

A photograph of a lively street scene in Inner East Bay. On the left, a large tree with green and yellowing leaves is strung with warm white lights. A person is seated at a small outdoor table in the foreground. The sidewalk is lined with parked bicycles. On the right, a row of shops with yellow and white striped awnings is visible. Signs for 'Books Dalloway's', 'SHANGRI-LA TREASURES', and 'Books Dalloway's' are visible. The overall atmosphere is warm and inviting.

INNER EAST BAY MARKET UPDATE*

Q3 2026





VANGUARD PROPERTIES

MARKET UPDATE

INNER EAST BAY* | Q3 2026

The Inner East Bay delivered another strong quarter for single-family homes, with inventory falling 21.8% while the median price per square foot climbed 8.9% and the median sales price increased 7.7%. Buyers continued to compete for limited inventory, pushing more homes above asking price. Meanwhile, the condominium market showed improving activity, with more sales, faster transactions, and stronger competition despite a substantial increase in available listings.

Single-family homes remained the standout. Inventory at quarter-end declined 21.8% to just 480 homes, yet closed sales increased 4.7% to 852. The median sales price rose 7.7% to \$1,217,500, while the median price per square foot climbed 8.9% to \$746. Competition remained particularly strong, with 81.1% of homes selling over asking price, up from 73.8% last year. Sellers received an average of 120.7% of list price, compared to 112.8% a year ago, and homes sold in a median of just 14 days.

Several communities posted notable gains. Albany's single-family median price jumped 25% to \$1,377,500, while Kensington increased 20% to \$1,677,500, although both markets had relatively few sales. Berkeley saw its median price rise 8% to \$1.7 million alongside a 16% increase in sales. Oakland also demonstrated strength, with median prices up 5% to \$1,080,000 and marketing times falling 26%, from 19 to 14 days.

The condominium market also gained momentum, particularly in buyer activity. Closed sales increased 7.1%, properties going into contract rose 6.7%, and median days on market fell 21%, from 33 to 26 days. Notably, 42% of condos sold over asking price, compared to 33.7% last year. While the median price edged down 2% to \$490,000 and inventory increased 87.6%, the combination of greater selection, rising sales, and faster transactions suggests buyers are finding opportunities and responding.

The broader economic picture provides additional reasons for confidence. California added 39,400 jobs in August, bringing year-over-year job growth to 138,500, while the California Association of REALTORS® reported statewide existing single-family sales increased 1.4% year over year in August. Although borrowing costs remain a headwind, the Inner East Bay's strong pricing, continued buyer competition, and improving transaction activity demonstrate the market's resilience. Overall, Q3 reflected a competitive single-family market alongside a condominium segment gaining traction, positioning the region with meaningful opportunities for both buyers and sellers.



SINGLE FAMILY HOMES



CONDOMINIUMS

Q3 2026

Median Sales Price	\$1,217,500 ↑
Days on market	14 ↓
\$ / SQ. FT.	\$746 ↑
# For Sale On Last Day Of Quarter	480 ↓
Went Into Contract	917 ↓
Properties Sold	852 ↑

Q3 2026

Median Sales Price	\$490,000 ↓
Days On Market	26 ↓
\$ / Sq. Ft.	\$496 ↓
# For Sale Last Day Of Quarter	272 ↑
Went Into Contract	222 ↑
Properties Sold	181 ↑

