



INNER EAST BAY MARKET UPDATE*

2025 YEAR IN REVIEW





VANGUARD PROPERTIES

MARKET UPDATE

INNER EAST BAY* | 2025 YEAR IN REVIEW

The Inner East Bay housing market demonstrated notable stability and resilience in 2025, outperforming many broader regional and national trends. While higher interest rates early in the year created headwinds, demand across the Inner East Bay remained steady, supported by the area's strong employment base and lifestyle appeal.

Single-family homes continued to anchor the market. The median sales price held firm at \$1,200,000, and homes moved quickly, with a median of just 14 days on market. Despite a slight dip in price per square foot, activity increased modestly, with both contracts and closed sales finishing the year higher than 2024. Competition remained elevated, with nearly three-quarters of homes selling above list price and sellers receiving an average of 113.4 percent of asking, underscoring consistent buyer demand for well-located, quality properties.

The condominium market told a different but encouraging story. Prices adjusted meaningfully in 2025, with the median condo price falling 11.9 percent to \$528,000. This reset improved affordability and helped unlock demand. Contracts rose 7.8 percent and sales increased 6.4 percent year over year, signaling renewed momentum after a slower period. While condos took slightly longer to sell, more than a third still traded above asking, and sellers generally achieved full list price, reflecting healthy absorption for well-priced units.

Economic fundamentals across the Inner East Bay remained supportive throughout the year. Employment conditions stayed solid, and the region continued to benefit from proximity to major job centers in technology, healthcare and education. Toward year end, falling mortgage rates added an important tailwind, restoring purchasing power and improving buyer confidence as the market transitioned into 2026.

Looking ahead, the Inner East Bay enters the new year from a position of strength. Stable single-family pricing, improving condo activity and easing borrowing costs point to an active spring selling season. Buyers should expect competitive conditions for desirable homes, while sellers are well positioned to benefit from steady demand and limited supply across this highly sought-after region.



SINGLE FAMILY HOMES



CONDOMINIUMS

2025

Median Sales Price	\$1,200,000
Days on market	14
\$ / SQ. FT.	\$705 ↓
# For Sale On Last Day Of Year	196 ↓
Went Into Contract	3,555 ↑
Properties Sold	3,308 ↑

2025

Median Sales Price	\$528,000 ↓
Days On Market	32 ↑
\$ / Sq. Ft.	\$520 ↓
# For Sale Last Day Of Year	162 ↓
Went Into Contract	778 ↑
Properties Sold	664 ↑

*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. ©2026 Vanguard Properties. All rights reserved. Equal Housing Opportunity. DRE No. 01486075

