



**scansan**

# **Analytical Report**

Sale Market Analysis (October, 2025)

Greater London

Intelligence Team

## Overview

The following report represents information on sale properties in various postcode districts in Greater London.

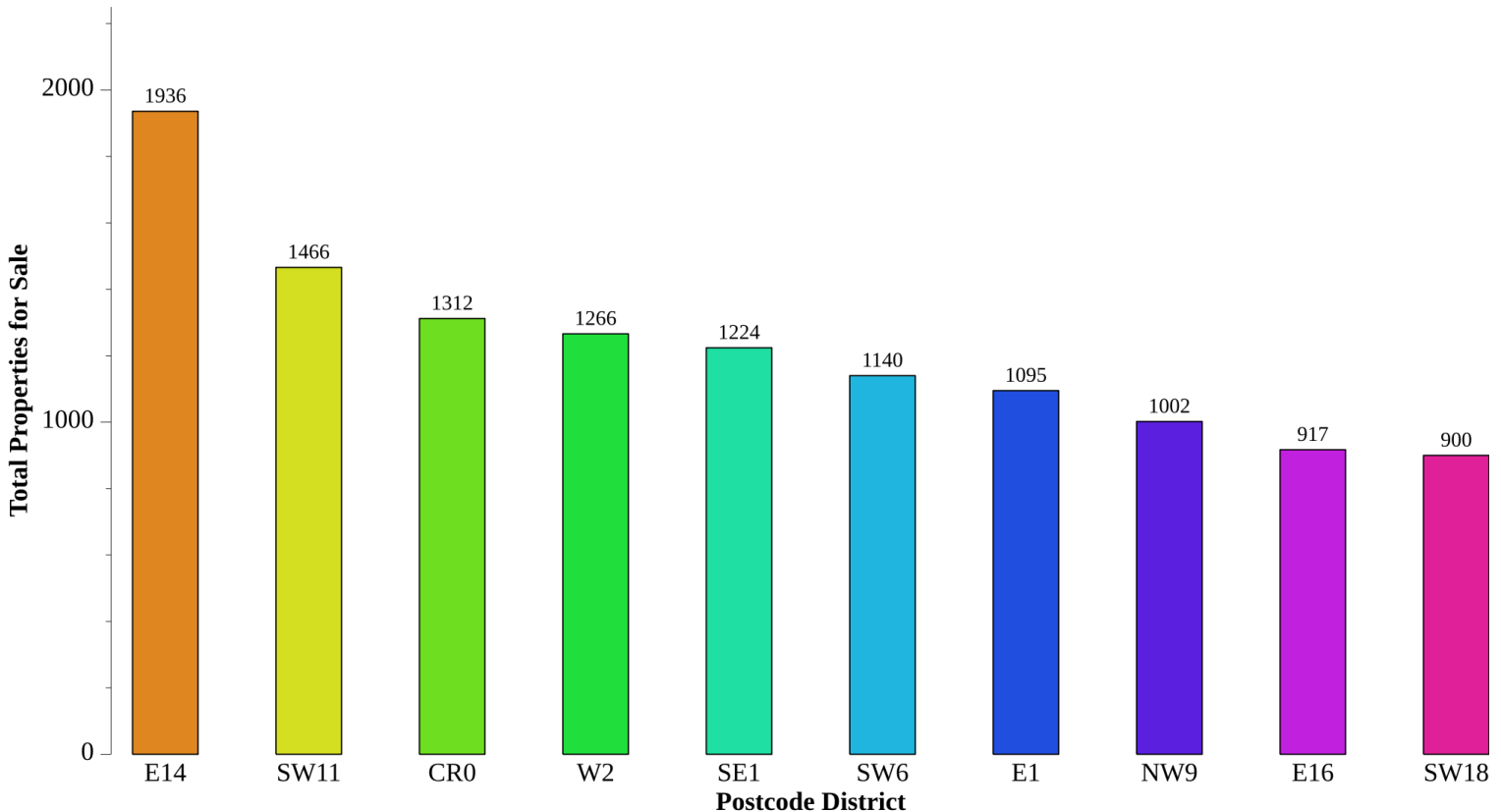
## Key Metrics

- Total properties for sale : This value indicates the total number of properties available on the market for sale in a month.
- Average transactions per month : The average number of properties sold in a calendar month
- Months of inventory : The amount of time it takes for the said "total properties for sale" to be sold out.
