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COMPASS

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LAFAYETTE Q3 MARKET UPDATE

MartinHomesTeam.com

COMPASS

BY THE NUMBERS

\$1+
BILLION
Lifetime Transactions

\$100+
MILLION
Annual Transactions

4
GENERATIONS
In Lafayette

8X REPEAT
LPIE Title Sponsor

9X REPEAT
Lafayette Juniors
Marble Sponsor

3X FEATURE
PROPERTY
On the Lafayette
Kitchen Tour

\$100+
MILLION
Invested in Lafayette

As Rates Rise, So Do Lafayette Home Prices

After a sluggish start to 2026, Lafayette's market has found its second wind this fall. Activity has picked up noticeably since late summer, with more buyers out and well-priced homes moving quickly, all while mortgage rates have been climbing. Conventional wisdom says higher rates should cool demand, but local buyers have proven resilient. Here's what we're seeing on the ground.

- **Pent-up demand from a slow first half.** Uncertainty around the Iran conflict kept many buyers on the sidelines earlier this year, effectively shifting the spring rush into fall. Now that uncertainty has eased, many have returned ready to act.
- **Rising rates are creating urgency.** Rather than waiting, many buyers are acting now out of concern that rates could climb further.
- **Stock market wealth is boosting confidence.** Last quarter we noted AI hadn't yet materially impacted Lafayette, and that's still largely true for home prices. But with AI-driven stocks still near highs, strong portfolios are helping many buyers absorb higher borrowing costs.
- **Employment has held up.** Despite periodic tech layoff headlines, the job market has remained steadier than many expected, giving buyers confidence to make long-term commitments.
- **Inventory is still tight.** With limited homes coming to market, buyers are competing for a small pool of listings, and well-prepared, well-priced homes continue to draw strong interest.

Some of this momentum reflects a comparison to a slow spring, and we'll be watching whether it holds into the new year. Still, for sellers, this fall window is an opportunity: buyers are motivated and competition is limited. For buyers, preparation matters more than ever. As always, expect the unexpected, and we're here to help you navigate whatever comes next.

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Lafayette Averages By School & Neighborhood

Last Six Months

Neighborhood	# of Home Sales	Sold Price (\$M)	List Price (\$M)	Price Per Sqft	Sqft
Lafayette (average)	146	\$2.35	\$2.30	\$900	2655
Lafayette (median)	146	\$2.00	\$2.00	\$890	2488
Burton Valley Elementary	55	\$1.95	\$1.92	\$877	2303
Burton Valley	24	\$1.98	\$1.94	\$868	2375
Laf. Valley Estates	6	\$1.61	\$1.61	\$900	1856
Saranap / Condit	19	\$1.66	\$1.63	\$882	1965
Trails	6	\$3.11	\$3.06	\$875	3529
Happy Valley Elementary	39	\$3.12	\$3.03	\$991	3067
Happy Valley	5	\$4.83	\$4.93	\$1,231	3867
Happy Valley Glen	8	\$2.93	\$2.78	\$970	3051
Hidden Valley	10	\$1.77	\$1.74	\$833	2177
Upper Happy Valley	16	\$3.53	\$3.37	\$1,025	3382
Lafayette Elementary	27	\$2.21	\$2.16	\$930	2480
Downtown	18	\$2.20	\$2.17	\$890	2619
Silver Springs	1	\$3.08	\$2.77	\$960	3202
Trails	8	\$2.13	\$2.05	\$1,017	2079
Springhill Elementary	25	\$2.18	\$2.19	\$775	2974
Acalanes	7	\$1.50	\$1.47	\$870	1873
Baywood	1	\$2.10	\$2.00	\$780	2692
Reliez Valley	14	\$2.57	\$2.60	\$714	3654
Springhill	3	\$1.99	\$2.00	\$836	2459