Analytical Report

Sale Market Analysis (January, 2026)

Greater London

Intelligence Team

Sale Market Analysis

Greater London - Jan 2026

Overview

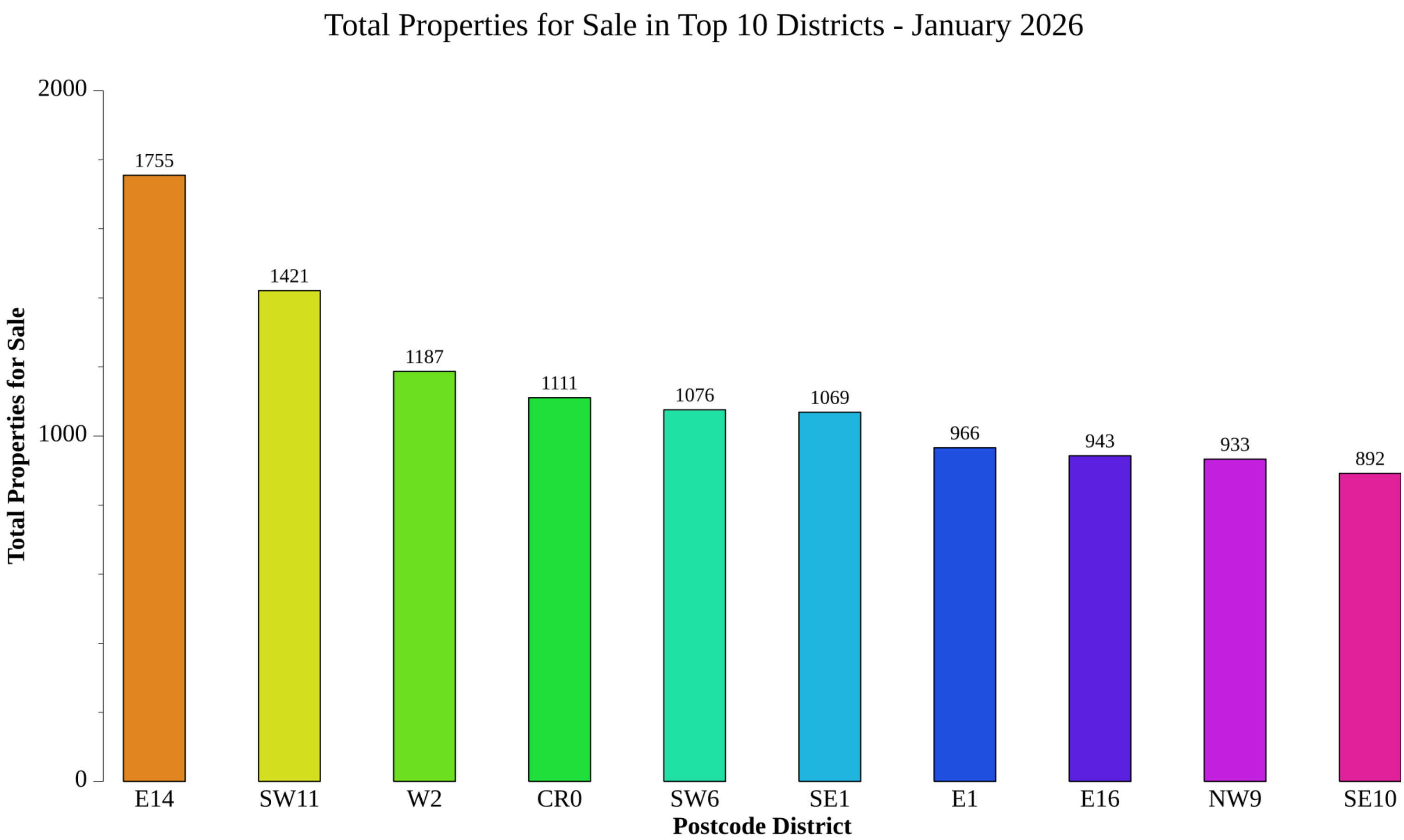
The following report represents information on sale properties in various postcode districts in Greater London.

