• REALYSE INSIGHTS · Q3 2026

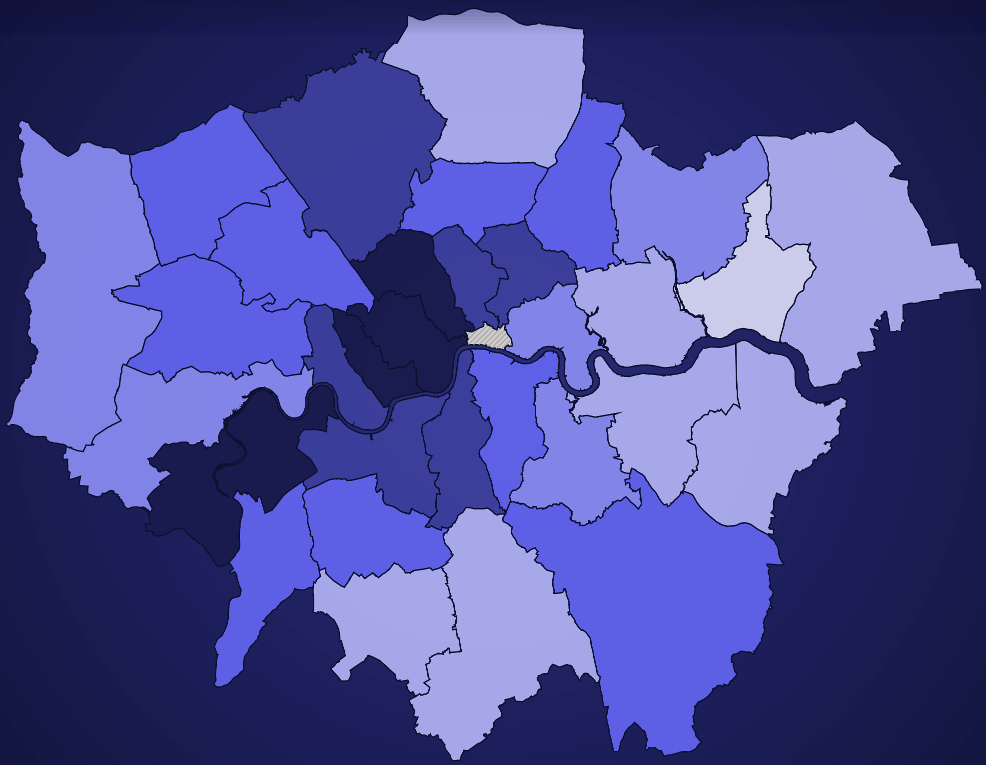
London sales market.

What the capital pays.

Prices, time to sell and discount to asking across the 32 boroughs of London — built from Land Registry sales and live listings, reported on a trailing twelve-month basis.

12 months to 2025-11 · 216,147 homes to market · 32 boroughs

Data as at 2026-08-11



• MARKET OVERVIEW

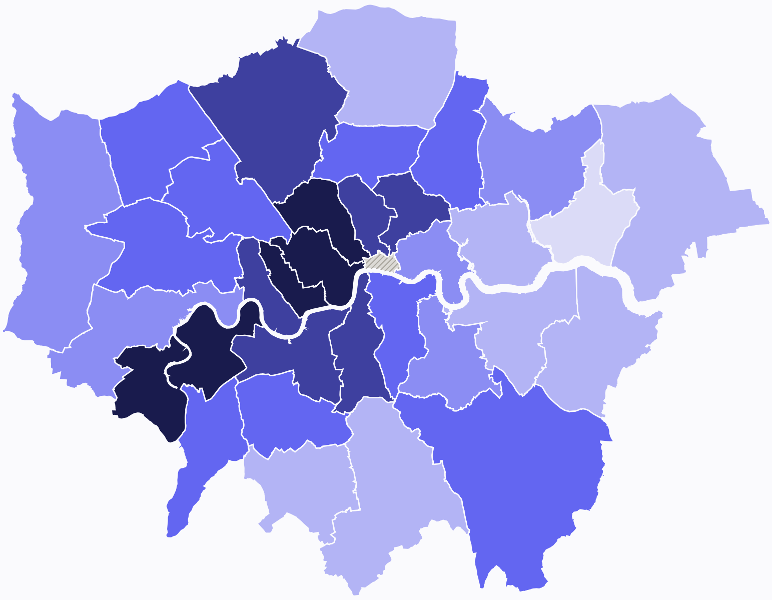
London sold prices,
holding flat.

