



Analytical Report

Sale Market Analysis (September, 2025)

Greater London

Intelligence Team

Overview

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

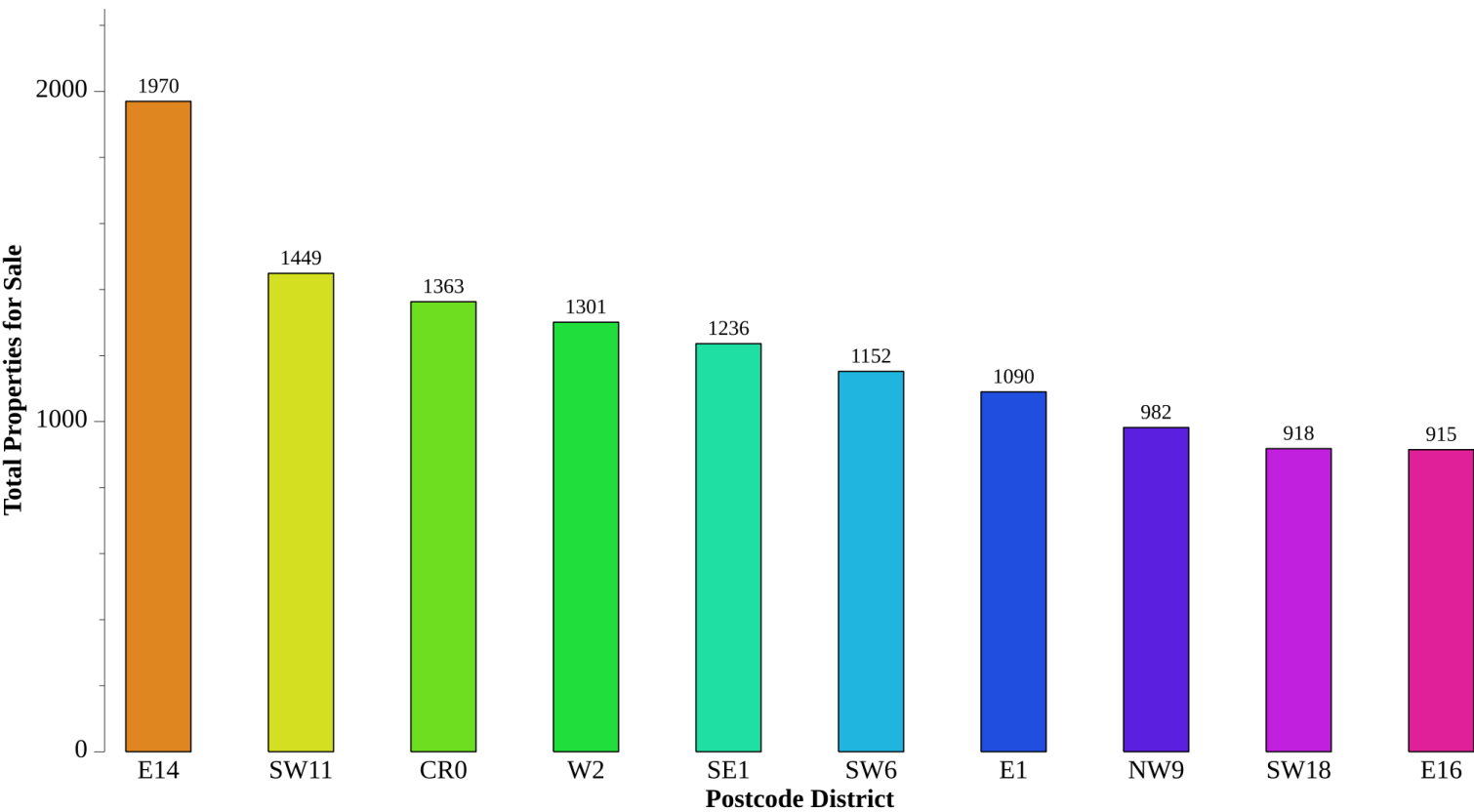
Key Metrics

