



Valbridge
PROPERTY ADVISORS



QUARTERLY MARKET UPDATE

LOS ANGELES - INLAND EMPIRE 2Q24

In September, the Fed cut rates by half a percent, the first drop in rates since March of 2020. Another half percent drop is expected by the end of the calendar year, and likely a full percent over 2025. As interest rates decrease, cap rates generally fall as well; lower interest rates will also mean increases in liquidity, plus refinancing opportunities for borrowers near the end of their leases. In the LA metro area, downturns in the tech and entertainment sectors have continued to push office and retail leasing down.

In the following pages, we outline the major market trends in the Los Angeles and Inland Empire market sectors, along with key indicators. In today's quickly changing environment, we remain ready to assist you with your commercial real estate valuation needs at any time.

VALBRIDGE PROPERTY ADVISORS | LOS ANGELES-INLAND EMPIRE

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INDUSTRIAL SECTOR HIGHLIGHTS

LOS ANGELES TRENDS

- Industrial vacancies are up, reaching 5.4%.
- Rents are down a little over a percent, a trend since mid-2023, with lease concessions of multiple months' free rent increasingly the norm from landlords.
- Cap rates are up, having expanded more than 100 basis points into the mid-5% range.

INLAND EMPIRE TRENDS

- Vacancy rates have increased quickly, to 7.5%, and will continue to rise in the near term.
- Significant new construction is coming online, even as a third of prior new construction is still available to lease.
- Rents are down, and sublet listings comprise 22% of total availability, pushing rents even lower.

OFFICE SECTOR HIGHLIGHTS

LOS ANGELES TRENDS

- As has been the case, vacancies remain extremely high, at 16.2%.
- Rents have flatlined in the face of low demand, and will likely decline in coming quarters as tenant activity cools further.
- Recent downturns in tech and entertainment have also contributed to downsizing.

INLAND EMPIRE TRENDS

- The IE retains one of the nation's lowest vacancy rates, at 5.7%.
- Rent levels, currently at \$28/SF, have risen a little more than 2% over the past 12 months, largely driven by the demand for medical office space.
- Asset values are declining, and will through 2024; cap rates are predicted to plateau in 2025.

RETAIL SECTOR HIGHLIGHTS

LOS ANGELES TRENDS

- Demand for space has been soft; the highest availability rates are in Santa Monica, at 14%.
- Rent growth has been flat or negative across the LA metro as a whole; however, the San Fernando Valley and San Gabriel Valley have seen modest positive YOY gains.
- Valuations are likely to decline through 2025.

INLAND EMPIRE TRENDS

- Vacancies are tight (historically speaking) at 5.8%.
- The most in-demand markets are those where housing development is on the rise: near the airport and South Riverside.
- Rents are up but less strongly than in previous quarters, +3.5% over the past 12 months.
- Cap rates should rise through 2024 and 2025.

MULTIFAMILY HOUSING SECTOR HIGHLIGHTS

LOS ANGELES TRENDS

- The sector seems to be beginning a recovery, with vacancies stabilizing around 5% and rents starting to rise from a low point.
- Despite the need for more housing across LA, recent development (both new construction + redevelopment) has centered on already-dense areas like DTLA, Koreatown, and Hollywood.

INLAND EMPIRE TRENDS

- Demand for apartments is up, and should continue to improve; vacancies at the lower end of the market average in the 5% range, while 4 and 5 star apartments are seeing vacancies north of 10%.
- Rent growth has risen and should continue to +5% in 2025.
- Cap rates over the past 12 months averaged 5.7%.

HOSPITALITY SECTOR HIGHLIGHTS

LOS ANGELES TRENDS

- Although LA has one of the strongest occupancy and ADR levels nationwide, revPAR has declined by slightly more than 5% in 2024. This should reverse, yielding a flat finish by year end.
- Sales volume is down, with higher interest rates, higher labor costs, and union strikes muting activity; interest rate cuts may help modestly.

INLAND EMPIRE TRENDS

- RevPAR is down by -5.4%, outpacing the national average of -1.5%; it is forecasted to continue to decline through the end of calendar year 2024.
- ADR has been essentially flat, so most of the decline is attributable to decreases in demand.
- The highest sales volume across the IE occurred in Palm Springs.

LOS ANGELES INDUSTRIAL TRENDS

OVERVIEW

LOS ANGELES INDUSTRIAL

12 Mo Deliveries in SF: **6.7M**
 12 Mo Net Absorption in SF: **(12M)**
 Vacancy Rate: **5.4%**
 Market Asking Rent Growth: **-1.2%**

KEY INDICATORS

Current Quarter	RBA	Vacancy Rate	Market Asking Rent	Availability Rate	Net Absorption SF	Deliveries SF	Under Construction
Logistics	654,406,357	5.9%	\$18.47	8.4%	9,913	0	5,408,911
Specialized Industrial	248,890,662	3.8%	\$17.87	4.8%	6,634	0	205,048
Flex	58,438,006	6.6%	\$25.03	9.6%	(29,802)	0	77,696
Market	961,735,025	5.4%	\$18.75	7.5%	(13,255)	0	5,613,959

