

## MARKET TRENDS

# EAST BAY RETAIL

↓	VACANCY	↑	UNEMPLOYMENT
↓	RENTAL RATES	↓	CONSTRUCTION DELIVERIES

Year-Over-Year Change

### SIGNIFICANT SALE TRANSACTIONS 2Q 2025

Property	Submarket	SF	Sale Price	\$/SF	Buyer	Seller
Rossmoor Shopping Center	Walnut Creek-BART/DT	101,605	\$56,705,789	\$558	Sterling Organization	Citivest Commercial Inv., LLC
Clayton Station Shopping Center	Concord/Pleasant Hill	60,320	\$27,750,000	\$460	Clayton Station, LP	Las Trampas Investments
Amador Plaza Center	Dublin	16,571	\$10,800,000	\$652	C&E Investment Holdings, LLC	Dublin Veterinary Properties, LLC

### SIGNIFICANT LEASE TRANSACTIONS 2Q 2025

Property	Submarket	SF	Transaction Date	Tenant
Mission Plaza	Hayward/Castro Valley	52,132	4/2/2025	Urban Air
Plaze Escuela	Walnut Creek-BART/DT	10,015	4/14/2025	Salon Suite
Plaze Escuela	Walnut Creek-BART/DT	7,216	4/9/2025	North Italia

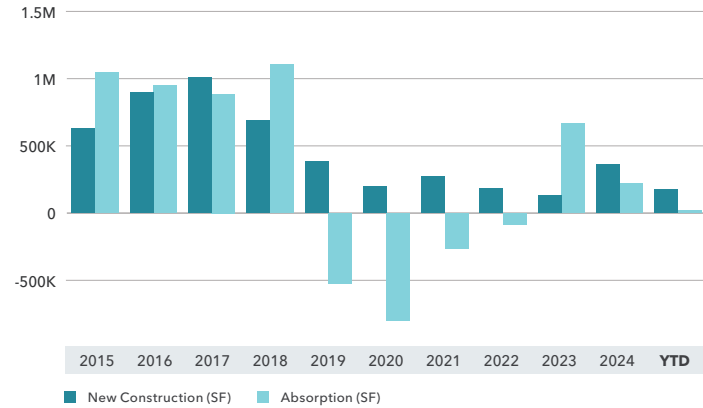
### SIGNIFICANT UNDER CONSTRUCTION

Property	Submarket	SF	Delivery
Plaza Gale Ranch Phase IV	San Ramon	125,000	3Q 2025
Sprouts Farmers Market	Antioch/Pittsburg	23,204	3Q 2025
Brickyard	Livermore	16,335	3Q 2025

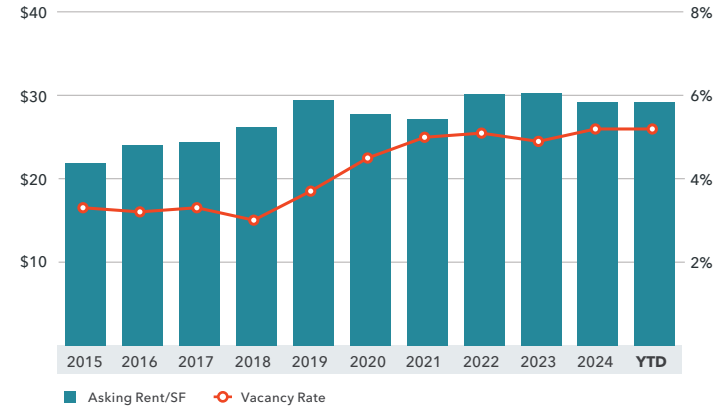
### MARKET BREAKDOWN

	2Q25	1Q25	2Q24	YOY Change
Vacancy Rate	5.2%	5.2%	5.6%	<b>-40 bps</b>
Average Asking Rents	\$2.44	\$2.42	\$2.52	<b>-3.21%</b>
Under Construction	208,308	223,808	185,837	<b>12.09%</b>
Average Sales Price	\$344	\$320	\$284	<b>20.96%</b>
Average Cap Rate	6.5%	6.3%	5.1%	<b>140 bps</b>
	2Q25	2025 YTD	2024 YTD	YOY Change
Construction Deliveries	20,000	174,582	190,063	<b>-8.15%</b>
Net Absorption	-64,477	17,654	-542,056	<b>N/A</b>

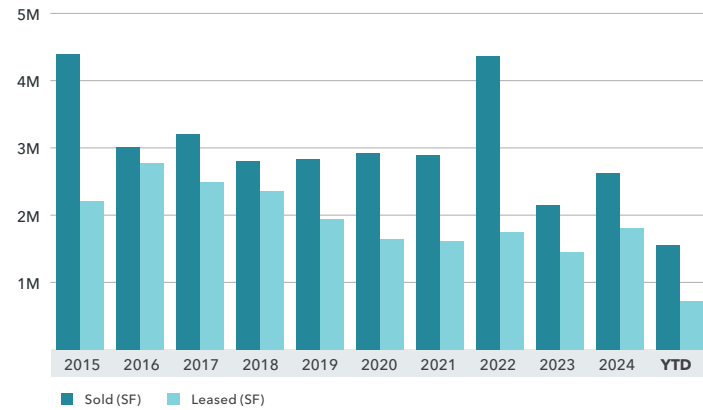
## NEW CONSTRUCTION & ABSORPTION



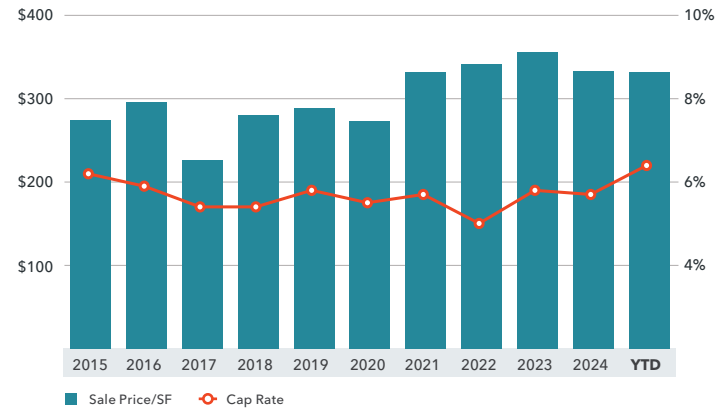
## AVERAGE ASKING RENT/SF & VACANCY RATE



## SALE VOLUME & LEASE VOLUME



## AVERAGE SALE PRICE/SF & CAP RATES



Data Source: CoStar



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

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### COMMERCIAL BROKERAGE

**\$9B**

AVERAGE ANNUAL TRANSACTION VOLUME

**26.2M**

ANNUAL SALES SF

**36.7M**

ANNUAL LEASING SF

### ASSET SERVICES

**58M SF**

MANAGEMENT PORTFOLIO SIZE

**850+**

ASSETS UNDER MANAGEMENT

**250+**

CLIENTS SERVED

### VALUATION ADVISORY

**2,400+**

AVERAGE ASSIGNMENTS

**39**

TOTAL APPRAISERS

**24**

WITH MAI DESIGNATIONS

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