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# LAFAYETTE Q4 MARKET UPDATE

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## 2026 REAL ESTATE MARKET: TIME FOR CHANGE

### BY THE NUMBERS

\$1+  
BILLION  
Lifetime Transactions

\$100+  
MILLION  
Annual Transactions

4  
GENERATIONS  
In Lafayette

7X REPEAT  
LPIE Title Sponsor

8X REPEAT  
Lafayette Juniors  
Marble Sponsor

3X FEATURE  
PROPERTY  
On the Lafayette  
Kitchen Tour

\$100+  
MILLION  
Invested in Lafayette

Most experts agree that 2026 will mark the end of the pandemic-driven disruption of historic low inventory levels, volatile rates, affordability challenges and a whipsaw effect on home prices. Here is what most folks are saying about 2026.

MODEST PRICE GAINS – Most experts predict prices to grow between 1-2%

INCREASING HOME SALES – Price, inventory and affordability improvement is anticipated to drive a ~ 5% increase in home sales volume

MORE INVENTORY – Homebuyers will have more choices as inventory levels are expected to rise by ~ 10%

LOWER RATES – Mortgages are expected to continue to improve as most experts anticipate a 0.25 – 0.5% rate reduction

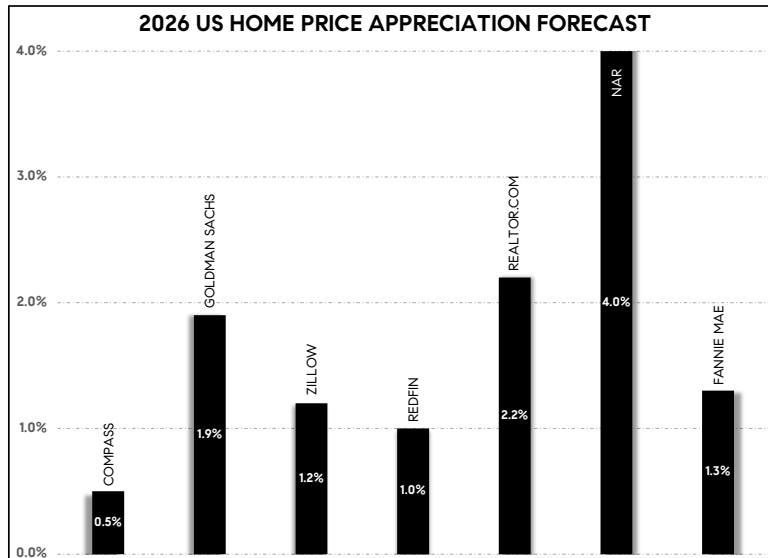
INCREASED AFFORDABILITY – Slight improvement in mortgage rates and wages are anticipated to grow faster than home prices

GREATER MIGRATION – The mortgage rate “lock-in effect” will thaw as real estate markets improve and a larger percent of mortgages now carry rates of ~ 6%

AI IMPACT – Lafayette should continue to be positively impacted by the Bay Area AI tech boom as more homebuyers migrate to the East Bay

MORE ADUs – The desire for separate, flexible and well integrated living space will continue as homeowners look for ways to improve comfort and functionality

NEW SMALLER LOTS – CA’s new lot split laws under SB9 will continue to create new smaller lots with large new homes



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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
<b>Lafayette (average)</b>	<b>135</b>	<b>\$2.39</b>	<b>\$2.38</b>	<b>\$863</b>	<b>2888</b>
Lafayette (median)	135	\$1.95	\$1.90	\$853	2416
<b>Burton Valley Elementary</b>	<b>50</b>	<b>\$2.04</b>	<b>\$2.03</b>	<b>\$910</b>	<b>2268</b>
Burton Valley	26	\$2.13	\$2.19	\$868	2498
Laf. Valley Estates	6	\$1.40	\$1.36	\$946	1520
Saranap / Condit	12	\$1.43	\$1.39	\$909	1667
Trails	6	\$3.48	\$3.33	\$1,062	3219
<b>Happy Valley Elementary</b>	<b>36</b>	<b>\$2.97</b>	<b>\$2.98</b>	<b>\$825</b>	<b>3580</b>
Happy Valley	10	\$4.38	\$4.35	\$959	4435
Happy Valley Glen	13	\$1.92	\$1.96	\$768	2501
Hidden Valley	3	\$1.87	\$1.86	\$661	2848
Upper Happy Valley	10	\$3.25	\$3.29	\$814	4348
<b>Lafayette Elementary</b>	<b>25</b>	<b>\$2.02</b>	<b>\$1.96</b>	<b>\$917</b>	<b>2448</b>
Downtown	16	\$1.88	\$1.86	\$764	2715
Silver Springs	-	-	-	-	-
Trails	9	\$2.28	\$2.14	\$1,190	1973
<b>Springhill Elementary</b>	<b>24</b>	<b>\$2.62</b>	<b>\$2.62</b>	<b>\$764</b>	<b>3602</b>
Acalanes	2	\$1.84	\$1.69	\$777	2368
Baywood	1	\$2.80	\$2.99	\$672	4173
Reliez Valley	13	\$2.98	\$3.03	\$689	4347
Springhill	8	\$2.20	\$2.14	\$893	2629

