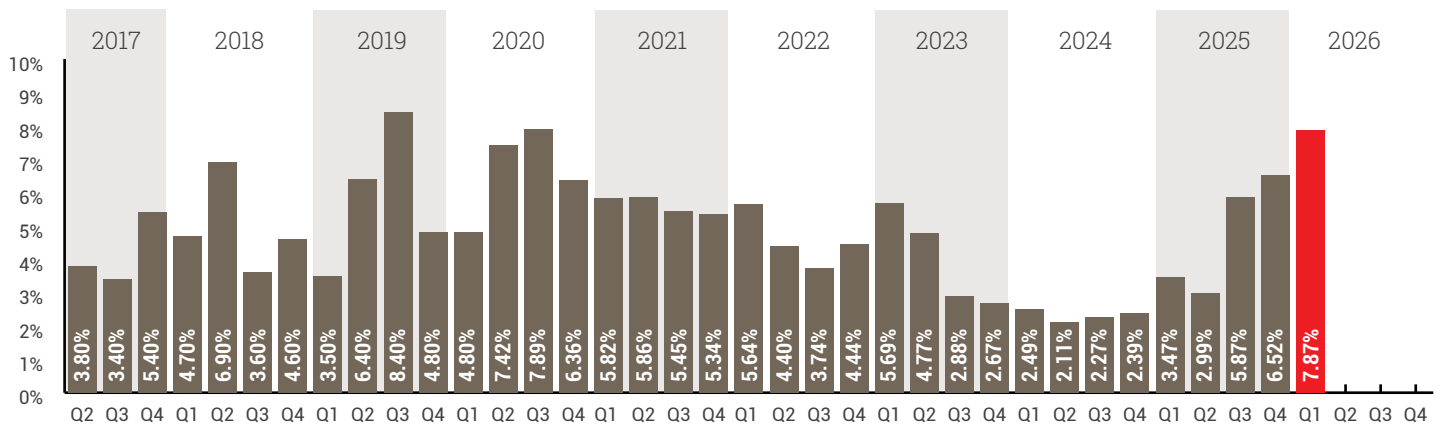




RETAIL FUNDAMENTALS
HOLD STEADY AMID
MIXED MOVES IN Q1 2026

Despite three predominant vacancies in Montclair Village, Oakland's premier retail submarkets showed resilience through the close of Q1 2026

OVERALL VACANCY



Overall vacancy in the Oakland submarket increased 1.35% in the 1st quarter of 2026.

VACANCY EDGES HIGHER BUT FUNDAMENTALS ARE STRONG

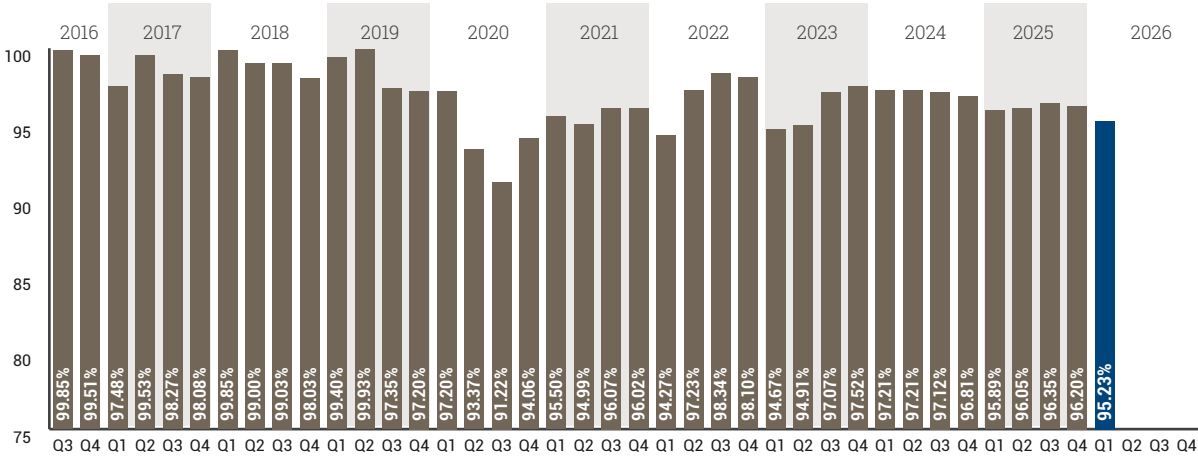
With the exception of three predominant vacancies in Montclair Village, Oakland's primary retail submarkets demonstrated resilience through the first quarter of 2026. While overall fundamentals dipped slightly due to these specific departures, occupancy levels across the Rockridge, Grand Lake, and Montclair Village corridors remained steady. This stability was largely driven by consistent leasing momentum and a wave of new retail activity that helped sustain demand for space throughout the core East Bay.