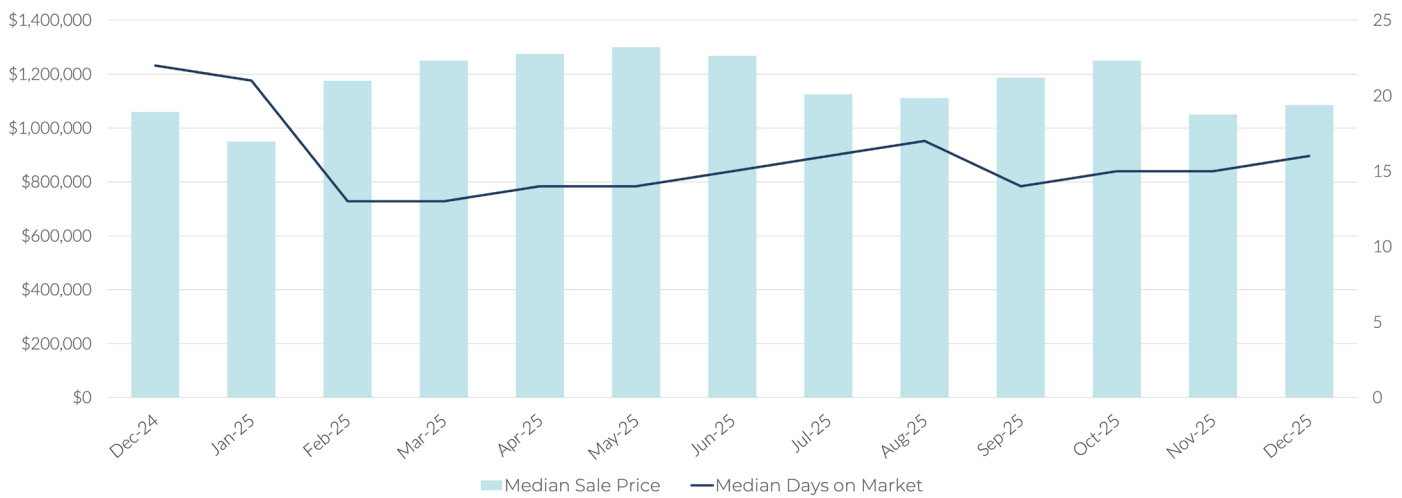


INNER EAST BAY MARKET UPDATE*

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SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **+3.3%**

DAYS ON MARKET: **+1 days**

YEAR-OVER-YEAR COMPARISON

"Competition remained elevated, with nearly three-quarters of homes selling above list price and sellers receiving an average of 113.4 percent of asking, underscoring consistent buyer demand for well-located, quality properties."

	MEDIAN		
	2025	2024	%Δ
Sales Price	\$1,200,000	\$1,200,000	0.0%
Days On Market	14	14	0.0%
\$ / SQ. FT.	\$705	\$711	-0.8%

	TOTAL		
	2025	2024	%Δ
Went Into Contract	3,555	3,536	+0.5%
Properties Sold	3,308	3,289	+0.6%
# For Sale Last Day of Year	196	256	-23.4%
% Of Properties Sold Over List	73.6%	76.0%	-3.2%
% Of List Price Received (Average)	113.4%	112.7%	+0.6%

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SINGLE FAMILY RESIDENCES

REGION	HOMES SOLD (TOTAL)			DAYS ON MARKET (MEDIAN)			SALE PRICE (MEDIAN)		
	2025	2024	%Δ	2025	2024	%Δ	2025	2024	%Δ
Alameda	310	286	▲ 8%	13	13	0%	\$1,382,500	\$1,400,000	▼ 1%
Albany	82	79	▲ 4%	14	14	0%	\$1,320,000	\$1,350,000	▼ 2%
Berkeley	534	510	▲ 5%	14	14	0%	\$1,600,000	\$1,500,000	▲ 7%
El Cerrito	186	180	▲ 3%	14	14	0%	\$1,200,000	\$1,200,000	0%
Kensington	64	48**	▲ 33%	14	14	0%	\$1,412,500	\$1,537,500	▼ 8%
Oakland*	1606	1604	▲ 0%	16	16	0%	\$1,054,500	\$1,100,000	▼ 4%
Piedmont	108	108	0%	12	12	0%	\$2,657,500	\$2,400,000	▲ 11%
San Leandro	419	474	▼ 12%	14	13	▲ 8%	\$859,900	\$868,000	▼ 1%
INNER EAST BAY*	3,308	3,289	▲ 1%	14	14	0%	\$1,200,000	\$1,200,000	0%

