Q1 2026 Berkshires Market Recap

A more balanced market, with county-by-county differences moving to the foreground.

The Berkshires market did not move as one market in Q1. Sales volume softened modestly across North, Mid-County, and South County, while inventory rose in every county. The result is a market that feels healthier and more discerning: still active, still local, but less automatic than the highly supply-constrained years.

Mid-County delivered the clearest price strength, South County remained the region's high-value market with longer selling times, and North County showed the most pronounced price reset, even as March activity improved.

205	603	$560K
TOTAL Q1 SALES vs. 216 in Q1 2025	ACTIVE LISTINGS +11.0% YoY	HIGHEST MEDIAN South County

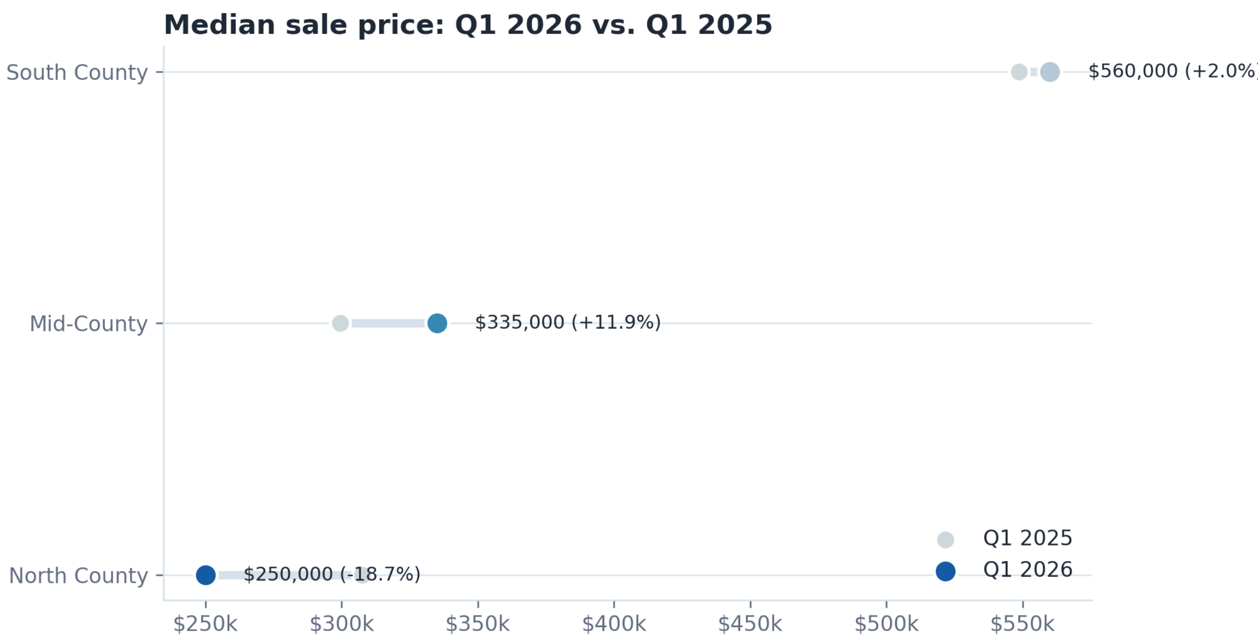
County	Sold	Median Sale	Active	Absorption	Avg DOM
North County	55 (-8.3%)	$250,000 (-18.7%)	132 (+14.8%)	2.46	104
Mid-County	83 (-3.5%)	$335,000 (+11.9%)	196 (+8.3%)	2.22	97
South County	67 (-4.3%)	$560,000 (+2.0%)	275 (+11.3%)	5.03	160

Source: Q1 2026 Flexmls residential market summaries for North County, Mid-County, and South County.

