



INNER EAST BAY MARKET UPDATE*

NOVEMBER 2025





VANGUARD PROPERTIES

MARKET UPDATE

INNER EAST BAY* | NOVEMBER 2025

The Inner East Bay market continued to show impressive stability through October, with solid gains in home values despite modest shifts in activity. The median sales price for single-family homes rose 3.5% year over year to \$1,250,000, underscoring the region's ongoing appeal and resilience. Homes are still selling quickly, with a median of just 15 days on market, only one day longer than last year, while the number of closed sales climbed 2.2% to 374, signaling steady buyer demand even as inventory tightened.

At the same time, available listings dropped 6.4% year over year to 611 homes, keeping competition high and supporting strong pricing. Sellers continued to perform well, with 75.9% of homes selling over list price and an average of 114.8% of list price received, up a full percentage point from 2024 — clear evidence that motivated buyers are still stepping up for desirable properties.

Although the number of new contracts dipped 5.4%, the overall picture remains highly encouraging. Limited supply, steady buyer confidence, and competitive offers continue to define the East Bay market heading into winter.



SINGLE FAMILY HOMES

OCTOBER 2025

Median Sales Price	\$1,250,000 ↑
Days on market	15 ↑
\$ / SQ. FT.	\$700 ↓
# For Sale On Last Day Of Month	611 ↓
Went Into Contract	371 ↓
Properties Sold	374 ↑

*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: **+5.4%**

DAYS ON MARKET: **+1 day**

YEAR-OVER-YEAR COMPARISON

"Sellers continued to perform well, with 75.9% of homes selling over list price and an average of 114.8% of list price received, up a full percentage point from 2024 – clear evidence that motivated buyers are still stepping up for desirable properties."

	MEDIAN		
	OCT-2025	OCT-2024	%Δ
Sales Price	\$1,250,000	\$1,207,500	+3.5%
Days On Market	15	14	+7.1%
\$ / SQ. FT.	\$700	\$729	-4.0%

	TOTAL		
	OCT-2025	OCT-2024	%Δ
Went Into Contract	371	392	-5.4%
Properties Sold	374	366	+2.2%
# For Sale Last Day of Month	611	653	-6.4%
% Of Properties Sold Over List	75.9%	77.6%	-2.2%
% Of List Price Received (Average)	114.8%	113.7%	+1.0%

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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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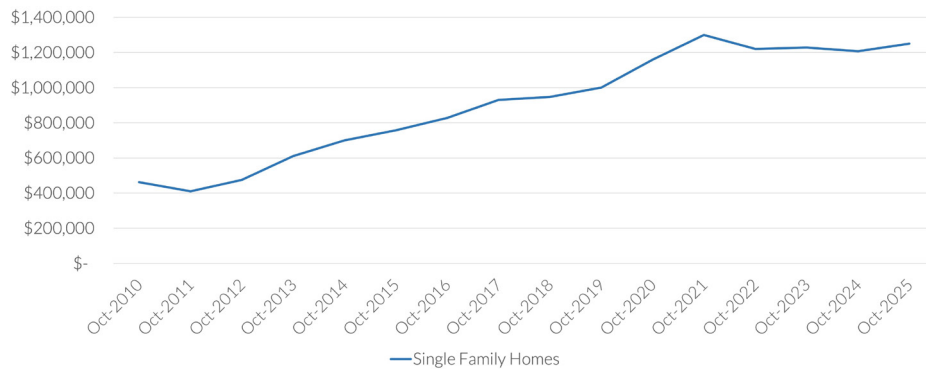


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YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

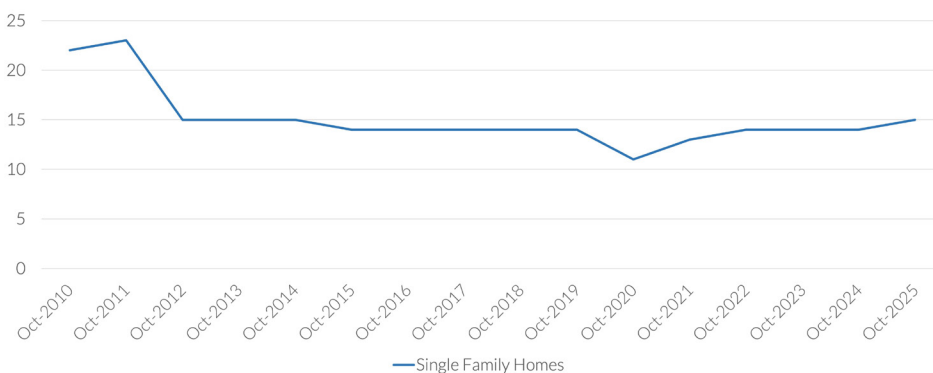


Single Family Residences

\$1,250,000

+3.5% change year-over-year

MEDIAN MARKET TIME

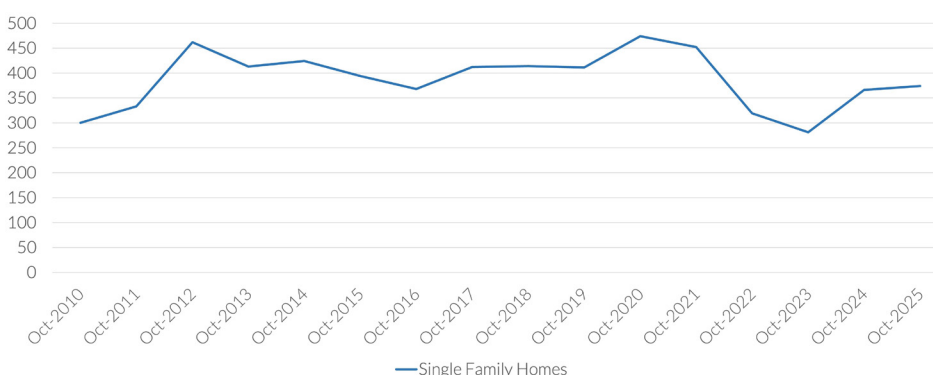


Single Family Residences

15 days

+1 day change year-over-year

NUMBER OF SALES



Single Family Residences

374

+2.2% change year-over-year

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