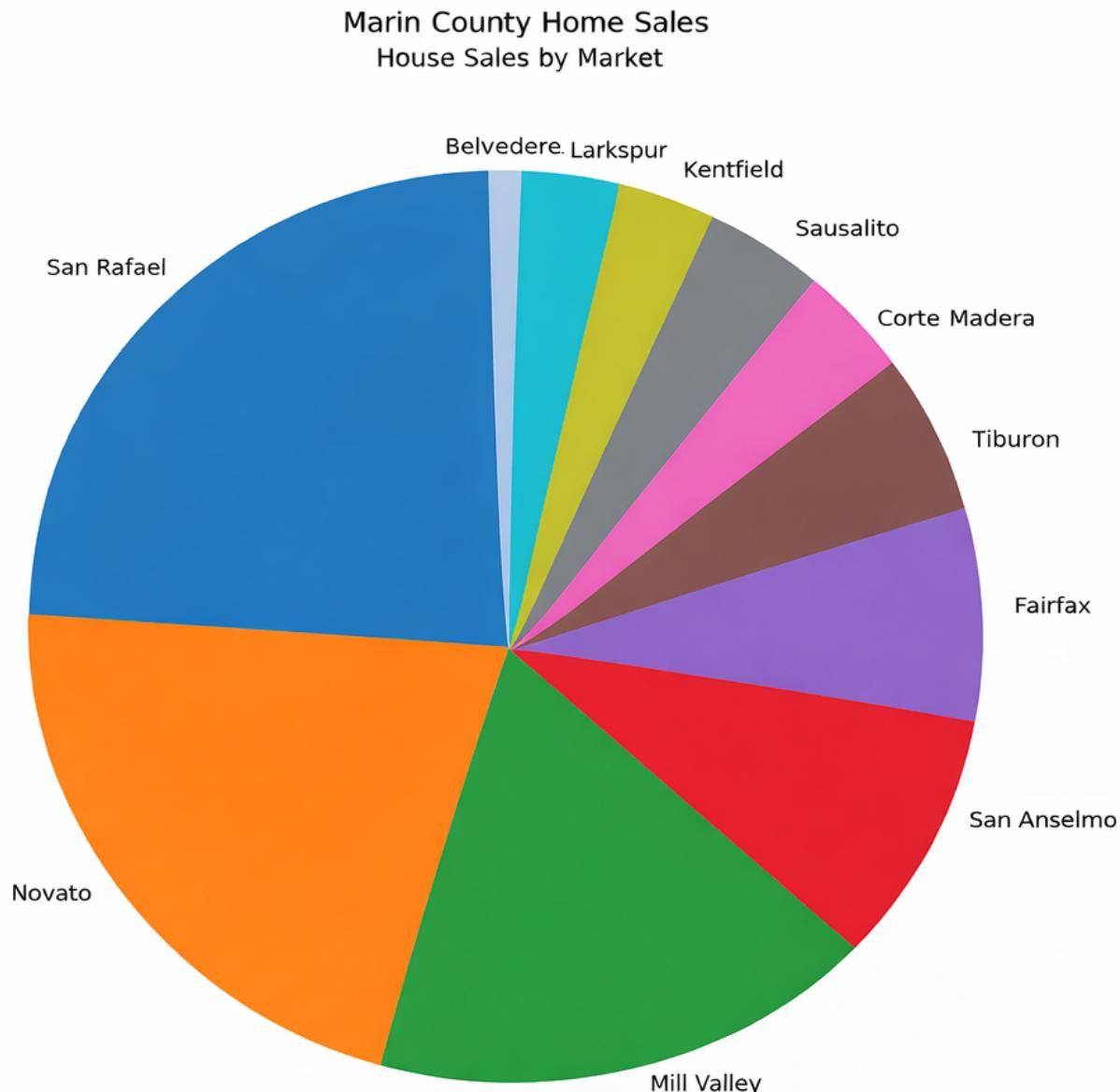
NUMBER OF SALES | MARIN COUNTY

CITY	2024	2025	YEAR-OVER-YEAR CHANGE
Belvedere	31	33	+6.5%
Corte Madera	111	96	-13.5%
Fairfax	65	91	+40%
Greenbrae	24	23	-4.2%
Kentfield	77	72	-6.5%
Larkspur	123	116	-5.7%
Mill Valley	320	349	+9.1%
Novato	551	524	-4.9%
Ross	39	33	-15.4%
San Anselmo	116	126	+8.6%
San Rafael	548	590	+7.7%
Sausalito	89	110	+23.6%
Tiburon	100	124	+24%

Year-over-Year Comparison (2024–2025)



Comparative Markets: Marin County



This chart reflects single-family home sales by community.