- Turnover percentage per month : The proportion of properties that change hands each month.
- Days on the market : The average number of days it takes for a property to be sold out.
- Market Rating : This value provides a qualitative assessment of the market type based on certain criteria including demand, sale price etc.
- Sellers Market : Market with high demand and less supply.
- Balanced Market : Market with approximately equal demand and supply.
- Buyers Market : Market with high supply and less demand.

## High-level Analysis

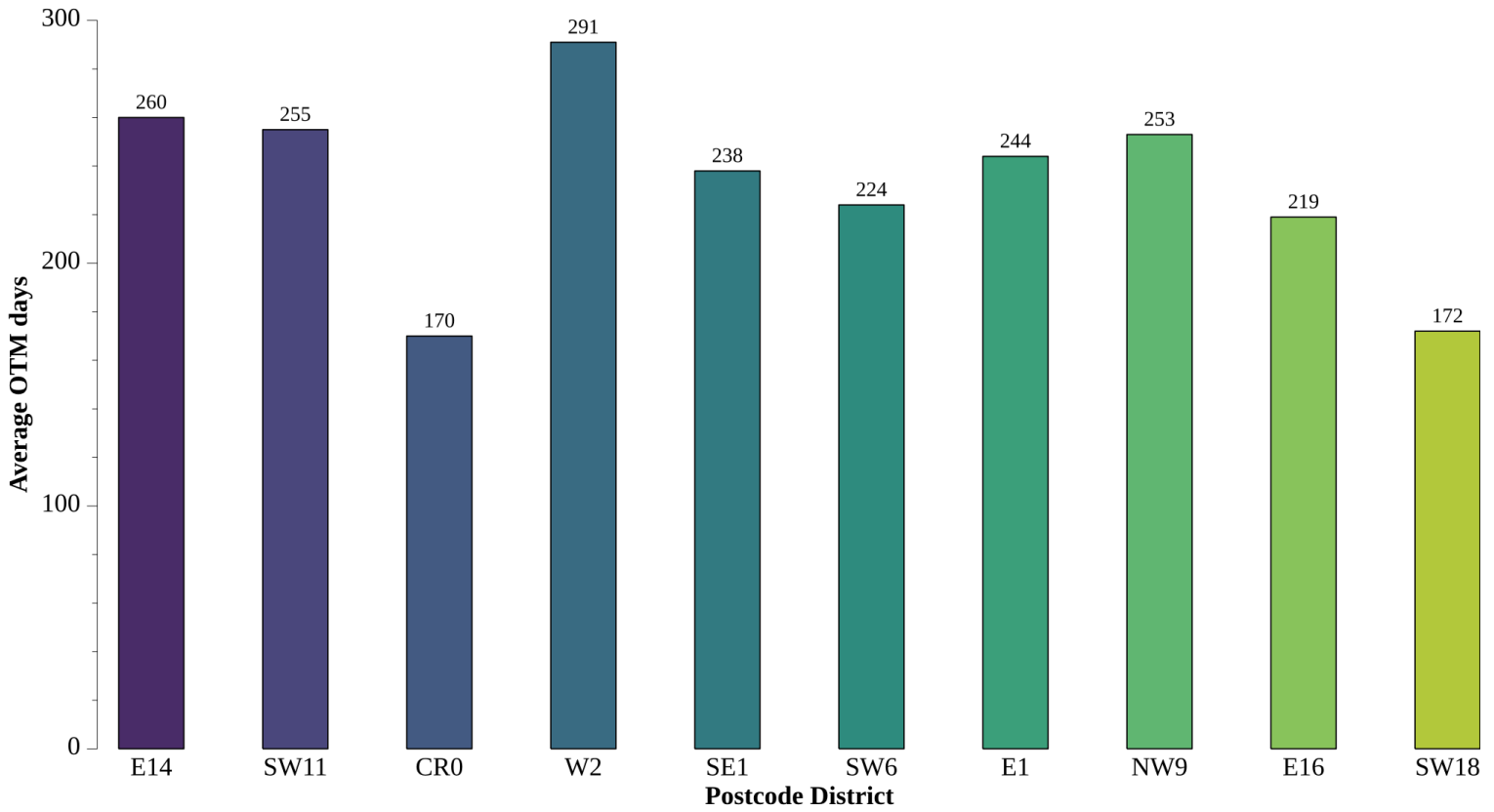
The following analysis gives an overview of how the sale market appears to be in some of the postcode districts for October 2025.

