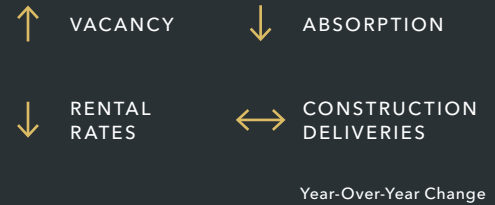


MARKET TRENDS

EAST BAY OFFICE



SIGNIFICANT SALE TRANSACTIONS 2Q 2026

Property	Submarket	SF	Sale Price	\$/SF	Buyer	Seller
6537 Foothill Blvd	Oakland-South/Airport	6,578	\$1,530,000	\$232.59	Endless Grace, LLC	Bay Area Haven, LLC
2021 Clement Ave	Alameda	4,245	\$1,350,000	\$318.02	Martin Kurkchubasche	Risewell Homes
22762-22770 Main St	Hayward/Castro Valley	4,617	\$1,200,000	\$259.91	Main Street Properties, LLC	Nor Cal Realty

SIGNIFICANT LEASE TRANSACTIONS 2Q 2026

Property	Submarket	SF	Transaction Date	Landlord	Tenant
1201 Marina Village Pkwy	Alameda	83,000	April 2026	DRA Advisors	World Market (Renewal)
1151 Marina Village Pkwy	Alameda	24,000	April 2026	DRA Advisors	World Market (Renewal)
740 Heinz	Berkeley	12,500	April 2026	Wareham Development Group	Rigetti Computing

SIGNIFICANT UNDER CONSTRUCTION

Property	Address	Submarket	Square Feet	Owner	Delivery Date
The Union 1.2	1100 Decoto Rd	Union City	383,000.00	Community Redevelopment Agency of Union City	3Q 2027

MARKET BREAKDOWN

	2Q26	1Q26	12Q25	YOY Change
Direct Vacancy Rate	14.3%	13.8%	12.5%	180 bps
Availability Rate	17.8%	17.2%	16.4%	140 bps
Direct Asking Leasing Rents /SF/Mo	\$3.55	\$3.62	\$3.89	-8.7%
Under Construction (SF)	383,000	0	56,176	N/A
	2Q26	2026 YTD	2025 YTD	YOY Change
Construction Deliveries (SF)	0	0	0	N/A
Leased SF	472,237	715,147	1,134,389	-37.0%
Sold SF	73,222	306,627	1,656,452	-81.5%
Total Net Absorption (SF)	-322,645	-227,283	-98,940	N/A

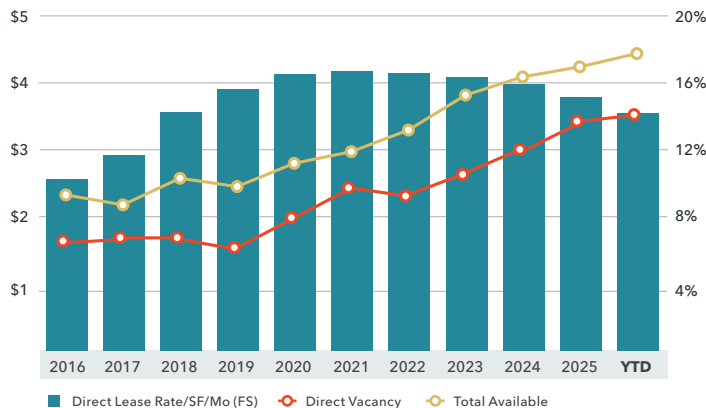
SUBMARKET STATISTICS

Submarket	Total Inventory	Direct Vacancy Rate	Total Vacancy Rate	Total Availability Rate	2Q26 Total Net Absorption	YTD Total Net Absorption	2Q26 Leasing Activity	YTD Leasing Activity	Direct Rental Rate
Oakland Downtown	20,694,006	20.3%	21.7%	22.5%	-230,293	3,442	188,112	319,759	\$3.85
Oakland - Jack London Square	1,373,750	19.9%	20.4%	23.7%	-69,918	-34,073	9,164	9,164	\$3.10
Oakland CBD Total	22,067,756	20.2%	21.7%	22.6%	-300,211	-30,631	197,276	328,923	\$3.69
Alameda	4,049,243	6.8%	8.5%	17.9%	-23,098	-119,079	107,882	129,522	\$3.02
Albany	163,813	3.3%	3.3%	3.4%	2,958	2,561	853	5,403	\$2.62
Berkeley	5,417,221	11.8%	15.0%	16.8%	51,974	-56,460	33,581	62,356	\$3.26
Castro Valley	530,056	2.6%	2.6%	2.6%	2,098	-4,226	1,140	1,140	\$3.35
El Cerrito	170,804	11.2%	11.2%	11.3%	-4,900	-2,500	0	0	\$3.55
Emeryville	4,347,948	18.5%	21.8%	23.9%	-54,756	-4,562	58,450	58,450	\$4.48
Hayward	2,543,689	5.1%	5.2%	9.8%	6,670	14,214	4,061	15,324	\$2.09
Oakland	30,335,774	17.5%	18.6%	19.5%	-335,502	-65,915	256,608	428,429	\$3.60
Richmond	1,911,242	9.5%	9.5%	8.8%	-3,571	5,658	4,325	4,325	\$2.28
San Leandro	2,021,370	4.6%	4.8%	11.7%	35,182	34,447	5,337	10,198	\$2.63
San Lorenzo	20,453	0.0%	0.0%	0.0%	0	0	0	0	N/A
San Pablo	271,580	0.8%	0.8%	0.8%	300	300	0	0	\$2.00
Union City	538,708	3.3%	6.3%	6.3%	0	-31,721	0	0	\$2.50
East Bay Total	52,321,901	14.3%	15.7%	17.8%	-322,645	-227,283	472,237	715,147	\$3.55
Class A	11,895,209	24.0%	27.1%	29.5%	-127,718	-147,906	125,055	180,671	\$4.45
Class B	27,731,804	13.7%	14.7%	17.1%	-204,331	-10,851	297,362	430,617	\$3.00
Class C	12,694,888	6.6%	7.3%	8.5%	9,404	-68,526	49,820	103,859	\$2.82

