Analytical Report

Sale Market Analysis (July, 2025)

Greater London

Intelligence Team

Overview

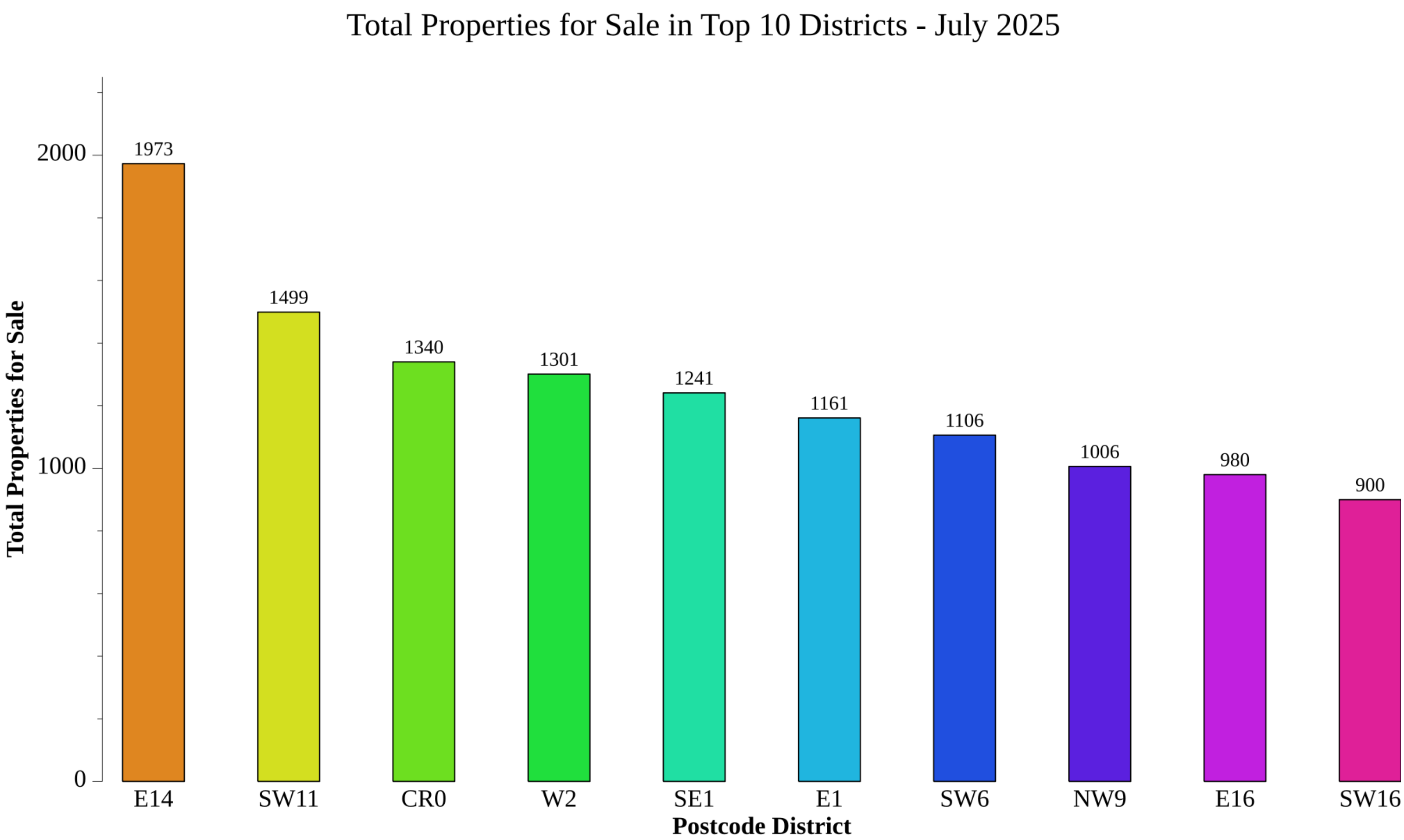
The following report represents information on sale properties in various postcode districts in Greater London.

