



INNER EAST BAY MARKET UPDATE*

Q3 2025





VANGUARD PROPERTIES

MARKET UPDATE

INNER EAST BAY* | Q3 2025

The fall selling season is in full swing with the Inner East Bay continuing to demonstrate momentum despite constrained inventory and selective buyer behavior. Lower mortgage rates in recent weeks have further supported activity, helping both buyers and sellers regain confidence as the market transitions into the final stretch of the year.

The single-family segment held steady year over year, underscoring its stability even amid lower supply. The median sales price remained unchanged at \$1,130,000, while homes continued to sell quickly with a median of 15 days on market. Price per square foot dipped slightly by 1.4% to \$685, suggesting modest recalibration rather than weakening demand.

Contract and closing volume eased slightly, with 934 homes going into contract (down 5.2%) and 814 sold (down 9.7%), a reflection of limited new listings rather than diminished interest. Active inventory at the end of September was 12.8% lower than last year at 614 homes, keeping competition elevated. Still, 73.8% of homes sold over asking, and sellers received an impressive 112.8% of list price on average, marking a small gain over last year. With months' supply of inventory at 2.2, the market remains firmly in seller territory.

The condo market showed a more mixed but improving picture. The median sales price declined 13.0% to \$500,000, while the median price per square foot fell 9.6% to \$508. Median market time lengthened modestly to 33 days, signaling more breathing room for buyers.

Encouragingly, 208 condos went into contract (up 8.3%) and 169 closed (up 1.2%), showing renewed demand as affordability improves. Active listings dropped sharply — down 55% year over year — keeping the market from tipping too far in favor of buyers. About 33.7% of condos sold over asking, and sellers achieved 100.7% of list price on average, indicating steady traction for well-presented properties. The months' supply of inventory at 3.1 points to a more balanced but tightening environment.

According to Freddie Mac, mortgage rates have decreased in recent weeks and are now at their lowest levels in roughly a year. Buyers appear to be responding, with stronger showing activity and a sense of urgency returning to the market.

Overall, the Inner East Bay continues to demonstrate strong fundamentals: quick-moving single-family homes, a reawakening condo sector, and a steady influx of motivated buyers drawn by easing rates and limited supply. As fall progresses, conditions are aligning for a competitive yet opportunity-filled close to 2025.



SINGLE FAMILY HOMES



CONDOMINIUMS

Q3 2025

Median Sales Price	\$1,130,000
Days on market	15
\$ / SQ. FT.	\$685 ↓
# For Sale On Last Day Of Quarter	614 ↓
Went Into Contract	934 ↓
Properties Sold	814 ↓

Q3 2025

Median Sales Price	\$500,000 ↓
Days On Market	33 ↑
\$ / Sq. Ft.	\$508 ↓
# For Sale Last Day Of Quarter	145 ↓
Went Into Contract	208 ↑
Properties Sold	169 ↑

*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

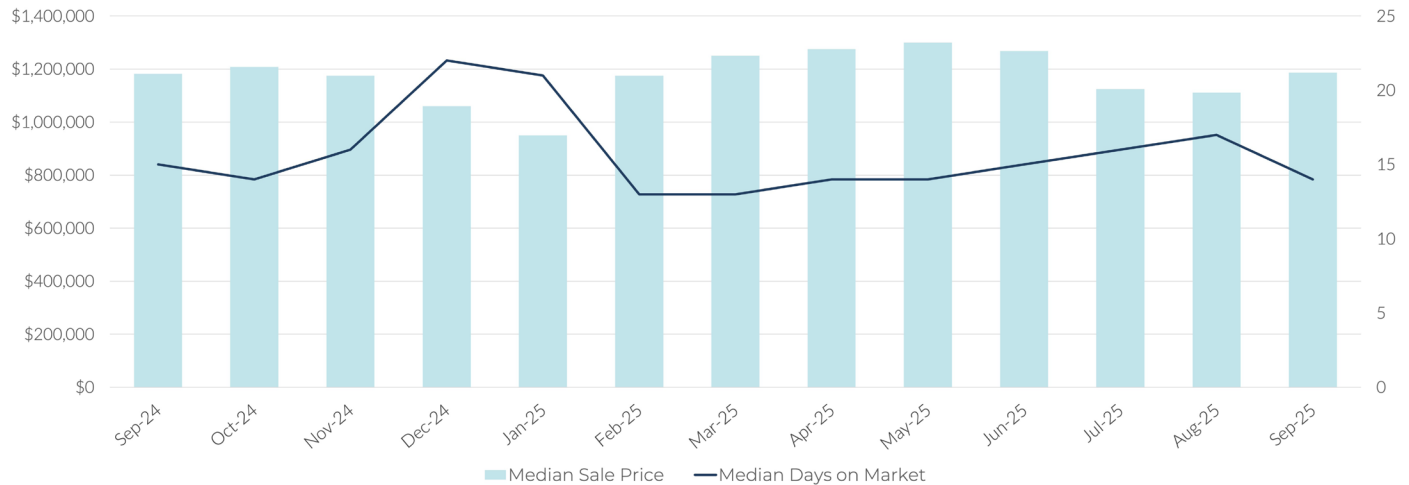


INNER EAST BAY MARKET UPDATE*

Q3 2025

SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **+6.8%**

DAYS ON MARKET: **-3 days**

YEAR-OVER-YEAR COMPARISON

"The single-family segment held steady year over year, underscoring its stability even amid lower supply."