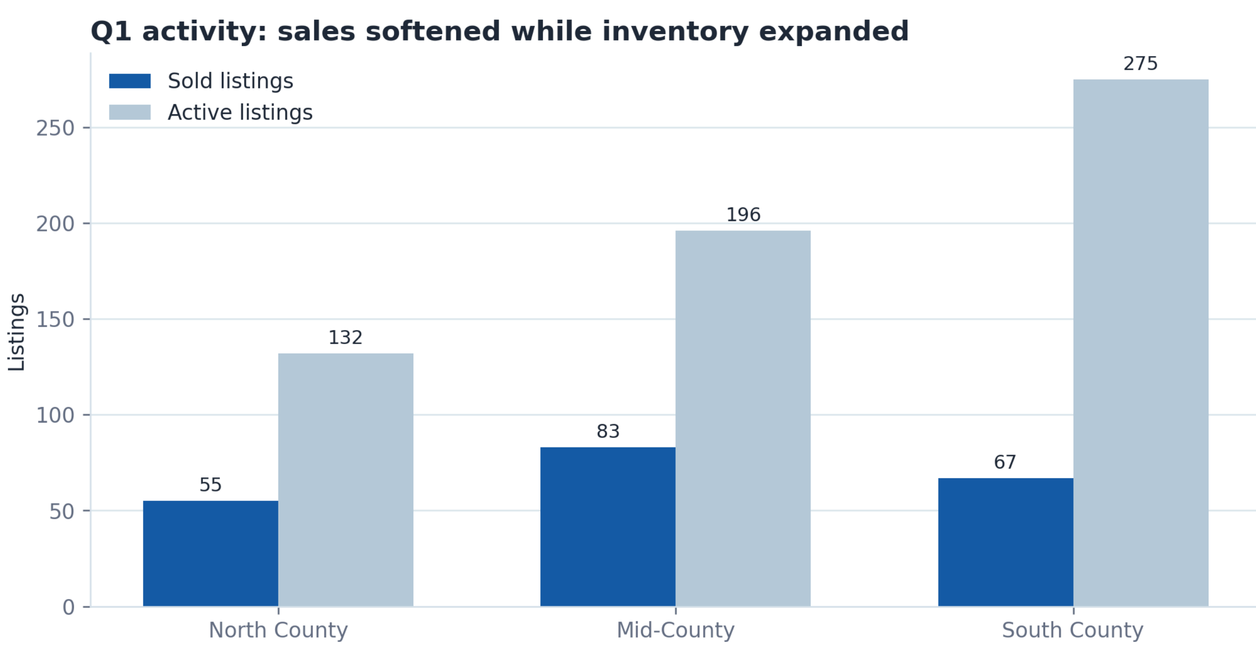
SALES & PRICING

A softer transaction count, not a single price story.

Q1 sales volume was down in every county, but pricing split sharply by geography. Mid-County showed the strongest median price growth, South County remained stable at a higher price point, and North County softened as the sales mix shifted lower.



Median sale price: Q1 2026 vs. Q1 2025.



Q1 activity: sold listings softened while active listings expanded.

Source: Analysis is based on Q1 2026 Flexmls residential market summaries.

INVENTORY & MARKET CONDITIONS

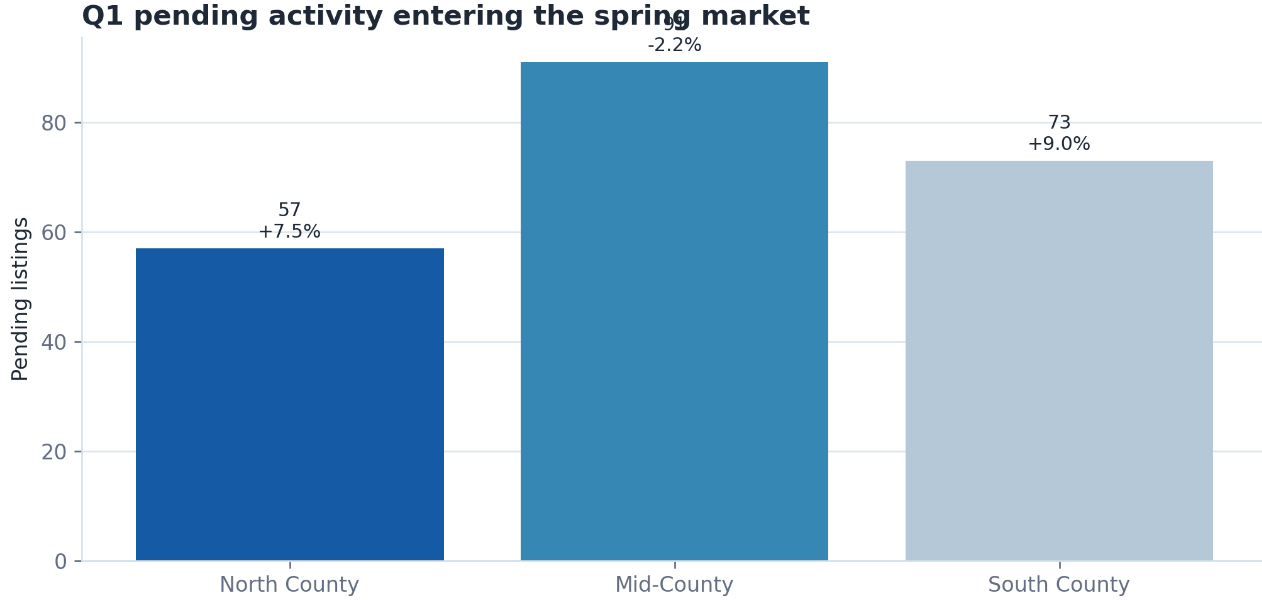
More supply, more selectivity.

