

STATE OF THE MARKET

MARIN • JANUARY 2026

HOW'S THE MARKET?

The past five years have tested the strength of Marin's real estate market. From 2021 to 2025, mortgage interest rates doubled, rising from the historic low 3% range to 6.5% while available homes on the market increased by approximately 32% to the highest level in over 5 years.

So, what happened during that five-year period? Home sales declined by 20% yet median home prices remained steady at approximately \$1,700,000. (See chart below)

Rates doubled, inventory soared, but prices held steady for the 5th year in a row.

What does that tell you? That the underlying demand in Marin is strong. Buyers adapted to higher rates by putting more money down or opting more often for cash purchases. Increased inventory was absorbed without meaningful price erosion.

Marin's resilience comes from fundamentals: Limited land, equity-strong, cash-heavy buyers and the strong lifestyle incentives Marin has to offer.

The projection for 2026? That Marin will continue on its path to a more balanced and stable market. With the economy in the headlines, interest rates are likely to become a political football. Lower rates would have an impact on the purchasing power of certain price segments in our market.

Marin will continue to outperform mortgage-rate-dependent national markets by attracting buyers drawn to our desirable location, lifestyle and the long-term value Marin homeownership provides.

MARIN SALES BY PRICE POINT

Price	# Homes Sold								
	2017	2018	2019	2020	2021	2022	2023	2024	2025
Above \$4 million	90	86	89	124	215	206	135	143	165
\$3 - \$4 million	100	105	110	151	244	182	143	137	173
\$2 - \$3 million	281	298	298	365	501	487	322	385	353
\$1.5 - \$2 million	347	397	378	441	621	493	348	384	402
\$1 - \$1.5 million	674	715	774	749	814	567	483	504	531
\$800,000 - \$1 million	412	383	355	328	250	130	132	138	166
Below \$800,000	321	200	247	154	60	45	43	45	72
	2225	2184	2251	2312	2705	2110	1606	1736	1862

2025 was the third year in a row with single family homes sales under 2,000 – the fewest since 2011. What remained constant is the sales by price point – very consistent with 2024. The meat of the market in Marin remains between \$1 - \$2 million representing 50% of total sales, under \$1 million – 13% and over \$4 million – 8% of total 2025 sales.

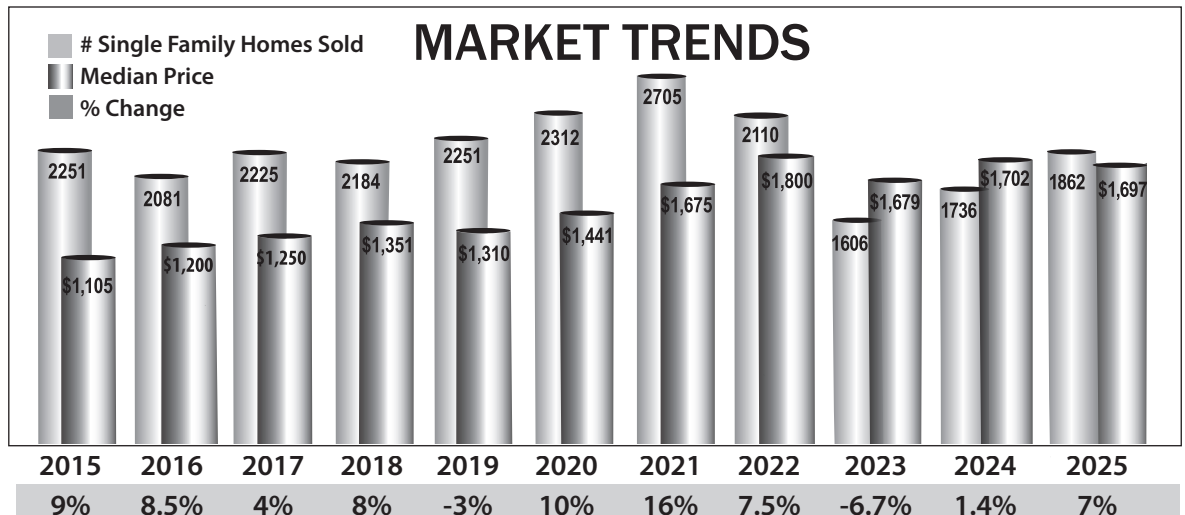


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This eleven-year chart of single-family home sales demonstrates the total number of home sales and median sale price by year. 2025 showed real market resilience in the face of high interest rates and increasing inventory closing out the year at a median sale price of \$1,697,000. The number of single-family homes sold increased by 7%. Of the 1,862 single family home sales in 2025 – 35% were over asking, 33% were all cash transactions and 11% were sold off market.