Annual Trends	12 Month	Historical Average	Forecast Average	Peak	When	Trough	When
Vacancy Change (YOY)	1.6%	3.7%	4.8%	5.5%	2010 Q1	1.7%	2022 Q1
Net Absorption SF	(12M)	1,420,369	(31,497)	15,180,863	2021 Q4	(15,749,738)	2023 Q4
Deliveries SF	6.7M	5,509,833	3,143,687	14,051,182	2002 Q1	761,275	2011 Q1
Market Asking Rent Growth	-1.2%	4.6%	3.9%	12.6%	2022 Q2	-4.2%	2009 Q4
Sales Volume	\$4.6B	\$3.8B	N/A	\$9.5B	2023 Q1	\$969.2M	2009 Q3

INLAND EMPIRE INDUSTRIAL TRENDS

OVERVIEW

INLAND EMPIRE INDUSTRIAL

12 Mo Deliveries in SF: **31.6M**
 12 Mo Net Absorption in SF: **1.6M**
 Vacancy Rate: **7.5%**
 Market Asking Rent Growth: **0.7%**

KEY INDICATORS

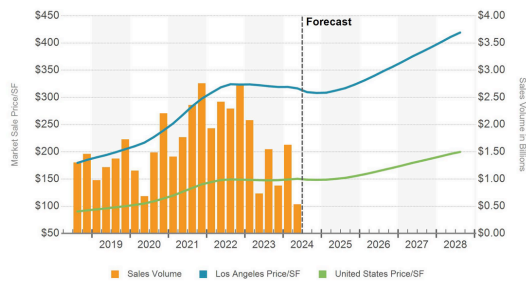
Current Quarter	RBA	Vacancy Rate	Market Asking Rent	Availability Rate	Net Absorption SF	Deliveries SF	Under Construction
Logistics	651,360,631	8.1%	\$13.53	12.4%	(3,878,636)	0	20,882,804
Specialized Industrial	103,051,017	4.3%	\$15.18	6.3%	(57,598)	0	194,074
Flex	16,453,811	4.9%	\$18.19	6.2%	(19,175)	0	77,696
Market	770,865,459	7.5%	\$13.85	11.5%	(3,955,409)	0	21,154,574

Annual Trends	12 Month	Historical Average	Forecast Average	Peak	When	Trough	When
Vacancy Change (YOY)	3.7%	6.0%	6.5%	12.1%	2009 Q3	1.3%	2022 Q2
Net Absorption SF	1.6M	17,427,421	15,793,364	31,548,468	2021 Q4	(2,980,421)	2024 Q1
Deliveries SF	31.6M	19,567,832	16,380,488	34,376,991	2006 Q4	1,344,226	2011 Q3
Market Asking Rent Growth	0.7%	4.9%	5.0%	14.4%	2022 Q2	-7.8%	2009 Q4
Sales Volume	\$3.4B	\$2.5B	N/A	\$10B	2023 Q1	\$486M	2001 Q2

SALES

LOS ANGELES INDUSTRIAL

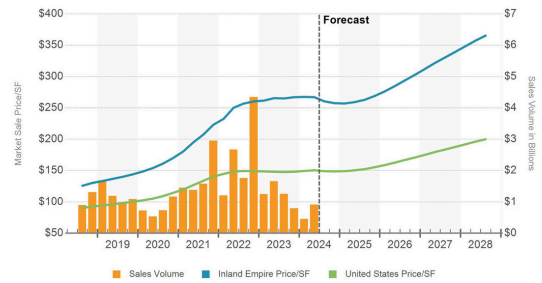
SALES VOLUME & MARKET SALE PRICE PER SF



SALES

INLAND EMPIRE INDUSTRIAL

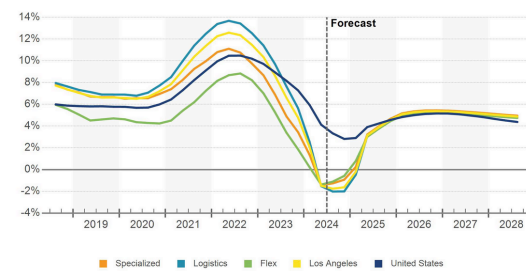
SALES VOLUME & MARKET SALE PRICE PER SF



RENT

LOS ANGELES INDUSTRIAL

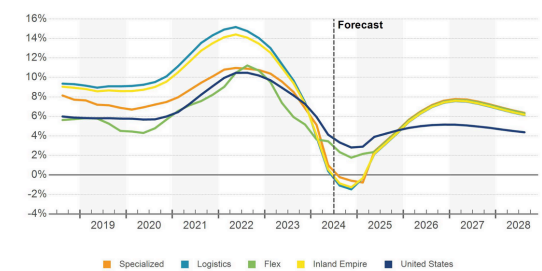
MARKET ASKING RENT GROWTH (YOY)



RENT

INLAND EMPIRE INDUSTRIAL

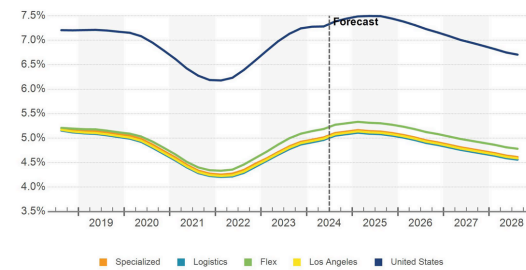
MARKET ASKING RENT GROWTH (YOY)



