



INNER EAST BAY MARKET UPDATE*

AUGUST 2025





VANGUARD PROPERTIES

MARKET UPDATE

INNER EAST BAY* | AUGUST 2025

Following an active second quarter, the Inner East Bay housing market slowed down in July, which is typical for the summer season. While buyer activity eased from spring's pace, core market fundamentals remain healthy. Historically, summer sees fewer new listings and a dip in buyer urgency, but fall often brings renewed momentum and fresh opportunities.

The median sales price ticked down 3.8 percent year over year to \$1,125,000, showing some cooling after strong gains earlier in the year. Homes are still selling quickly, with the median days on market rising by just 2 days to 16, which remains a brisk pace. The median price per square foot dipped slightly by 0.3 percent.

Pending sales fell 15.5 percent, and closed sales decreased 11.5 percent. However, inventory grew modestly, with the number of homes for sale on the last day of July increasing 1.2 percent to 573. Despite this, the market remains competitive; over seven out of ten homes sold above their list price, with sellers receiving an average of 112.0 percent of asking, consistent with last year. The Months Supply of Inventory (MSI) recorded at 2.0, indicating a balanced but still relatively tight market.

Freddie Mac reported that the average 30-year fixed mortgage rate dropped to 6.63 percent, the lowest level since April. This decline improves buyers' purchasing power, making it a favorable time to shop for homes.



SINGLE FAMILY HOMES

JULY 2025

Median Sales Price	\$1,125,000 ↓
Days on market	16 ↑
\$ / SQ. FT.	\$695 ↓
# For Sale On Last Day Of Month	573 ↑
Went Into Contract	290 ↓
Properties Sold	285 ↓

*The data utilized for this Inner East Bay Market Update was pulled from the following cities: Alameda, Albany, Berkeley, El Cerrito, Kensington, Oakland (limited to the following Oakland zip codes: 94602, 94605, 94606, 94607, 94608, 94609, 94610, 94611, 94618, 94619 and 94705), Piedmont and San Leandro. 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

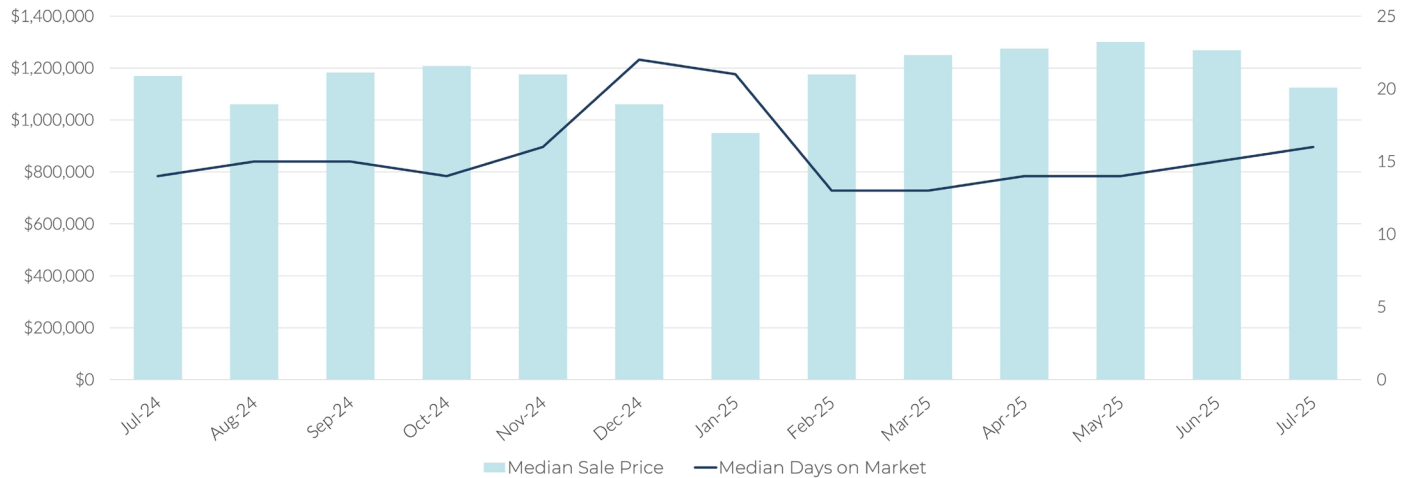


INNER EAST BAY MARKET UPDATE*

AUGUST 2025

SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **-11.3%**

DAYS ON MARKET: **+1 day**

YEAR-OVER-YEAR COMPARISON

"...the market remains competitive; over seven out of ten homes sold above their list price, with sellers receiving an average of 112.0 percent of asking, consistent with last year. The Months Supply of Inventory (MSI) recorded at 2.0, indicating a balanced but still relatively tight market."

