



LAFAYETTE MARKET UPDATE

DECEMBER 2025





VANGUARD PROPERTIES

MARKET UPDATE

LAMORINDA | DECEMBER 2025

Year to date, the single-family market has remained active and well-supported, with buyer engagement strengthening even as pricing has stayed relatively steady. One of the most meaningful signals this year has been higher transaction volume: the number of homes going into contract increased 8.6 percent to 603, and closed sales rose 3.4 percent to 578, confirming consistent demand throughout 2025.

Inventory levels edged higher, with homes for sale at the end of November up 10.0 percent to 66, modestly expanding buyer choice while remaining historically low. Even with this increase, absorption has stayed strong and competition intact.

Pricing has been stable. The median sales price slipped just 1.9 percent to \$1,912,500, and the median price per square foot decreased only 0.4 percent to \$822 — movements that are minor in the context of long-term pricing trends shown in the charts. Homes continue to trade quickly, with median days on market at 12 days, still exceptionally fast by historical standards.

Seller performance remains solid. While the percentage of homes selling over list price declined to 46.2 percent, sellers still achieved 101.4 percent of list price on average, reinforcing that properly priced homes continue to command strong results even in a more measured environment.



SINGLE FAMILY HOMES

YTD NOVEMBER 2025

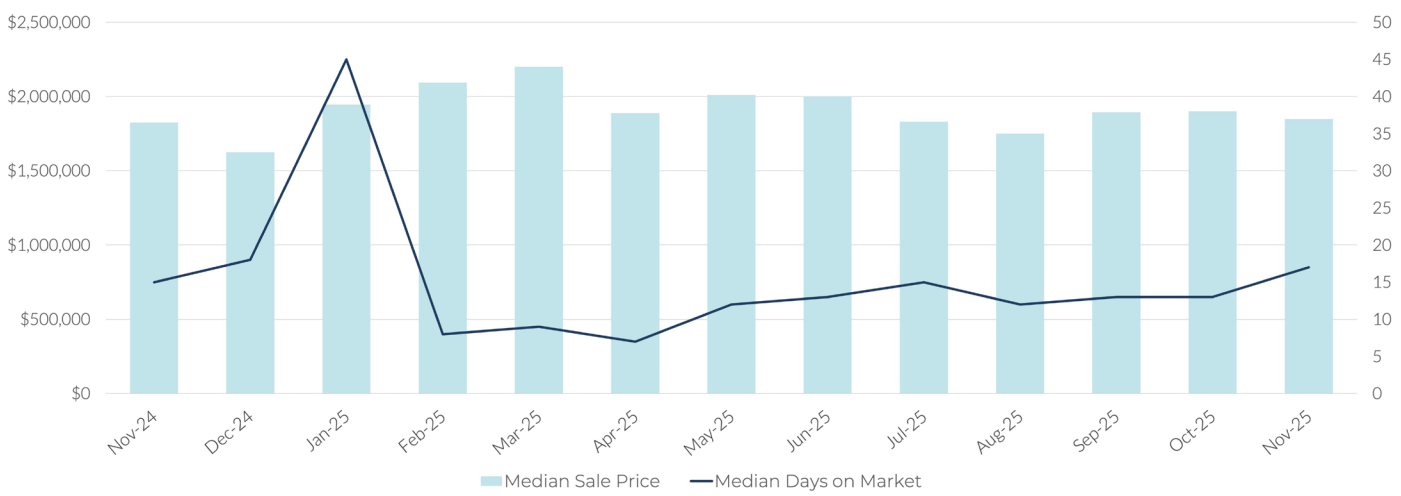
Median Sales Price	\$1,912,500 ↓
Days on market	12 ↑
\$ / SQ. FT.	\$822 ↓
# For Sale On Last Day Of Month	66 ↑
Went Into Contract	603 ↑
Properties Sold	578 ↑

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SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **-2.8%**

DAYS ON MARKET: **+4 days**

YEAR-OVER-YEAR COMPARISON

"One of the most meaningful signals this year has been higher transaction volume: the number of homes going into contract increased 8.6 percent to 603, and closed sales rose 3.4 percent to 578, confirming consistent demand throughout 2025."

	YTD NOV 2025	YTD NOV 2024	MEDIAN %Δ
Sales Price	\$1,912,500	\$1,950,000	-1.9%
Days On Market	12	10	+20.0%
\$ / SQ. FT.	\$822	\$825	-0.4%

	YTD NOV 2025	YTD NOV 2024	TOTAL %Δ
Went Into Contract	603	555	+8.6%
Properties Sold	578	559	+3.4%
# For Sale Last Day of November	66	60	+10.0%
% Of Properties Sold Over List	46.2%	49.6%	-6.9%
% Of List Price Received (Average)	101.4%	103.0%	-1.6%

Data is from January through April. 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.

