



**scansan**

# **Analytical Report**

Sale Market Analysis (February, 2026)

Greater London

Intelligence Team

## Overview

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

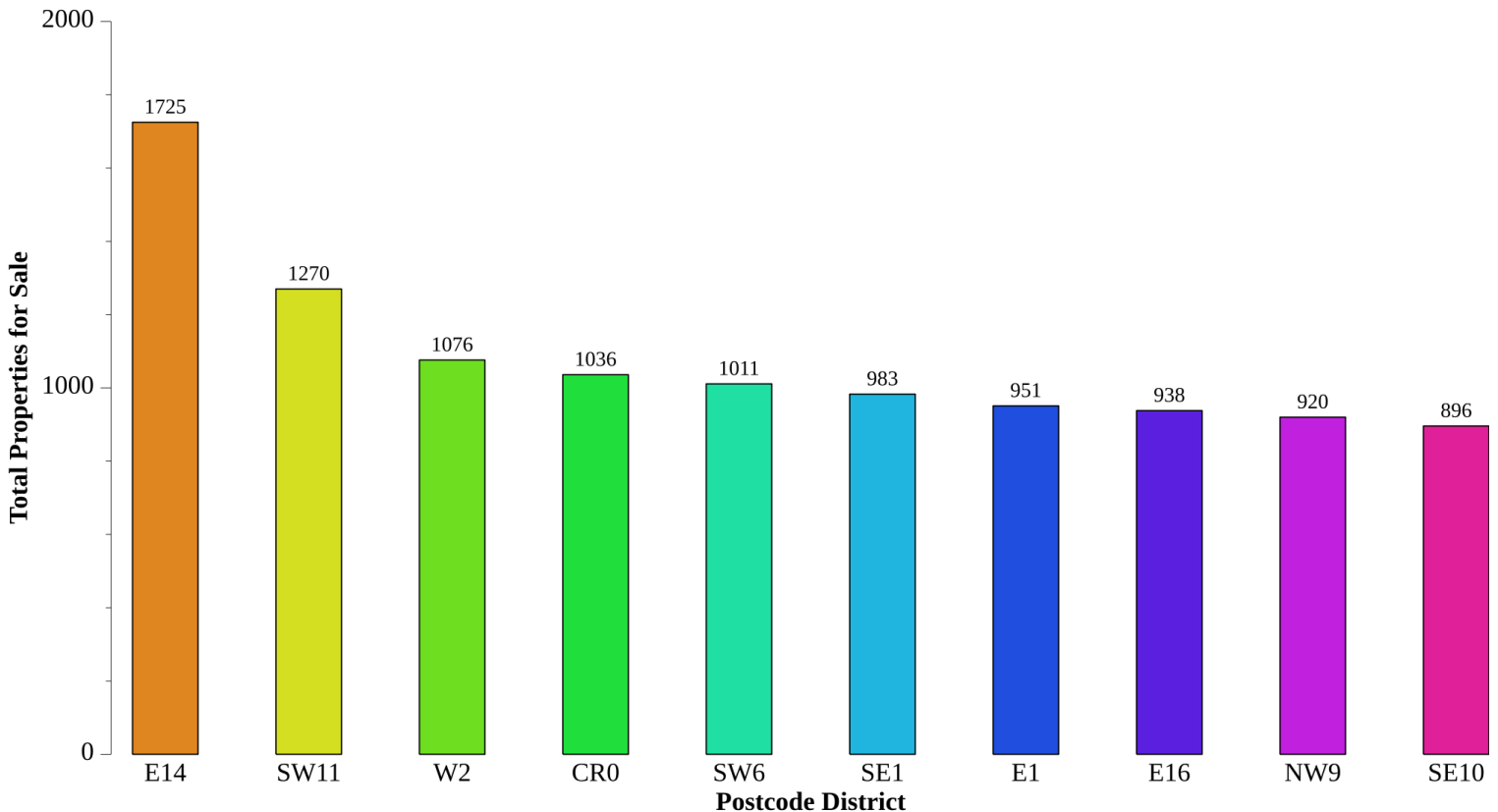