- 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

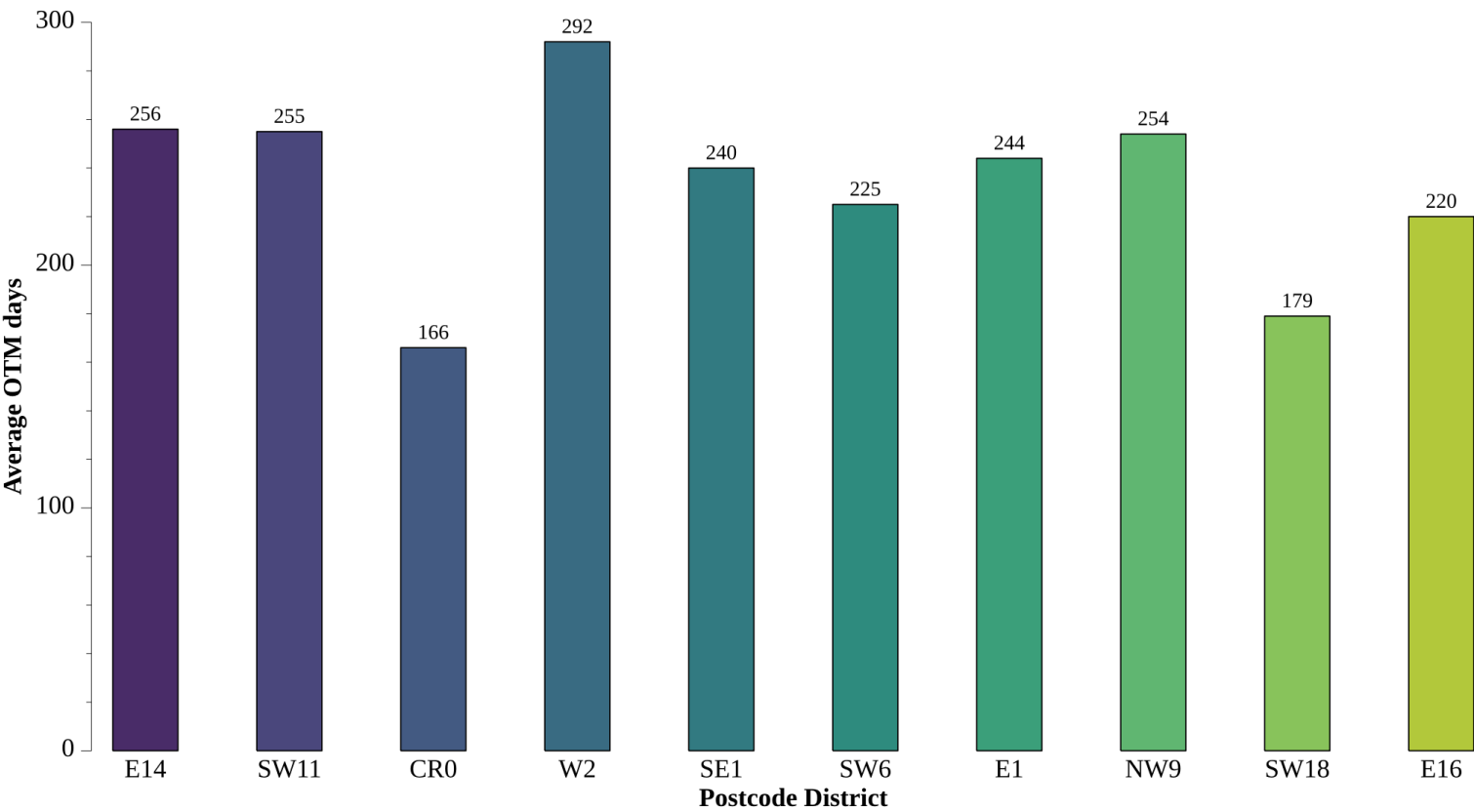
The following analysis gives an overview of how the sale market appears to be in some of the postcode districts for September 2025.