CAP RATES

LOS ANGELES INDUSTRIAL

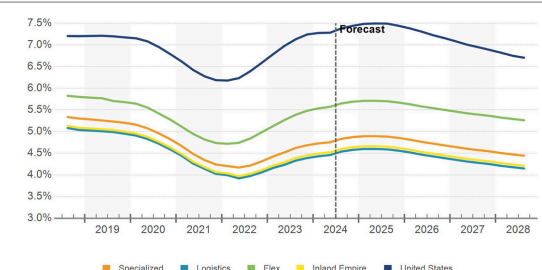
MARKET CAP RATE



CAP RATES

INLAND EMPIRE INDUSTRIAL

MARKET CAP RATE



LOS ANGELES OFFICE TRENDS

OVERVIEW

LOS ANGELES OFFICE

12 Mo Deliveries in SF **1.5M** | 12 Mo Net Absorption in SF **(5.6M)** | Vacancy Rate **16.2%** | Market Asking Rent Growth **0.4%**

KEY INDICATORS

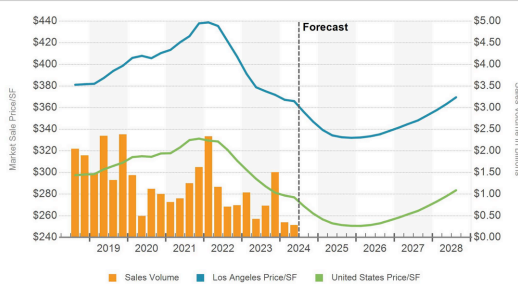
Current Quarter	RBA	Vacancy Rate	Market Asking Rent	Availability Rate	Net Absorption SF	Deliveries SF	Under Construction
4 & 5 Star	165,450,429	24.1%	\$47.24	26.5%	(84,722)	0	2,491,284
3 Star	172,465,548	13.3%	\$39.95	16.6%	(279,420)	0	470,955
1 & 2 Star	102,951,182	8.1%	\$34.84	9.4%	(38,001)	0	0
Market	440,867,159	16.2%	\$41.52	18.7%	(402,149)	0	2,962,239

Annual Trends	12 Month	Historical Average	Forecast Average	Peak	When	Trough	When
Vacancy Change (YOY)	1.4%	10.9%	18.2%	16.2%	2024 Q3	6.7%	2007 Q3
Net Absorption SF	(5.6M)	586,584	(2,920,113)	13,125,292	2000 Q1	(9,858,591)	2021 Q1
Deliveries SF	1.5M	2,463,552	705,439	5,102,303	2002 Q3	627,093	1997 Q1
Market Asking Rent Growth	0.4%	3.0%	-0.3%	14.8%	2007 Q3	-11.3%	2009 Q3
Sales Volume	\$2.9B	\$5B	N/A	\$11.4B	2017 Q3	\$763.5M	2009 Q4

SALES

LOS ANGELES OFFICE

SALES VOLUME & MARKET SALE PRICE PER SF



INLAND EMPIRE OFFICE TRENDS

OVERVIEW

INLAND EMPIRE OFFICE

12 Mo Deliveries in SF **164K** | 12 Mo Net Absorption in SF **235K** | Vacancy Rate **5.7%** | Market Asking Rent Growth **2.1%**

KEY INDICATORS

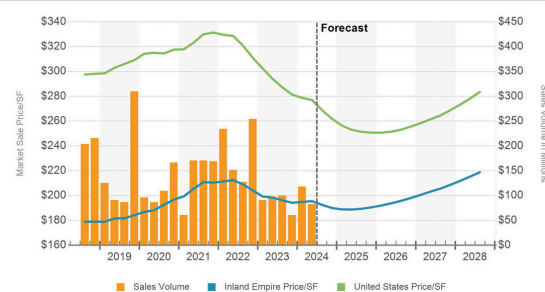
Current Quarter	RBA	Vacancy Rate	Market Asking Rent	Availability Rate	Net Absorption SF	Deliveries SF	Under Construction
4 & 5 Star	9,100,565	6.4%	\$33.44	9.1%	(6,738)	0	86,630
3 Star	37,683,938	5.7%	\$27.65	8.6%	(5,055)	0	45,661
1 & 2 Star	30,761,687	5.4%	\$25.56	6.4%	5,686	0	0
Market	77,536,190	5.7%	\$27.51	7.8%	(6,107)	0	132,291

Annual Trends	12 Month	Historical Average	Forecast Average	Peak	When	Trough	When
Vacancy Change (YOY)	-0.1%	9.1%	6.4%	15.8%	2009 Q3	5.5%	2022 Q4
Net Absorption SF	235K	981,884	73,704	3,031,788	2006 Q3	(197,943)	2024 Q1
Deliveries SF	164K	1,071,124	277,442	4,700,932	2008 Q3	121,972	2017 Q2
Market Asking Rent Growth	2.1%	2.6%	1.6%	10.6%	2001 Q2	-12.1%	2009 Q4
Sales Volume	\$363M	\$412.5M	N/A	\$787.4M	2022 Q4	\$103.4M	2009 Q4