	MEDIAN		
	Q3 2025	Q3 2024	%Δ
Sales Price	\$1,130,000	\$1,130,000	0.0%
Days On Market	15	15	0.0%
\$ / SQ. FT.	\$685	\$695	-1.4%

	TOTAL		
	Q3 2025	Q3 2024	%Δ
Went Into Contract	934	985	-5.2%
Properties Sold	814	901	-9.7%
# For Sale Last Day of Quarter	614	704	-12.8%
% Of Properties Sold Over List	73.8%	75.7%	-2.5%
% Of List Price Received (Average)	112.8%	111.9%	+0.8%

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Q3 2025

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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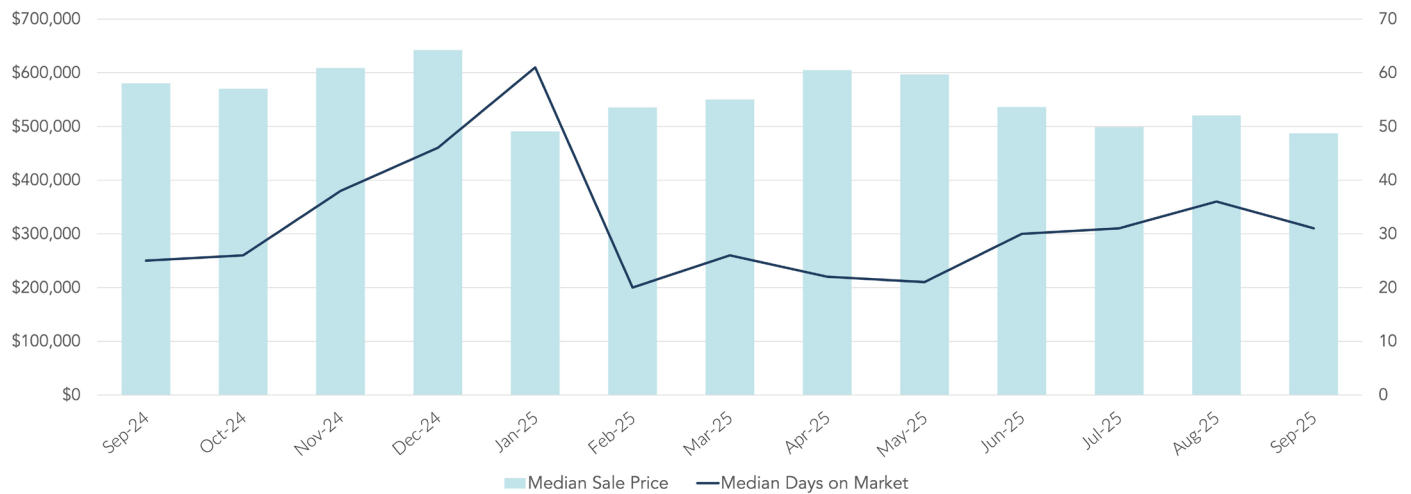


INNER EAST BAY MARKET UPDATE*

Q3 2025

CONDOMINIUMS

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **-6.4%**

DAYS ON MARKET: **-5 days**

YEAR-OVER-YEAR COMPARISON

"Encouragingly, 208 condos went into contract (up 8.3%) and 169 closed (up 1.2%), showing renewed demand as affordability improves."

	MEDIAN		
	Q3 2025	Q3 2024	%Δ
Sales Price	\$500,000	\$575,000	-13.0%
Days On Market	33	28	+17.9%
\$ / SQ. FT.	\$508	\$562	-9.6%

	TOTAL		
	Q3 2025	Q3 2024	%Δ
Went Into Contract	208	192	+8.3%
Properties Sold	169	167	+1.2%
# For Sale Last Day of Quarter	145	322	-55.0%
% Of Properties Sold Over List	33.7%	40.7%	-17.2%
% Of List Price Received (Average)	100.7%	101.2%	-0.5%