Key Metrics

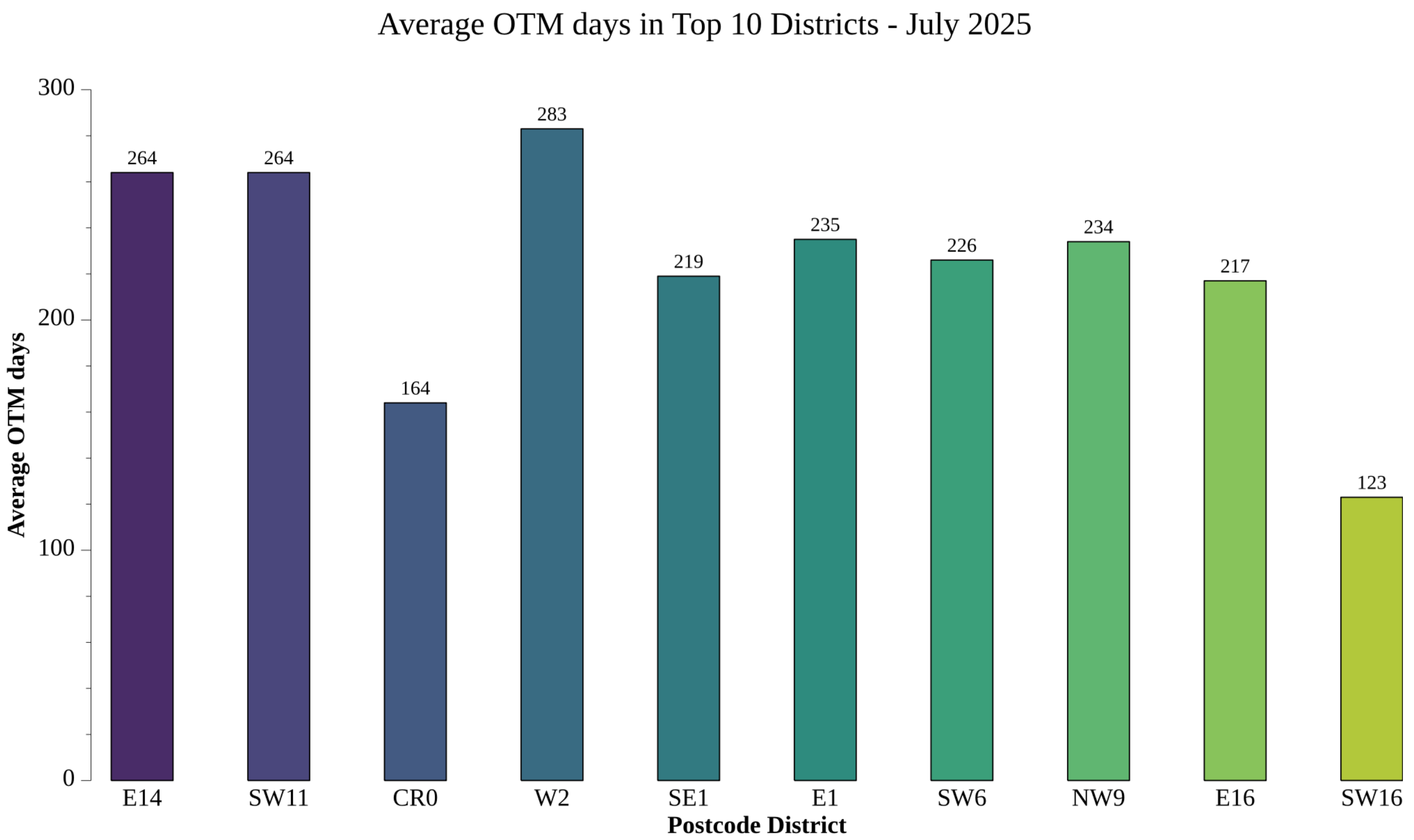
- *Total properties for sale* : This value indicates the total number of properties available on the market for sale in a month.
- *Average transactions per month* : The average number of properties sold in a calendar month
- *Months of inventory* : The amount of time it takes for the said "total properties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