SALES

INLAND EMPIRE OFFICE

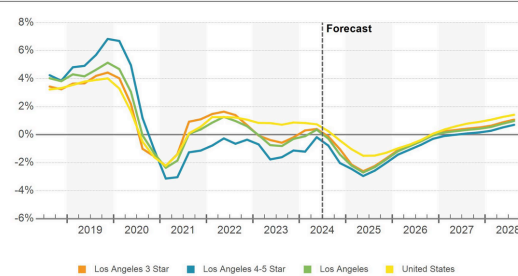
SALES VOLUME & MARKET SALE PRICE PER SF



RENT

LOS ANGELES OFFICE

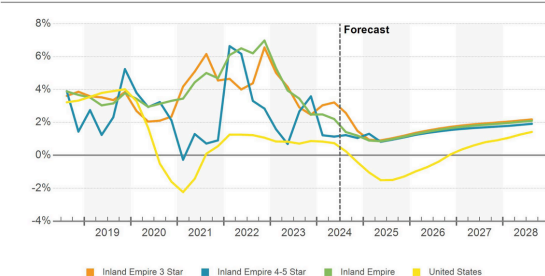
MARKET ASKING RENT GROWTH (YOY)



RENT

INLAND EMPIRE OFFICE

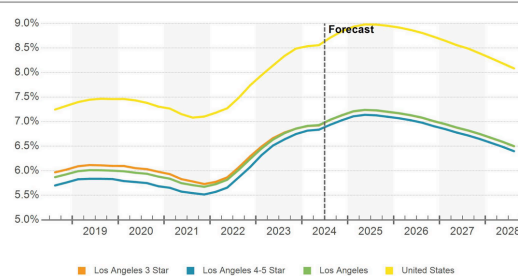
MARKET ASKING RENT GROWTH (YOY)



CAP RATES

LOS ANGELES OFFICE

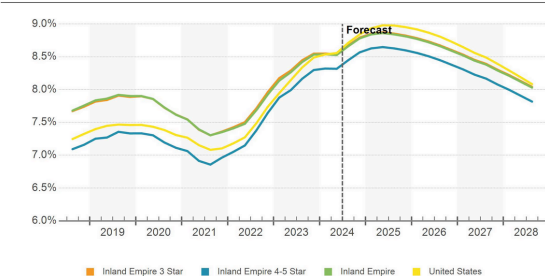
MARKET CAP RATE



CAP RATES

INLAND EMPIRE OFFICE

MARKET CAP RATE



LOS ANGELES RETAIL TRENDS

INLAND EMPIRE RETAIL TRENDS

OVERVIEW

OVERVIEW

LOS ANGELES RETAIL

INLAND EMPIRE RETAIL

12 Mo Deliveries in SF: **1.1M**
 12 Mo Net Absorption in SF: **(537K)**
 Vacancy Rate: **5.5%**
 Market Asking Rent Growth: **0%**

12 Mo Deliveries in SF: **784K**
 12 Mo Net Absorption in SF: **5.9K**
 Vacancy Rate: **5.8%**
 Market Asking Rent Growth: **3.5%**

KEY INDICATORS

KEY INDICATORS

Current Quarter	RBA	Vacancy Rate	Market Asking Rent	Availability Rate	Net Absorption SF	Deliveries SF	Under Construction
Malls	40,811,239	11.9%	\$45.15	9.1%	0	0	400,000
Power Center	22,787,905	4.5%	\$36.62	5.9%	(30,160)	0	0
Neighborhood Center	104,004,718	6.3%	\$34.72	7.3%	76,601	0	463,699
Strip Center	36,073,607	5.0%	\$32.65	4.5%	(12,177)	0	576,708
General Retail	247,570,469	4.2%	\$36.12	5.8%	(136,530)	0	376,980
Other	2,511,371	4.0%	\$41.64	6.0%	0	0	0
Market	453,759,329	5.5%	\$36.34	5.9%	(102,266)	0	1,817,387

Current Quarter	RBA	Vacancy Rate	Market Asking Rent	Availability Rate	Net Absorption SF	Deliveries SF	Under Construction
Malls	13,645,222	9.7%	\$34.16	9.4%	6,051	0	3,300
Power Center	20,180,016	5.0%	\$31.56	6.7%	0	0	6,924
Neighborhood Center	79,396,196	7.6%	\$26.61	8.4%	(14,727)	0	365,300
Strip Center	15,412,957	5.0%	\$23.36	6.1%	(28,188)	0	30,722
General Retail	70,770,617	3.2%	\$23.77	3.7%	(43,146)	0	376,653
Other	2,803,730	9.3%	\$25.37	8.1%	0	0	0
Market	202,211,738	5.8%	\$26.35	6.4%	(81,010)	0	782,099