Total Properties for Sale in Top 10 Districts - October 2025

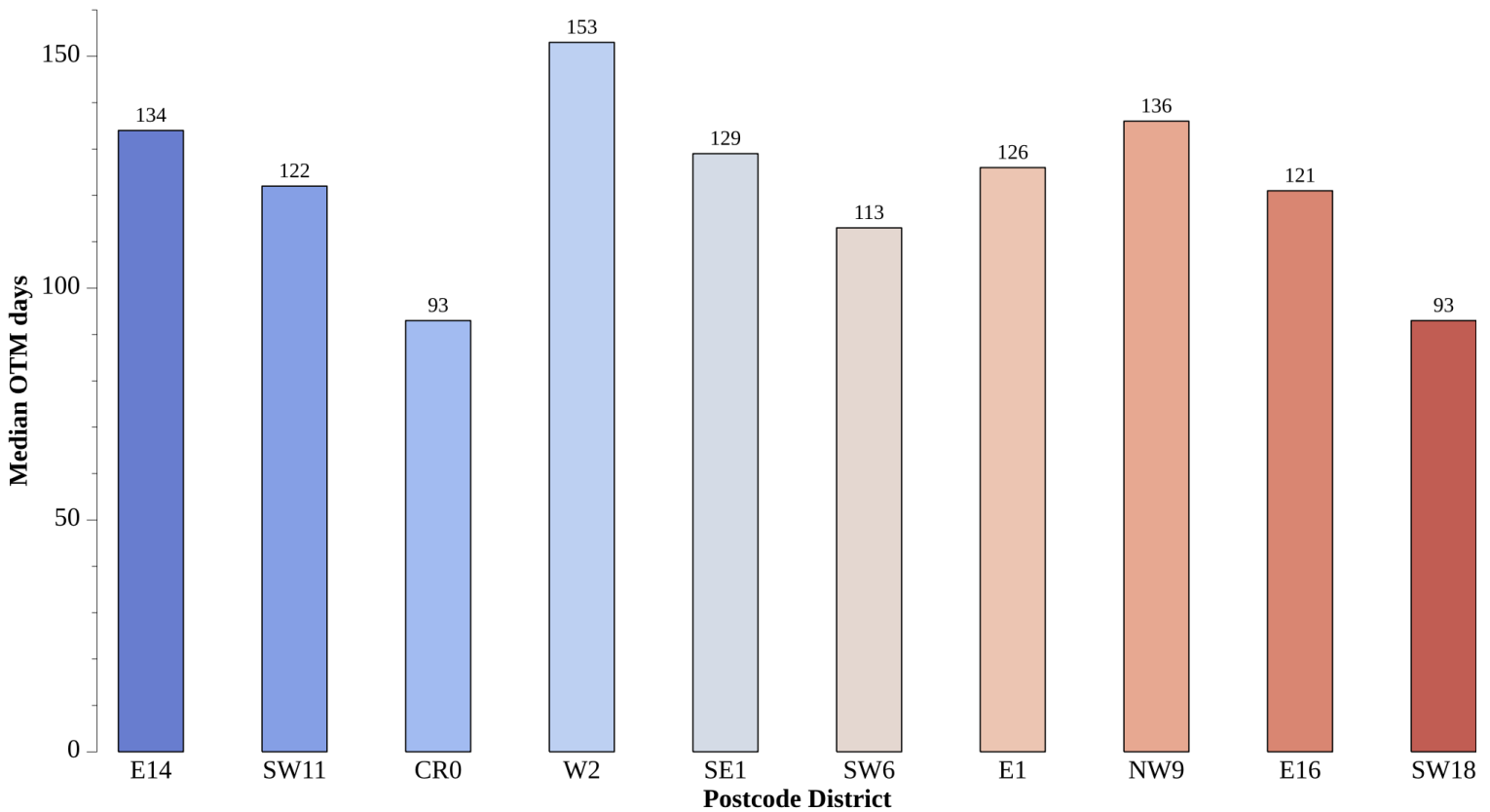


The data shows a market where buyers have quiet leverage, not because prices are falling, but because sellers in many high end districts are still pricing above what buyers feel is reasonable, seen in the big gaps between mean and median values. This creates a subtle standoff where