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

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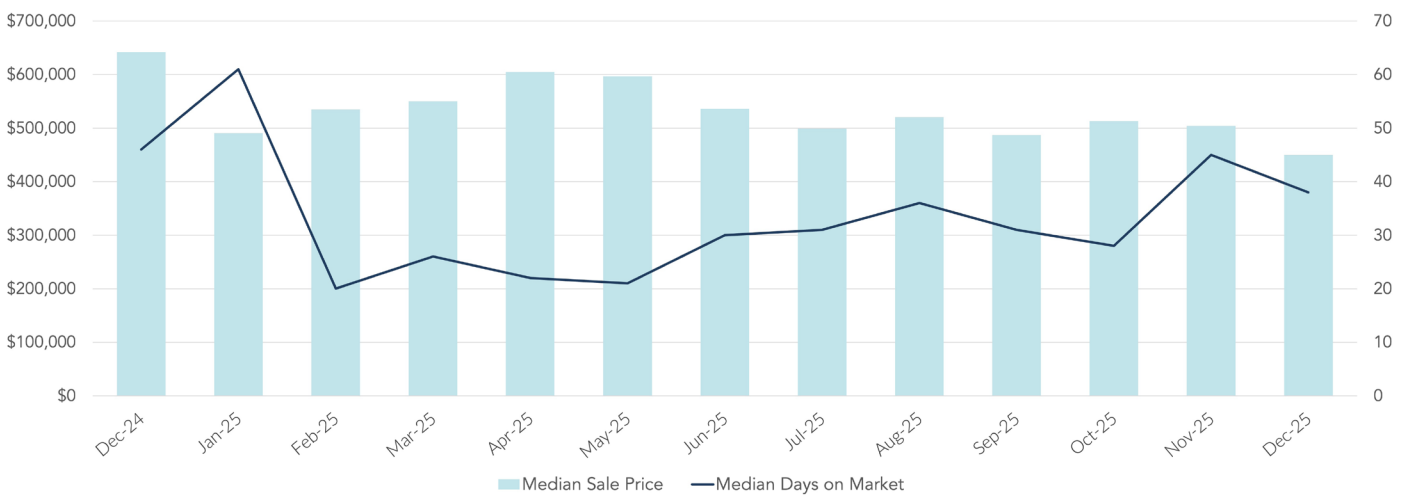


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CONDOMINIUMS

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **-10.7%**

DAYS ON MARKET: **-7 days**

YEAR-OVER-YEAR COMPARISON

"Prices adjusted meaningfully in 2025, with the median condo price falling 11.9 percent to \$528,000. This reset improved affordability and helped unlock demand. Contracts rose 7.8 percent and sales increased 6.4 percent year over year..."

			MEDIAN
	2025	2024	%Δ
Sales Price	\$528,000	\$599,000	-11.9%
Days On Market	32	26	+23.1%
\$ / SQ. FT.	\$520	\$565	-8.0%

			TOTAL
	2025	2024	%Δ
Went Into Contract	778	722	+7.8%
Properties Sold	664	624	+6.4%
# For Sale Last Day of Year	162	179	-9.5%
% Of Properties Sold Over List	36.1%	40.2%	-10.2%
% Of List Price Received (Average)	100.7%	101.1%	-0.4%

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CONDOMINIUMS

REGION	HOMES SOLD (TOTAL)			DAYS ON MARKET (MEDIAN)			SALE PRICE (MEDIAN)		
	2025	2024	%Δ	2025	2024	%Δ	2025	2024	%Δ
Alameda	93	119	▼ 22%	14	26	▼ 46%	\$730,000	\$770,072	▼ 5%
Albany	33**	37**	▼ 11%	45	34	▲ 32%	\$475,000	\$525,000	▼ 10%
Berkeley	92	67	▲ 37%	25	15	▲ 67%	\$776,000	\$730,000	▲ 6%
El Cerrito	3**	4**	▼ 25%	27	46	▼ 41%	\$580,000	\$630,000	▼ 8%
Kensington	0	0	-	-	-	-	-	-	-
Oakland*	385	330	▲ 17%	39	27	▲ 44%	\$463,700	\$530,000	▼ 13%
Piedmont	0	0	-	-	-	-	-	-	-
San Leandro	58	62	▼ 6%	31	20	▲ 55%	\$483,750	\$515,000	▼ 6%
INNER EAST BAY*	664	624	▲ 6%	32	26	▲ 23%	\$528,000	\$599,000	▼ 12%