Inventory expanded across all three counties, giving buyers more room than last year. North and Mid-County still remain relatively tight, while South County is closest to balance, with the highest months-of-supply figure and longer average days on market.

Where the market feels tight - and where buyers have more room

Absorption rate and average days on market by county.

Q1 pending activity entering the spring market



Q1 pending activity entering the spring market.

Source: Analysis is based on Q1 2026 Flexmls residential market summaries.

BIRCH
PROPERTIES

COUNTY SPOTLIGHTS

Three markets, three distinct signals.

North County

A lower-priced sales mix, but March activity improved.

North County recorded 55 Q1 sales, down 8.3% year over year. Median sale price declined to $250,000, reflecting a softer price mix; however, March closings rose to 25 and pending activity reached 24, keeping the spring pipeline active.

Metric	Q1 2026	Q1 2025	Change
Sold listings	55	60	-8.3%
Median sale price	$250,000	$307,500	-18.7%
Active listings	132	115	+14.8%
Pending listings	57	53	+7.5%
Average DOM	104	112	-7.1%

Mid-County

The cleanest pricing strength in the region.

Mid-County was the strongest pricing story, with median sale price rising 11.9% to $335,000. Sales were only slightly lower year over year, and the market remains relatively tight, though average days on market rose to 97.

Metric	Q1 2026	Q1 2025	Change
Sold listings	83	86	-3.5%
Median sale price	$335,000	$299,450	+11.9%
Active listings	196	181	+8.3%
Pending listings	91	93	-2.2%
Average DOM	97	81	+19.8%

South County

High-value, more balanced, and slower to move.

South County remained the highest-value market, with a Q1 median sale price of $560,000 and average sale price of $890,896. More inventory and a 5.03-month absorption rate gave buyers the most choice, while pending listings rose 9.0% year over year.

Metric	Q1 2026	Q1 2025	Change
Sold listings	67	70	-4.3%
Median sale price	$560,000	$548,750	+2.0%
Active listings	275	247	+11.3%
Pending listings	73	67	+9.0%
Average DOM	160	127	+26.0%

Source: Analysis is based on Q1 2026 Flexmls residential market summaries.

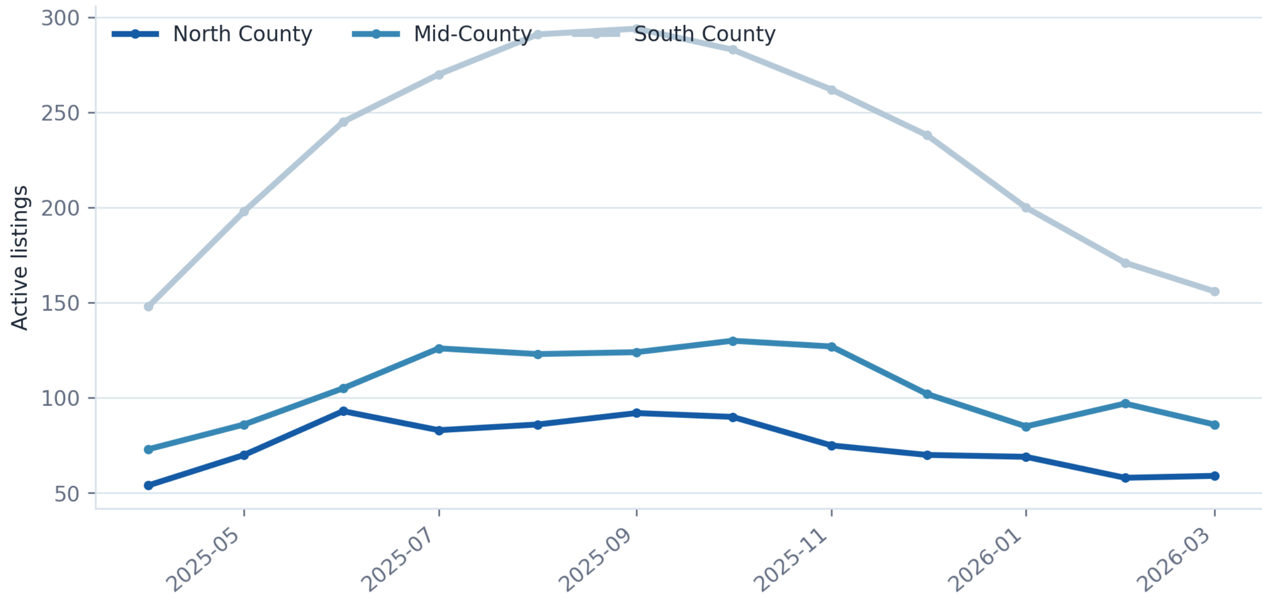
BIRCH PROPERTIES

MONTHLY TRENDS

The seasonal turn into spring is visible, but uneven.