Rockridge's College Avenue continues to be a retail focal point, highlighted by the ongoing construction at the former Takara Sushi space for an upcoming restaurant and the anticipated arrival of Bodyrok at 5901 College Avenue. Beyond the traditional corridors, retail vibrancy is spreading into West Oakland and surrounding neighborhoods. Clayroom is set to open its second Oakland location at 1733 Peralta St this May, while the grocery sector is showing strength with two new Grocery Outlet locations in the work, including a strategic backfill of the former Walgreens site at 51st and Telegraph.

The broader Oakland food and beverage scene is currently experiencing a "superbloom" of activity this spring, further anchoring the region's retail fundamentals. Notable openings include Fungi Foods offering Delicious, plant-based mushroom snacks at 434 25th St, and the debut of FOB West at the new Prescott Market. These diverse developments across the dining, fitness, and essential retail sectors have provided a necessary counterweight to recent vacancies, ensuring Oakland's submarkets remain thriving as it moves further into 2026.

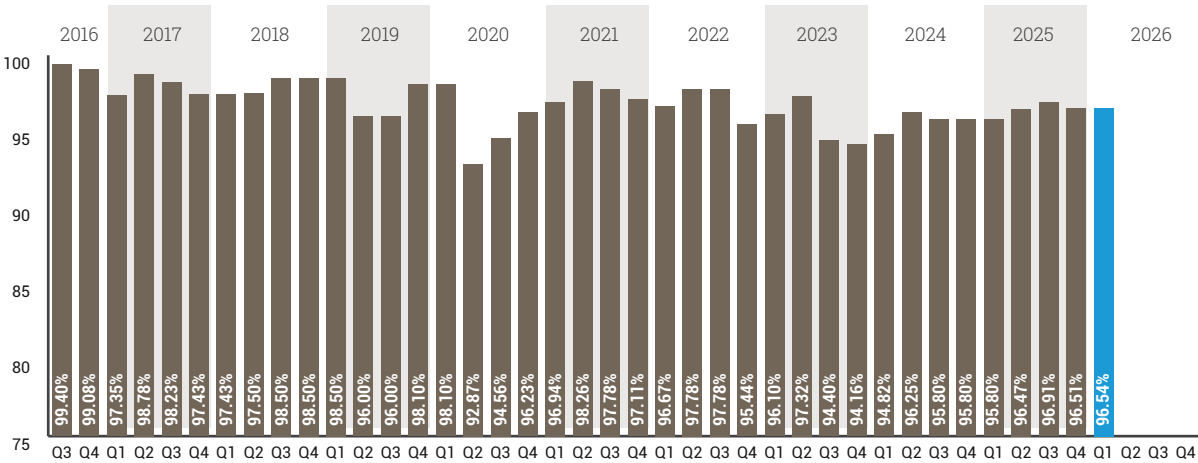
SUBMARKET OCCUPANCY LEVELS

Grand Lake



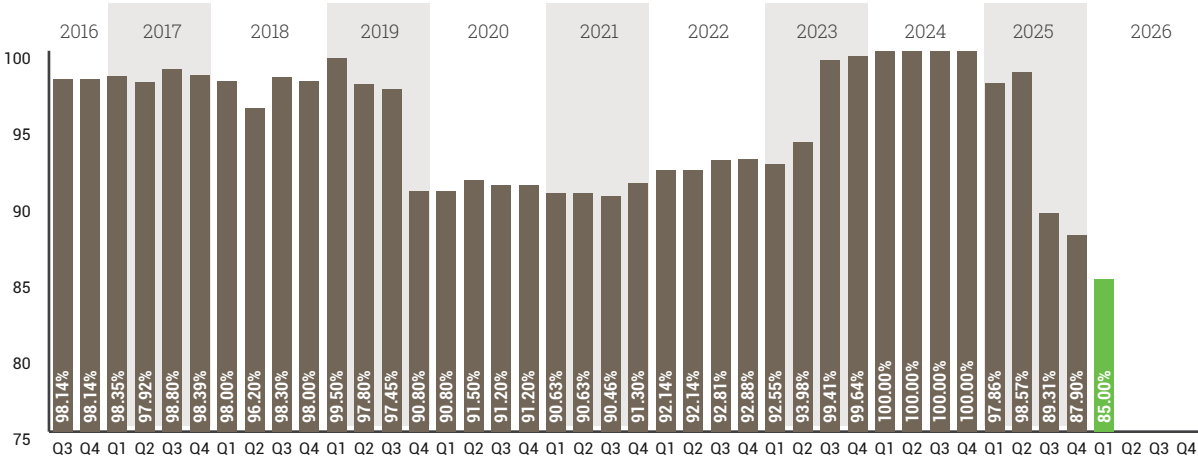
**GRAND LAKE
OCCUPANCY**
95.23%
(DOWN 0.97%)

Rockridge



**ROCKRIDGE
OCCUPANCY**
96.54%
(DOWN 0.03%)

Montclair Village

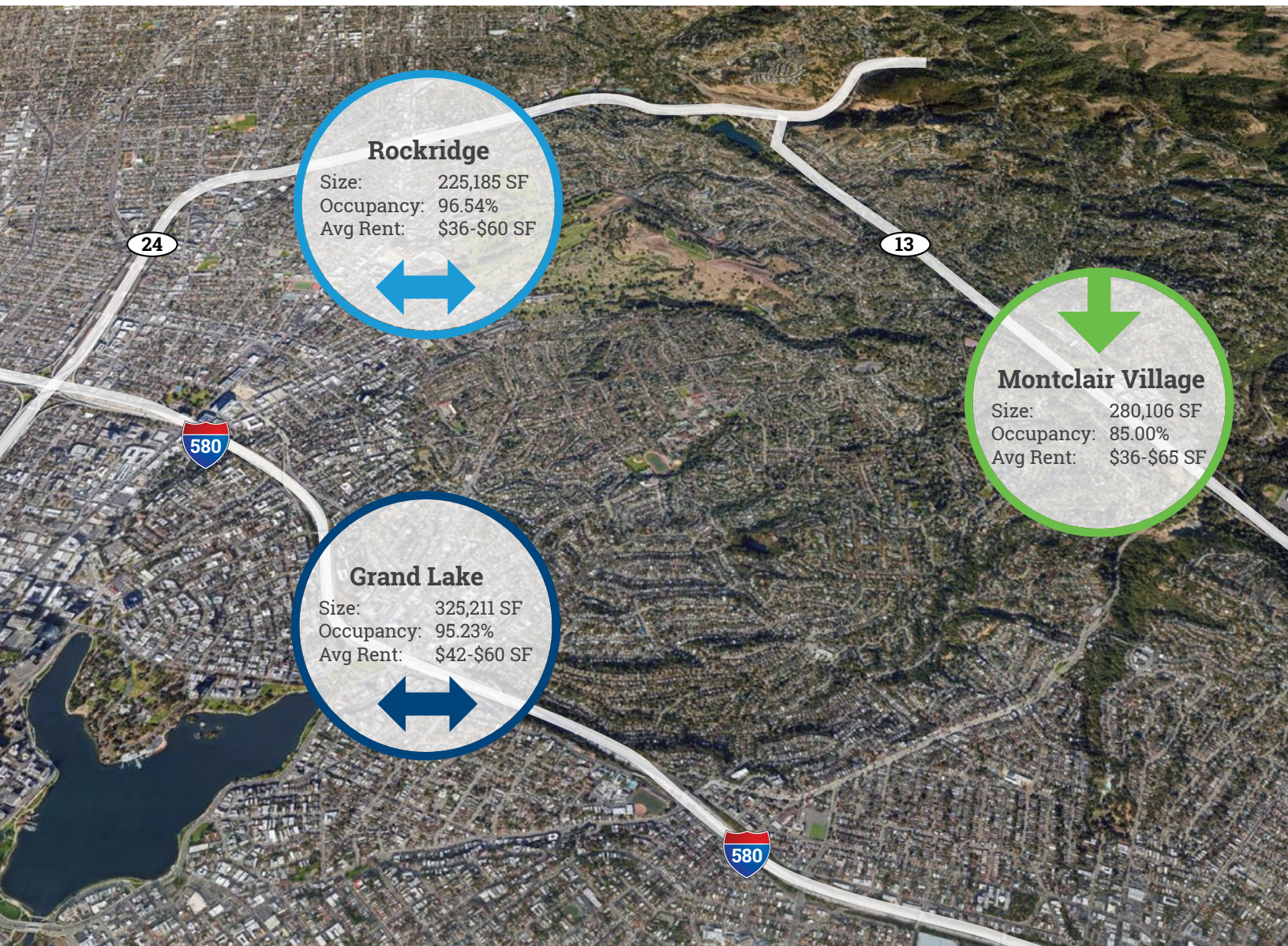
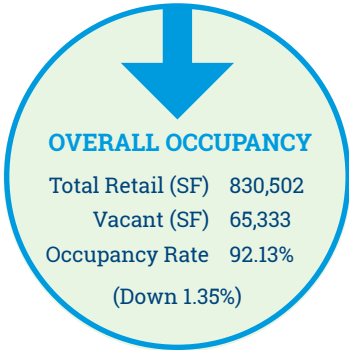