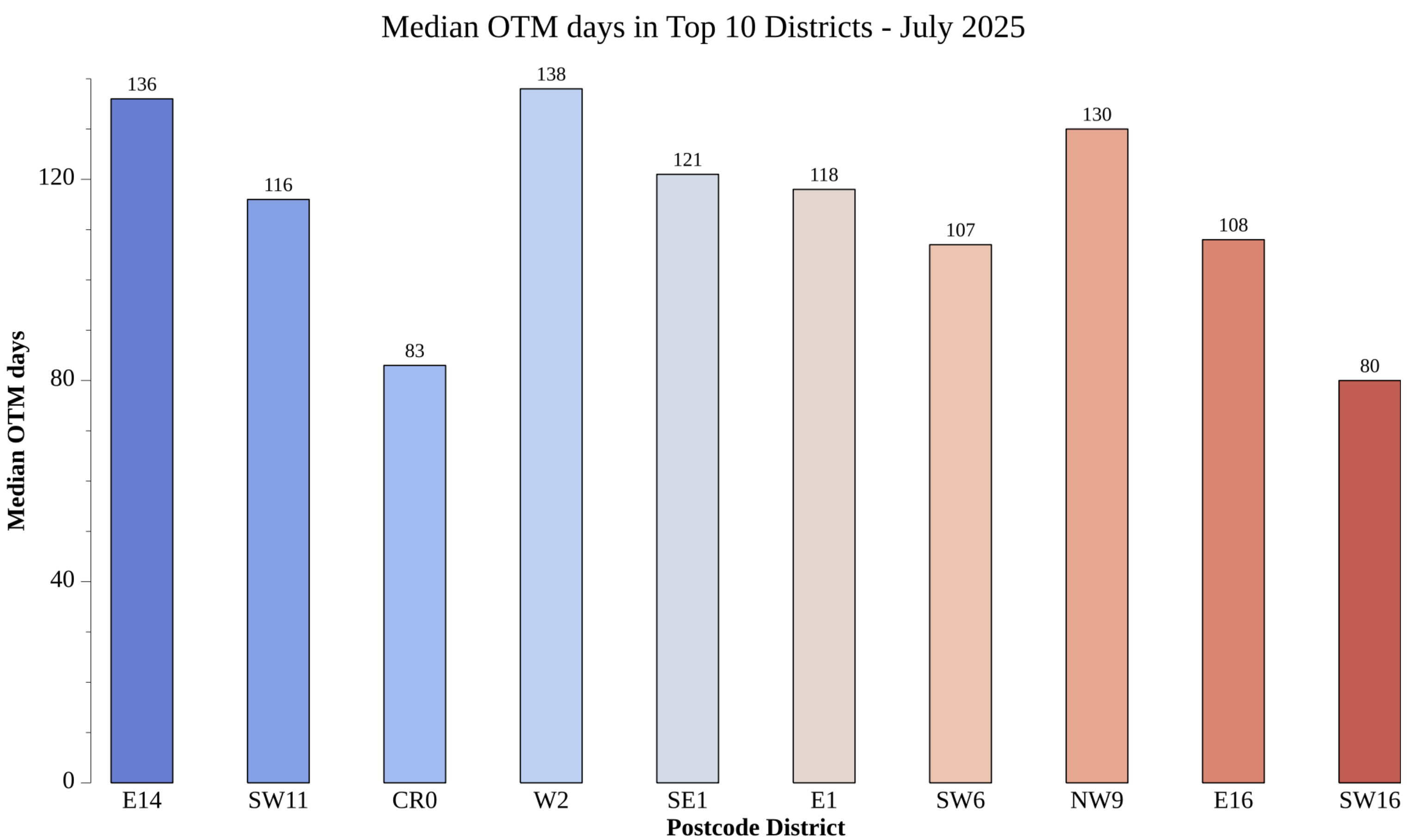
High-level Analysis

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



Despite varied price points, most districts remain in a buyer's market, supply continues to outweigh demand, even in premium areas. Districts like W2 and SW6 show high averages but much lower medians, revealing a surplus of overpriced listings that aren't moving. This likely reflects seller optimism more than buyer appetite. In contrast, balanced markets like CR0 and SW16 show tighter mean-to-median alignment, suggesting pricing there is more in tune with actual demand.