## Key Metrics

- 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

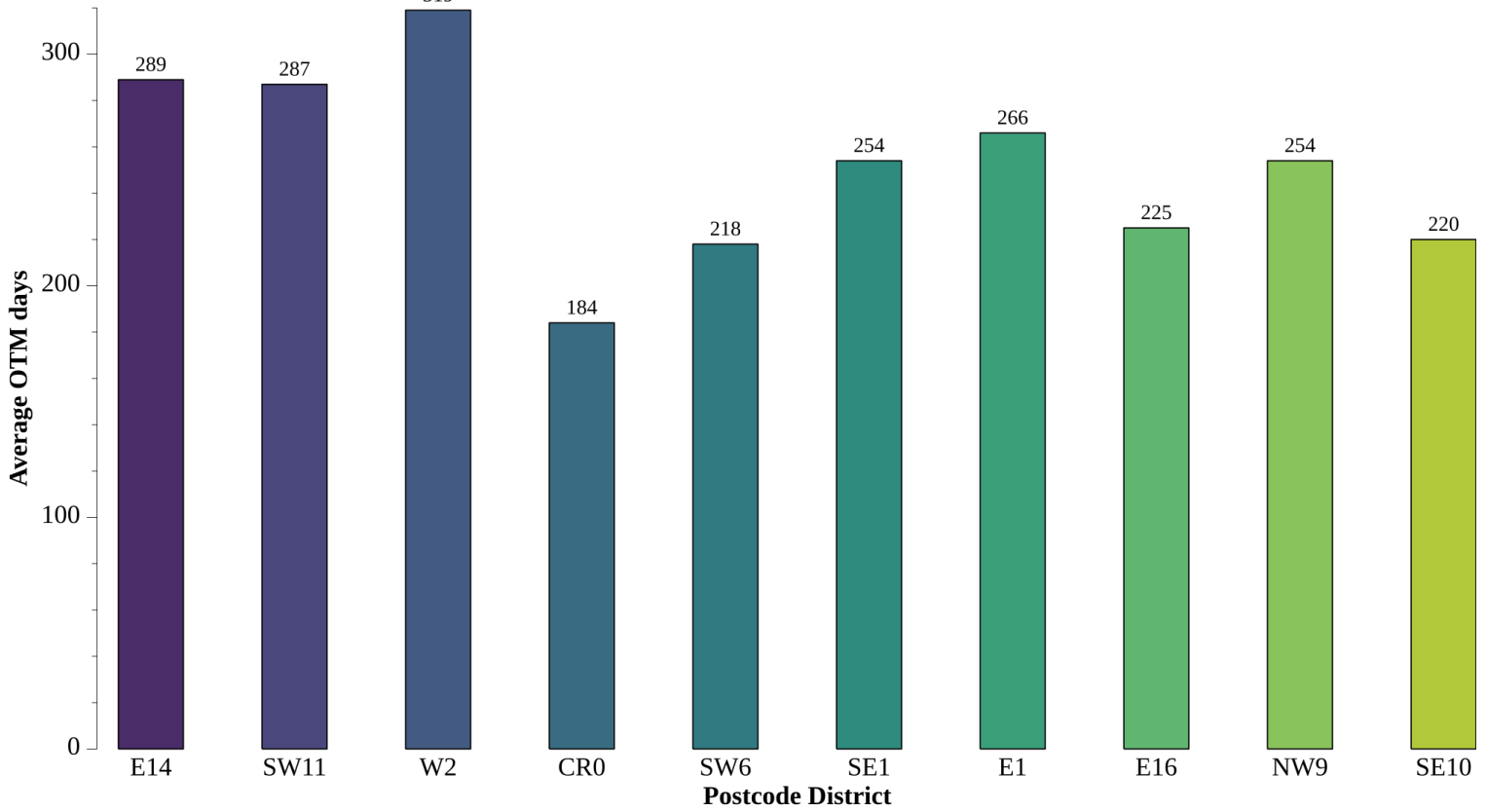
The following analysis gives an overview of how the sale market appears to be in some of the postcode districts for February 2026.