Total Properties for Sale in Top 10 Districts - September 2025

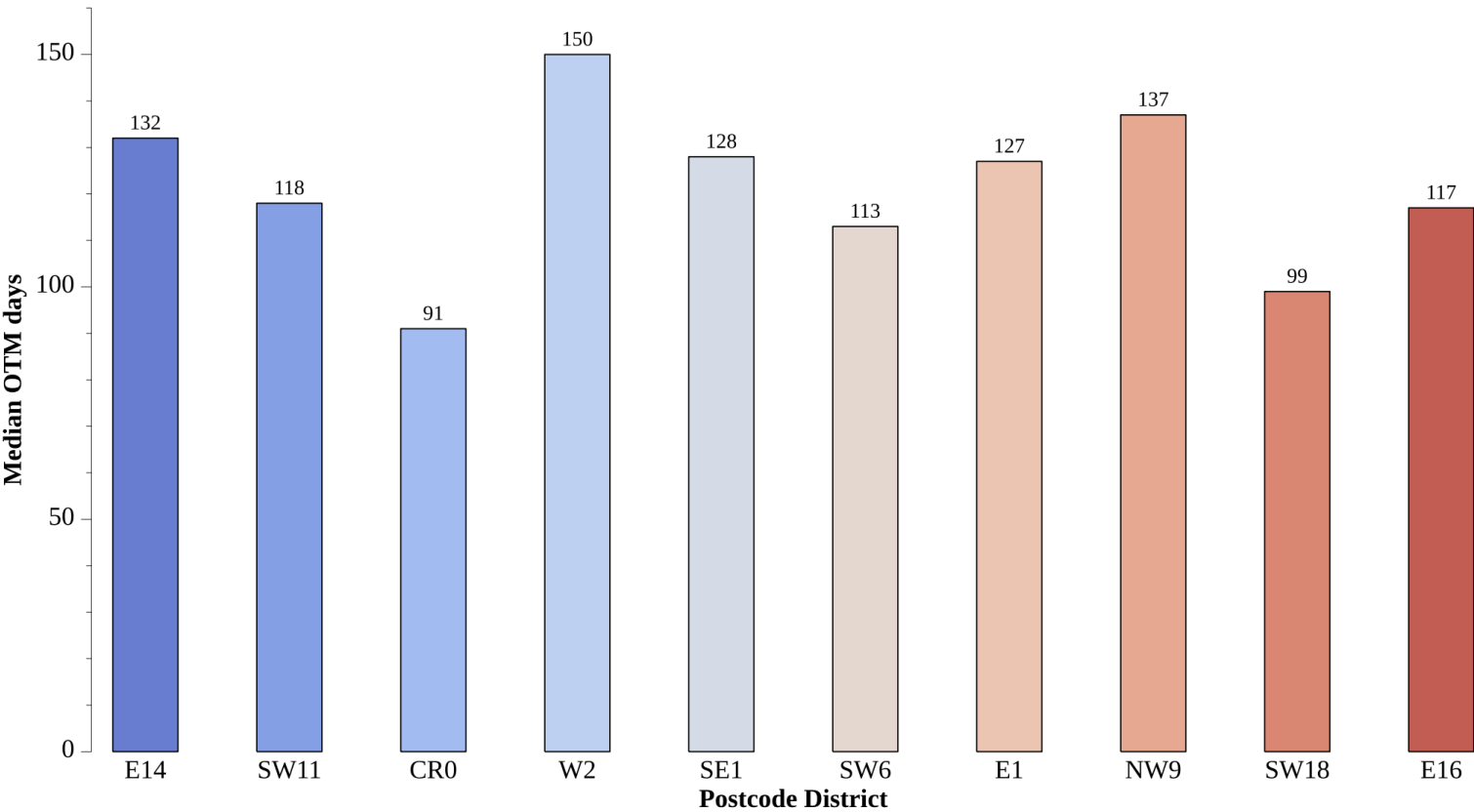


The property for sale market shows a strong Buyer’s tilt in most districts, with high inventories and wide gaps between mean and median prices, suggesting opportunities to negotiate, especially in premium areas like W2 and SW6 where averages are inflated by high end listings. Balanced