Key Metrics

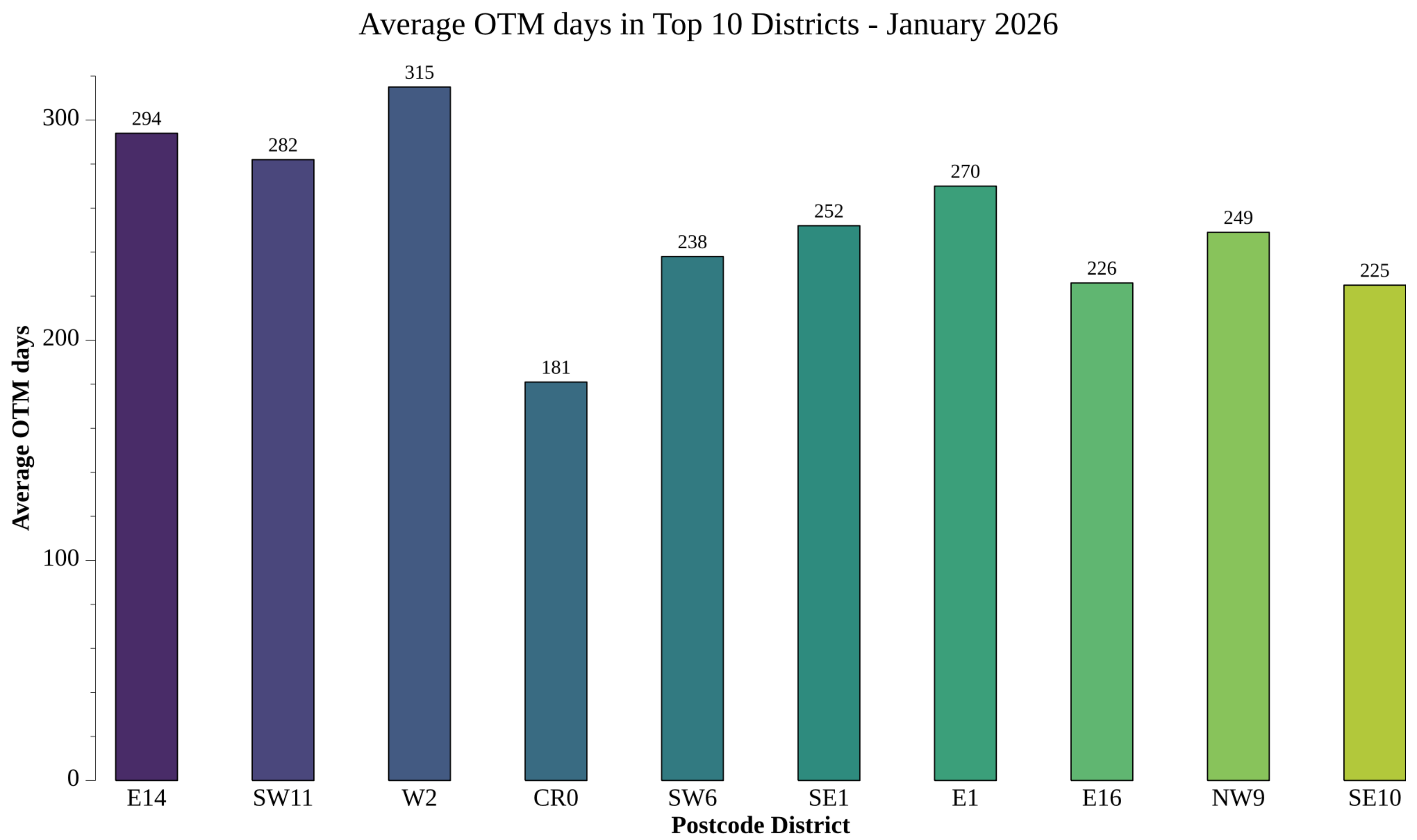
- *Total properties for sale* : This value indicates the total number of properties available on the market for sale in a month.
- *Average transactions per month* : The average number of properties sold in a calendar month
- *Months of inventory* : The amount of time it takes for the said "total properties 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.

