

MARKET TRENDS

SACRAMENTO

RETAIL

↑ VACANCY	↑ UNEMPLOYMENT
↑ RENTAL RATES	↓ CONSTRUCTION DELIVERIES
Year-Over-Year Change	

SIGNIFICANT SALE TRANSACTIONS 4Q 2025

Property	Submarket	SF	Sale Price	\$/SF	Buyer	Seller
Cordova Village Shopping Center	Highway 50 Corridor	55,255	\$15,705,088	\$284	The Jim Pattison Group	Trestle Cordova, LLC
FoodMaxx	Natomas	50,433	\$12,292,500	\$244	The Jim Pattison Group	Oak Street R.E. Capital
The UV	Arden/Watt/Howe	45,686	\$9,260,926	\$203	DRA Advisors DLC Mgmt. Corp.	Merlone Geier Mgmt., Inc.

SIGNIFICANT LEASE TRANSACTIONS 4Q 2025

Property	Submarket	SF	Transaction Date	Tenant
Florin Towne Centre	South Sacramento	117,334	December 2025	Anova Cabinets and Stone
SWC E Bidwell St & Alder Creek Pkwy	Outer Sacramento County	55,000	November 2025	Safeway
Florin Towne Centre	South Sacramento	53,834	October 2025	El Super Markets

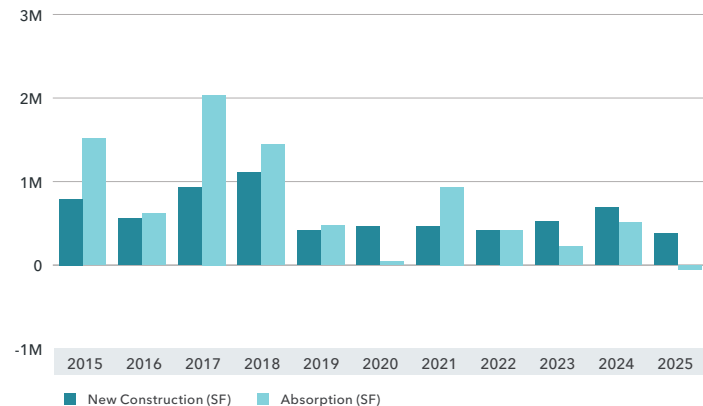
SIGNIFICANT UNDER CONSTRUCTION

Property	Submarket	SF	Delivery
Costco Wholesale	Outer Placer County	165,000	2Q 2026
Whole Foods	Elk Grove	65,936	1Q 2026
Nugget	Lincoln	43,074	1Q 2026

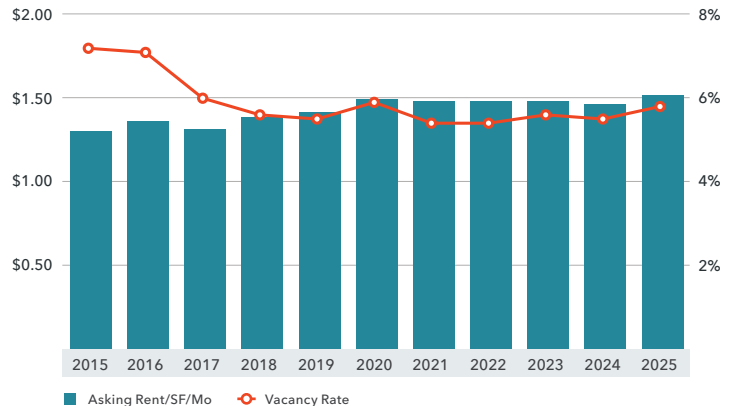
MARKET BREAKDOWN

	4Q25	3Q25	4Q24	YOY Change
Vacancy Rate	5.8%	5.8%	5.5%	30 bps
Average Asking Rents/SF/Mo	\$1.51	\$1.49	\$1.46	3.14%
Under Construction (SF)	476,519	490,420	558,606	-14.69%
Average Sales Price/SF	\$261	\$194	\$285	-8.36%
Average Cap Rate	6.7%	6.6%	6.7%	0 bps
	4Q25	2025	2024	YOY Change
Construction Deliveries (SF)	20,701	375,669	694,145	-45.88%
Net Absorption (SF)	17,874	-50,356	507,999	-109.91%

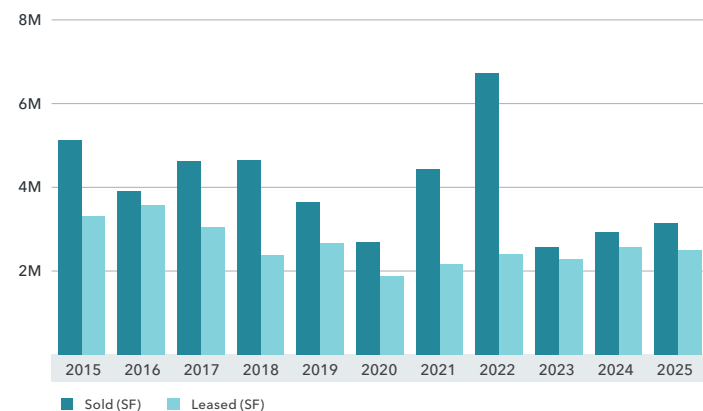
NEW CONSTRUCTION & ABSORPTION



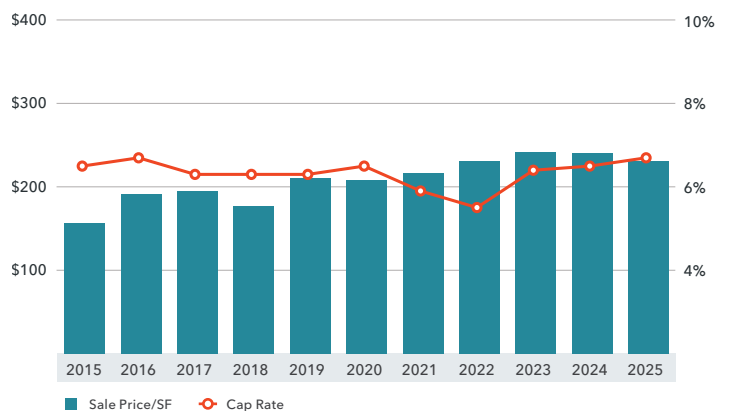
AVERAGE ASKING RENT/SF & VACANCY RATE



SALE VOLUME & LEASE VOLUME



AVERAGE SALE PRICE/SF & CAP RATES



Data Source: CoStar



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.

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

53M SF

MANAGEMENT PORTFOLIO SIZE

800+

ASSETS UNDER MANAGEMENT

250+

CLIENTS SERVED

VALUATION ADVISORY

2,400+

AVERAGE ASSIGNMENTS

41

TOTAL APPRAISERS

23

WITH MAI DESIGNATIONS