*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



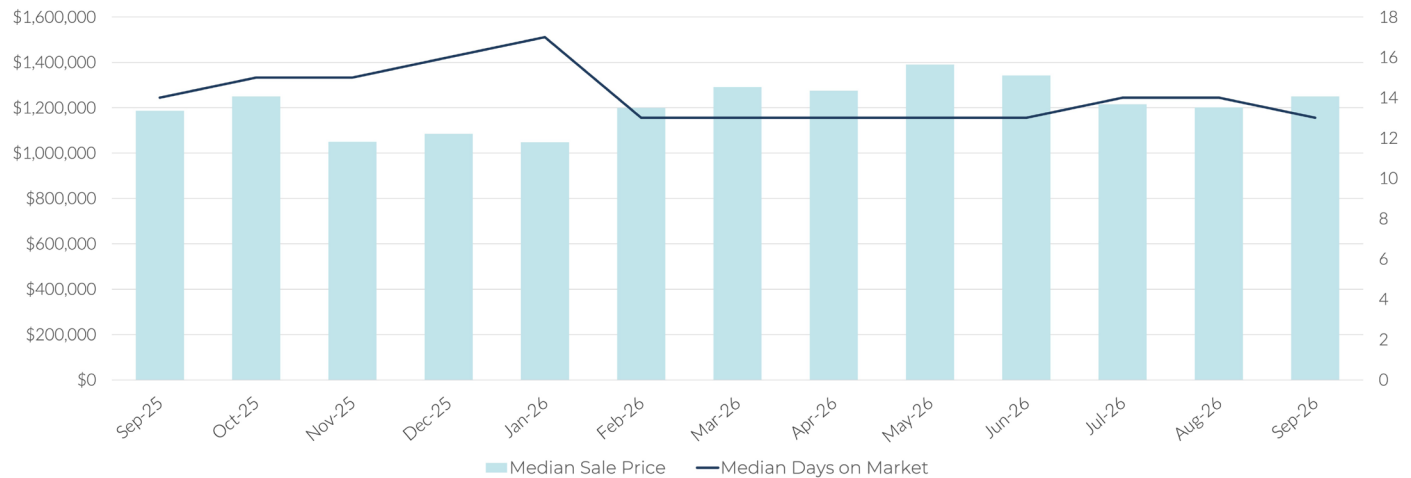
VANGUARD PROPERTIES

INNER EAST BAY MARKET UPDATE*

Q3 2026

SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **+4.0%**

DAYS ON MARKET: **-1 day**

YEAR-OVER-YEAR COMPARISON

"The Inner East Bay delivered another strong quarter for single-family homes, with inventory falling 21.8% while the median price per square foot climbed 8.9% and the median sales price increased 7.7%."

	MEDIAN		
	Q3-2026	Q3-2025	%Δ
Sales Price	\$1,217,500	\$1,130,000	+7.7%
Days On Market	14	15	-6.7%
\$ / SQ. FT.	\$746	\$685	+8.9%

	TOTAL		
	Q3-2026	Q3-2025	%Δ
Went Into Contract	917	934	-1.8%
Properties Sold	852	814	+4.7%
# For Sale Last Day of Quarter	480	614	-21.8%
% Of Properties Sold Over List	81.1%	73.8%	+9.9%
% Of List Price Received (Average)	120.7%	112.8%	+7.0%

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INNER EAST BAY MARKET UPDATE*

Q3 2026

SINGLE FAMILY RESIDENCES

REGION	HOMES SOLD (TOTAL)			DAYS ON MARKET (MEDIAN)			SALE PRICE (MEDIAN)		
	Q3-2026	Q3-2025	%Δ	Q3-2026	Q3-2025	%Δ	Q3-2026	Q3-2025	%Δ
Alameda	85	83	▲ 2%	12	14	▼ 14%	\$1,350,000	\$1,330,000	▲ 2%
Albany	22*	19*	▲ 16%	13	15	▼ 13%	\$1,377,500	\$1,100,000	▲ 25%
Berkeley	140	121	▲ 16%	14	14	0%	\$1,700,000	\$1,580,000	▲ 8%
Castro Valley	13*	4*	▲ 225%	22	4	▲ 450%	\$800,000	\$956,000	▼ 16%
El Cerrito	44*	43*	▲ 2%	14	14	0%	\$1,250,000	\$1,395,000	▼ 10%
Kensington	14*	11*	▲ 27%	14	14	0%	\$1,677,500	\$1,400,000	▲ 20%
Oakland*	410	417	▼ 2%	14	19	▼ 26%	\$1,080,000	\$1,025,000	▲ 5%
Piedmont	30*	15*	▲ 100%	12	13	▼ 8%	\$2,800,000	\$3,025,000	▼ 7%
San Leandro	94	105	▼ 10%	12	14	▼ 14%	\$880,000	\$850,000	▲ 4%
INNER EAST BAY*	852	814	▲ 5%	14	15	▼ 7%	\$1,217,500	\$1,130,000	▲ 8%