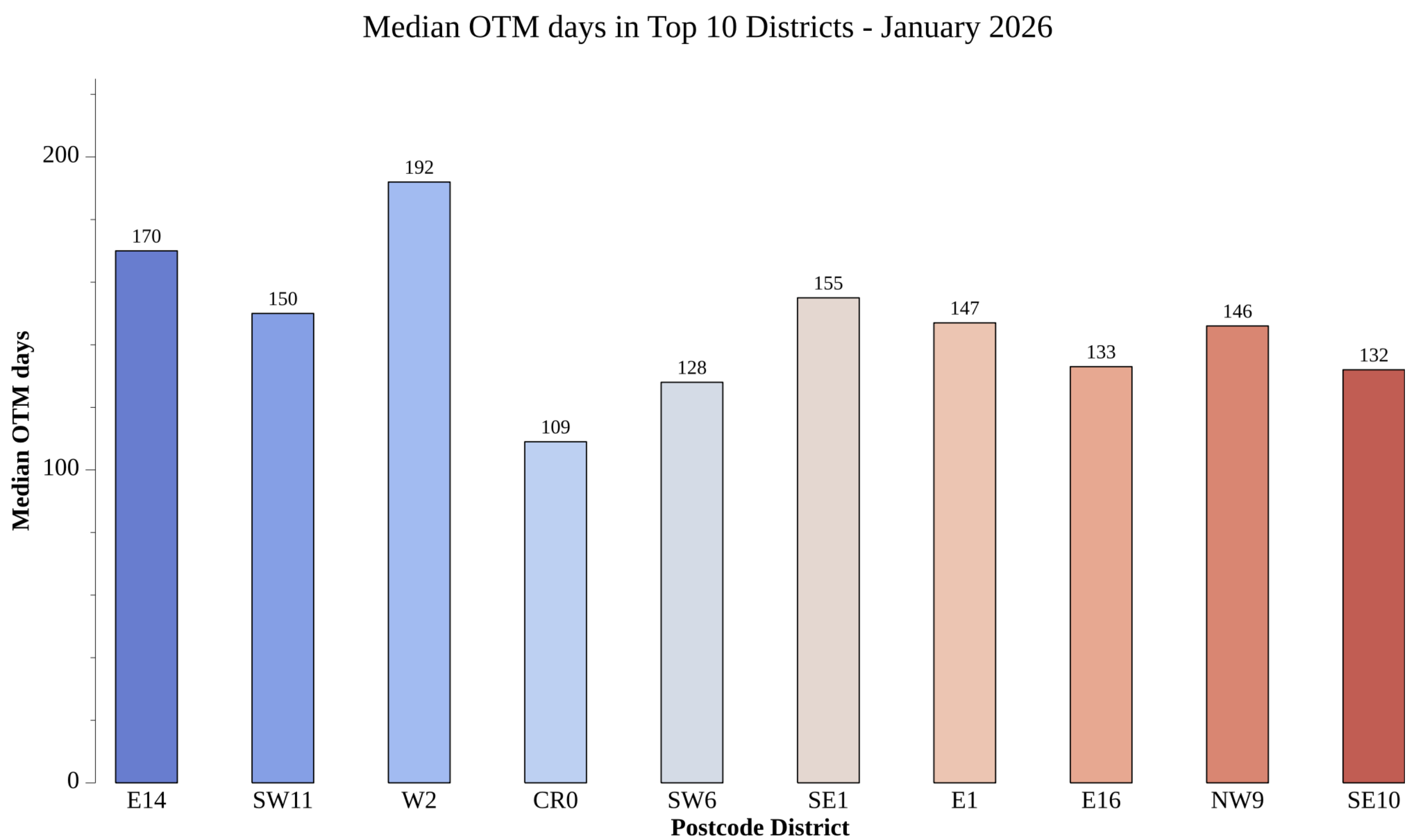
High-level Analysis

The following analysis gives an overview of how the sale market appears to be in some of the postcode districts for January 2026.