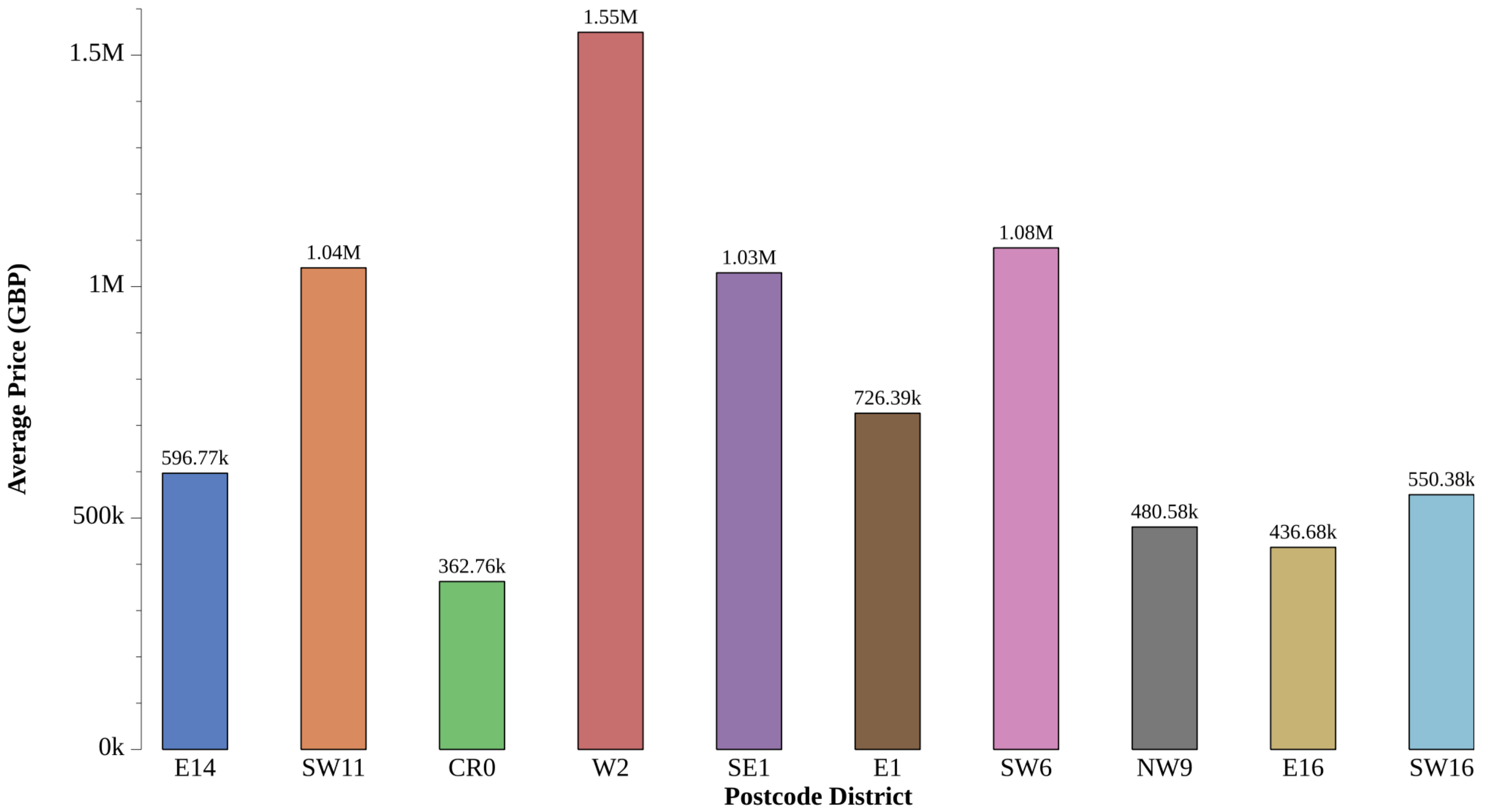

Average OTM days in Top 10 Districts - July 2025
Average OTM days
300
200
100
0
264
264
164
283
219
235
226
234
217
123
E14
SW11
CR0
W2
SE1
E1
SW6
NW9
E16
SW16
Postcode District


Median OTM days in Top 10 Districts - July 2025
Median OTM days
120
80
40
0
136
116
83
138
121
118
107
130
108
80
E14
SW11
CR0
W2
SE1
E1
SW6
NW9
E16
SW16
Postcode District

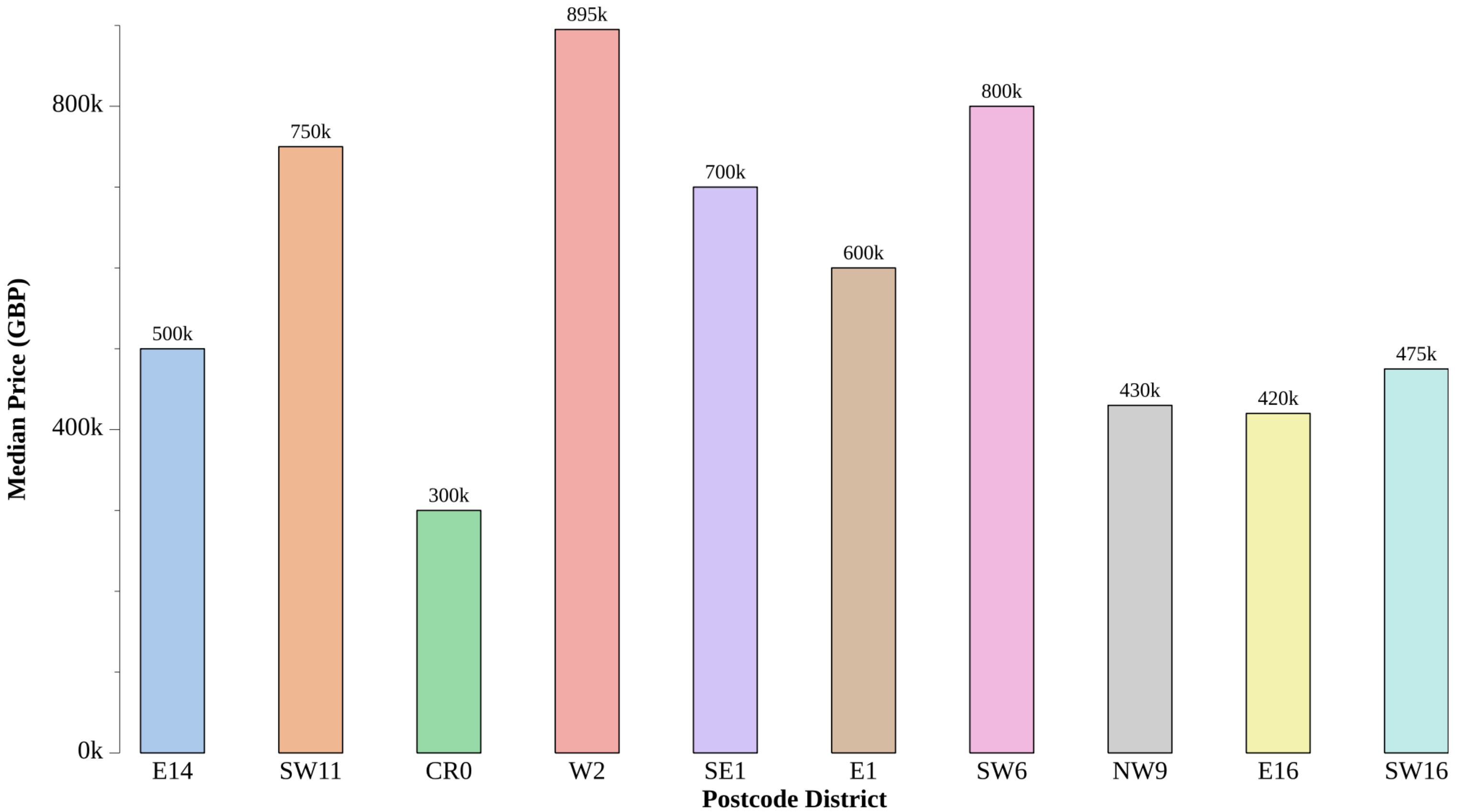
Under the surface, the data reveals not just how listings move but where market belief and urgency collide. Most districts are stuck in sluggish cycles, with months of inventory hovering around 7 to 9 and long average days on the market, pointing to hesitancy, either from buyers or unrealistic seller expectations. But outliers like SW16 and CR0 break this pattern. With fast turnover, tight inventory, and far shorter time on market, they're functioning more like liquid markets where pricing aligns closely with buyer conviction. The real signal here isn't just speed, it's trust. Buyers are willing to act decisively in markets where value feels grounded. Meanwhile, premium or overstocked areas like W2 and E14 carry the weight of indecision, where listings linger not from lack of visibility, but lack of urgency, telling us the real friction isn't inventory, it's confidence.