Annual Trends	12 Month	Historical Average	Forecast Average	Peak	When	Trough	When
Vacancy Change (YOY)	0.2%	4.6%	5.2%	5.5%	2010 Q1	2.9%	2007 Q3
Net Absorption SF	(537K)	718,977	(154,332)	6,900,833	2007 Q3	(4,078,421)	2009 Q3
Deliveries SF	1.1M	2,144,020	542,403	6,674,835	2008 Q3	755,248	2023 Q1
Market Asking Rent Growth	0%	1.6%	1.9%	5.2%	2007 Q2	-5.1%	2009 Q4
Sales Volume	\$2.7B	\$3.7B	N/A	\$7B	2022 Q3	\$996M	2010 Q1

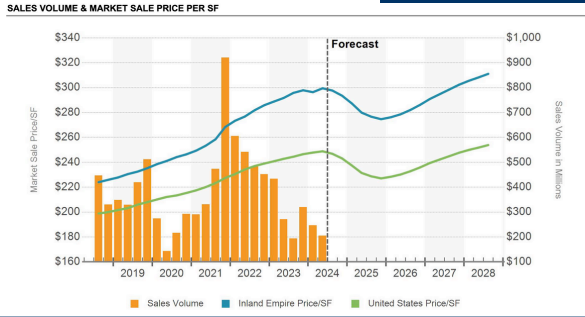
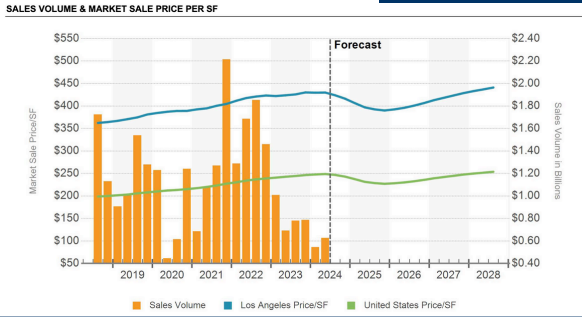
Annual Trends	12 Month	Historical Average	Forecast Average	Peak	When	Trough	When
Vacancy Change (YOY)	-0.1%	7.3%	5.9%	9.5%	2011 Q2	4.9%	2007 Q3
Net Absorption SF	5.9K	1,653,209	29,671	8,252,783	2007 Q1	(1,861,938)	2009 Q4
Deliveries SF	784K	2,024,548	723,260	7,339,100	2007 Q1	381,205	2011 Q1
Market Asking Rent Growth	3.5%	0.9%	2.5%	6.1%	2007 Q1	-10.0%	2009 Q4
Sales Volume	\$966M	\$1.2B	N/A	\$2.6B	2022 Q3	\$398.2M	2010 Q1

SALES

SALES

LOS ANGELES RETAIL

INLAND EMPIRE RETAIL

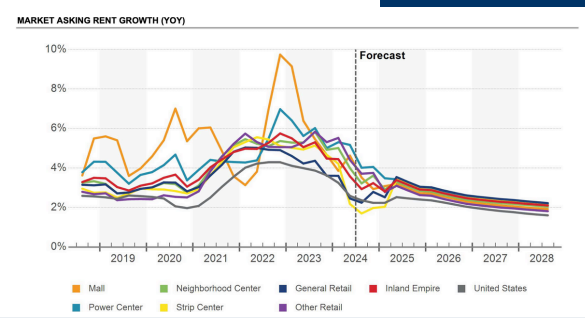
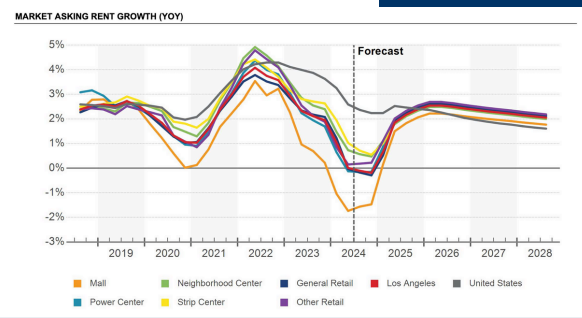


RENT

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LOS ANGELES RETAIL

INLAND EMPIRE RETAIL

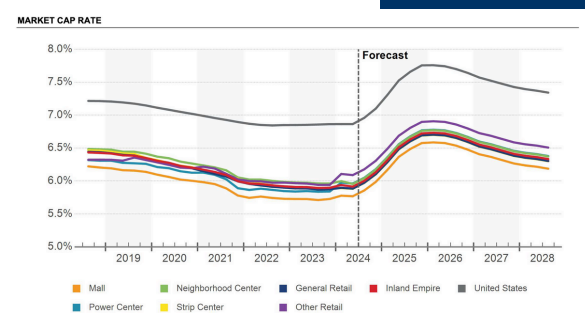
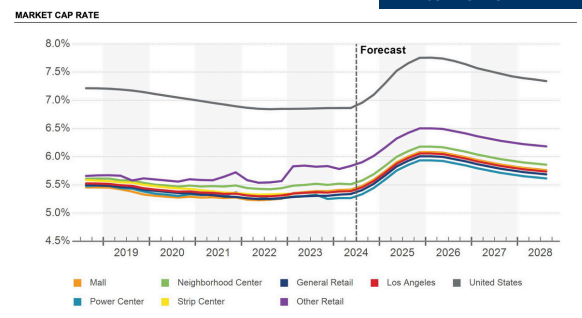