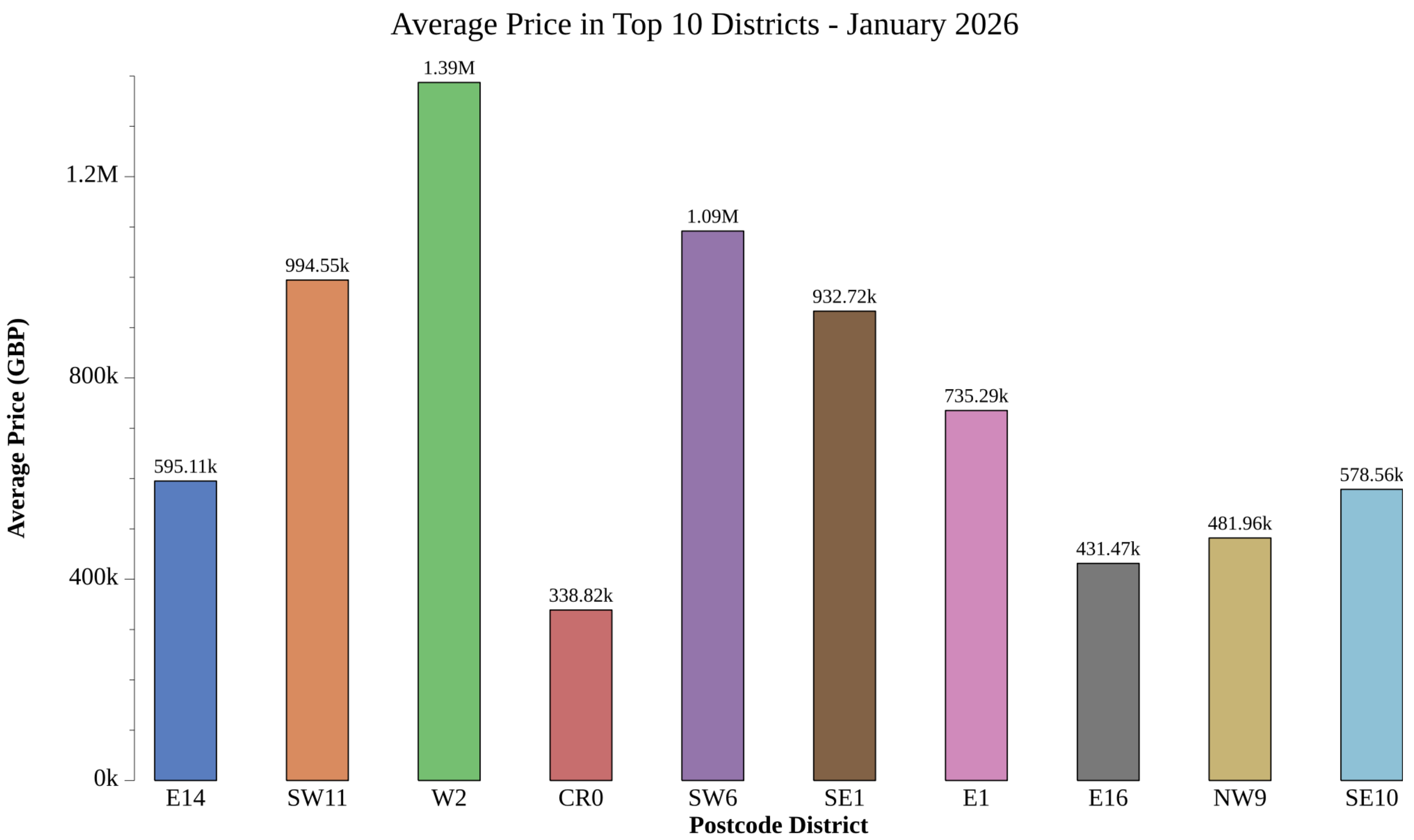
January’s buyer control reflects excess listing volume rather than weak demand, with supply consistently outpacing absorption. Even premium districts like W2 and SE1 show sellers competing against depth of stock, not scarcity. More affordable areas such as CR0, E16 and SE10 sit nearer equilibrium as supply clears more proportionately. Pricing strength now favours markets with controlled stock, while larger pipelines quietly increase negotiation pressure.

