



LAMORINDA MARKET UPDATE

2025 YEAR IN REVIEW





VANGUARD PROPERTIES

MARKET UPDATE

LAMORINDA | 2025 YEAR IN REVIEW

Lamorinda's housing market ended 2025 with encouraging signs of strength and renewed momentum. The biggest gains came in transaction volumes: the number of single-family homes going under contract jumped 7.2 % and closed sales rose 4.9 % compared with 2024. This surge in activity underscores how buyers returned to the market as economic conditions improved, stock markets rebounded, and mortgage rates fell to multi-year lows. Amid greater confidence and restored purchasing power, households moved decisively to secure homes in one of the Bay Area's most sought-after communities.

Prices held up well despite more abundant inventory. The median sales price slipped a modest 1.3 % to \$1,900,000, while the median price per square foot eased just 1.2 % to \$815. Homes still sold remarkably quickly – with the typical listing going pending in just 12 days, barely a day longer than last year – reflecting strong demand for well-presented properties. Even with a larger pool of listings, more than 44 % of homes sold above their asking price, and sellers received an average of 101.2 % of list price, highlighting that competition remained healthy for desirable homes.

Beyond Lamorinda's local dynamics, broader economic factors supported housing demand. Equity markets climbed to new highs during the second half of the year, boosting household wealth among the affluent buyers who dominate Lamorinda's market. Inflation moderated, consumer confidence improved and, most importantly, mortgage rates dropped sharply, reaching their lowest level in more than three years by January 2026. Lower borrowing costs have already spurred an uptick in purchase and refinance activity, signalling that buyers are poised to remain active through the spring.

Looking ahead, Lamorinda enters 2026 with a rare combination of rising sales momentum, abundant but not overwhelming inventory, and historically low mortgage rates. As stock markets remain resilient and the Bay Area's tech and professional sectors continue to generate high incomes, demand for quality homes in Lafayette, Moraga and Orinda is likely to stay strong. Sellers who price their homes appropriately can expect solid interest and competitive offers, while buyers benefit from more choices and improved affordability. With these tailwinds in place, Lamorinda is set for a vibrant and active spring selling season.



SINGLE FAMILY HOMES

2025

Median Sales Price	\$1,900,000 ↓
Days on market	12 ↑
\$ / SQ. FT.	\$815 ↓
# For Sale On Last Day Of Year	31 ↑
Went Into Contract	624 ↑
Properties Sold	621 ↑

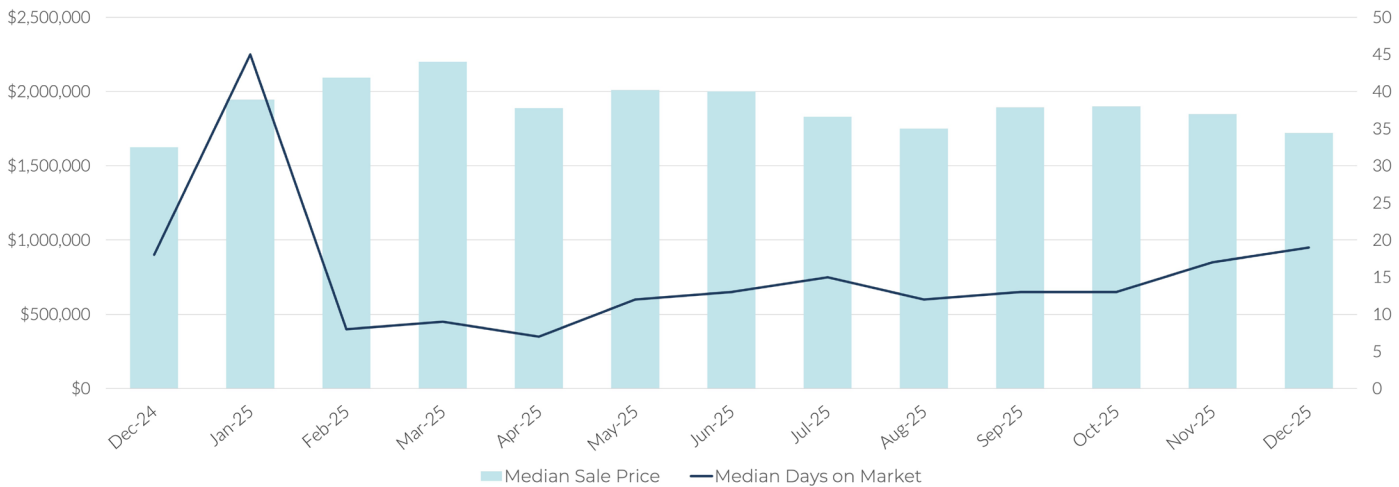


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SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **-6.9%**

DAYS ON MARKET: **+2 days**

YEAR-OVER-YEAR COMPARISON

"The biggest gains came in transaction volumes: the number of single-family homes going under contract jumped 7.2 % and closed sales rose 4.9 % compared with 2024."