markets like CR0 and SW18 indicate steadier demand and more predictable pricing. Overall, while buyers hold the upper hand, selective premium pockets remain resilient, offering a mix of tactical bargains and strategic investment potential.

Average OTM days in Top 10 Districts - September 2025



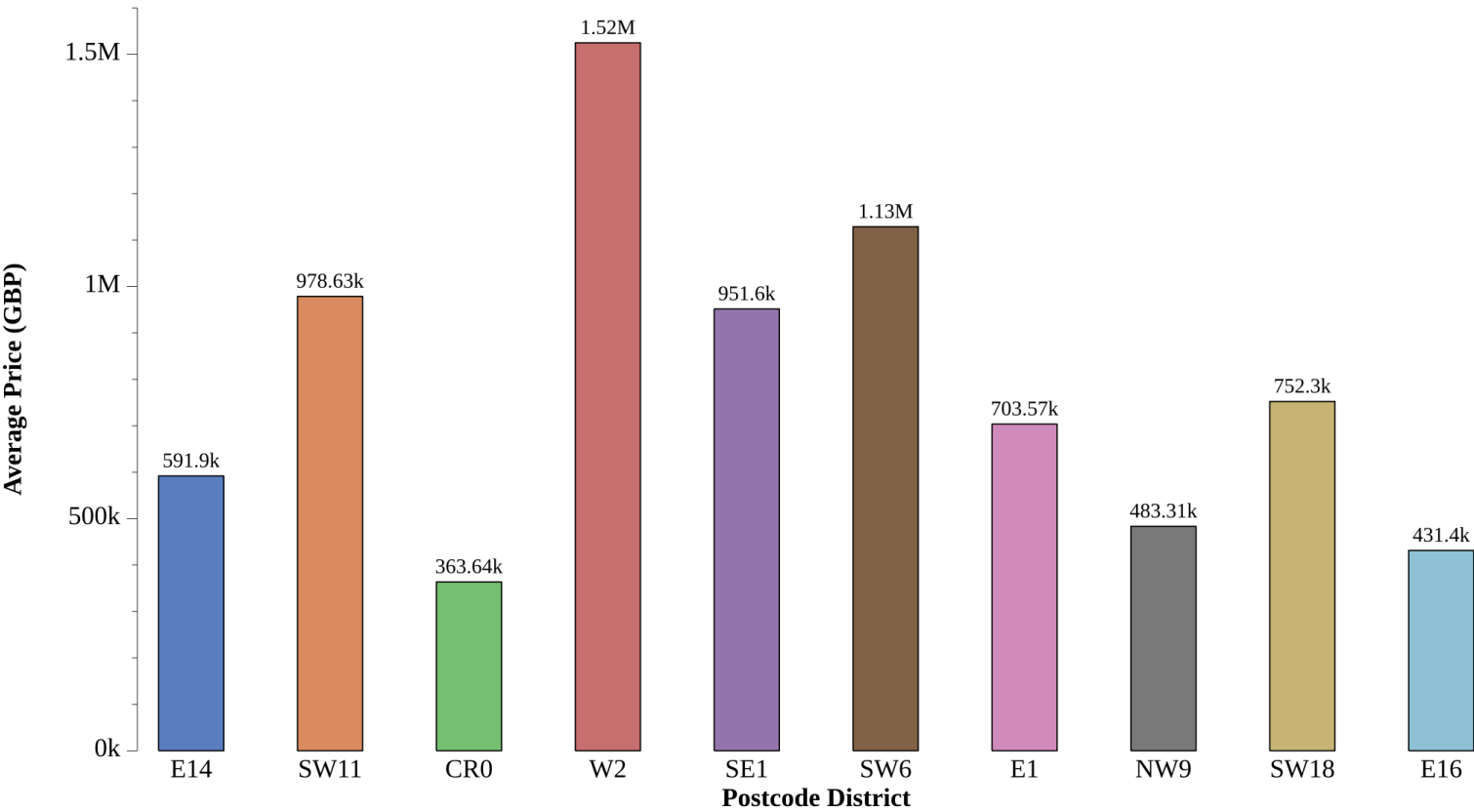
Median OTM days in Top 10 Districts - September 2025