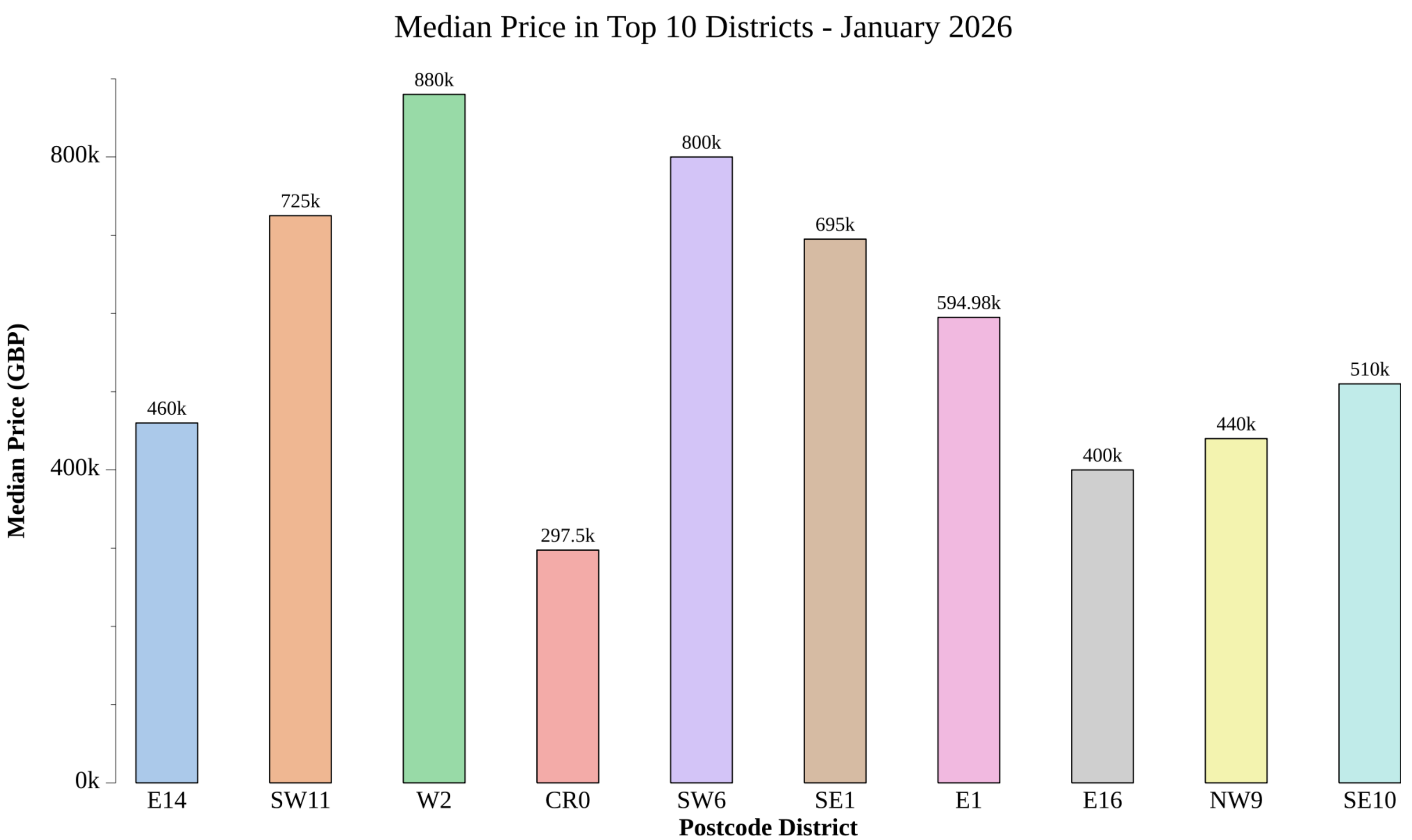

Average OTM days in Top 10 Districts - January 2026
Average OTM days
300
200
100
0
294
282
315
181
238
252
270
226
249
225
E14
SW11
W2
CR0
SW6
SE1
E1
E16
NW9
SE10
Postcode District