	2025	2024	%Δ
Sales Price	\$1,900,000	\$1,925,000	-1.3%
Days On Market	12	11	+9.1%
\$ / SQ. FT.	\$815	\$825	-1.2%

	2025	2024	%Δ
Went Into Contract	624	582	+7.2%
Properties Sold	621	592	+4.9%
# For Sale Last Day of Year	31	25	+24.0%
% Of Properties Sold Over List	44.6%	48.5%	-8.0%
% Of List Price Received (Average)	101.2%	102.8%	-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. ©2026 Vanguard Properties. All rights reserved. Equal Housing Opportunity. DRE No. 01486075

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YEAR-OVER-YEAR REGION COMPARISON

LAFAYETTE	2025	2024	%Δ	2023
Median Sales Price	\$2,000,000	\$1,985,000	+0.8%	\$1,900,000
Median Days on Market	10	10	0.0%	11
Median Price Per Square Foot	\$856	\$853	+0.4%	\$812
Homes Sold	281	274	+2.6%	226
Homes for Sale Last Day of Year	16	11	+45.5%	22
MORAGA	2025	2024	%Δ	2023
Median Sales Price	\$1,797,500	\$1,850,000	-2.8%	\$1,900,000
Median Days on Market	16	10	+60.0%	9
Median Price Per Square Foot	\$791	\$770	+2.7%	\$844
Homes Sold	98	113	-13.3%	101
Homes for Sale Last Day of Year	4	2	+100.0%	7
ORINDA	2025	2024	%Δ	2023
Median Sales Price	\$1,872,500	\$2,000,000	-6.4%	\$1,975,000
Median Days on Market	15	13	+15.4%	11
Median Price Per Square Foot	\$799	\$824	-3.0%	\$811
Homes Sold	242	205	+18.0%	183
Homes for Sale Last Day of Year	11	12	-8.3%	19

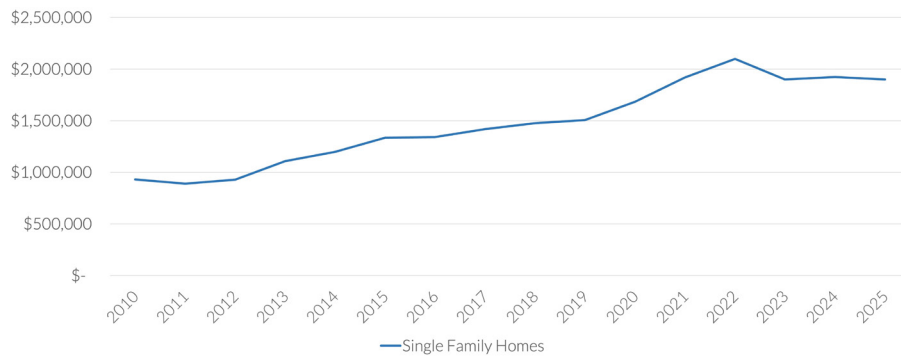
*Small sample size; use caution when interpreting statistics. Data is from January through April. Sources: SFAR Super Regional MLS & BrokerMetrics.
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YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

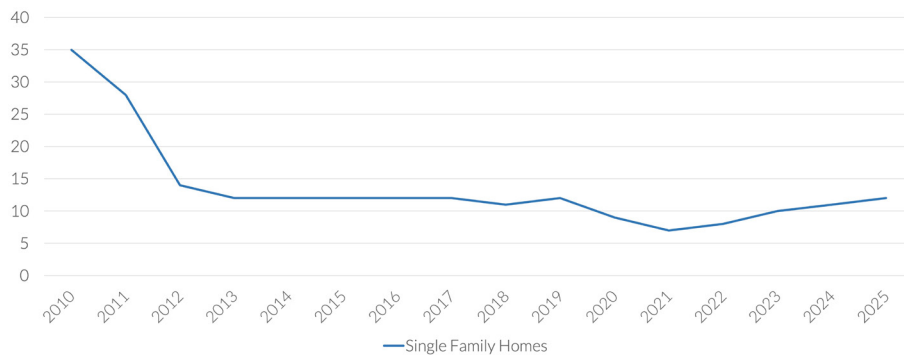


Single Family Residences

\$1,900,000

-1.3% change year-over-year

MEDIAN MARKET TIME

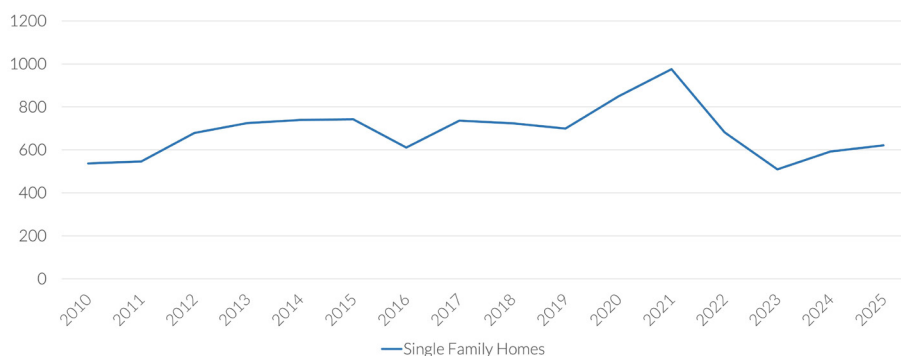


Single Family Residences

12 days

+1 day change year-over-year

NUMBER OF SALES



Single Family Residences

621

+4.9 change year-over-year