



# INNER EAST BAY MARKET UPDATE\*

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DECEMBER 2025







## VANGUARD PROPERTIES

# MARKET UPDATE

INNER EAST BAY\* | DECEMBER 2025

The Inner East Bay market wrapped up November with a blend of strong demand and tighter supply that continues to favor sellers. Single-family homes are still moving very quickly, with the median days on market dipping by one day to just 15 days, underscoring how fast well-priced listings are getting snapped up. Competition remains brisk: 70.3 percent of homes sold over list price, and sellers received an average of 111.9 percent of asking, a slight gain from last year that highlights ongoing buyer urgency for desirable properties.

Inventory remains constrained, with the number of homes for sale at the end of November 14.1 percent lower year over year at 420. This leaner selection is helping support pricing even as the median sales price adjusted 10.6 percent to \$1,050,000 and the median price per square foot eased just 0.6 percent to \$692. These modest price and price-per-foot shifts suggest more of a normalization and change in the mix of homes selling rather than a fundamental weakening in values. Contract activity dipped a mild 3.1 percent, and closed sales held steady at 269, reinforcing that underlying demand remains healthy.



## SINGLE FAMILY HOMES

### NOVEMBER 2025

Median Sales Price	\$1,050,000 ↓
Days on market	15 ↑
\$ / SQ. FT.	\$692 ↓
# For Sale On Last Day Of Month	420 ↓
Went Into Contract	280 ↓
Properties Sold	269

\*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



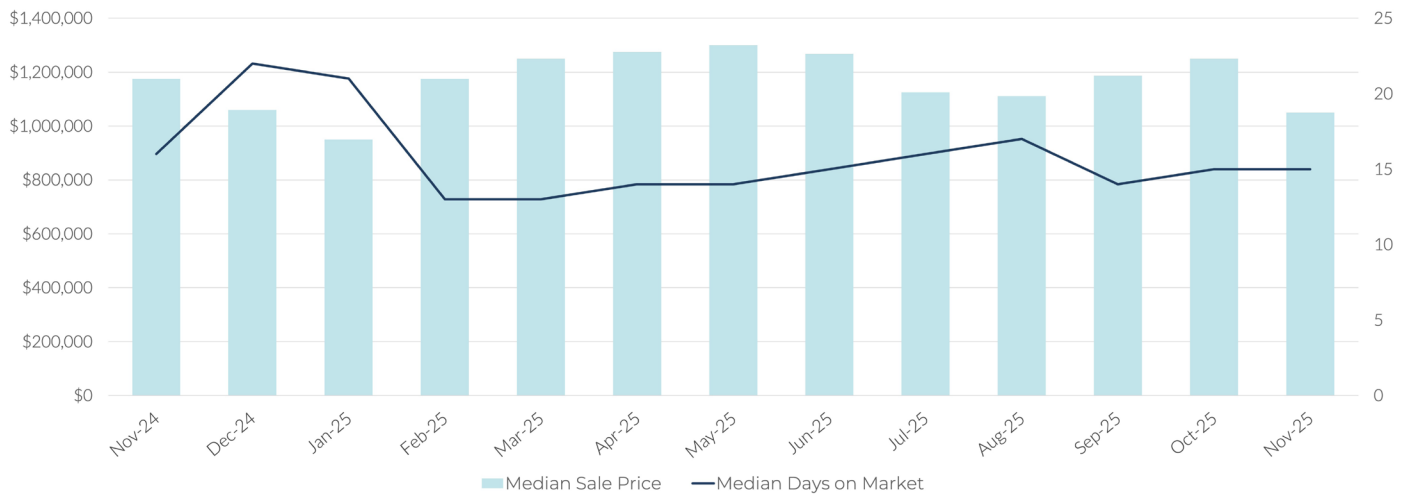
VANGUARD PROPERTIES

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## SINGLE FAMILY RESIDENCES

### MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **-16.0%**

DAYS ON MARKET: **No change**

### YEAR-OVER-YEAR COMPARISON

*"The Inner East Bay market wrapped up November with a blend of strong demand and tighter supply that continues to favor sellers."*

	MEDIAN		
	NOV-2025	NOV-2024	%Δ
Sales Price	\$1,050,000	\$1,175,000	-10.6%
Days On Market	15	16	-6.3%
\$ / SQ. FT.	\$692	\$696	-0.6%

	TOTAL		
	NOV-2025	NOV-2024	%Δ
Went Into Contract	280	289	-3.1%
Properties Sold	269	269	0.0%
# For Sale Last Day of Month	420	489	-14.1%
% Of Properties Sold Over List	70.3%	72.5%	-3.0%
% Of List Price Received (Average)	111.9%	111.2%	+0.6%