Median OTM days in Top 10 Districts - January 2026
Median OTM days
200
100
0
170
150
192
109
128
155
147
133
146
132
E14
SW11
W2
CR0
SW6
SE1
E1
E16
NW9
SE10
Postcode District

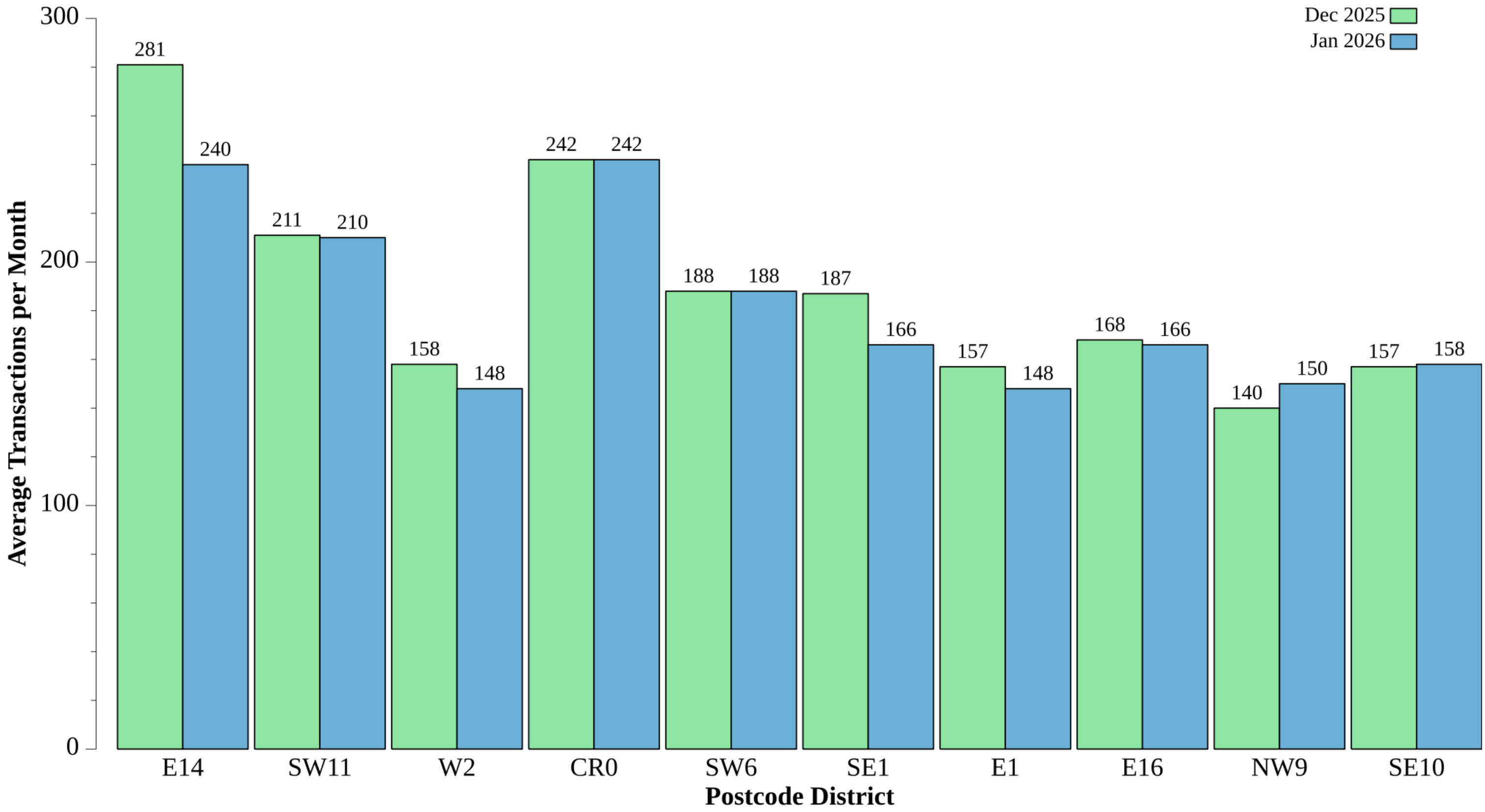
Across buyer-rated districts, the wide gap between mean and median time on market shows a long tail of stale listings quietly distorting averages, meaning negotiation drag is concentrated in a subset of overpriced stock rather than the whole market. Balanced areas display tighter gaps, implying pricing alignment is stronger and vendor expectations more realistic. Where sale supply is high and days on market stretch, liquidity is slowing structurally, not seasonally. The real pressure point is ageing inventory accumulation, which gradually shifts leverage even before headline ratings change.