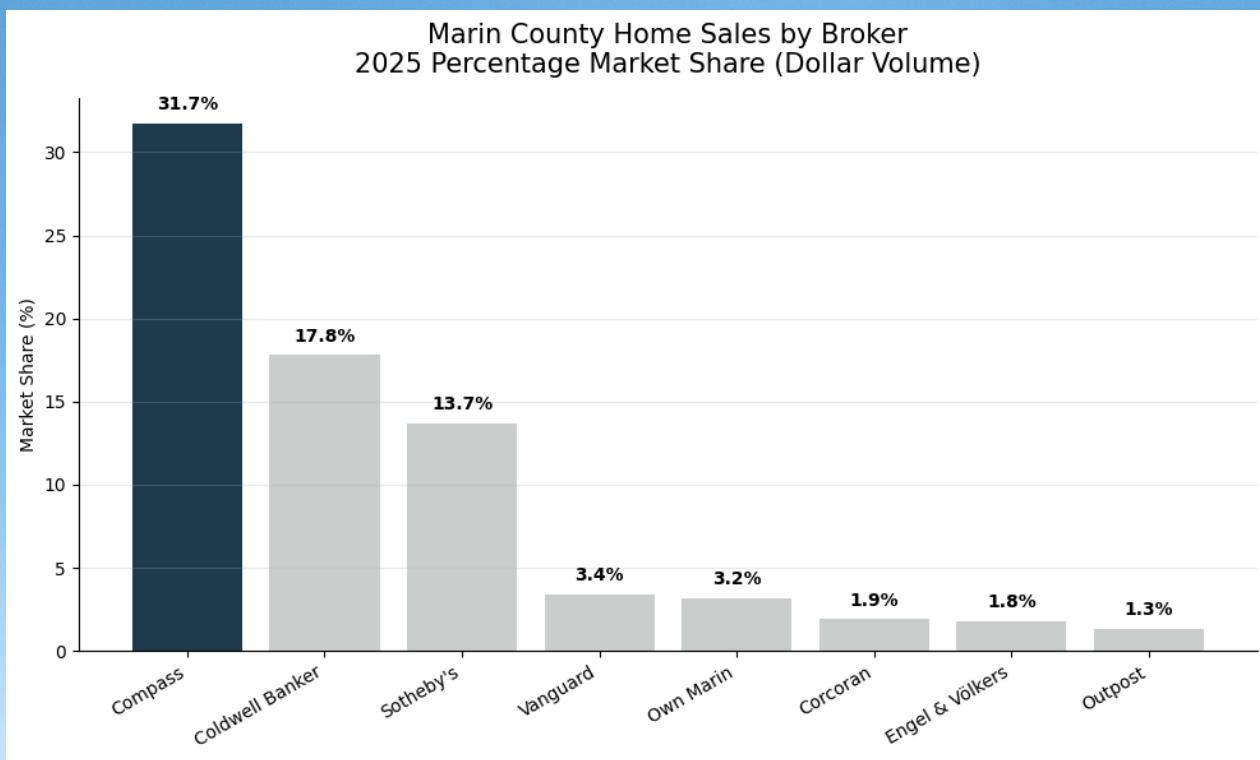
Condo and townhouse sales are excluded.

Ross (33) and Greenbrae (23) are not included in the graph. This is the 2025 data.



COMPASS STATS

The chart below shows how home sales in Marin County are distributed across brokerages based on dollar volume in 2025. It offers a snapshot of relative market activity among the firms operating in the county and highlights differences in market presence. As shown, Compass sits at the top of the chart, reflecting its leading role in Marin County's residential real estate market.



SHANA ROHDE-LYNCH

"Experience the Difference"

#1 MARIN COUNTY AGENT IN 2025

\$246M+ in Sales Volume

61 Transactions Closed

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