CAP RATES

CAP RATES

LOS ANGELES RETAIL

INLAND EMPIRE RETAIL



RETAIL TRENDS

LOS ANGELES MULTIFAMILY TRENDS

INLAND EMPIRE MULTIFAMILY TRENDS

OVERVIEW

LOS ANGELES MULTIFAMILY

12 Mo Delivered Units: **9,231** | 12 Mo Absorption Units: **6,284** | Vacancy Rate: **5.2%** | 12 Mo Asking Rent Growth: **0.6%**

KEY INDICATORS

Current Quarter	Units	Vacancy Rate	Asking Rent	Effective Rent	Absorption Units	Delivered Units	Under Constr Units
4 & 5 Star	156,139	8.9%	\$3,273	\$3,235	23	0	18,516
3 Star	224,534	5.0%	\$2,381	\$2,363	(1)	0	3,593
1 & 2 Star	657,357	4.4%	\$1,757	\$1,748	1	0	67
Market	1,038,030	5.2%	\$2,264	\$2,246	23	0	22,176

Annual Trends	12 Month	Historical Average	Forecast Average	Peak	When	Trough	When
Vacancy Change (YOY)	0.2%	4.6%	4.8%	6.0%	2020 Q3	3.3%	2000 Q3
Absorption Units	6,284	4,949	6,833	30,713	2021 Q4	(4,894)	2002 Q1
Delivered Units	9,231	6,477	6,952	12,962	2020 Q3	917	2011 Q4
Demolished Units	71	606	629	1,582	2010 Q3	43	2024 Q1
Asking Rent Growth (YOY)	0.6%	2.4%	2.7%	8.1%	2001 Q1	-7.0%	2009 Q4
Effective Rent Growth (YOY)	0.5%	2.4%	2.7%	8.1%	2001 Q1	-7.0%	2009 Q4
Sales Volume	\$4.3B	\$6.5B	N/A	\$14.6B	2022 Q2	\$1.7B	2010 Q1

OVERVIEW

INLAND EMPIRE MULTIFAMILY

12 Mo Delivered Units: **3,129** | 12 Mo Absorption Units: **2,202** | Vacancy Rate: **6.3%** | 12 Mo Asking Rent Growth: **0.6%**

KEY INDICATORS

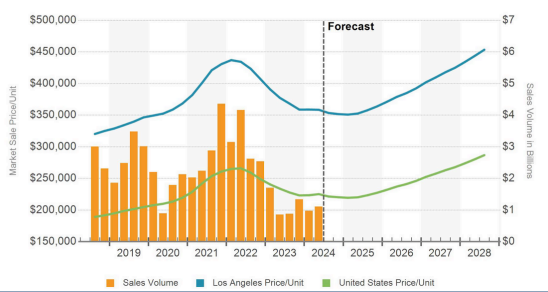
Current Quarter	Units	Vacancy Rate	Asking Rent	Effective Rent	Absorption Units	Delivered Units	Under Constr Units
4 & 5 Star	38,234	10.1%	\$2,610	\$2,582	2	0	6,149
3 Star	76,254	5.4%	\$2,073	\$2,060	5	0	1,499
1 & 2 Star	80,575	4.9%	\$1,414	\$1,400	0	0	205
Market	175,063	6.3%	\$2,044	\$2,028	7	0	7,936

Annual Trends	12 Month	Historical Average	Forecast Average	Peak	When	Trough	When
Vacancy Change (YOY)	0.4%	5.5%	6.0%	8.0%	2009 Q1	2.0%	2021 Q2
Absorption Units	2,202	1,539	2,446	6,516	2021 Q1	(2,613)	2023 Q1
Delivered Units	3,129	1,836	2,277	3,947	2007 Q3	80	2011 Q4
Demolished Units	0	55	72	296	2013 Q4	0	2024 Q2
Asking Rent Growth (YOY)	0.6%	3.8%	3.9%	14.3%	2021 Q3	-4.9%	2009 Q2
Effective Rent Growth (YOY)	0.5%	3.8%	3.9%	14.8%	2021 Q3	-4.8%	2009 Q2
Sales Volume	\$480M	\$1.2B	N/A	\$3.8B	2022 Q2	\$66.1M	2009 Q3