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CONDOMINIUMS

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	22**	29**	▼ 24%	12	23	▼ 48%	\$752,500	\$862,500	▼ 13%
Albany	11**	12**	▼ 8%	48	31	▲ 55%	\$480,000	\$613,500	▼ 22%
Berkeley	33**	20**	▲ 65%	18	16	▲ 13%	\$850,000	\$671,500	▲ 27%
El Cerrito	0	1**	▼ 100%	-	48	-	-	\$750,000	-
Kensington	0	0	-	-	-	-	-	-	-
Oakland*	92	85	▲ 8%	32	23	▲ 39%	\$498,500	\$550,000	▼ 9%
Piedmont	0	0	-	-	-	-	-	-	-
San Leandro	8**	19**	▼ 58%	36	28	▲ 29%	\$471,250	\$520,000	▼ 9%
INNER EAST BAY*	166	166	0%	25	23	▲ 9%	\$582,500	\$600,000	▼ 3%

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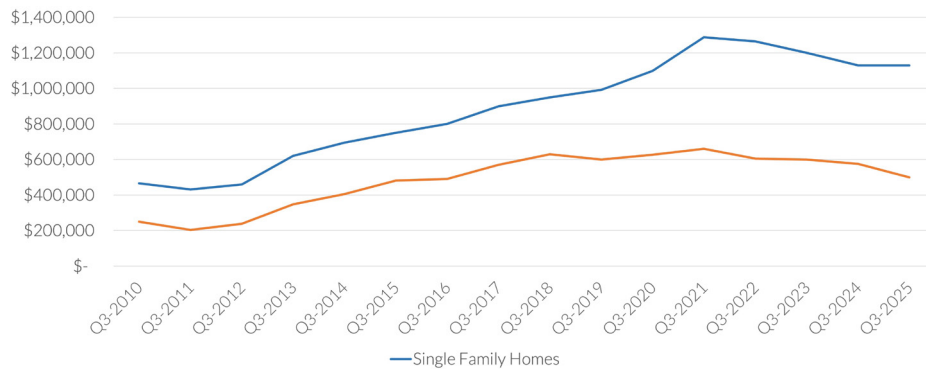
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YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE



Single Family Residences

\$1,130,000

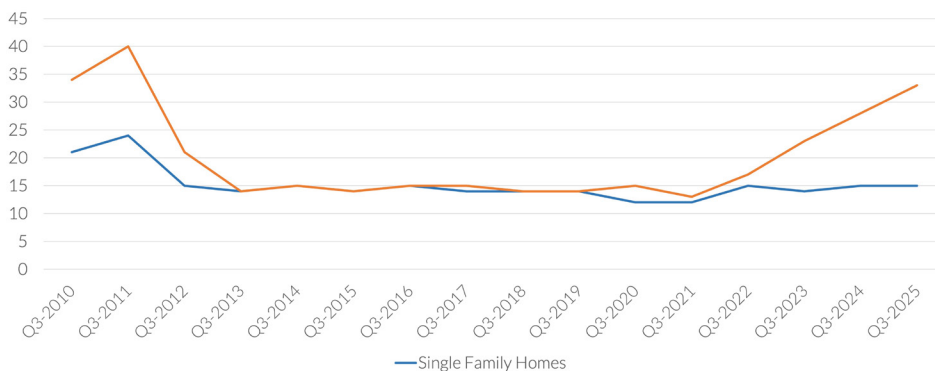
No change year-over-year

Condominium/TIC/COOPs

\$500,000

-13.0% change year-over-year

MEDIAN MARKET TIME



Single Family Residences

15 days

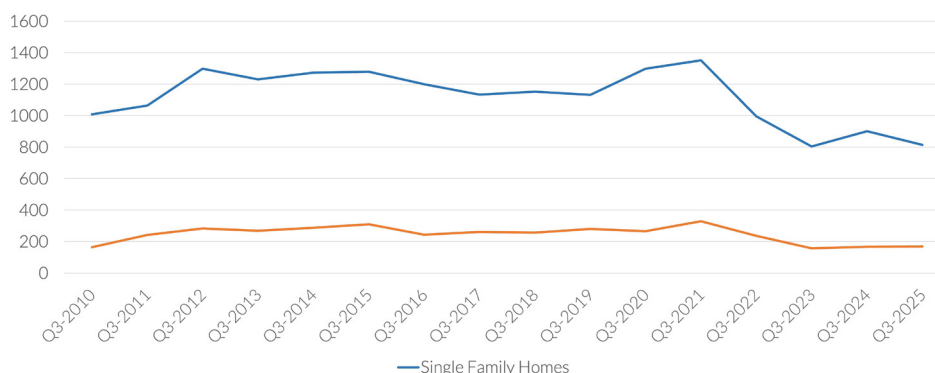
No change year-over-year

Condominium/TIC/COOPs

33 days

+5 day change year-over-year

NUMBER OF SALES



Single Family Residences

814

-9.7% change year-over-year

Condominium/TIC/COOPs

169

+1.2% change year-over-year

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