listings sit longer and buyers wait for realism. In mid priced districts like E14, NW9, and E16, tighter price bands signal healthier alignment, so deals move faster. Balanced areas like CR0 and SW18 act as the “true pulse” of the market.

Average OTM days in Top 10 Districts - October 2025



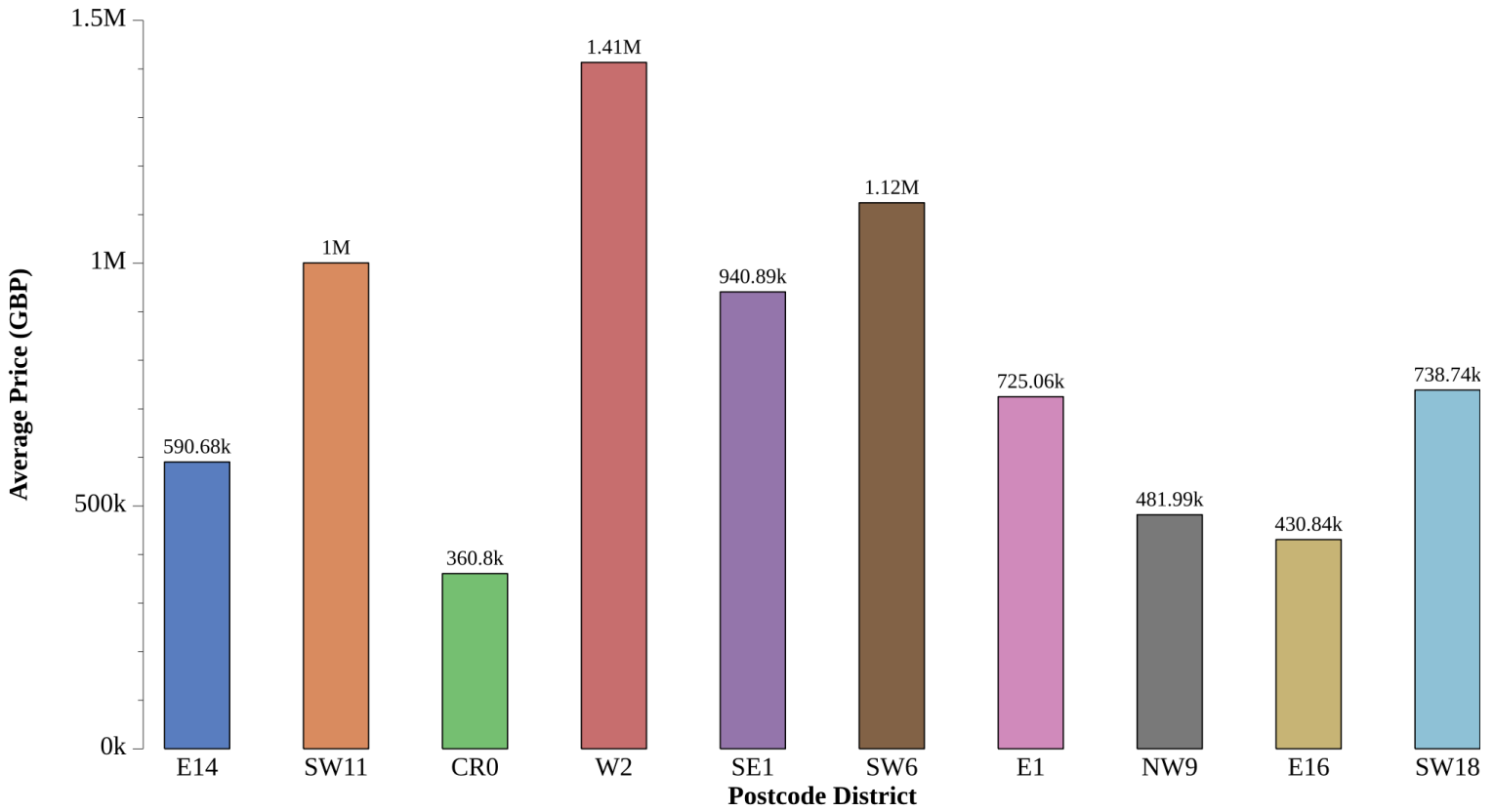
Median OTM days in Top 10 Districts - October 2025