**MONTCLAIR
VILLAGE
OCCUPANCY**
85.00%
(DOWN 2.90%)



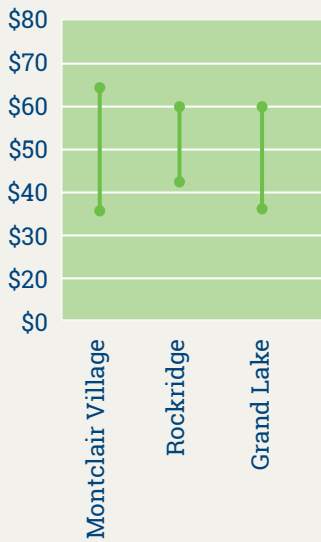
OAKLAND'S RETAIL DISTRICTS

Oakland's premier retail districts, Rockridge, Grand Lake and Montclair Village, have a comparable inventory of retail space, 830,000 SF, to Walnut Creek's regional mall area. Yet these vibrant streets outperform Walnut Creek – with occupancy levels that are unsurpassed by any other Bay Area submarket. A powerful mixture of residential density, incomes and growing job creation have pushed Oakland's retail inventory to record occupancy and rent levels. High barriers to entry have constrained the development of new retail inventory, helping to maintain both occupancy and rent levels.



NEIGHBORHOOD SUMMARY

Rental Rates*



*Rental rates are quoted

- Oakland closed the quarter with an overall occupancy of 92.13% (down 1.35%)
- Grand Lake occupancy closed at 95.23% (down 0.97%)
- Rockridge occupancy closed at 96.54% (down 0.03%)
- Montclair Village occupancy closed at 85.00% (down 2.90%)
- Clayroom will be opening a second location in Oakland at 1733 Peralta St in West Oakland in May
- Body Rok, a hybrid Pilates studio, will open on College Ave in Rockridge in Q2 of this year
- Twin Flame, coming soon to Piedmont Ave, promises a variety of Korean and Japanese dishes and an over-the-top experience from the moment you walk in



Oakland's distinctive retail landscape is home to some of the Bay Area's elite restaurants, shopping and entertainment venues. Urban in nature, but low-rise in scale, Oakland's premier retail streets and shopping districts are the perfect cross between San Francisco's urban towers and the sprawling, suburban centers of the East Bay. Oakland has a dynamic retail market built on a mixture of both national retailers and local artisanal businesses. Composed of multiple unique shopping & dining districts, Oakland offers a blend of existing centers and new developments that provides consumers with a broad shopping experience.



