# INNER EAST BAY MARKET UPDATE*

AUGUST 2026

VANGUARD PROPERTIES

# MARKET UPDATE

## INNER EAST BAY* | AUGUST 2026

The Inner East Bay single family home market remained highly competitive in July, with sharply tighter inventory supporting stronger prices, faster sales, and increased bidding activity.

The most consequential shift was supply. Just 400 homes remained for sale at the end of July, down 30.2% year over year. Despite buyers having far fewer options, 316 homes closed, an increase of 10.9%. More sales against substantially lower inventory points to resilient demand and a market absorbing available homes efficiently.

Competition intensified accordingly. 77.8% of homes sold over list price, up from 72.6% last year, while sellers received an average of 119.3% of list price, compared with 112.0% a year ago. Although strategic underpricing is common in the Inner East Bay and contributes to these ratios, the widening year over year spread is a clear sign that buyers competed more aggressively for desirable homes.

Prices reflected that pressure. Although the median eased from its spring peak, it increased 8.0% year over year to $1,215,000, while the median price per square foot rose 5.3% to $732. The parallel gains reinforce the underlying strength of values across the market. Homes also sold in a median of just 14 days, two days faster than last July and among the quickest July market times recorded since 2010.

The broader backdrop remains mixed but constructive. Mortgage rates are still elevated, with the average rate for a 30 year fixed mortgage reaching 6.69% as of August 6, compared with 6.63% a year earlier. However, the market is demonstrating considerable resilience despite that affordability headwind. Regional employment grew 0.6% year over year in June, led by continued strength in education, healthcare, leisure, and hospitality. Nationally, core inflation eased to 2.5% in July, while the S&P 500 remained near record territory with a year to date gain of more than 13%, providing additional support for consumer confidence and household wealth.

Overall, the Inner East Bay remains a fast moving, seller favorable market defined by limited supply and decisive buyer competition. Sellers who prepare and price strategically continue to be rewarded, while buyers should be ready to move quickly when the right home appears. The Inner East Bay typically sees a second wave of listings after Labor Day, bringing more choices for buyers and renewed market activity through September and October.

### SINGLE FAMILY HOMES

### JULY 2026

| | |
|---|---|
| Median Sales Price | $1,215,000 ↑ |
| Days on market | 14 ↓ |
| $ / SQ. FT. | $732 ↑ |
| # For Sale<br>On Last Day Of Month | 400 ↓ |
| Went Into Contract | 275 ↓ |
| Properties Sold | 316 ↑ |

*The data utilized for this Inner East Bay Market Update was pulled from the following cities: Alameda, Albany, Berkeley, Castro Valley, El Cerrito, Kensington, Oakland (limited to the following Oakland zip codes: 94602, 94605, 94606, 94607, 94608, 94609, 94610, 94611, 94618, 94619 and 94705), Piedmont and San Leandro. 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. 

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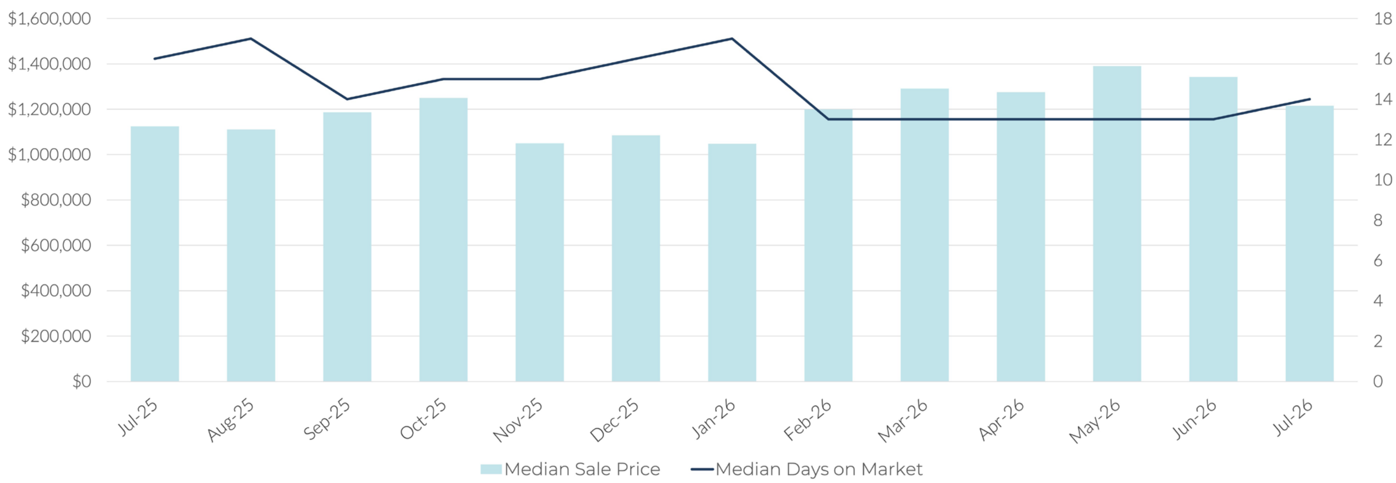
## SINGLE FAMILY RESIDENCES