All figures are trailing 12-month values. Cut-off dates differ by dataset.

SOLD PRICE	PRICE PER SQFT	DAYS TO SELL	DISCOUNT TO ASKING
£515,260	£609	66	1.54%
-0.2% YoY	-1.3% YoY	+0.2% YoY	-22.7% YoY
105,496 observations	1,001,214 observations	1,026,397 observations	43,768 observations

Sold price by borough

12 months to 2025-11



Under £400,000 · £400,000 - £450,000 · £450,000 - £500,000 · £500,000 - £550,000 · £550,000 - £700,000 · £700,000 and above · Insufficient data

Highest and lowest

BOROUGH	£	YOY
Kensington and Chelsea	1,165,083	-5.0%
Westminster	899,338	-10.4%
Camden	774,839	-2.8%
Richmond upon Thames	713,708	+2.7%
Hammersmith and Fulham	699,225	-12.3%
Wandsworth	669,125	+3.8%
Islington	661,792	-0.1%
Hackney	572,763	-1.4%
...		
Havering	442,000	+3.4%
Newham	438,917	+2.2%
Bexley	413,727	+1.4%
Croydon	406,500	+2.6%
Barking and Dagenham	373,750	+3.8%

What the data shows

Sold prices are flat on the year, with the median borough a fraction lower than it was. The split is close to even — 17 of 32 boroughs fell and 15 rose — so the flat headline covers movement in both directions rather than one trend. Four of the five highest-priced boroughs lost ground, led by Hammersmith and Fulham, while all five of the cheapest gained. The City of London has no sold price reading this window, so 32 of 33 boroughs are ranked here.

IN THIS ISSUE

02 Segments
Price by property type, the new-build premium, and which areas are tightening.

03 Supply
Homes coming to market, and how close sales settle to asking.

+ Also held
EPC, title and ownership, land transactions, demographics and planning policy.

Analysis covers 32 boroughs and 216,147 homes brought to market over the 12-month window, from 43,768 underlying records.

• SEGMENTS

Underneath
the headline.

The same 12-month window, cut by property type and by build type.

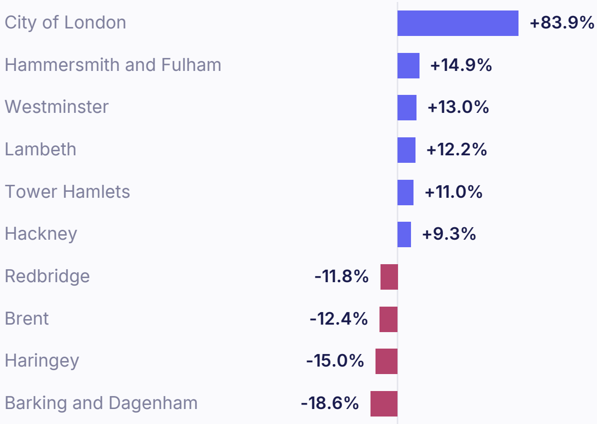
Asking price by property type

Median across boroughs, 12 months to 2026-05

A detached home asks +163% over a flat.