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

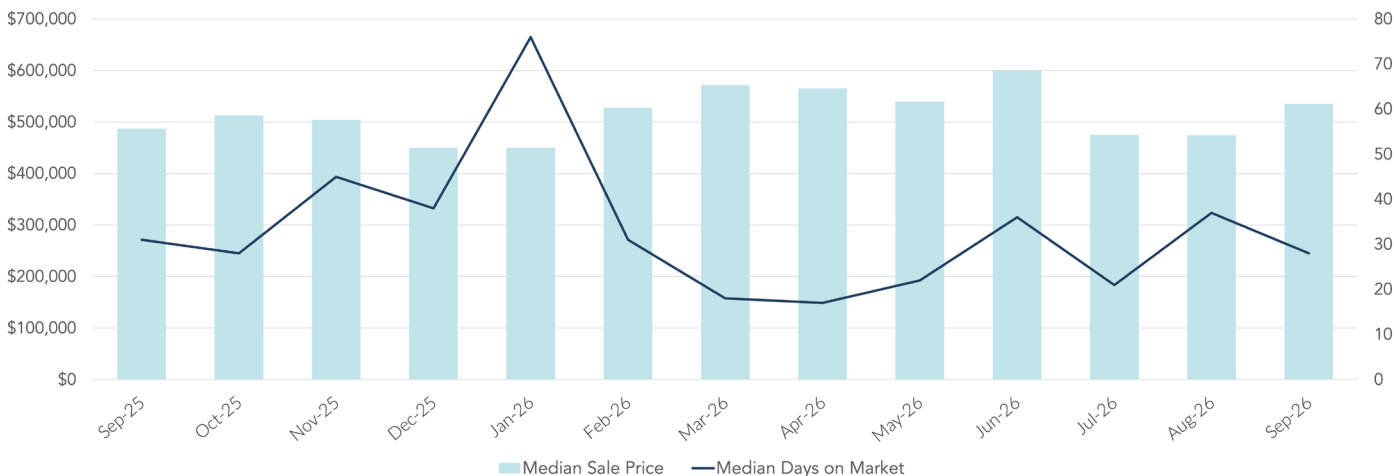
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INNER EAST BAY MARKET UPDATE*

Q3 2026

CONDOMINIUMS

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: **+12.8%**

DAYS ON MARKET: **-9 days**

YEAR-OVER-YEAR COMPARISON

"Notably, 42% of condos sold over asking price, compared to 33.7% last year. While the median price edged down 2% to \$490,000 and inventory increased 87.6%, the combination of greater selection, rising sales, and faster transactions suggests buyers are finding opportunities and responding."

MEDIAN

	Q3-2026	Q3-2025	%Δ
Sales Price	\$490,000	\$500,000	-2.0%
Days On Market	26	33	-21.2%
\$ / SQ. FT.	\$496	\$508	-2.4%

TOTAL

	Q3-2026	Q3-2025	%Δ
Went Into Contract	222	208	+6.7%
Properties Sold	181	169	+7.1%
# For Sale Last Day of Quarter	272	145	+87.6%
% Of Properties Sold Over List	42.0%	33.7%	+24.6%
% Of List Price Received (Average)	101.9%	100.7%	+1.2%

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INNER EAST BAY MARKET UPDATE*

Q3 2026

CONDOMINIUMS

REGION	HOMES SOLD (TOTAL)			DAYS ON MARKET (MEDIAN)			SALE PRICE (MEDIAN)		
	Q3-2026	Q3-2025	%Δ	Q3-2026	Q3-2025	%Δ	Q3-2026	Q3-2025	%Δ
Alameda	22*	22*	0%	25	12	▲ 108%	\$675,000	\$752,500	▼ 10%
Albany	4*	11*	▼ -64%	86	48	▲ 79%	\$417,500	\$480,000	▼ 13%
Berkeley	24*	33*	▼ -27%	26	18	▲ 44%	\$830,000	\$850,000	▼ 2%
Castro Valley	0	0	-	-	-	-	-	-	-
El Cerrito	0	0	-	-	-	-	-	-	-
Kensington	0	0	-	-	-	-	-	-	-
Oakland*	111	92	▲ 21%	26	32	▼ 19%	\$435,000	\$498,500	▼ 13%
Piedmont	0	0	-	-	-	-	-	-	-
San Leandro	20*	8*	▲ 150%	30	36	▼ 17%	\$472,500	\$471,250	0%
INNER EAST BAY*	181	166	▲ 9%	26	33	▼ 21%	\$490,000	\$500,000	▼ 2%