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## SINGLE FAMILY RESIDENCES

REGION	HOMES SOLD (TOTAL)			DAYS ON MARKET (MEDIAN)			SALE PRICE (MEDIAN)		
	Q3 2025	Q3 2024	%Δ	Q3 2025	Q3 2024	%Δ	Q3 2025	Q3 2024	%Δ
Alameda	83	81	▲ 2%	14	12	▲ 17%	\$1,330,000	\$1,332,000	▲ 5%
Albany	19*	19*	0%	15	15	0%	\$1,100,000	\$1,500,000	▲ 2%
Berkeley	121	132	▲ 8%	14	14	0%	\$1,580,000	\$1,461,125	▲ 1%
El Cerrito	43*	41*	▲ 5%	14	14	0%	\$1,395,000	\$1,100,991	▲ 12%
Kensington	11*	15*	▼ 27%	14	14	0%	\$1,400,000	\$1,465,000	▲ 4%
Oakland**	417	443	▼ 6%	19	17	▲ 12%	\$1,025,000	\$1,050,000	▲ 5%
Piedmont	15*	20*	▼ 25%	13	12	▲ 8%	\$3,025,000	\$2,250,000	▲ 7%
San Leandro	105	150	▼ 30%	14	13	▲ 8%	\$850,000	\$872,500	▲ 3%
INNER EAST BAY*	814	901	▼ 10%	15	15	0%	\$1,130,000	\$1,130,000	▲ 2%

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

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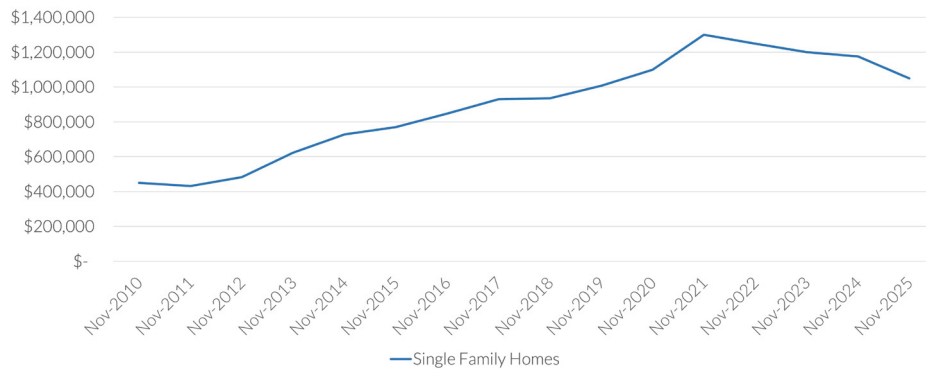


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## YEAR-OVER-YEAR COMPARISONS

### MEDIAN SALE PRICE

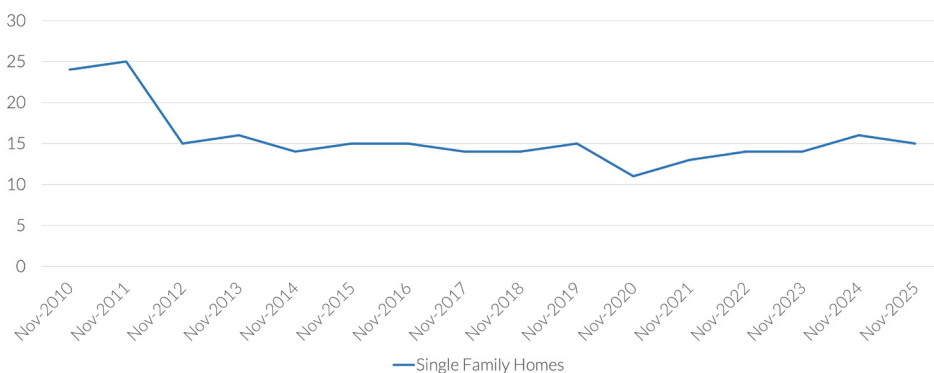


Single Family Residences

**\$1,050,000**

-10.6% change year-over-year

### MEDIAN MARKET TIME

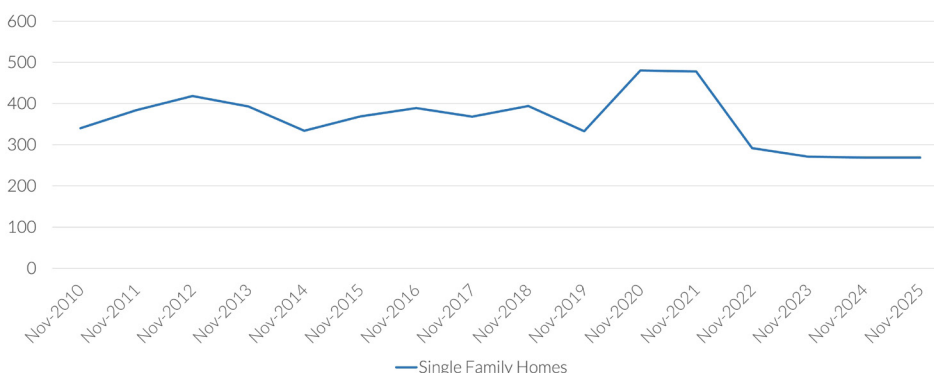


Single Family Residences

**15 days**

-1 day change year-over-year

### NUMBER OF SALES



Single Family Residences

**269**

No change year-over-year

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