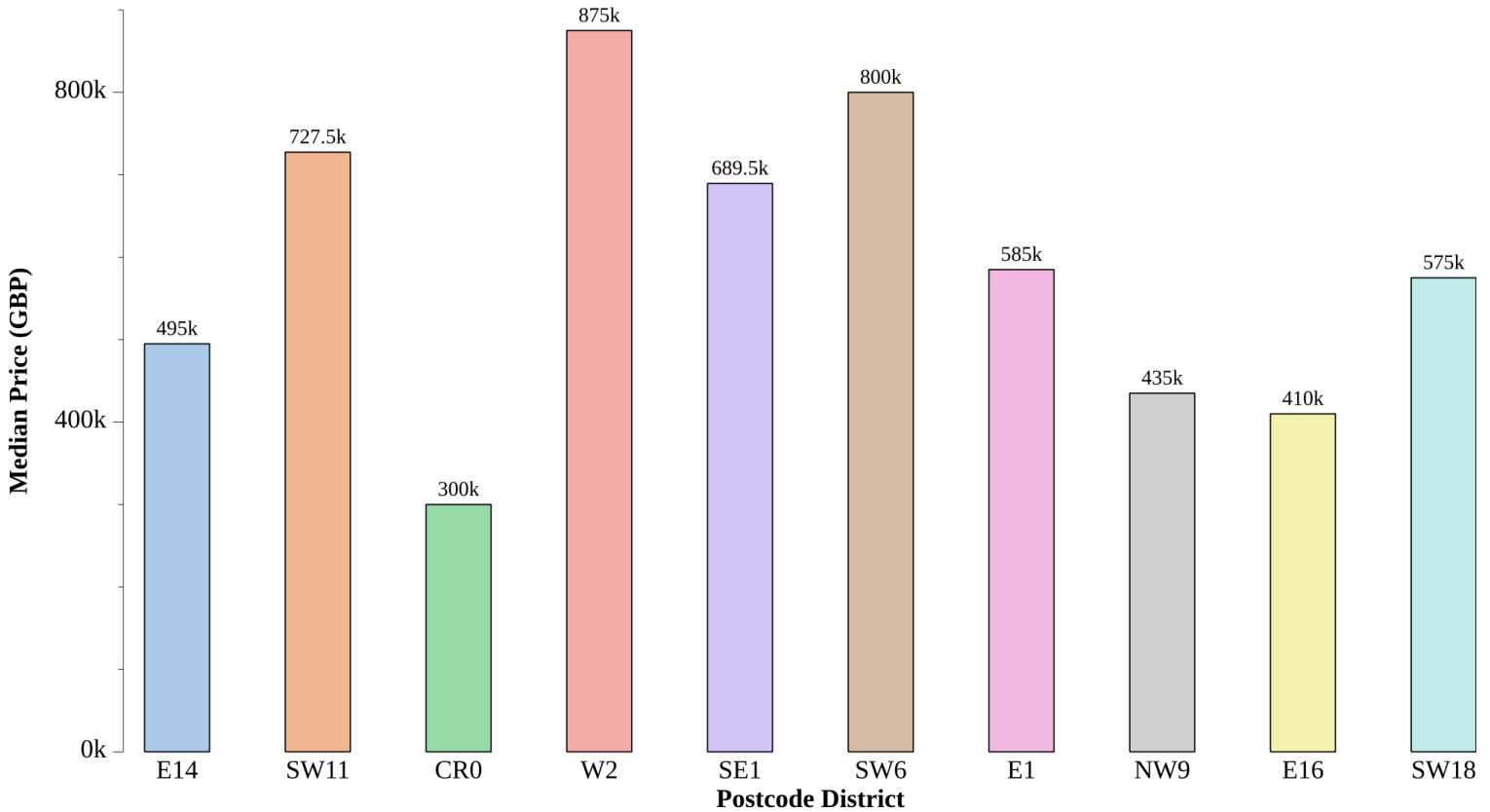
Looking beyond surface metrics, the data suggests that areas like W2 and E14 are facing chronic oversupply, with extremely high months of inventory and mean OTM exceeding 250 days, signaling that even premium listings struggle to find buyers and price sensitivity is high. In contrast, CR0 and SW18, despite smaller absolute inventories, show faster median OTM and higher turnover, highlighting pockets of the market where listings are realistic, well-priced, and liquidity is strong. The wide gap between mean and median OTM in W2 and NW9 hints at a subset of properties that linger far longer than the market norm, likely ultra-luxury or overvalued units, creating hidden drag on the overall market. For investors or buyers, this points to opportunities in balanced districts where pricing aligns with demand, while oversupplied zones may require aggressive pricing or differentiated offerings to accelerate sales.