New-build price premium

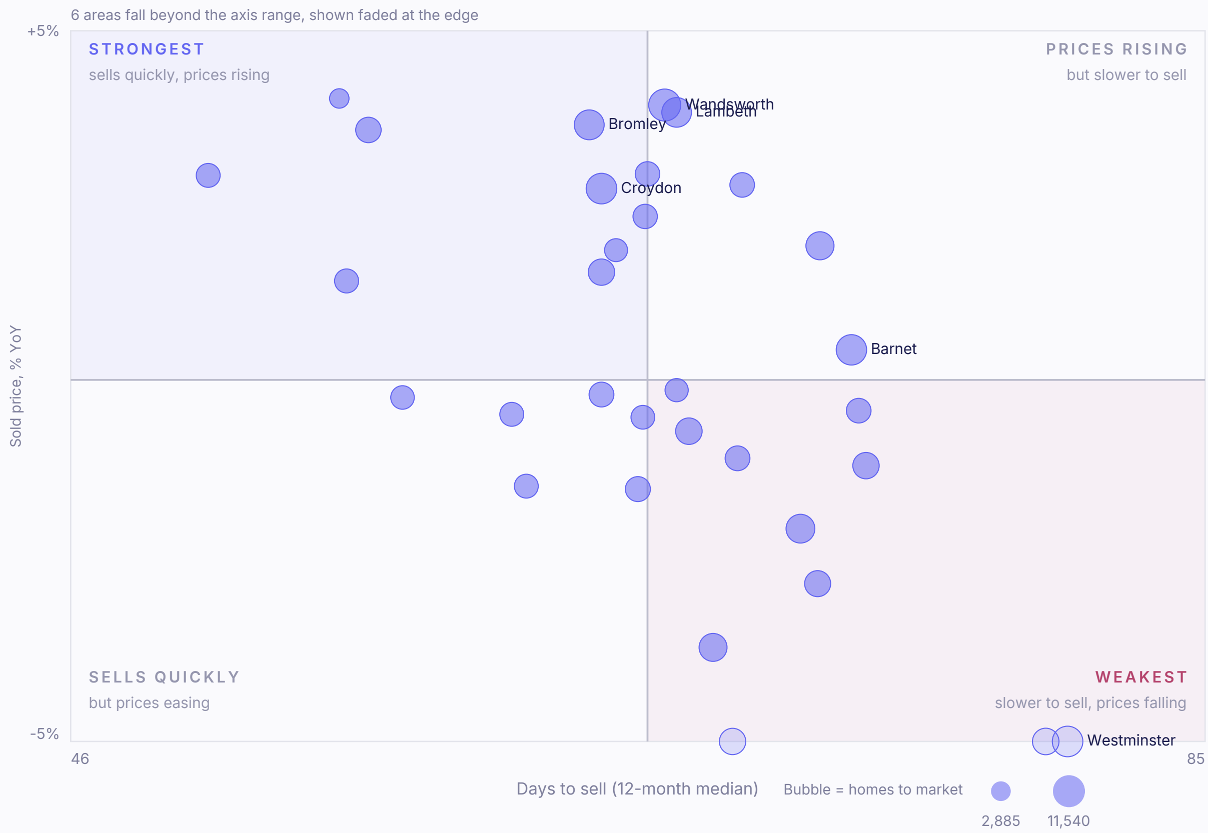
New-build against secondary asking price
Raw comparison; not adjusted for unit size or specification.



33 of 33 boroughs hold enough new-build stock to report.

Where the market is tight

Each borough placed by how fast homes sell and how prices have moved. Bubble size is the number of homes brought to market.



Median price steps up at each property type from flats to detached, and the sample thins at every step — detached sales are a small share of the flat count. City of London stands well clear of the field on the new-build premium, which compares asking prices rather than sold ones and sits on the smallest listing base in London.

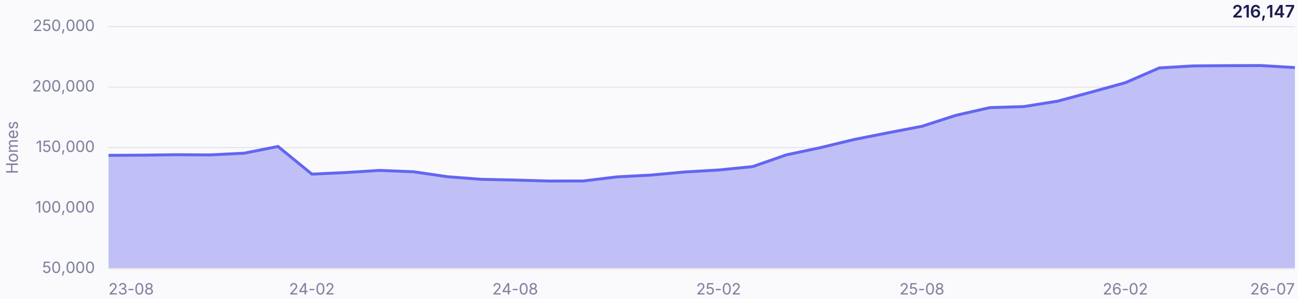
• SUPPLY AND DEMAND

Where buyers
have least room.