FEATURED LISTING

5026 TELEGRAPH

Temescal • Oakland • CA

1,800 SF

Located in Temescal –
Oakland's best sub market!

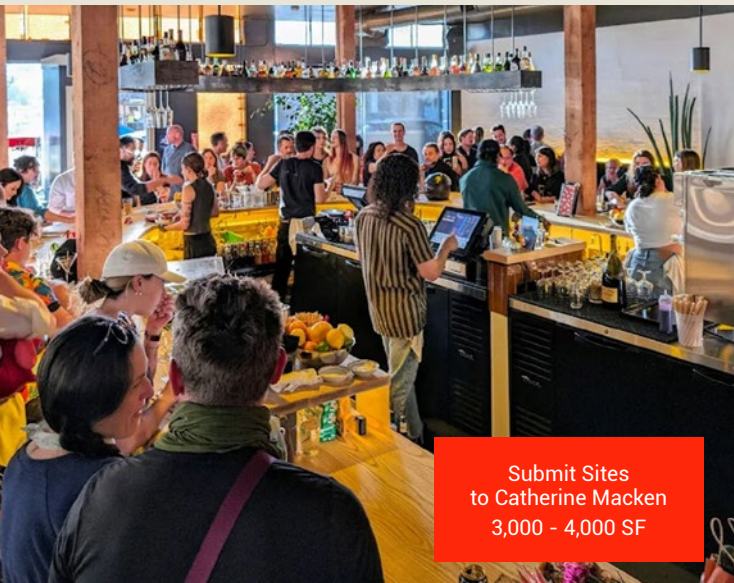
The ±1,800 SF subject space is located in a highly sought after area on walk friendly Telegraph Ave surrounded by charming retail shops, services and fabulous eateries.

CONTACT CATHERINE MACKEN

VIEW BROCHURE



FEATURED RETAILER



Submit Sites
to Catherine Macken
3,000 - 4,000 SF



TALLBOY

SEEKING LOCATIONS FOR A
NEW CONCEPT!

Purchase or Lease Requirement

LOCATION

Emeryville, Rockridge, Piedmont Ave,
Dimond, Laurel, West Oakland

SIZE

3,000-4,000 SF
with outdoor/garden dining

**SECOND GEN FOOD/BEVERAGE
SPACE A PLUS**

[VIEW ALL LISTINGS](#)

[VIEW ALL RETAILERS](#)

ABOUT THE FIRM

John Cumbelich & Associates is a San Francisco Bay Area firm that provides commercial real estate services to Fortune 500 retailers and select owners and developers of retail commercial properties. The firm's expertise is in developing store networks for retailers seeking to penetrate the Northern California marketplace, and the representation of premier power center and lifestyle developments.

1470 Maria Lane, Suite 420 Walnut Creek, CA 94596
TEL 925.935.5400 www.cumbelich.com

John Cumbelich
Chief Executive Officer
john@cumbelich.com
CA DRE ID 01006249

Tim Seiler
Partner
tim@cumbelich.com
CA DRE ID 0107626

Joe Kuvetakis
Partner
joe@cumbelich.com
CA DRE ID 01854159

Catherine Macken
Associate Broker
catherine@cumbelich.com
CA DRE ID 02136323

Joe Cumbelich
Associate Broker
joe.cumbelich@cumbelich.com
CA DRE ID 02278794

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