GOLDEN GATE SOTHEBY'S INTERNATIONAL REALTY

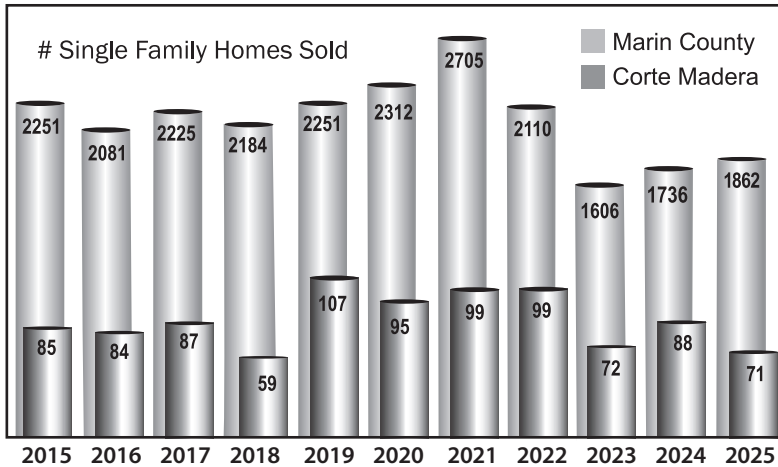
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2. CORTE MADERA MARKET TRENDS

Data Source: MLS



Price	# Homes Sold										
	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
above \$3 million	0	1	2	1	5	2	8	9	5	6	10
\$2 - \$3 million	5	8	12	8	14	20	32	41	16	27	19
\$1.5 - \$2 million	19	21	24	17	36	31	44	37	30	37	31
\$1 - \$1.5 million	48	44	44	31	49	35	14	11	19	14	10
below \$1 million	13	10	5	2	3	7	1	1	2	4	1
	85	84	87	59	107	95	99	99	72	88	71

Over the past year, Corte Madera recorded **71 home sales**, reflecting steady demand across price points. **33 homes sold over asking**, with **16 in East Corte Madera (ECM)**—a clear sign of the neighborhood's strong appeal. Competition remained elevated, with **29 multiple-offer sales**, including **13 in ECM**. Buyer quality stood out as well: **13 all-cash purchases** closed market-wide, **6 in ECM**. Off-market activity was also meaningful, with **12 sales, 5 in ECM**. While Corte Madera remains healthy overall, **ECM continues to outperform**. Demand remains deep—but accurate, strategic pricing is essential.