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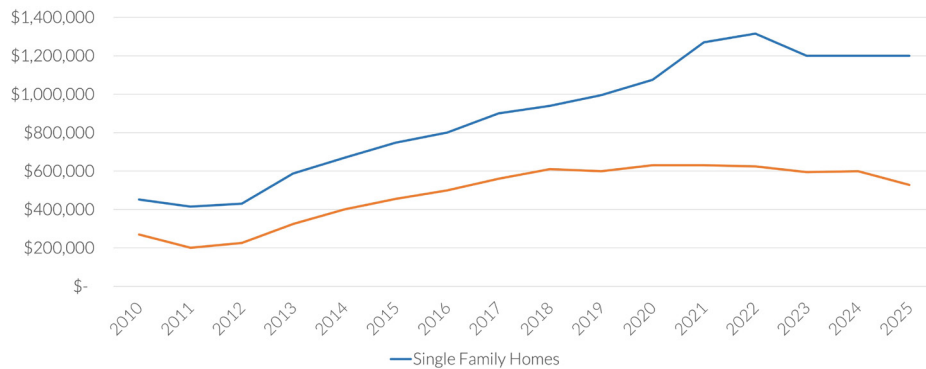


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YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE



Single Family Residences

\$1,200,000

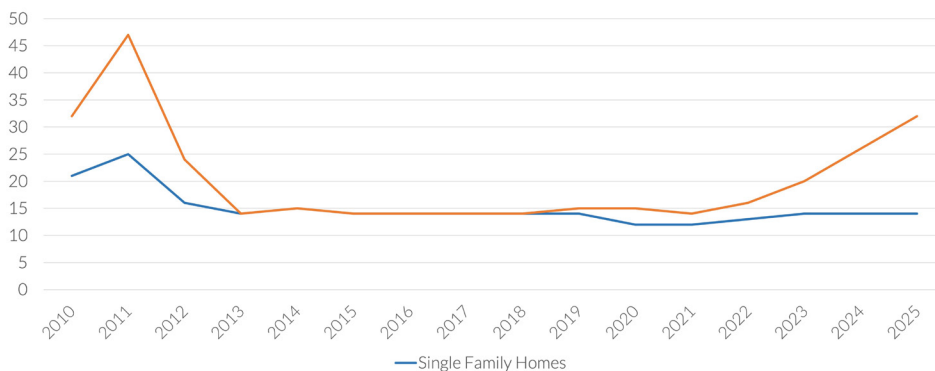
No change year-over-year

Condominium/TIC/COOPs

\$528,000

-11.9% change year-over-year

MEDIAN MARKET TIME



Single Family Residences

14 days

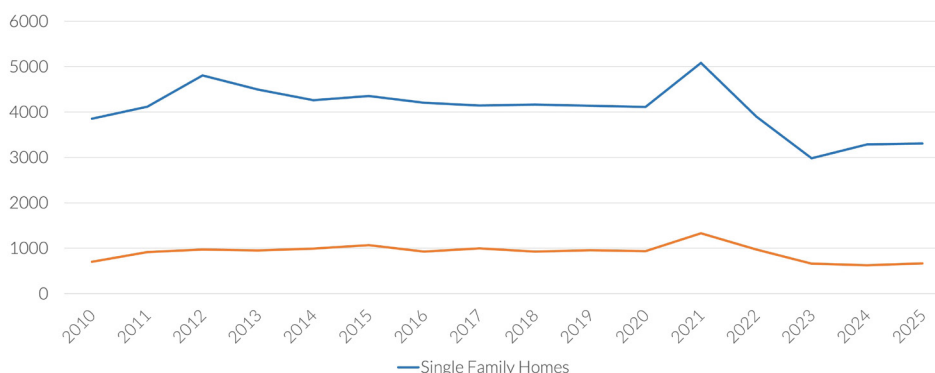
No change year-over-year

Condominium/TIC/COOPs

32 days

+6 day change year-over-year

NUMBER OF SALES



Single Family Residences

3,308

+0.6% change year-over-year

Condominium/TIC/COOPs

664

+6.4% change year-over-year

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