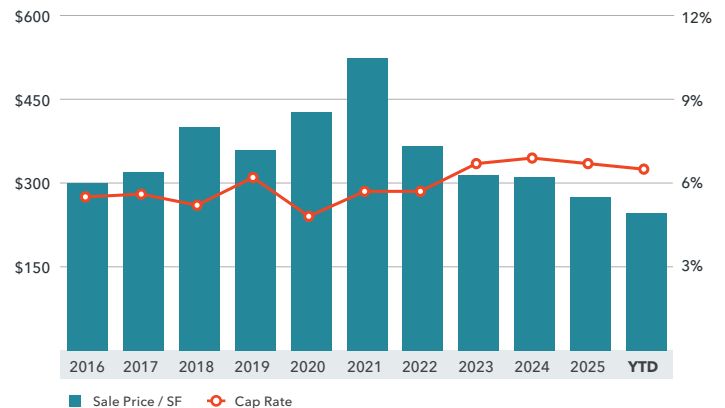
BIGGEST SALE OF THE QUARTER

6537 Foothill Blvd, Oakland

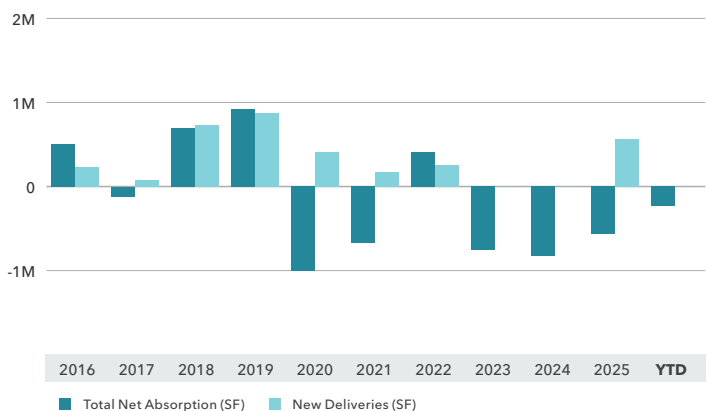
LEASE RATE, VACANCY & AVAILABILITY



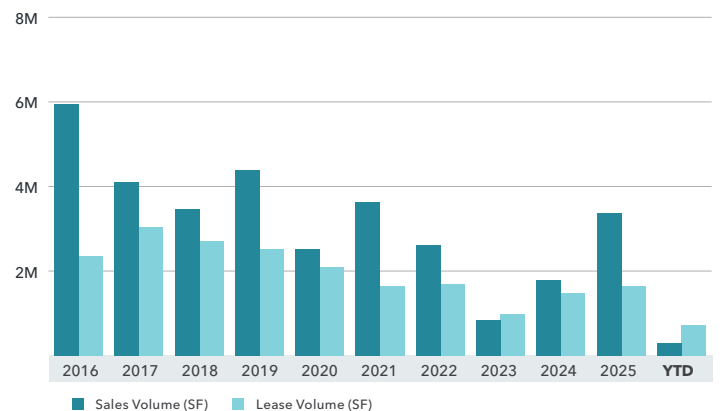
AVERAGE SALES PRICE/SF & CAP RATES



NET ABSORPTION & NEW DELIVERIES



SALE VOLUME & LEASE VOLUME



Data Source: CoStar



The information in this report was composed by the Kidder Mathews Research Group.

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Kidder Mathews is the largest fully independent commercial real estate firm in the Western U.S., with over 900 real estate professionals and staff in 19 offices in Washington, Oregon, California, Nevada, and Arizona. We offer a complete range of brokerage, appraisal, asset services, consulting, and debt & equity finance services for all property types.

COMMERCIAL BROKERAGE

\$9B

AVERAGE ANNUAL TRANSACTION VOLUME

32.4M

ANNUAL SALES SF

32.5M

ANNUAL LEASING SF

ASSET SERVICES

54M SF

MANAGEMENT PORTFOLIO SIZE

800+

ASSETS UNDER MANAGEMENT

250+

CLIENTS SERVED

VALUATION ADVISORY

2,700+

AVERAGE ASSIGNMENTS

42

TOTAL APPRAISERS

23

WITH MAI DESIGNATIONS