Looking at mean versus median prices reveals hidden tensions in the market: districts with high gaps, like W2, SW6, and SW11, suggest a concentration of ultra premium listings inflating averages, signaling that many buyers may feel priced out despite a few high-value deals. Mid tier areas such as E14, E1, and NW9 show smaller gaps, indicating more accessible pricing and quicker movement, where average trends better reflect typical buyer budgets. Balanced zones like CR0 and SW18 act as early indicators for emerging pricing shifts, showing where sellers are realistically matching buyer expectations and where opportunities for strategic investments are most likely to succeed.

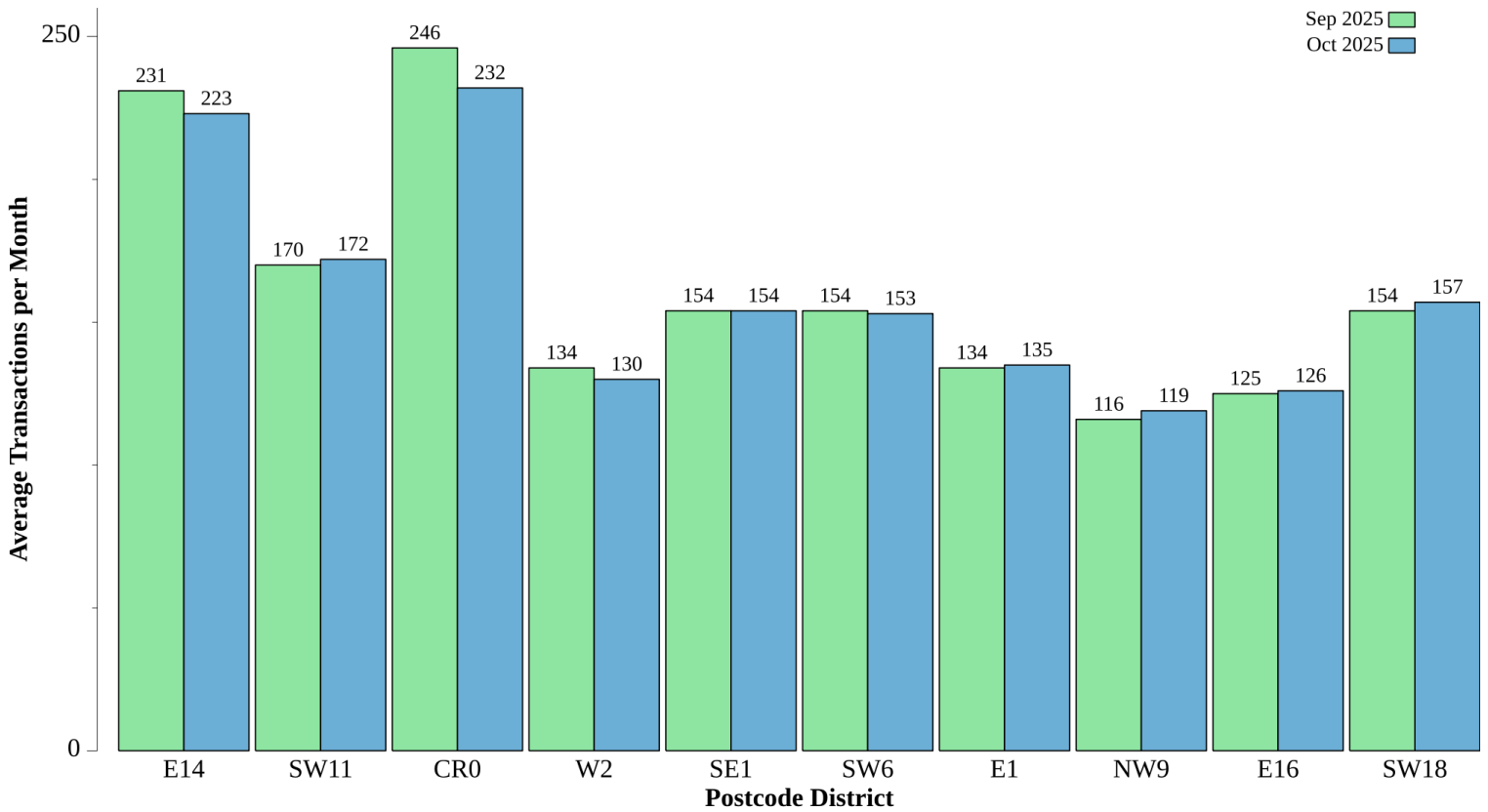
Average Price in Top 10 Districts - October 2025