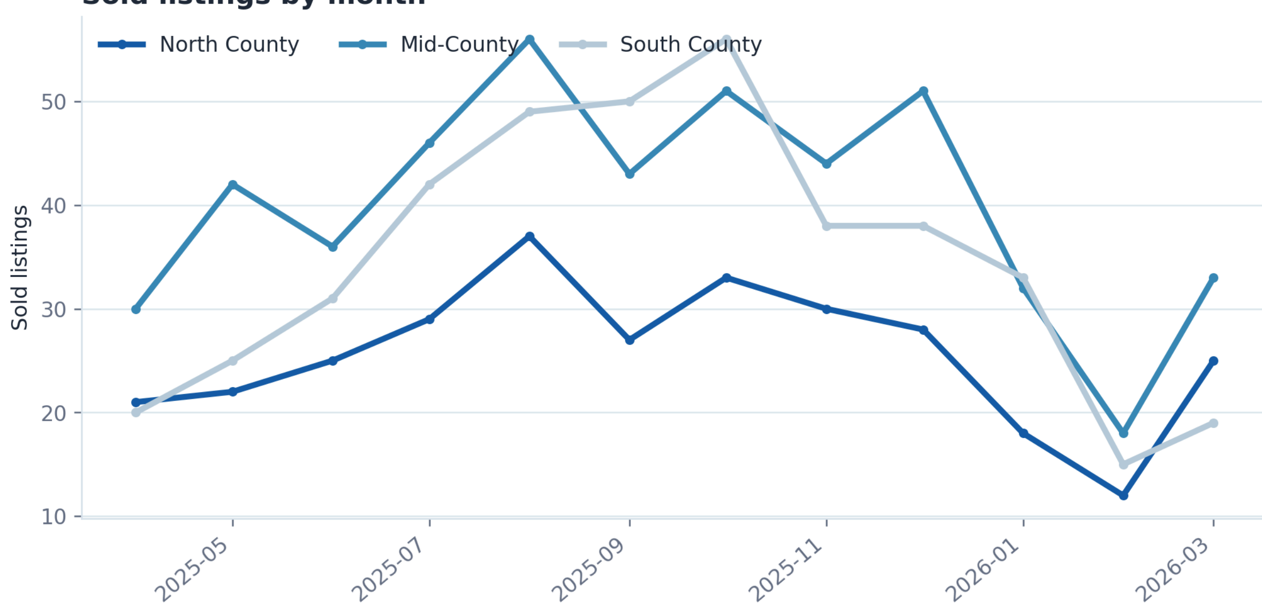
Monthly activity followed the expected seasonal pattern: inventory built through 2025, then pulled back during the winter months before beginning to reset in March. The most important spring question is not simply whether new inventory arrives, but where and at what price points.

Active listings by month



Active listings by month, April 2025 through March 2026.

Sold listings by month



Sold listings by month, April 2025 through March 2026.

Source: Analysis is based on Q1 2026 Flexmls residential market summaries.

BIRCH PROPERTIES

SPRING OUTLOOK

What buyers and sellers should expect now.

For Buyers	For Sellers
More inventory means more choice, particularly in South County; however, best-in-class homes will still move quickly when priced correctly.	The market remains active, but buyers are more selective. Accurate pricing and strong presentation matter more than they did during the tightest inventory years.
Mid-County remains competitive for well-positioned properties, while North County may offer more value-sensitive opportunities.	North County sellers should be mindful of the lower-priced sales mix; Mid-County sellers may benefit from stronger middle-market demand.
Longer days on market create more room for negotiation on some listings, but not every property will offer leverage.	South County sellers can still achieve premium results, but should expect longer marketing times and a more discerning buyer pool.

Bottom line: The Berkshires market remains healthy, but more balanced. Inventory has improved, county-level performance is more differentiated, and the most successful buyers and sellers will be the ones who treat pricing, timing, and presentation as strategy - not afterthoughts.

Source: Analysis is based on Q1 2026 Flexmls residential market summaries.