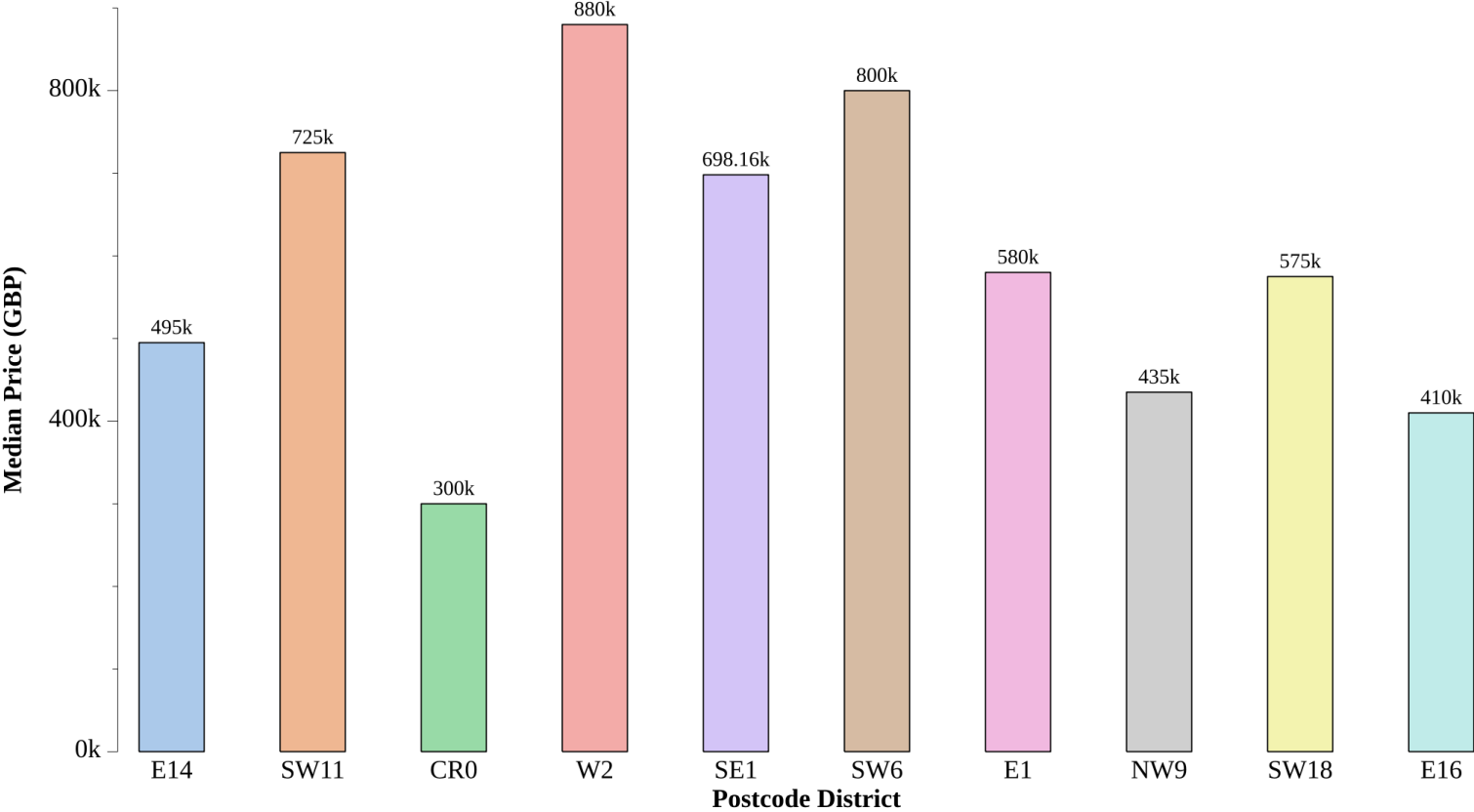
Looking beyond prices, the sales market reveals a landscape of stretched inventories and sluggish movement, particularly in high value areas like W2, SW11, and SE1, where long on market days and low turnover suggest a caution heavy buyer mindset despite abundant listings. Balanced districts like CR0 and SW18 show healthier circulation, indicating pockets where transactions happen more predictably and buyers are willing to engage faster. Across the board, the combination of high months of inventory and modest transaction rates points to a market ripe for strategic negotiation, where patience could yield value, and areas with slightly lower inventory and shorter selling times could offer faster liquidity for sellers. The data hints at a subtle layering of opportunity: premium markets are slow but potentially rewarding, while mid tier zones offer steadier, more actionable activity.