3. CORTE MADERA HOME SALES

January – December 31, 2025

ADDRESS	BD/BA	SQ. FT.	SALE PRICE	CLOSE DATE	ADDRESS	BD/BA	SQ. FT.	SALE PRICE	CLOSE DATE
* 34 Fairview Avenue	4/4.5	5016	\$4,220,000	11/19/25	60 Edison Avenue	3/2	1746	\$1,880,000	10/01/25
* 134 Grove Avenue	5/4	3472	\$4,200,000	06/20/25	* 26 Flying Cloud Course	3/2	1871	\$1,825,000	05/30/25
340 Corte Madera Avenue	4/3	3345	\$4,050,000	09/11/25	* 401 Sausalito Street	3/2	1411	\$1,825,000	07/02/25
* 111 Palm Avenue	5/3	2490	\$3,755,000	07/11/25	* 58 Sonora Way	4/2	1580	\$1,820,000	10/27/25
* 633 Manzanita Avenue	4/4.5	2700	\$3,670,000	10/10/25	* 49 Sonora Way	4/2	1903	\$1,820,000	01/14/25
929 Meadowsweet Drive	5/3	2852	\$3,650,000	10/29/25	* 233 Prince Royal Passage	4/2	1549	\$1,755,000	07/30/25
219 Baltimore Avenue	5/4	2969	\$3,595,000	08/22/25	* 58 Spindrift Passage	3/2	1452	\$1,750,000	02/14/25
12 Willow Avenue	4/3.5	2716	\$3,200,000	02/04/25	* 18 Chickasaw Court	3/2	1416	\$1,750,000	10/09/25
* 31 Grove Avenue	4/3	2275	\$3,200,000	07/06/25	* 80 Golden Hind Passage	4/3	1872	\$1,735,000	03/20/25
* 200 Granada Drive	5/3	2443	\$3,012,500	03/28/25	* 9 Endeavor Cove	3/2.5	1558	\$1,728,000	06/14/25
* 17 Privateer Drive	4/3	2216	\$2,950,000	09/04/25	* 14 Seawolf Passage	3/2	1411	\$1,700,000	11/13/25
7 Madrono Avenue	4/3	2311	\$2,725,000	06/03/25	* 45 Ebbtide Passage	4/2	1615	\$1,675,000	05/08/25
* 17 Hickory Avenue	4/4	1324	\$2,650,000	04/07/25	* 199 Golden Hind Passage	3/3	1529	\$1,642,500	09/16/25
* 137 Granada Drive	4/4	2312	\$2,630,000	12/26/25	508 Oakdale Avenue	3/2	1776	\$1,640,000	10/15/25
* 10 Vista Court	4/3	1842	\$2,605,000	10/02/25	* 13 Seamast Passage	3/2	1712	\$1,625,000	06/06/25
409 Summit Drive	4/2.5	3145	\$2,600,000	09/04/25	* 61 Spindrift Passage	3/2	1452	\$1,620,000	04/02/25
* 26 Council Crest	3/2	1817	\$2,550,000	11/21/25	322 Oakdale Avenue	3/2	1283	\$1,600,000	07/01/25
* 45 Golden Hind Passage	5/4	2659	\$2,550,000	06/18/25	488 Chapman Drive	3/3	1644	\$1,575,000	05/28/25
* 145 Yolo Street	4/2.5	2072	\$2,535,000	12/24/25	* 179 Golden Hind Passage	4/2	1,766	\$1,564,000	06/09/25
* 40 Windward Avenue	4/2.5	2570	\$2,495,000	09/19/25	1123 Meadowsweet	2/2.5	2065	\$1,550,000	04/28/25
312 Summit Drive	3/3	2855	\$2,450,000	06/27/25	* 274 Sausalito Street	2/1	1028	\$1,550,000	10/15/25
* 31 Mohawk Avenue	3/2.5	1865	\$2,425,000	05/30/25	* 22 Prince Royal Passage	3/2	1694	\$1,550,000	04/16/25
* 105 Madera Del Presidio	3/2.5	2293	\$2,350,000	06/11/25	24 Mohawk Avenue	2/1	985	\$1,535,000	05/16/25
* 13 Vista Court	3/2	2353	\$2,300,000	06/25/25	* 10 Birch Avenue	3/1.5	1274	\$1,530,000	10/07/25
* 122 Golden Hind Passage	4/3	2259	\$2,165,000	08/29/25	* 16 Tradewind Passage	3/2	1827	\$1,430,000	11/11/25
* 70 Birch Avenue	3/2	1804	\$2,150,000	04/02/25	* 22 Echo Avenue	4/2	1578	\$1,425,000	06/11/25
* 97 Sonora Way	4/2	1895	\$2,150,000	08/19/25	* 40 Staghound Passage	3/2	1559	\$1,400,000	08/19/25
* 14 Channel Drive	4/2.5	1912	\$2,100,000	06/12/25	* 160 Golden Hind Passage	3/2	1622	\$1,365,000	11/12/25
* 25 Paloma Drive	4/2.5	1978	\$2,010,000	12/17/25	112 Edison Avenue	5/3	2805	\$1,282,500	09/18/25
13 Ash Avenue	3/2	1356	\$2,000,000	09/12/25	* 17 Sonora Way	4/2	1580	\$1,250,000	11/03/25
* 26 Channel Drive	3/2	1816	\$1,995,000	09/26/25	* 26 Echo Avenue	3/1	1137	\$1,200,000	01/25/25
* 33 Prince Royal Passage	4/2	1635	\$1,970,000	08/29/25	* 10 Diamond Head Psg.	3/2	1452	\$1,200,000	08/07/25
* 191 Golden Hind Passage	3/2	1851	\$1,950,000	04/04/25	666 Redwood Avenue	3/2	1854	\$1,150,000	12/31/25
310 Redwood Avenue	3/2.5	1628	\$1,925,000	12/01/25	* 633 Meadowsweet Drive	2/2	1011	\$1,100,000	03/26/25
404 Summit Drive	3/4	2191	\$1,900,000	10/28/25	244 Summit Drive	2/2	1294	\$720,000	03/24/25

* sale over list price

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Marin at a Glance – 2025

\$500,000 - \$15,700,000

The lowest and highest sale price for a single-family home in 2025 – from three fixers in Fairfax to a new construction estate in Ross.

50% *of the 1,862 single-family homes sales in 2025 closed between \$1,000,000 – \$2,000,000 – the meat of the market in Marin.*

35% *of homes sold in 2025 traded OVER their list price compared to 55% in 2024.*

33% *of single-family home sales were purchased all cash.*

54% *of sales over \$3 million were all cash transactions.*

11% *of sales were conducted off market.*