Median Price in Top 10 Districts - October 2025



## Comparison of Average Sale Transaction per Month in Top 10 Districts - September 2025 vs October 2025



Between September and October 2025, the market shows subtle shifts rather than dramatic changes: oversupplied areas like E14 see a slight inventory dip but slower transactions, suggesting buyer caution despite marginally fewer listings. SW11's small inventory rise paired with stable turnover hints at sustained demand even as new listings appear. Meanwhile, districts like CR0 and SW18 are slowly shedding inventory with steady transactions, signaling that realistically priced properties are gaining traction. Overall, the market evolution points to a cautious, stability-seeking environment where supply adjustments are gradual, and liquidity is concentrated in areas with balanced pricing rather than purely high-demand districts.

## **Insights – October 2025**

### Market Trends and Dynamics

High-end districts like W2, SW6, and SW11 show a stark gap between mean and median prices, suggesting a skewed market where a few ultra-expensive properties inflate the average, while most buyers deal with more moderate prices. Longer mean OTM in these areas implies that premium listings take time to find the right buyer, reflecting selective demand rather than weak interest. In contrast, balanced markets like CR0 and SW18 exhibit shorter OTM and narrower price gaps, hinting at more predictable and steady sales cycles, appealing to first-time or mid-tier buyers.

### Market Fluctuations and Variability

Districts with high listings but slower median turnover (W2, E14) signal latent volatility: although the supply is large, buyer decisions are paced, possibly due to affordability concerns or negotiation windows. Areas with smaller listings but faster OTM (CR0, SW18) experience low variability; the market absorbs new properties quickly, making these zones less prone to sudden price shocks but potentially more competitive for buyers.

## Market Possibilities and Opportunities

Skewed, slow-moving markets suggest opportunities for developers or investors to introduce mid range properties priced below the top tier outliers; this could accelerate sales while stabilizing turnover. Balanced areas with quick sales and moderate inventory highlight potential for strategic investments in both renovation and targeted marketing, as buyers respond quickly to well-priced listings. Observing mean vs. median OTM patterns can also guide timing: listing properties when demand is steady but inventory low may reduce days on market, maximizing liquidity and returns.