Total Properties for Sale in Top 10 Districts - February 2026

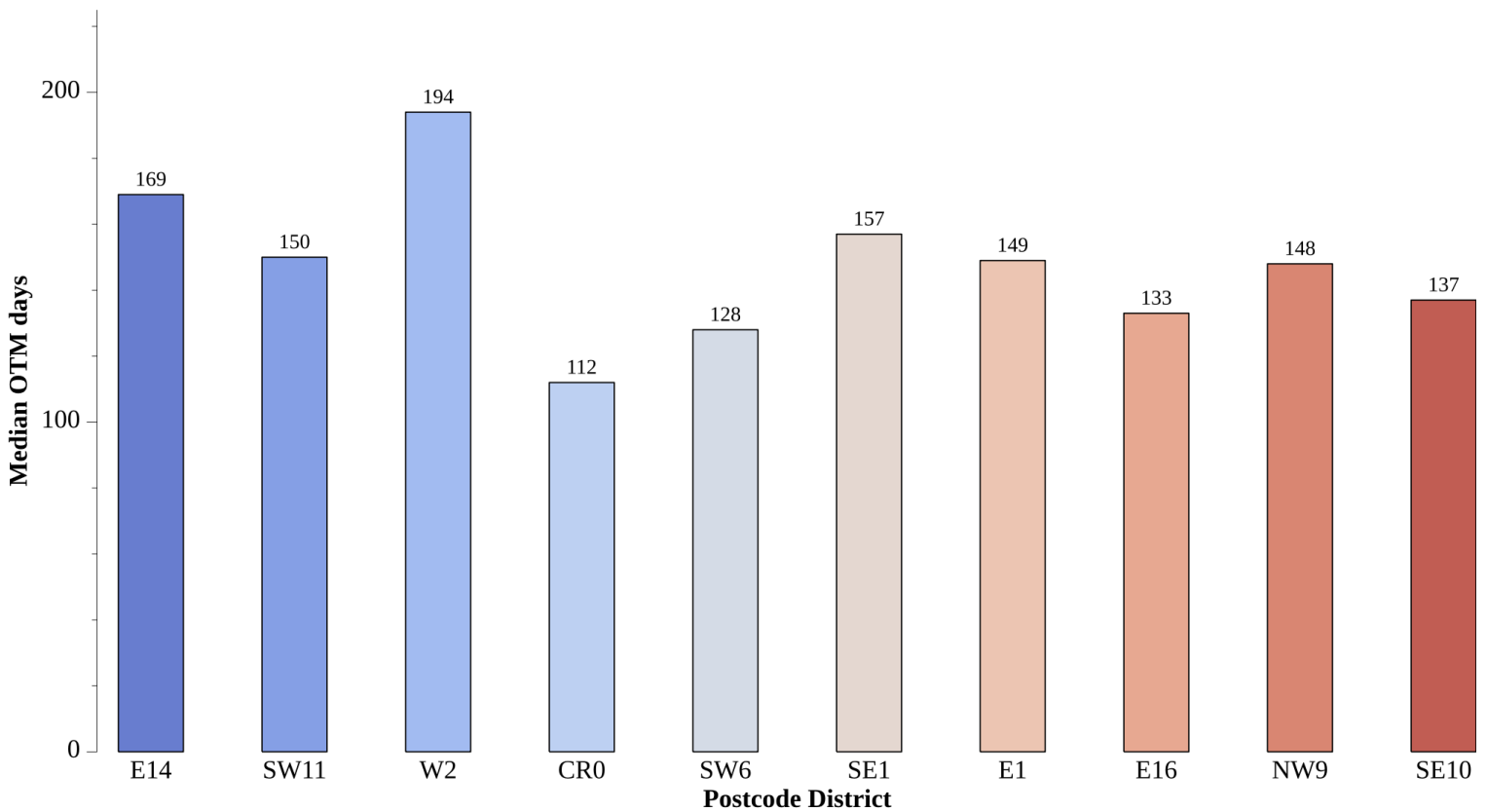


In February, stock levels eased slightly, but most areas still favour buyers, showing confidence is weaker than supply alone suggests. Higher-priced districts still have more homes than demand can absorb, so negotiating power hasn't shifted. Balanced areas are steady mainly because supply is controlled, not because demand is rising strongly. If spring listings stay low, some buyer markets could tighten quicker than expected as available stock thins out.