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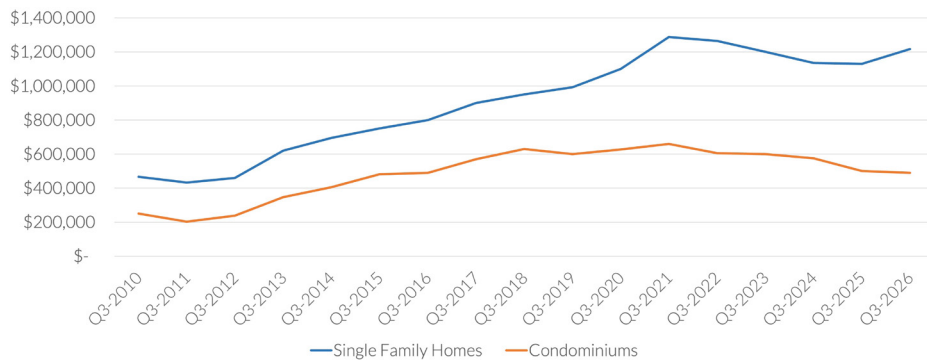
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YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE



Single Family Residences

\$1,217,500

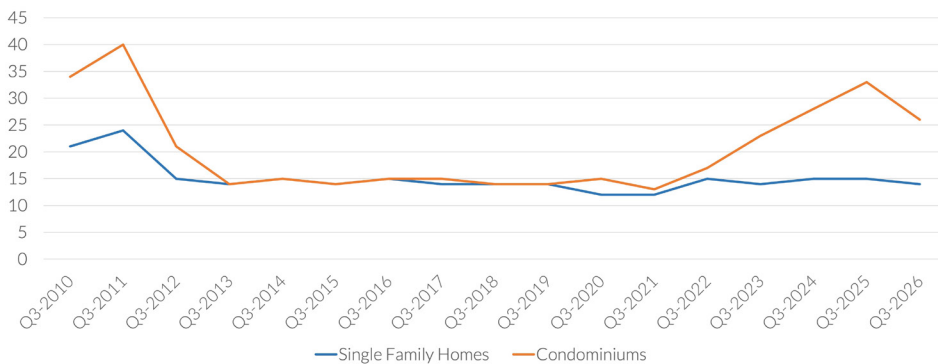
+7.7% change year-over-year

Condominium/TIC/COOPs

\$490,000

-2.0% change year-over-year

MEDIAN MARKET TIME



Single Family Residences

14 days

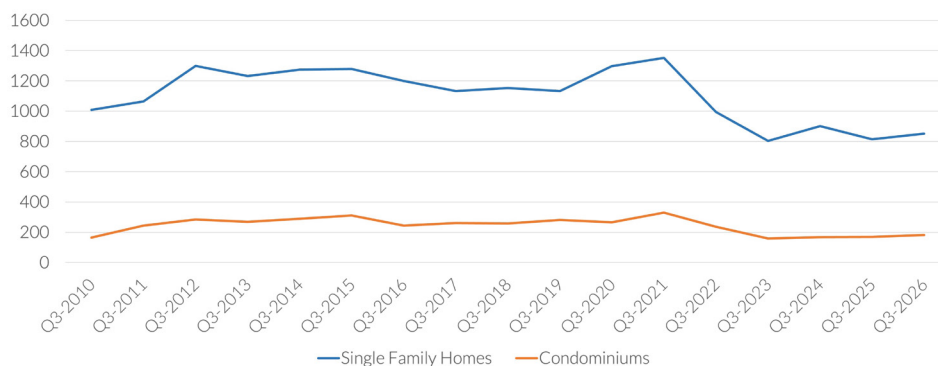
-1 day change year-over-year

Condominium/TIC/COOPs

26 days

-7 day change year-over-year

NUMBER OF SALES



Single Family Residences

852

+4.7% change year-over-year

Condominium/TIC/COOPs

181

+7.1% change year-over-year

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