



INNER EAST BAY
MARKET UPDATE*

FEBRUARY 2026





VANGUARD PROPERTIES

MARKET UPDATE

INNER EAST BAY* | FEBRUARY 2026

The inner East Bay kicked off 2026 with a market that still tilts in favor of sellers. The standout statistic is the 10.4% jump in median sales price to \$1.05 million. Combined with a 21.1% decline in inventory, this suggests intense competition for a limited number of homes. Despite fewer new contracts (-8.6%) and closed sales (-7.0%) compared with January 2024, homes moved more quickly—median time on market fell to 17 days, a 19.0% drop—indicating that desirable listings are still being snapped up almost immediately.

Tight supply is also reflected in pricing behavior. More than half of homes (56.4%) sold above their asking price, up from 51.6% a year earlier, and sellers received an average of 107.2% of list price, another small gain. The price per square foot rose just 1.0%, so the steep rise in the median price appears to be driven more by the scarcity of move-in-ready homes than by across-the-board appreciation. Meanwhile, lower contract and sales counts largely mirror the reduced number of listings rather than waning demand; many homeowners remain reluctant to trade sub-3% mortgages for higher rates, keeping inventory lean.



SINGLE FAMILY HOMES

JANUARY 2026

| | |
|------------------------------------|---------------|
| Median Sales Price | \$1,048,500 ↑ |
| Days on market | 17 ↓ |
| \$ / SQ. FT. | \$622 ↑ |
| # For Sale On Last Day Of Month | 318 ↓ |
| Went Into Contract | 169 ↓ |
| Properties Sold | 133 ↓ |

*The data utilized for this Inner East Bay Market Update was pulled from the following cities: Alameda, Albany, Berkeley, 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. ©2025 Vanguard Properties. All rights reserved. Equal Housing Opportunity. DRE No. 01486075

SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **-3.4%**

DAYS ON MARKET: **+1 day**

YEAR-OVER-YEAR COMPARISON

"The standout statistic is the 10.4% jump in median sales price to \$1.05 million. Combined with a 21.1% decline in inventory, this suggests intense competition for a limited number of homes."

| | MEDIAN | | |
|----------------|-------------|-----------|--------|
| | JAN-2026 | JAN-2025 | %Δ |
| Sales Price | \$1,048,500 | \$950,000 | +10.4% |
| Days On Market | 17 | 21 | -19.0% |
| \$/SQ. FT. | \$622 | \$616 | +1.0% |

| | TOTAL | | |
|----------------------------------------------|----------|----------|--------|
| | JAN-2026 | JAN-2025 | %Δ |
| Went Into Contract | 169 | 185 | -8.6% |
| Properties Sold | 133 | 143 | -7.0% |
| # For Sale Last Day of Month | 318 | 403 | -21.1% |
| % Of Properties Sold Over List | 56.4% | 53.8% | +4.8% |
| % Of List Price Received <i>(Average)</i> | 107.2% | 105.8% | +1.3% |

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SINGLE FAMILY RESIDENCES

| REGION | HOMES SOLD (TOTAL) | | | DAYS ON MARKET (MEDIAN) | | | SALE PRICE (MEDIAN) | | |
|-----------------|-----------------------|-------|-------|----------------------------|------|------|------------------------|-------------|-------|
| | 2025 | 2024 | %Δ | 2025 | 2024 | %Δ | 2025 | 2024 | %Δ |
| Alameda | 310 | 286 | ▲ 8% | 13 | 13 | 0% | \$1,382,500 | \$1,400,000 | ▼ 1% |
| Albany | 82 | 79 | ▲ 4% | 14 | 14 | 0% | \$1,320,000 | \$1,350,000 | ▼ 2% |
| Berkeley | 534 | 510 | ▲ 5% | 14 | 14 | 0% | \$1,600,000 | \$1,500,000 | ▲ 7% |
| El Cerrito | 186 | 180 | ▲ 3% | 14 | 14 | 0% | \$1,200,000 | \$1,200,000 | 0% |
| Kensington | 64 | 48** | ▲ 33% | 14 | 14 | 0% | \$1,412,500 | \$1,537,500 | ▼ 8% |
| Oakland* | 1606 | 1604 | ▲ 0% | 16 | 16 | 0% | \$1,054,500 | \$1,100,000 | ▼ 4% |
| Piedmont | 108 | 108 | 0% | 12 | 12 | 0% | \$2,657,500 | \$2,400,000 | ▲ 11% |
| San Leandro | 419 | 474 | ▼ 12% | 14 | 13 | ▲ 8% | \$859,900 | \$868,000 | ▼ 1% |
| INNER EAST BAY* | 3,308 | 3,289 | ▲ 1% | 14 | 14 | 0% | \$1,200,000 | \$1,200,000 | 0% |

**Small sample size; use caution when interpreting statistics.

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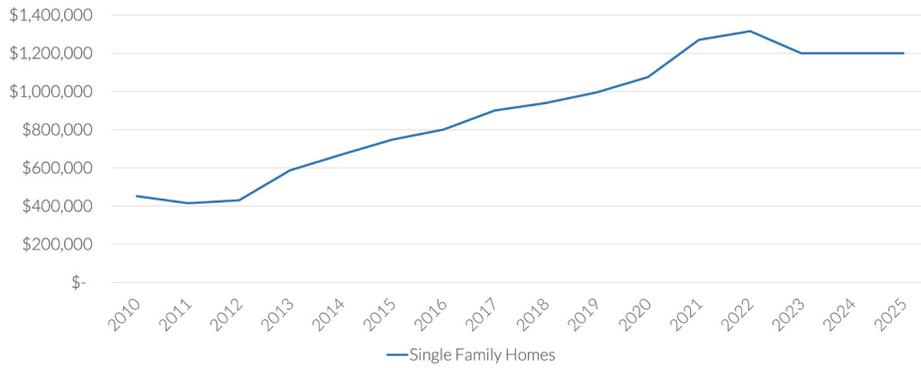


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YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

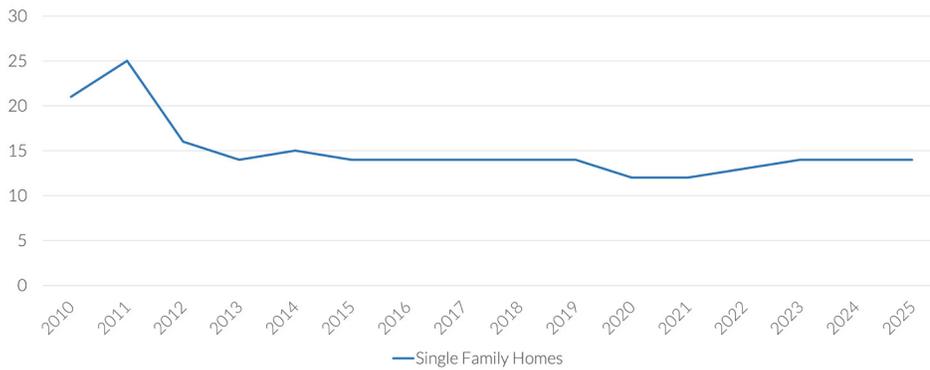


Single Family Residences

\$1,200,000

No change year-over-year

MEDIAN MARKET TIME



Single Family Residences

14 days

No change year-over-year

NUMBER OF SALES



Single Family Residences

3,308

+0.6% change year-over-year

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