Average OTM days in Top 10 Districts - February 2026



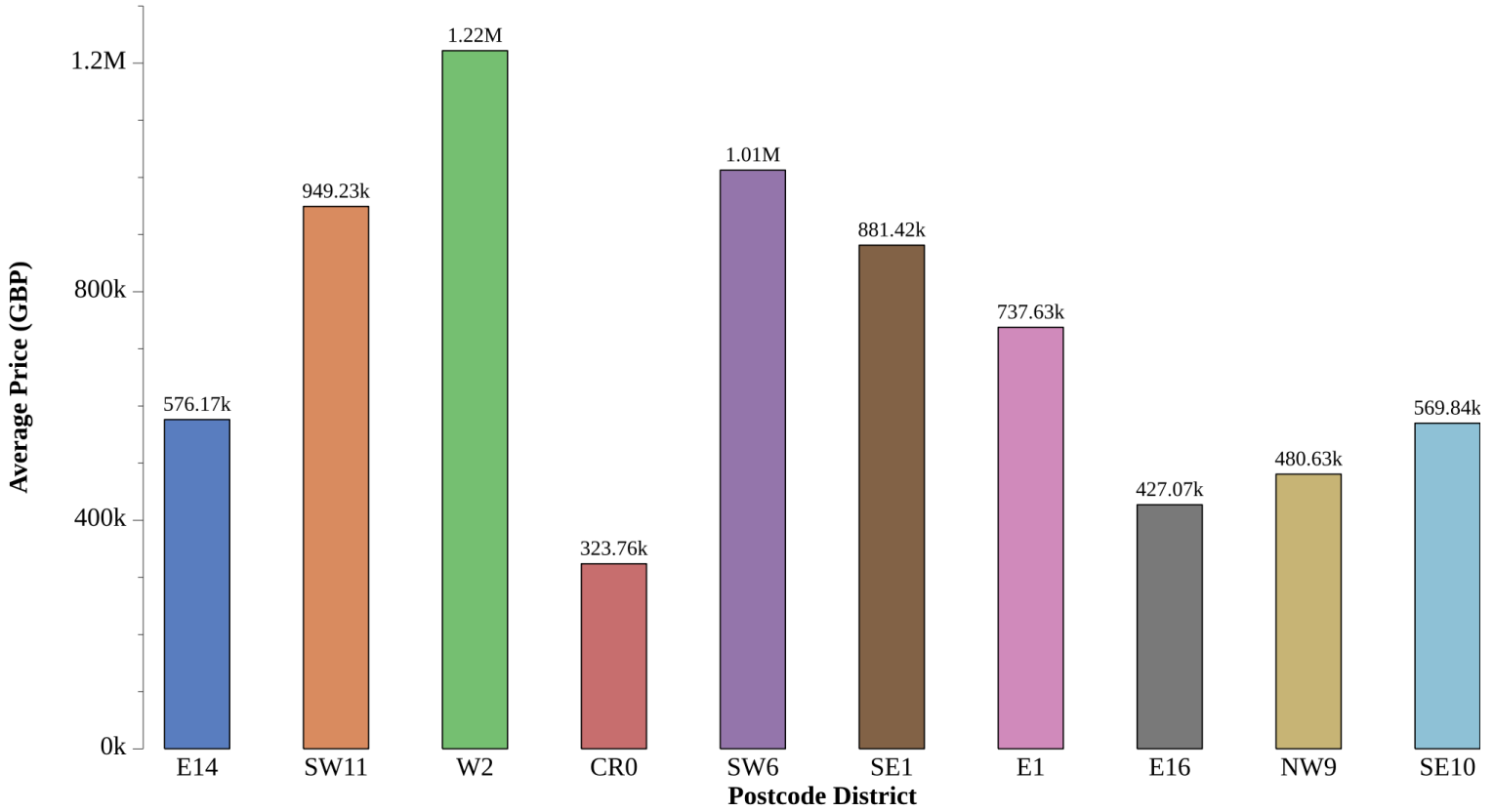
Median OTM days in Top 10 Districts - February 2026



