



INNER EAST BAY MARKET UPDATE*

JUNE 2026





VANGUARD PROPERTIES

MARKET UPDATE

INNER EAST BAY* | JUNE 2026

The Inner East Bay single family home market gained momentum in May, with stronger pricing, faster absorption, and significantly tighter inventory compared to last year.

The most notable shift was supply. Available inventory fell 26.2% year over year, leaving just 487 homes for sale at the end of May. That lack of supply continues to shape the market, especially for well-located, well-prepared homes. Even with fewer options, closed sales increased 2.2% year over year, while pending sales were essentially flat, down just 1.0%, showing that buyer demand remains steady despite a more constrained listing environment.

Pricing also moved higher. The median sales price increased 6.9% year over year to \$1,390,000, while the median price per square foot rose 0.8% to \$759. The stronger median price gain, paired with stable price-per-square-foot growth, suggests buyers are continuing to compete for quality homes, particularly those that check the right boxes on location, condition, layout, and outdoor space.

Competition remains one of the defining features of the Inner East Bay market. 83.8% of homes sold over list price, up from 77.6% last year, and sellers received an average of 123.1% of list price, compared to 115.7% a year ago. Homes also continued to move quickly, with median days on market dropping to just 13 days.

The broader backdrop is also more supportive than it was a year ago. Mortgage rates remain elevated, but they are lower than last year, giving buyers slightly more breathing room. At the same time, resilient local employment, strong financial markets, and continued confidence among higher-income buyers are helping keep demand active.

Overall, the Inner East Bay remains a fast, competitive, seller-favorable market. Inventory is meaningfully lower, pricing is up, and buyers are still moving decisively when the right home comes to market. For sellers, the message is clear: strong preparation and strategic pricing continue to be rewarded. For buyers, the market is competitive, but improved financing conditions and slightly steadier sales activity are creating real opportunities for those who are ready to act.



SINGLE FAMILY HOMES

MAY 2026

Median Sales Price	\$1,390,000 ↑
Days on market	13 ↓
\$ / SQ. FT.	\$759 ↑
# For Sale On Last Day Of Month	487 ↓
Went Into Contract	395 ↓
Properties Sold	320 ↑

*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. ©2026 Vanguard Properties. All rights reserved. Equal Housing Opportunity. DRE No. 01486075

SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **+9.0%**

DAYS ON MARKET: **No change**

YEAR-OVER-YEAR COMPARISON

"The most notable shift was supply. Available inventory fell 26.2% year over year, leaving just 487 homes for sale at the end of May."

	MAY-2026	MAY-2025	%Δ
Sales Price	\$1,390,000	\$1,300,000	+6.9%
Days On Market	13	14	-7.1%
\$/SQ. FT.	\$759	\$753	+0.8%

	MAY-2026	MAY-2025	%Δ
Went Into Contract	395	399	-1.0%
Properties Sold	320	313	+2.2%
# For Sale Last Day of Month	487	660	-26.2%
% Of Properties Sold Over List	83.8%	77.6%	+8.0%
% Of List Price Received <i>(Average)</i>	123.1%	115.7%	+6.4%

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SINGLE FAMILY RESIDENCES

REGION	HOMES SOLD (TOTAL)			DAYS ON MARKET (MEDIAN)			SALE PRICE (MEDIAN)		
	Q1-2026	Q1-2025	%Δ	Q1-2026	Q1-2025	%Δ	Q1-2026	Q1-2025	%Δ
Alameda	45*	61	▼ 26%	13	13	0%	\$1,435,000	\$1,380,000	▲ 4%
Albany	13*	12*	▲ 8%	13	13	0%	\$1,380,000	\$1,515,000	▼ 9%
Berkeley	102	81	▲ 26%	14	13	▲ 8%	\$1,599,500	\$1,576,000	▲ 1%
Castro Valley	61	62	▼ 2%	10	11	▼ 9%	\$1,165,656	\$1,277,500	▼ 9%
El Cerrito	26*	32*	▼ 19%	13	13	0%	\$1,212,500	\$1,187,500	▲ 2%
Kensington	8*	16*	▼ 50%	13	14	▼ 7%	\$1,775,000	\$1,367,500	▲ 30%
Oakland*	305	326	▼ 6%	14	14	0%	\$1,100,000	\$1,145,000	▼ 4%
Piedmont	25*	24*	▲ 4%	11	12	▼ 8%	\$3,000,000	\$3,002,500	▲ 0%
San Leandro	78	80	▼ 3%	12	12	0%	\$827,750	\$854,950	▼ 3%
INNER EAST BAY*	602	632	▼ 5%	13	14	▼ 7%	\$1,200,000	\$1,200,000	0%