A quiet tension runs through the price data, mean values consistently outpace medians, especially in premium zones like W2 and SW6, revealing a top-heavy market propped up by a handful of high-end listings. But this gap isn't just about luxury, it's a marker of misalignment between what sellers hope for and what buyers are willing to pay. In contrast, areas like E16 and SW16 show tighter spreads, reflecting a more grounded pricing reality where supply better matches demand. The broader story here is that inflated expectations may be holding some markets back, while more balanced zones are quietly driving healthier momentum.

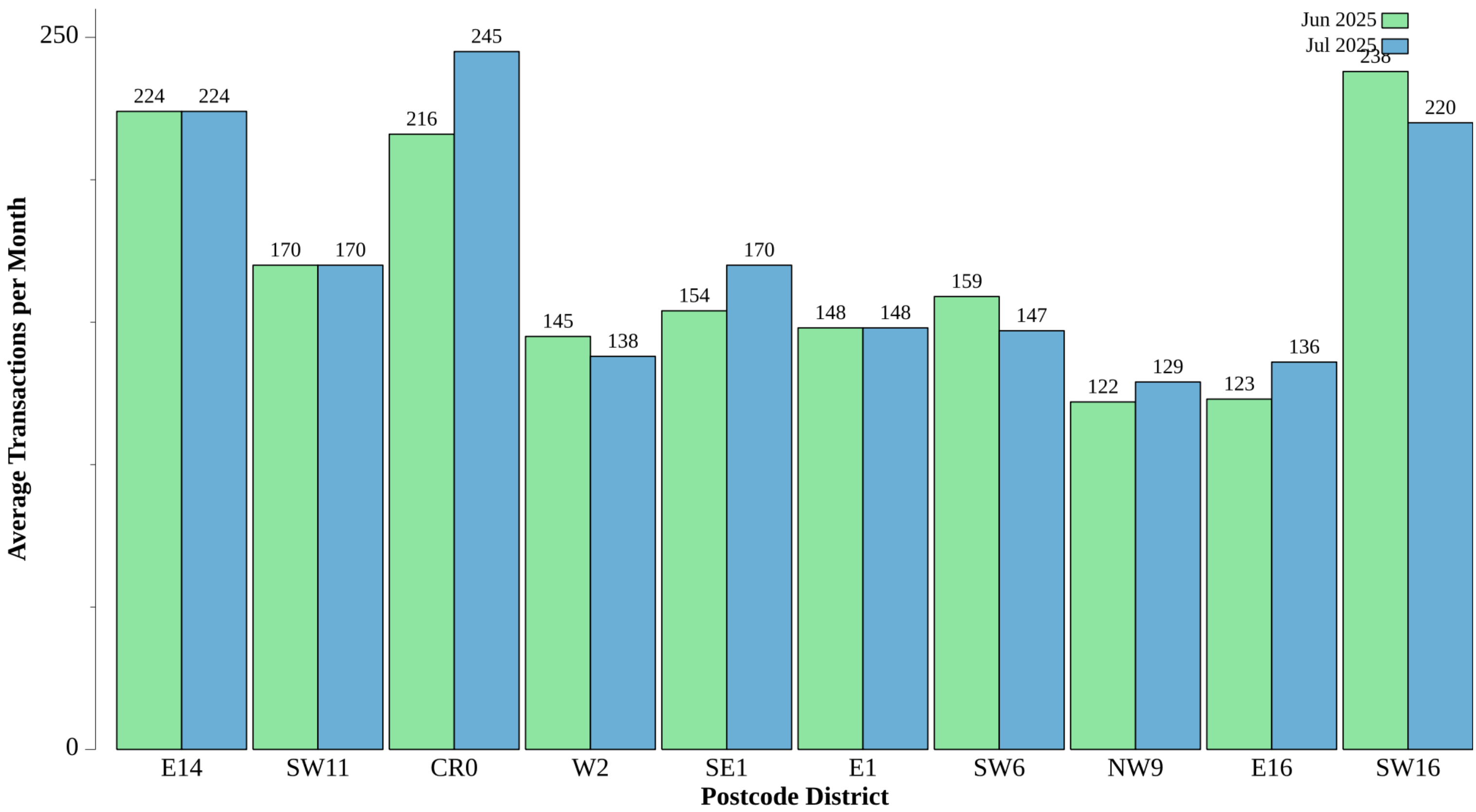
Average Price in Top 10 Districts - July 2025