Homes coming to market on a 12-month rolling basis, and how close sales settle to asking.

Homes coming to market

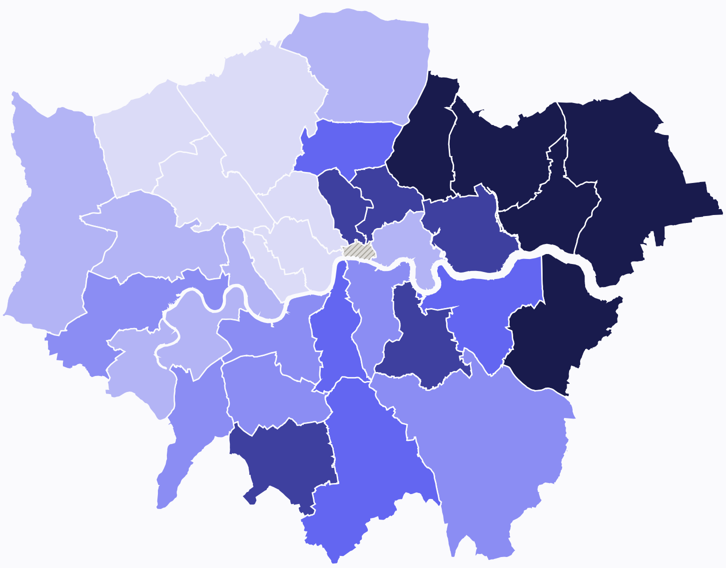
London total, homes that came to market in the preceding 12 months



Supply is +33.2% against a year earlier.

Where demand is strongest

Median discount to asking price, 12 months to 2025-11. The smaller the discount, the stronger the demand.
Darker areas carry the smallest discount. This is a matched asking-to-sold measure on the same properties, not two different samples compared.



Smallest discount to asking

BOROUGH	DISCOUNT %	PRICE YOY
Waltham Forest	-0.64	+2.8%
Barking and Dagenham	-0.09	+3.8%
Bexley	0.00	+1.4%
Redbridge	0.07	-0.2%
Havering	0.20	+3.4%
Hackney	0.52	-1.4%
Newham	0.60	+2.2%
Islington	0.88	-0.1%
...		
Brent	3.10	-1.2%
Westminster	4.82	-10.4%
Kensington and Chelsea	5.13	-5.0%

London median 1.57%; the spread across all 32 boroughs is 5.77%.

Homes brought to market ran 33% higher than a year earlier, and no borough recorded fewer than it did then. The median discount to asking narrowed by 23% on the year, and in three boroughs — Waltham Forest, Barking and Dagenham and Bexley — sold prices met or beat asking. Bexley has no discount figure for a year earlier, so its change cannot be read.

Below 0.50% | 0.50% to 1.00% | 1.00% to 1.50% | 1.50% to 2.00% | 2.00% to 2.50% | 2.50% and above | Insufficient data

METHODOLOGY AND SOURCES

All figures are trailing 12-month values; no single month is quoted. Recent months are excluded until their sample reaches 80% of the settled-period median, so cut-off dates differ by dataset (sold price to 2025-11). Areas below the sample floor are shown as insufficient data. Map bins are fixed between editions. London figures are the median across boroughs, not a population median. REalyse also holds EPC, title and ownership, land transactions, demographics and planning policy data at this geography. Source: REalyse. Data vintage: land 2026-06-05, listings 2026-08-11, IrOtherTransactions 2026-06-03, planning 2026-08-21, poi 2024-12-17, postcodes 2022-08-05.

Best practices have been used in compiling this report; inaccuracies may nonetheless remain.