SALES

LOS ANGELES MULTIFAMILY

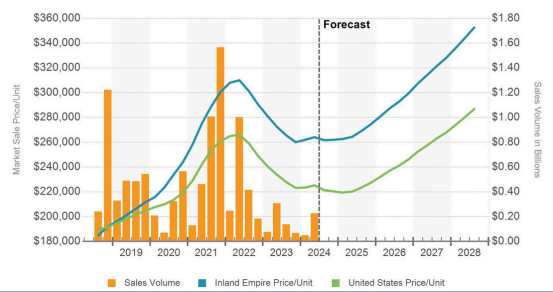
SALES VOLUME & MARKET SALE PRICE PER UNIT



SALES

INLAND EMPIRE MULTIFAMILY

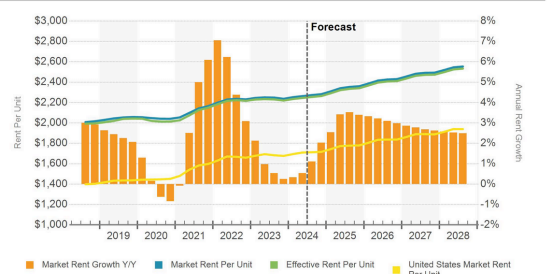
SALES VOLUME & MARKET SALE PRICE PER UNIT



RENT

LOS ANGELES MULTIFAMILY

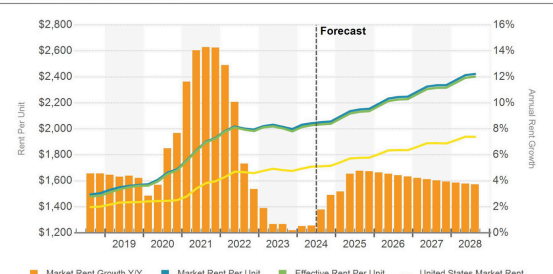
MARKET RENT PER UNIT & RENT GROWTH



RENT

INLAND EMPIRE MULTIFAMILY

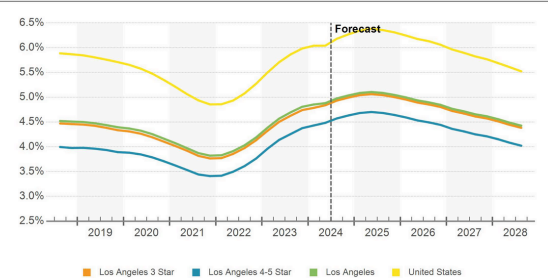
MARKET RENT PER UNIT & RENT GROWTH



CAP RATES

LOS ANGELES MULTIFAMILY

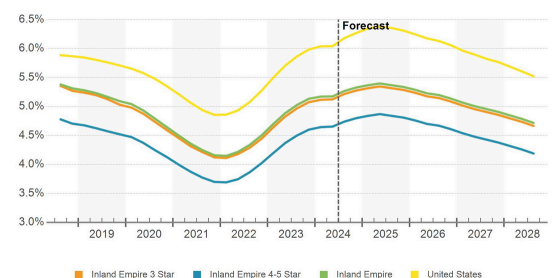
MARKET CAP RATE



CAP RATES

INLAND EMPIRE MULTIFAMILY

MARKET CAP RATE



LOS ANGELES HOSPITALITY TRENDS

INLAND EMPIRE HOSPITALITY TRENDS

OVERVIEW

LOS ANGELES HOSPITALITY

12 Mo Occupancy	12 Mo ADR	12 Mo RevPAR	12 Mo Supply	12 Mo Demand
71.2%	\$195.89	\$139.45	42.2M	30.1M

KEY INDICATORS

Class	Rooms	12 Mo Occ	12 Mo ADR	12 Mo RevPAR	12 Mo Delivered	Under Construction
Luxury & Upper Upscale	43,346	73.3%	\$284.11	\$208.17	0	470
Upscale & Upper Midscale	36,824	74.8%	\$171.43	\$128.17	957	641
Midscale & Economy	36,897	65.3%	\$110.65	\$72.28	25	810
Total	117,067	71.2%	\$195.89	\$139.45	982	1,921

Average Trend	Current	3 Mo	YTD	12 Mo	Historical Average	Forecast Average
Occupancy	72.8%	72.3%	69.6%	71.2%	66.3%	73.0%
Occupancy Change	1.1%	-1.5%	-1.8%	-0.4%	-1.9%	1.2%
ADR	\$197.86	\$194.83	\$192.41	\$195.89	\$177.20	\$216.65
ADR Change	-2.0%	-2.8%	-2.7%	-0.9%	2.5%	3.8%
RevPAR	\$143.94	\$140.85	\$133.90	\$139.45	\$117.49	\$159.63
RevPAR Change	-0.9%	-4.2%	-4.4%	-1.3%	0.5%	5.0%

OVERVIEW

INLAND EMPIRE HOSPITALITY

12 Mo Occupancy	12 Mo ADR	12 Mo RevPAR	12 Mo Supply	12 Mo Demand
62.9%	\$155.04	\$97.55	19.4M	12.2M

KEY INDICATORS

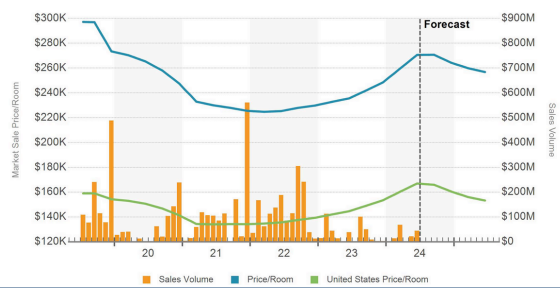
Class	Rooms	12 Mo Occ	12 Mo ADR	12 Mo RevPAR	12 Mo Delivered	Under Construction
Luxury & Upper Upscale	11,966	61.1%	\$277.37	\$169.48	0	570
Upscale & Upper Midscale	20,189	71.9%	\$146.61	\$105.41	656	778
Midscale & Economy	22,077	58.8%	\$92.29	\$51.53	288	644
Total	54,232	62.9%	\$155.04	\$97.55	944	2,192