Examining the interplay of prices with market activity, it becomes clear that higher priced areas like W2, SW6, and SW11, despite commanding premium mean and median prices, exhibit elongated on market periods and low turnover, which keeps the market firmly buyer's, indicating that elevated prices temper urgency and negotiation power leans toward buyers. In contrast, mid-range zones like CR0 and SW18, with moderate pricing, see faster transactions and shorter on-market durations, leading to more balanced market ratings. Even within buyer-favored districts, subtle price differences affect movement, hinting at selective buyer engagement and cautious pricing strategies.

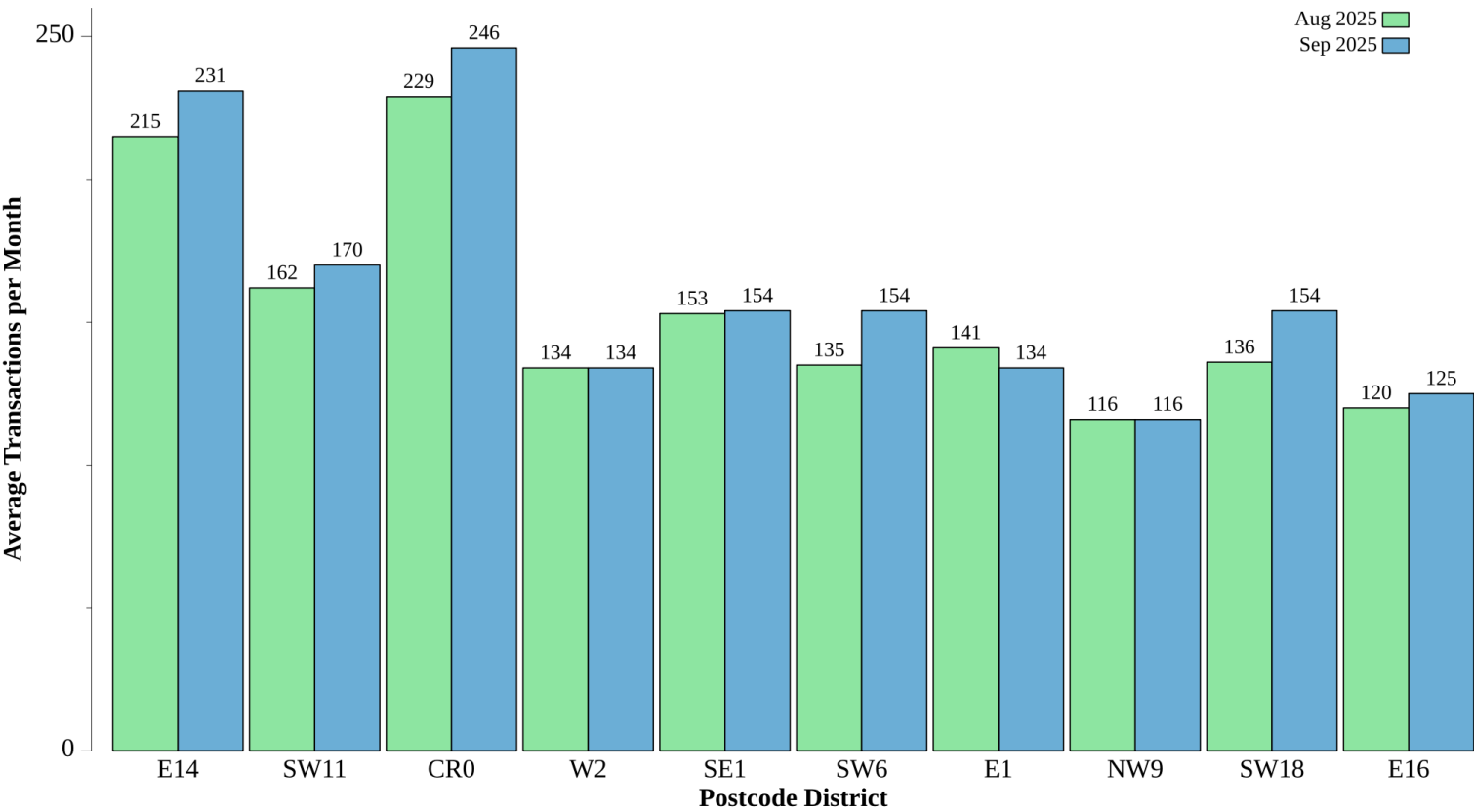
Average Price in Top 10 Districts - September 2025