### MONTH-OVER-MONTH COMPARISON




CHANGE IN PAST MONTH: SALES PRICE: -9.5% DAYS ON MARKET: +1 day

### YEAR-OVER-YEAR COMPARISON

*"Just 400 homes remained for sale at the end of July, down 30.2% year over year. Despite buyers having far fewer options, 316 homes closed, an increase of 10.9%."*

MEDIAN

| | JUL-2026 | JUL-2025 | %Δ |
|---|---|---|---|
| Sales Price | $1,215,000 | $1,125,000 | +8.0% |
| Days On Market | 14 | 16 | -12.5% |
| $ / SQ. FT. | $732 | $695 | +5.3% |

TOTAL

| | JUL-2026 | JUL-2025 | %Δ |
|---|---|---|---|
| Went Into Contract | 275 | 290 | -5.2% |
| Properties Sold | 316 | 285 | +10.9% |
| # For Sale Last Day of Month | 400 | 573 | -30.2% |
| % Of Properties Sold Over List | 77.8% | 72.6% | +7.2% |
| % Of List Price Received (Average) | 119.3% | 112.0% | +6.5% |

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### SINGLE FAMILY RESIDENCES

| REGION | HOMES SOLD (TOTAL) Q2-2026 | HOMES SOLD (TOTAL) Q2-2025 | HOMES SOLD (TOTAL) %Δ | DAYS ON MARKET (MEDIAN) Q2-2026 | DAYS ON MARKET (MEDIAN) Q2-2025 | DAYS ON MARKET (MEDIAN) %Δ | SALE PRICE (MEDIAN) Q2-2026 | SALE PRICE (MEDIAN) Q2-2025 | SALE PRICE (MEDIAN) %Δ |
|---|---|---|---|---|---|---|---|---|---|
| Alameda | 88 | 89 | ▼ 1% | 13 | 13 | 0% | $1,450,000 | $1,420,000 | ▲ 2% |
| Albany | 26** | 24** | ▲ 8% | 13 | 13 | 0% | $1,604,000 | $1,320,000 | ▲ 22% |
| Berkeley | 197 | 189 | ▲ 4% | 14 | 14 | 0% | $1,727,000 | $1,650,000 | ▲ 5% |
| Castro Valley | 3** | 1** | ▲ 200% | 11 | 9 | ▲ 22% | $590,000 | $1,225,000 | ▼ 52% |
| El Cerrito | 48** | 54 | ▼ 11% | 13 | 14 | ▼ 7% | $1,204,000 | $1,340,000 | ▼ 10% |
| Kensington | 24** | 20** | ▲ 20% | 14 | 14 | 0% | $1,732,500 | $1,363,000 | ▲ 27% |
| Oakland* | 456 | 445 | ▲ 2% | 13 | 15 | ▼ 13% | $1,200,000 | $1,135,000 | ▲ 6% |
| Piedmont | 47** | 30** | ▲ 57% | 11 | 12 | ▼ 8% | $3,200,000 | $2,432,500 | ▲ 32% |
| San Leandro | 96 | 104 | ▼ 8% | 13 | 13 | 0% | $920,000 | $872,500 | ▲ 5% |
| INNER EAST BAY* | 985 | 955 | ▲ 3% | 13 | 14 | ▼ 7% | $1,330,000 | $1,280,000 | ▲ 4% |