Median Price in Top 10 Districts - July 2025



Comparison of Average Sale Transaction per Month in Top 10 Districts - June 2025 vs July 2025



While most districts show little change in transaction pace, subtle shifts reveal a quiet recalibration beneath the surface. Markets like SE1, CR0, and E16 didn't just hold steady, they edged up in activity even as listings fell or stayed flat, suggesting pockets of growing buyer confidence. Conversely, places like SW6 and SW16 saw slight pullbacks in transaction rates despite fewer listings, possibly hinting at buyer fatigue or resistance at current price levels. Overall, turnover stability masks nuanced momentum: certain markets are warming from within while others cool subtly, not from lack of stock, but perhaps from cautious sentiment.

Insights - July 2025

Market Trends and Dynamics

The dominance of buyer's markets across most districts shows that sellers are no longer setting the pace, buyers are. High stock levels and longer selling times (especially in premium zones like W2 and SW11) hint that demand is becoming more selective, not absent. Buyers seem to be seeking real value, not just space or postcode. Where prices align better with demand, such as CR0 and SW16, the market behaves more fluidly, properties move faster and at more sustainable prices. It's less about market price tags now and more about perceived fairness and fit.

Market Fluctuations and Variability

What looks stable on the surface, steady sales or consistent listings, masks deeper shifts in urgency and negotiation power. Areas with big gaps between mean and median prices suggest inflated top ends are skewing perceptions, but buyers are gravitating toward the lower, more realistic band. Days on the market tell another story: longer waits in wealthier postcodes reflect pricing hesitation, while quicker sales in balanced zones show where confidence really lies. Volatility isn't just in prices, it's in timing, expectations, and strategy.

Market Possibilities and Opportunities

The current shape of the market favors patient, informed buyers. High inventory and long wait times give them room to negotiate, especially in overvalued zones where listings are stagnating. But sharper opportunities lie in balanced districts like SW16 and CR0, where better aligned prices meet steady demand, meaning less noise and more action. These areas reflect what the broader market could be shifting toward: less hype, more fundamentals. The moment isn't just about finding deals, it's about reading between the lines of pace, price, and persistence.