Median Price in Top 10 Districts - September 2025



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



Looking at the month on month shift, September shows a subtle yet telling pulse in the market: most areas see a gentle rise in listings and transactions, suggesting renewed buyer interest after the summer lull, yet high value hubs like W2 remain steady, hinting at saturation or cautious buyer behavior. Turnover percentages tick up slightly in districts like E14, SW11, and CR0, reflecting that moderate priced markets are moving faster, while luxury or highly sought after zones maintain their pace, revealing a layered market where demand warmth varies by affordability. Overall, the market feels like it’s nudging forward, more opportunities in mid tier areas, while top tier neighborhoods are stable, signaling selective engagement and careful buyer strategies rather than broad momentum.

Insights – September 2025

Market Trends and Dynamics

The market is clearly weighted towards buyers, particularly in high value districts like W2, SW6, and SE1, where elevated prices coincide with longer times on the market and higher months of inventory. Mid range areas such as CR0 and SW18 show a more balanced flow, indicating healthy demand relative to supply. Overall, the data suggests a market where affordability strongly drives activity, and high priced areas face slower absorption despite strong listing numbers.

Market Fluctuations and Variability

There's a noticeable divergence between districts in how quickly properties move. Expensive zones (W2, SW6) see slower turnover and higher mean days on market, highlighting cautious buyer behavior, whereas mid-tier markets (CR0, SW18) demonstrate faster sales and lower median OTM days, showing more fluidity. Inventory levels amplify this contrast, high value areas have stretched inventory, while balanced zones are leaner, revealing subtle imbalances across the market spectrum.

Market Possibilities and Opportunities

The disparity between turnover in high and mid tier districts hints at opportunities for strategic buyers and investors: mid range markets offer quicker returns and more predictable sales, while high end

markets may allow negotiation leverage due to prolonged listing durations. Additionally, high months of inventory in buyer favored districts could indicate potential for value driven investments or price-sensitive promotions to stimulate movement, suggesting that understanding price thresholds is key to capitalizing on latent market potential.