**Small sample size; use caution when interpreting statistics.
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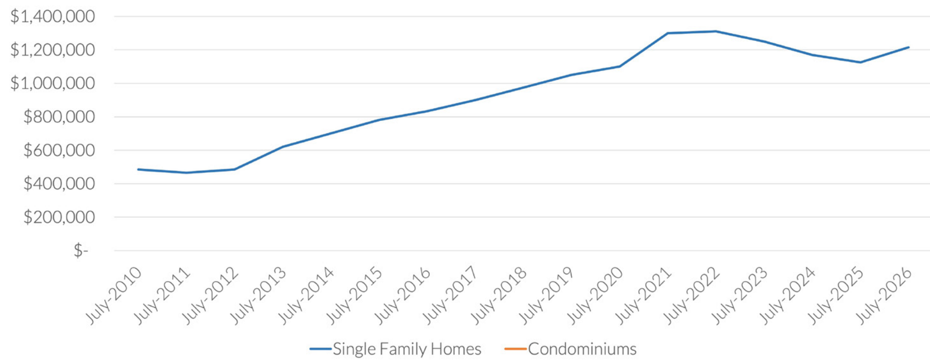
## YEAR-OVER-YEAR COMPARISONS

### MEDIAN SALE PRICE

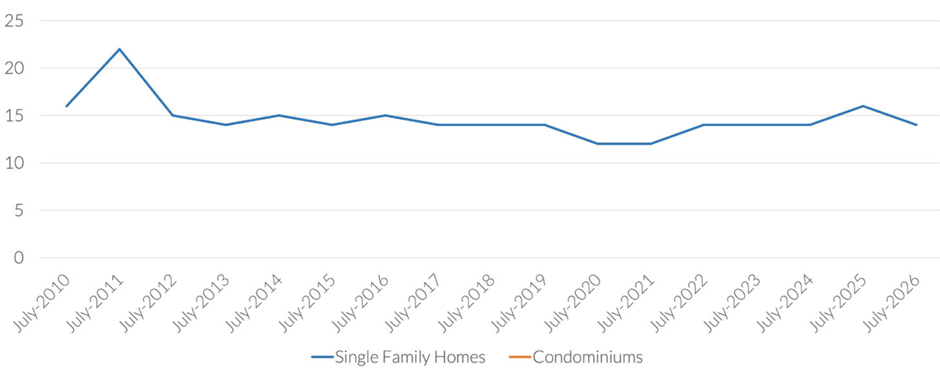



Single Family Residences

$1,215,000

+8.0% change year-over-year

### MEDIAN MARKET TIME

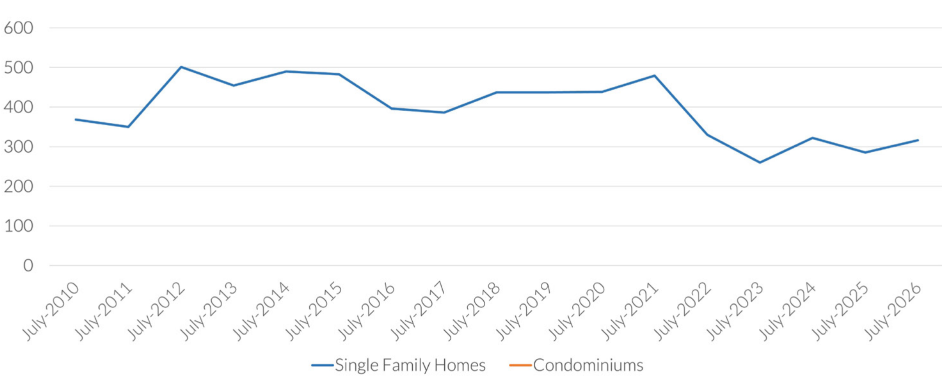



Single Family Residences

14 days

-2 day change year-over-year

### NUMBER OF SALES




Single Family Residences

316

+10.9% change year-over-year

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