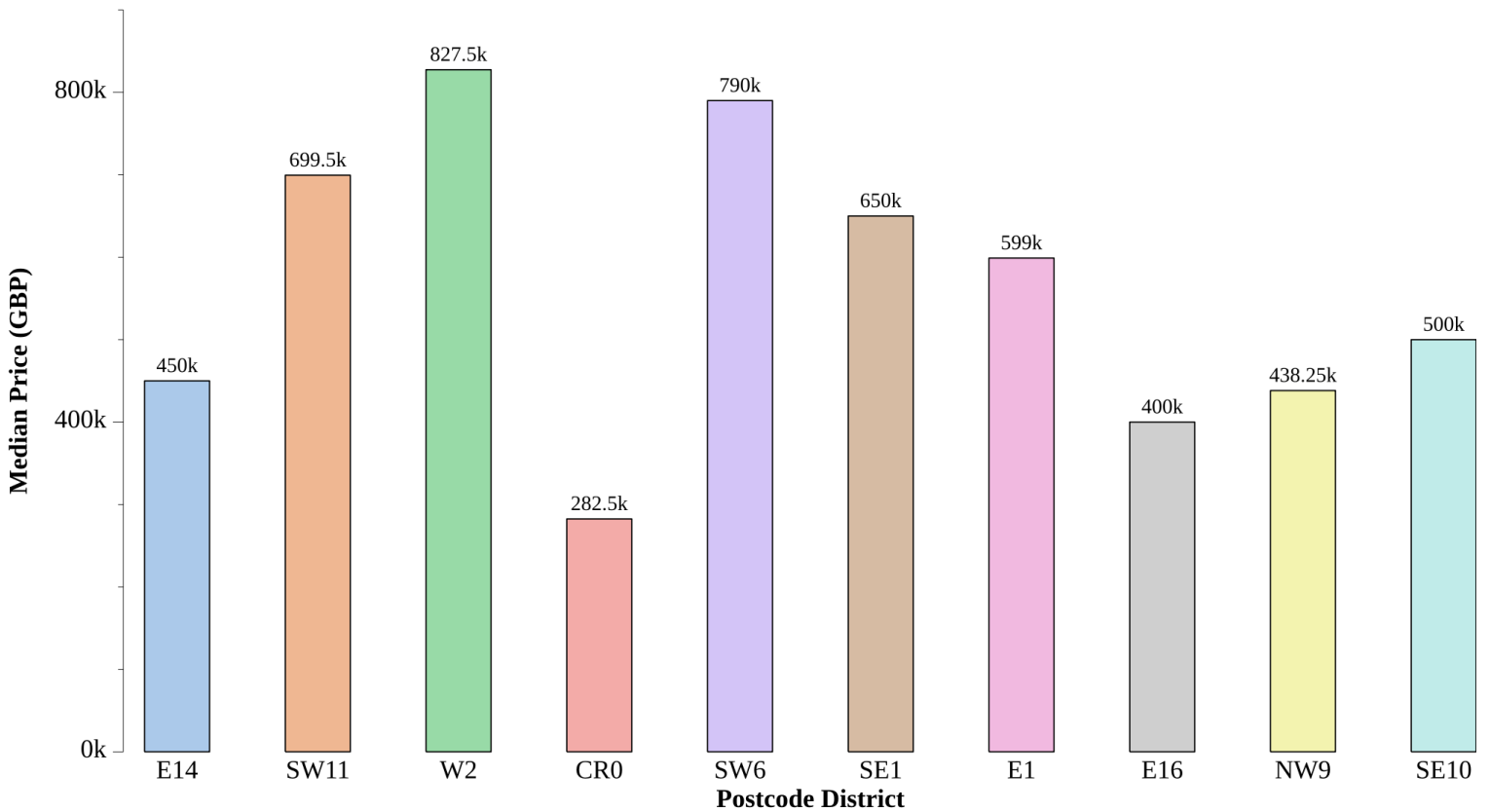
The wide gap between mean and median time on market in buyer-rated areas shows a hidden layer of stock sitting far longer than most sellers expect, quietly anchoring negotiations downward even if new listings slow. In contrast, balanced districts have shorter and tighter selling timelines, meaning liquidity is more evenly distributed across price bands rather than concentrated in quick-moving pockets. This suggests that in slower areas, buyer power is coming less from sheer supply and more from the presence of ageing, high-expectation listings that shape overall pricing psychology.

The consistent gap between average and median prices shows that a relatively small number of high-value listings are pulling headline figures upward, masking where most real demand sits. This creates a perception gap: sellers anchor to inflated averages, while buyers benchmark against the median, widening negotiation spreads. In districts where that gap is largest, pricing tension is likely to build quietly, as the market gradually reorients toward what typical buyers can actually afford rather than what premium stock aspires to achieve.