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

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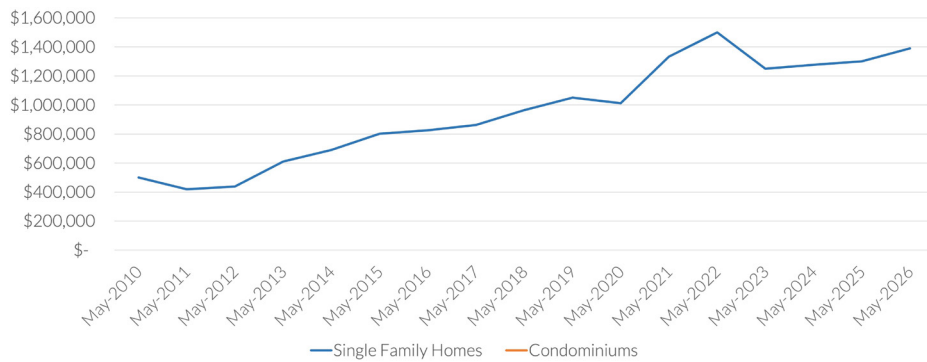


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YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

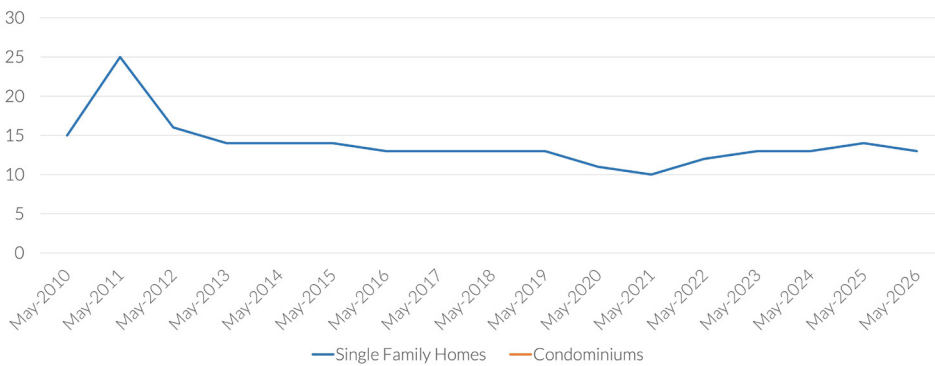


Single Family Residences

\$1,390,000

+6.9% change year-over-year

MEDIAN MARKET TIME

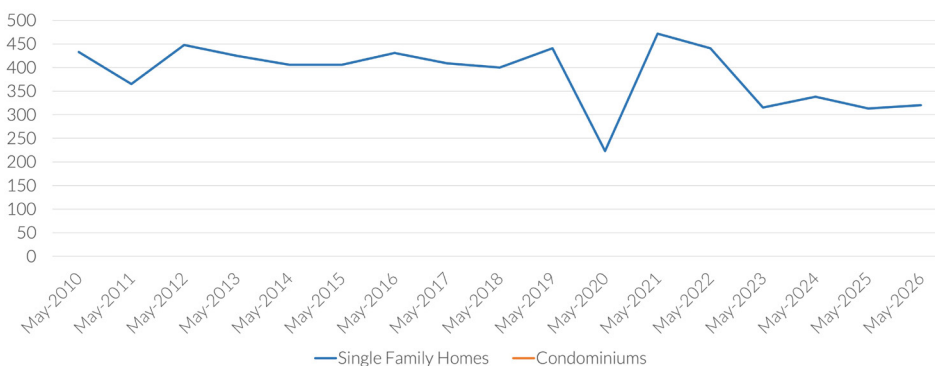


Single Family Residences

13 days

-1 day change year-over-year

NUMBER OF SALES



Single Family Residences

320

+2.2% change year-over-year

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