



# INNER EAST BAY MARKET UPDATE\*

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MARCH 2026





## VANGUARD PROPERTIES

# MARKET UPDATE

INNER EAST BAY\* | MARCH 2026

The Inner East Bay housing market remains highly competitive as the spring market begins to take shape. The most notable shift is a 23.2% drop in available inventory, with just 388 homes for sale at the end of February compared with 505 a year ago. This sharp decline in supply continues to fuel competition among buyers.

That demand is clearly reflected in pricing behavior. 78.0% of homes sold above their asking price, up from 74.9% last year, while sellers received an average of 115.4% of list price, another year-over-year increase. Homes are also moving quickly, with median days on market holding steady at just 13 days, underscoring how rapidly well-priced properties are being absorbed.

Buyer demand remains strong as well. The number of homes going into contract increased 2.5% to 289, even as inventory declined significantly. Closed sales dipped slightly to 191 homes, down 4.0% year-over-year, a change that appears more closely tied to the limited number of listings rather than weakening demand.

Prices continue to edge upward. The median sales price rose 2.1% to \$1,200,000, while the median price per square foot increased 1.7% to \$709, signaling steady appreciation in a supply-constrained market.

Overall, the Inner East Bay market continues to be defined by tight inventory, strong buyer competition, and fast-moving listings, conditions that should keep the market active as we move further into the spring selling season.



### SINGLE FAMILY HOMES

#### FEBRUARY 2026

Median Sales Price	\$1,200,000 ↑
Days on market	13
\$ / SQ. FT.	\$709 ↑
# For Sale On Last Day Of Month	388 ↓
Went Into Contract	289 ↑
Properties Sold	191 ↓

\*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

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## SINGLE FAMILY RESIDENCES

### MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **+14.4%**

DAYS ON MARKET: **-4 days**

### YEAR-OVER-YEAR COMPARISON

*"The most notable shift is a 23.2% drop in available inventory, with just 388 homes for sale at the end of February compared with 505 a year ago."*

	MEDIAN		
	FEB-2026	FEB-2025	%Δ
Sales Price	\$1,200,000	\$1,175,000	+2.1%
Days On Market	13	13	0.0%
\$/SQ. FT.	\$709	\$697	+1.7%

	TOTAL		
	FEB-2026	FEB-2025	%Δ
Went Into Contract	289	282	+2.5%
Properties Sold	191	199	-4.0%
# For Sale Last Day of Month	388	505	-23.2%
% Of Properties Sold Over List	78.0%	74.9%	+4.1%
% Of List Price Received <i>(Average)</i>	115.4%	113.6%	+1.6%

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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.

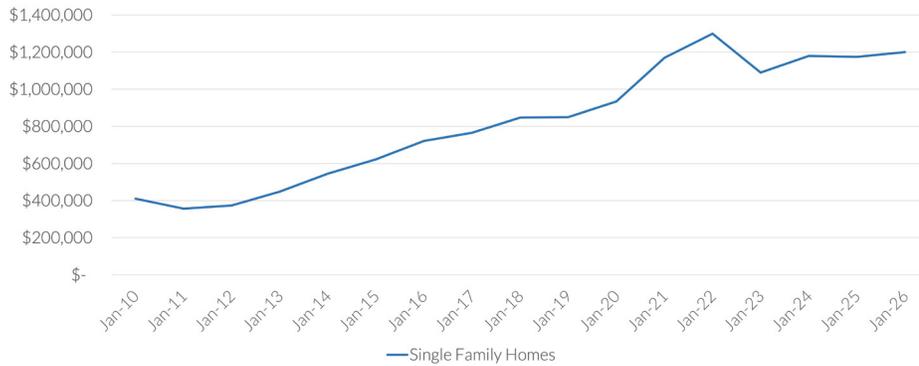
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## YEAR-OVER-YEAR COMPARISONS

### MEDIAN SALE PRICE



Single Family Residences

**\$1,200,000**

+2.1 change year-over-year

### MEDIAN MARKET TIME



Single Family Residences

**13 days**

No change year-over-year

### NUMBER OF SALES



Single Family Residences

**191**

-4.0% change year-over-year

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