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YEAR-OVER-YEAR REGION COMPARISON

LAFAYETTE	YTD NOV 2025	YTD NOV 2024	%Δ	2023
Median Sales Price	\$2,000,000	\$1,995,000	+0.3%	\$1,900,000
Median Days on Market	10	9	+11.1%	11
Median Price Per Square Foot	\$864	\$855	+1.1%	\$812
Homes Sold	263	256	+2.7%	226
Homes for Sale Last Day of November	29	27	+7.4%	22
MORAGA	YTD NOV 2025	YTD NOV 2024	%Δ	2023
Median Sales Price	\$1,800,000	\$1,850,000	-2.7%	\$1,900,000
Median Days on Market	15	10	+50.0%	9
Median Price Per Square Foot	\$796	\$774	+2.8%	\$844
Homes Sold	90	110	-18.2%	101
Homes for Sale Last Day of November	5	5	0.0%	7
ORINDA	YTD NOV 2025	YTD NOV 2024	%Δ	2023
Median Sales Price	\$1,875,000	\$2,030,000	-7.6%	\$1,975,000
Median Days on Market	15	12	+25.0%	11
Median Price Per Square Foot	\$803	\$824	-2.5%	\$811
Homes Sold	225	193	+16.6%	183
Homes for Sale Last Day of November	32	28	+14.3%	19

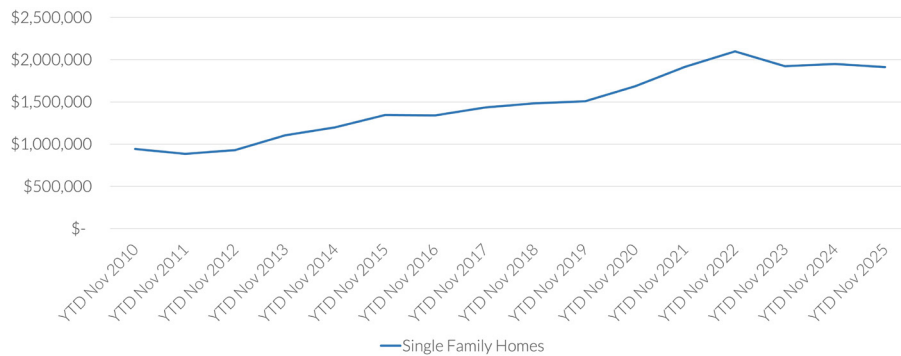
*Small sample size; use caution when interpreting statistics. Data is from January through April. Sources: SFAR Super Regional MLS & BrokerMetrics.
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YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

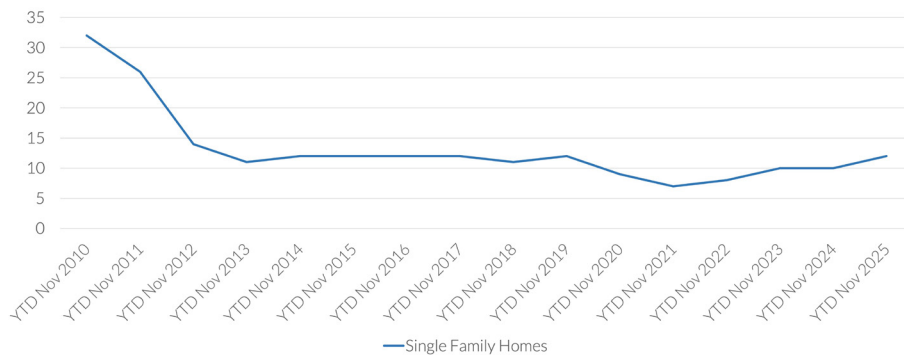


Single Family Residences

\$1,912,500

-1.9% change year-over-year

MEDIAN MARKET TIME

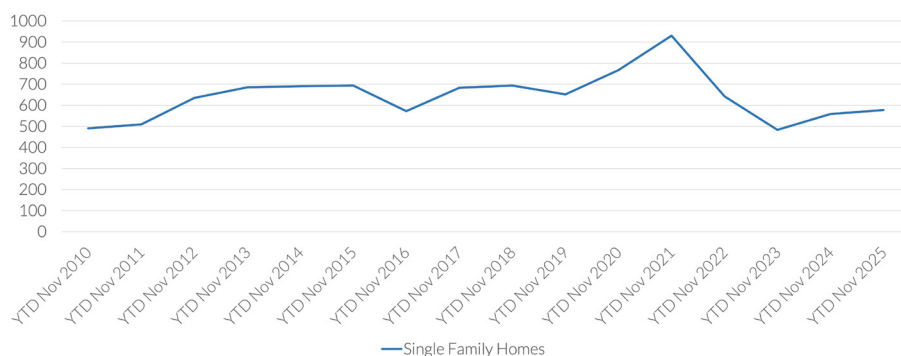


Single Family Residences

12 days

+2 day change year-over-year

NUMBER OF SALES



Single Family Residences

578

+3.4% change year-over-year