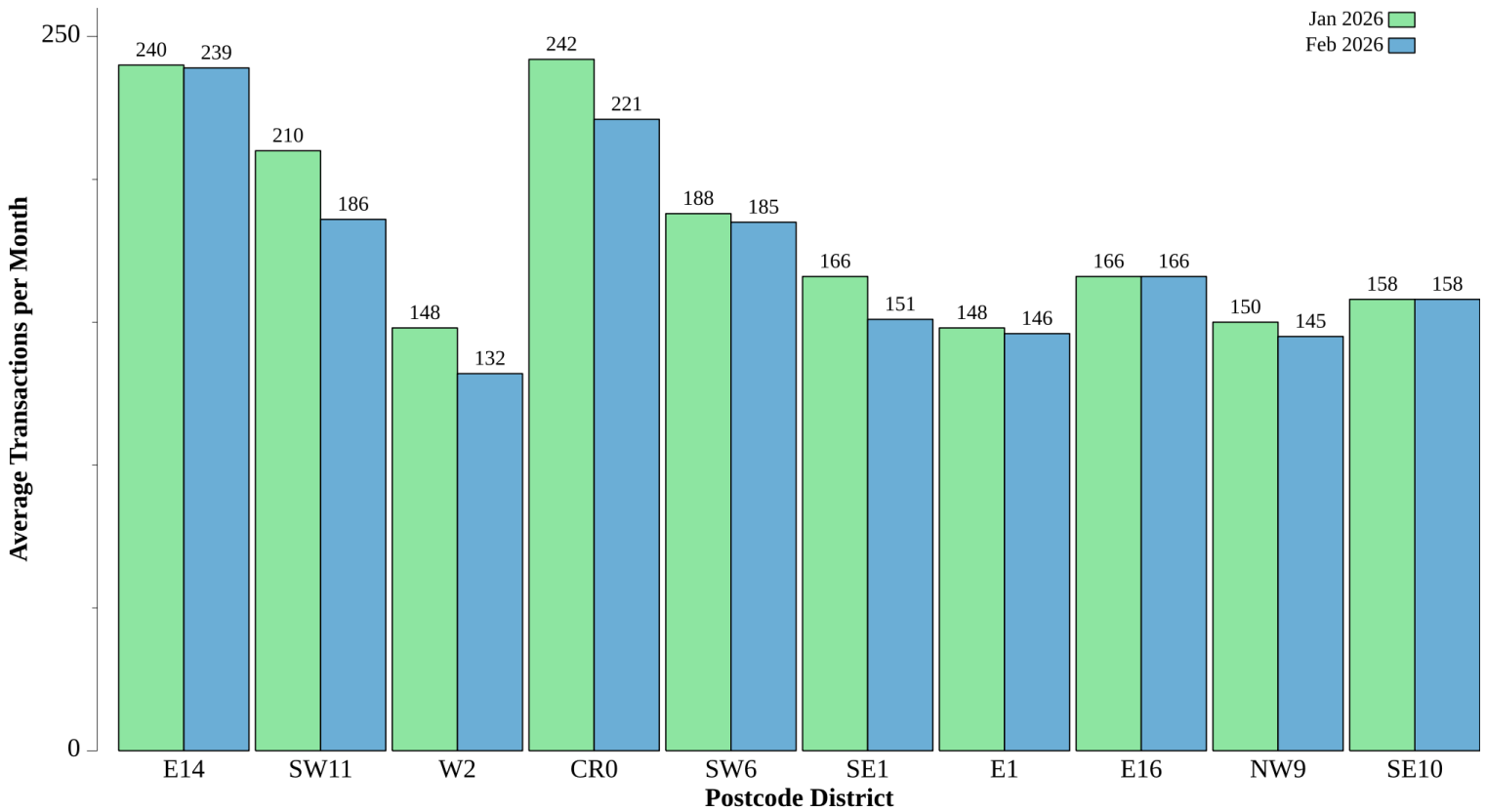
Average Price in Top 10 Districts - February 2026



Median Price in Top 10 Districts - February 2026



## Comparison of Average Sale Transaction per Month in Top 10 Districts - January 2026 vs February 2026



From January to February, activity eased more through softer transactions than through rising supply, which means demand intensity cooled slightly even as stock trimmed back. Turnover holding steady in most districts suggests the market structure hasn't shifted, but the drop in completed activity in places like SW11 and W2 hints at buyers becoming more selective rather than absent. Balanced areas maintained relative stability, showing their demand base is less seasonal and more needs-driven. Overall, buyer-rated conditions persist not because inventory surged, but because absorption slowed just enough to prevent leverage from flipping.

## **Insights – February 2026**

### Market Trends and Dynamics

February reveals that transaction strength is no longer enough to shift market control where inventory remains structurally high; liquidity is uneven within districts rather than across them. In buyer-rated zones, longer selling times combined with wide price spreads show that demand exists but is concentrated at specific value points. The market is behaving more like a sorting mechanism, quickly clearing realistic stock while sidelining aspirational listings.

### Market Fluctuations and Variability

Small differences in months of inventory are creating large differences in negotiation tone, especially above the mid-price range. Areas with similar turnover percentages are experiencing very different pricing pressure depending on how skewed their stock is toward higher values. This makes premium-heavy districts more sensitive to minor seasonal dips in confidence than affordability-led ones.

### 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.