In buyer-rated districts like E14, SW11 and W2, the large gap between mean and median prices signals a heavy top-end skew, where aspirational pricing is inflating averages but not driving momentum. High stock levels amplify this effect, as premium listings accumulate faster than mid-market homes clear. Balanced areas such as CR0, E16 and SE10 show tighter price spreads, suggesting healthier alignment between seller expectations and buyer capacity. The deeper pattern is that pricing dispersion, not just volume, is reinforcing buyer leverage in higher-supply markets.


Average Price in Top 10 Districts - January 2026
Average Price (GBP)
1.2M
800k
400k
0k
1.39M
994.55k
1.09M
932.72k
735.29k
595.11k
578.56k
481.96k
431.47k
338.82k
E14
SW11
W2
CR0
SW6
SE1
E1
E16
NW9
SE10
Postcode District


Median Price in Top 10 Districts - January 2026
Median Price (GBP)
800k
400k
0k
880k
725k
800k
695k
594.98k
460k
510k
440k
400k
297.5k
E14
SW11
W2
CR0
SW6
SE1
E1
E16
NW9
SE10
Postcode District

Comparison of Average Sale Transaction per Month in Top 10 Districts - December 2025 vs January 2026



The shift from December to January shows momentum cooling more through reduced absorption than rising supply, indicating demand hesitation rather than a listing surge. In districts like E14 and W2, falling turnover with steady stock suggests buyer selectivity has increased, lengthening deal cycles even before inventory spikes. Stable areas such as CR0 and SE10 reveal transactional resilience, where activity holds despite seasonal transition, pointing to underlying end-user demand. Where transactions dip but stock doesn’t rise sharply, the unseen risk is ageing inventory quietly pushing average time on market upward in the following months.

Insights - January 2026

Market Trends and Dynamics

January shows a split market where higher-priced districts carry longer inventory tails, meaning a portion of stock is simply not clearing at expected values. The gap between mean and median prices suggests quiet repricing pressure at the top, while mid-market homes still transact. Seasonal slowdown is exposing pricing inefficiencies that were less visible in busier months.

Market Fluctuations and Variability

Turnover varies sharply between districts with similar stock levels, showing that liquidity is driven more by affordability alignment than by volume alone. Where months of inventory stretch beyond six, small demand shifts create outsized effects on time to sell. This makes premium-heavy areas more sensitive to confidence changes than balanced, mid-priced markets.

Market Possibilities and Opportunities

Markets with moderate stock and tighter price spreads offer cleaner entry points, as expectations are already closer to buyer capacity. Longer average selling times in buyer-rated zones create room for structured negotiation rather than broad discounting. If spring demand returns unevenly, districts already near balance could tighten quickly while oversupplied areas may lag further.