			MEDIAN
	JUL-2025	JUL-2024	%Δ
Sales Price	\$1,125,000	\$1,169,500	-3.8%
Days On Market	16	14	+14.3%
\$ / SQ. FT.	\$695	\$697	-0.3%

			TOTAL
	JUL-2025	JUL-2024	%Δ
Went Into Contract	290	343	-15.5%
Properties Sold	285	322	-11.5%
# For Sale Last Day of Month	573	566	+1.2%
% Of Properties Sold Over List	72.6%	75.5%	-3.8%
% Of List Price Received (Average)	112.0%	112.0%	0.0%

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AUGUST 2025

SINGLE FAMILY RESIDENCES

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
Alameda	89	83	▲ 7%	13	12	▲ 8%	\$1,420,000	\$1,350,000	▲ 5%
Albany	24**	24**	0%	13	13	0%	\$1,320,000	\$1,300,000	▲ 2%
Berkeley	189	160	▲ 18%	14	13	▲ 8%	\$1,650,000	\$1,640,000	▲ 1%
El Cerrito	54	64	▼ 16%	14	13	▲ 8%	\$1,340,000	\$1,200,000	▲ 12%
Kensington	20**	15**	▲ 33%	14	13	▲ 8%	\$1,363,000	\$1,424,000	▼ 4%
Oakland**	445	419	▲ 6%	15	13	▲ 15%	\$1,135,000	\$1,200,000	▼ 5%
Piedmont	30**	34**	▼ 12%	12	13	▼ 8%	\$2,432,500	\$2,627,500	▼ 7%
San Leandro	104	129	▼ 19%	13	10	▲ 30%	\$872,500	\$850,000	▲ 3%
INNER EAST BAY*	955	928	▲ 3%	14	13	▲ 8%	\$1,280,000	\$1,250,000	▲ 2%

**Small sample size; use caution when interpreting statistics.

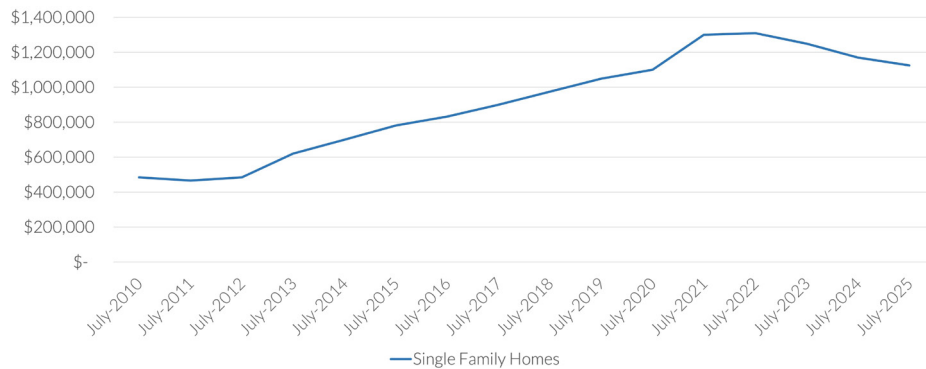
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JUNE 2025

YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

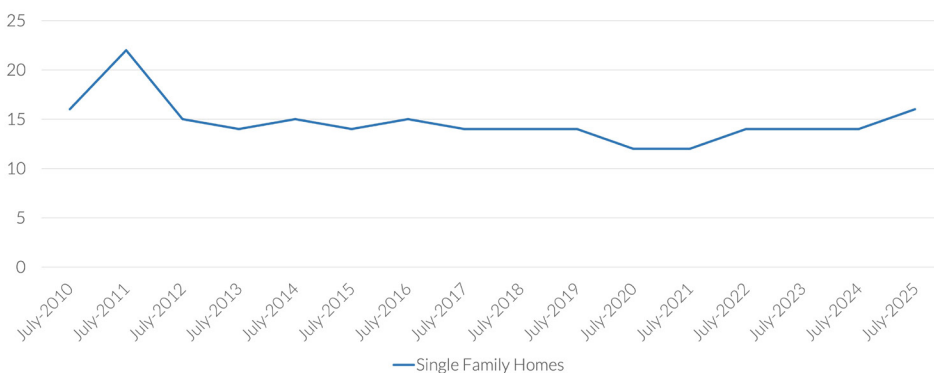


Single Family Residences

\$1,125,000

-3.8% change year-over-year

MEDIAN MARKET TIME

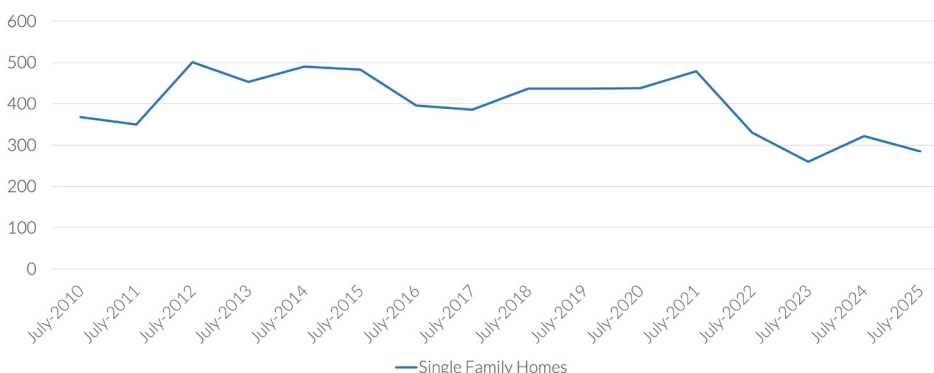


Single Family Residences

16 days

+2 day change year-over-year

NUMBER OF SALES



Single Family Residences

285

-11.5% change year-over-year

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