Average Trend	Current	3 Mo	YTD	12 Mo	Historical Average	Forecast Average
Occupancy	62.6%	66.9%	64.9%	62.9%	63.3%	58.7%
Occupancy Change	-2.7%	-4.9%	-5.8%	-4.9%	-1.3%	-1.6%
ADR	\$151.15	\$178.00	\$170.94	\$155.04	\$138.71	\$158.43
ADR Change	-1.2%	-1.4%	-1.2%	-0.6%	5.1%	1.0%
RevPAR	\$94.58	\$119.60	\$110.85	\$97.55	\$87.78	\$92.93
RevPAR Change	-3.9%	-5.0%	-6.9%	-5.4%	3.8%	-0.6%

SALES

LOS ANGELES HOSPITALITY

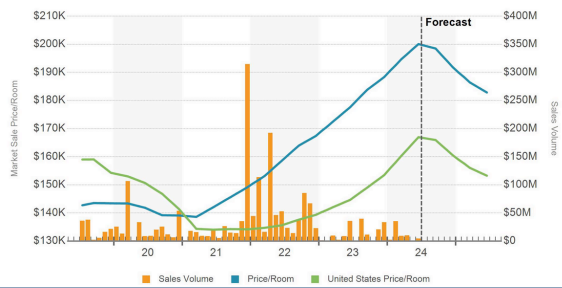
SALES VOLUME & MARKET SALE PRICE PER ROOM



SALES

INLAND EMPIRE HOSPITALITY

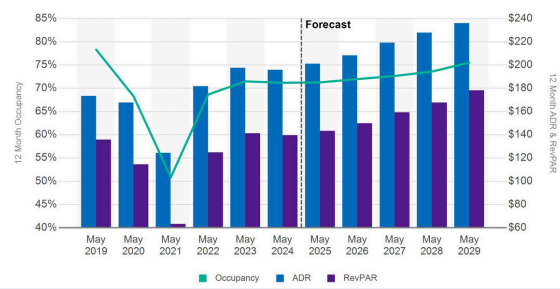
SALES VOLUME & MARKET SALE PRICE PER ROOM



PERFORMANCE

LOS ANGELES HOSPITALITY

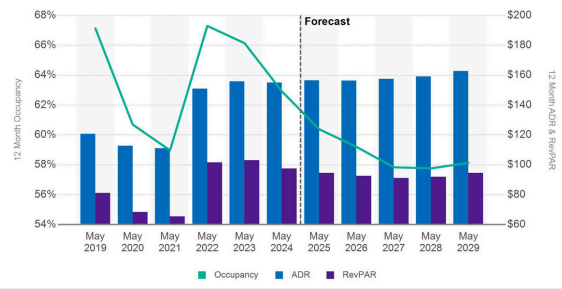
OCCUPANCY, ADR & REVPAR



PERFORMANCE

INLAND EMPIRE HOSPITALITY

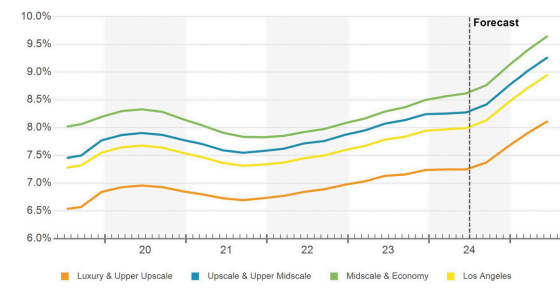
OCCUPANCY, ADR & REVPAR



CAP RATES

LOS ANGELES HOSPITALITY

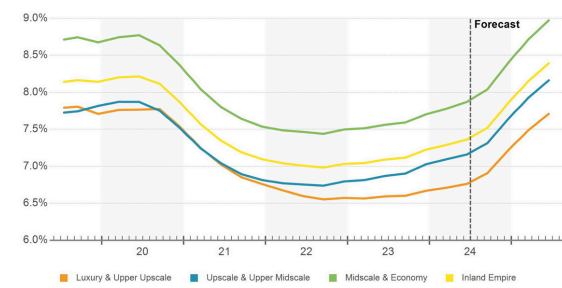
MARKET CAP RATE



CAP RATES

INLAND EMPIRE HOSPITALITY

MARKET CAP RATE





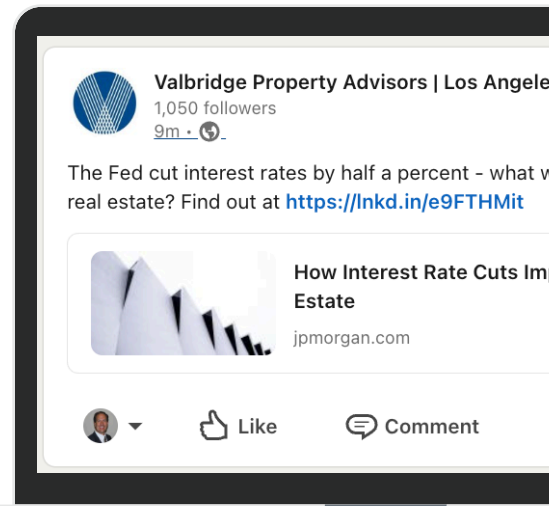
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