

• REALYSE INSIGHTS • Q3 2026

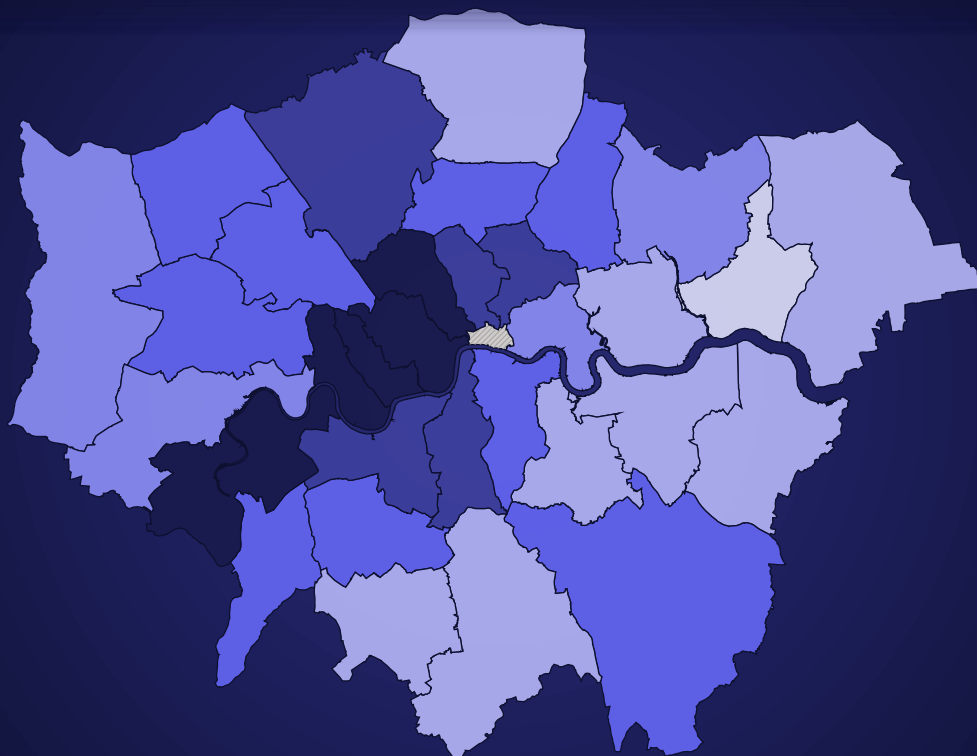
London sales market.

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 • 244,961 homes to market • 32 boroughs

Data as at 2026-09-21



London sold prices, *holding flat.*

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

SOLD PRICE

£515,375

+0.1% YoY

101,776 observations

PRICE PER SQFT

£616

-1.4% YoY

1,126,340 observations

DAYS TO SELL

71

+3.6% YoY

1,180,873 observations

DISCOUNT TO ASKING

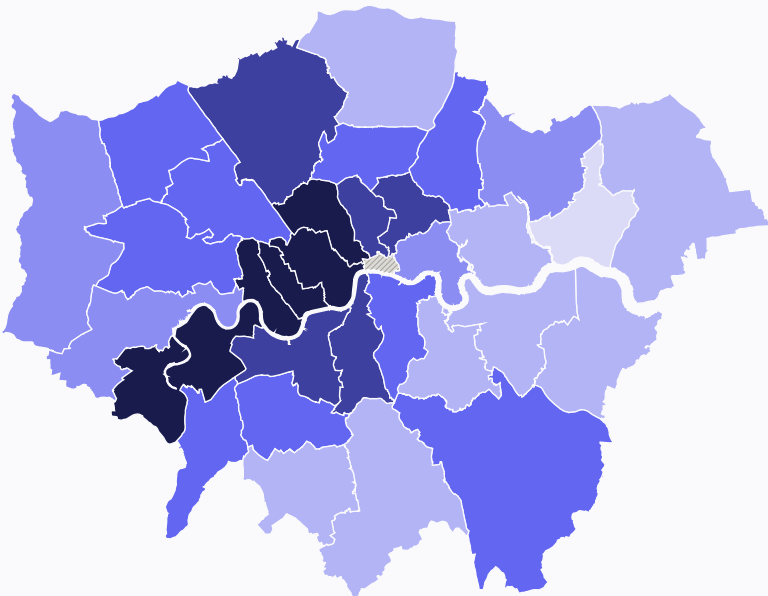
1.04%

-16.2% YoY

66,406 observations

Sold price by borough

12 months to 2025-11



Highest and lowest

BOROUGH	£	YOY
Kensington and Chelsea	1,176,295	-4.1%
Westminster	913,333	-9.3%
Camden	777,562	-1.1%
Richmond upon Thames	717,375	+2.7%
Hammersmith and Fulham	703,508	-13.0%
Wandsworth	673,478	+4.0%
Islington	668,792	-0.2%
Hackney	572,903	-1.7%
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Havering	440,583	+2.6%
Newham	439,990	+2.1%
Bexley	413,250	+0.7%
Croydon	407,792	+2.4%
Barking and Dagenham	373,833	+3.4%

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

What the data shows

Flat at the London median hides a split that follows price level. Four of the five most expensive boroughs sold below a year earlier, Hammersmith and Fulham furthest at -13.0% against +0.1% for the median borough, while all five of the cheapest rose. Across the 32 boroughs with a sold price the count is even, 16 up and 16 down. City of London is not among them, and at 14 sales a month it is too thin to carry a median. Asking price and price per sqft run to July 2026 where sold prices run to November 2025, so the pair is not matched.

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.

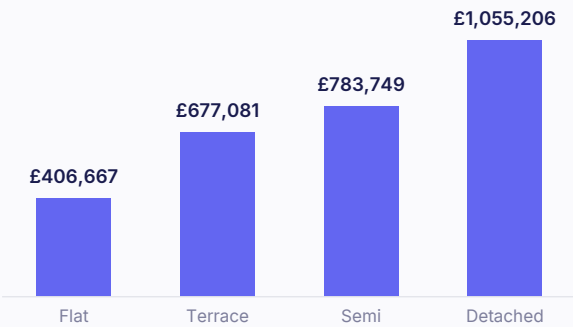
Analysis covers 32 boroughs and 244,961 homes brought to market over the 12-month window, from 66,406 underlying records.

Underneath *the headline.*

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

Asking price by property type

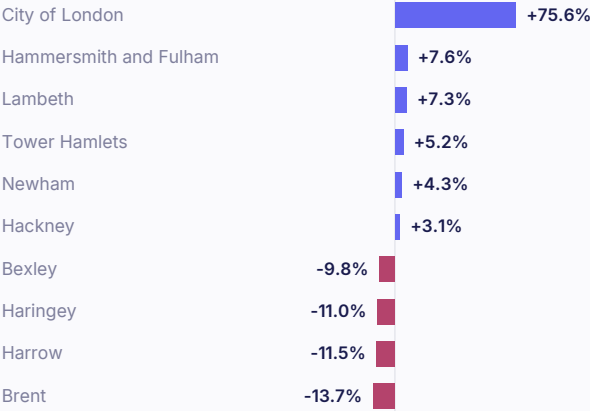
Median across boroughs, 12 months to 2026-07



A detached home asks +159% over a flat.

New-build price premium

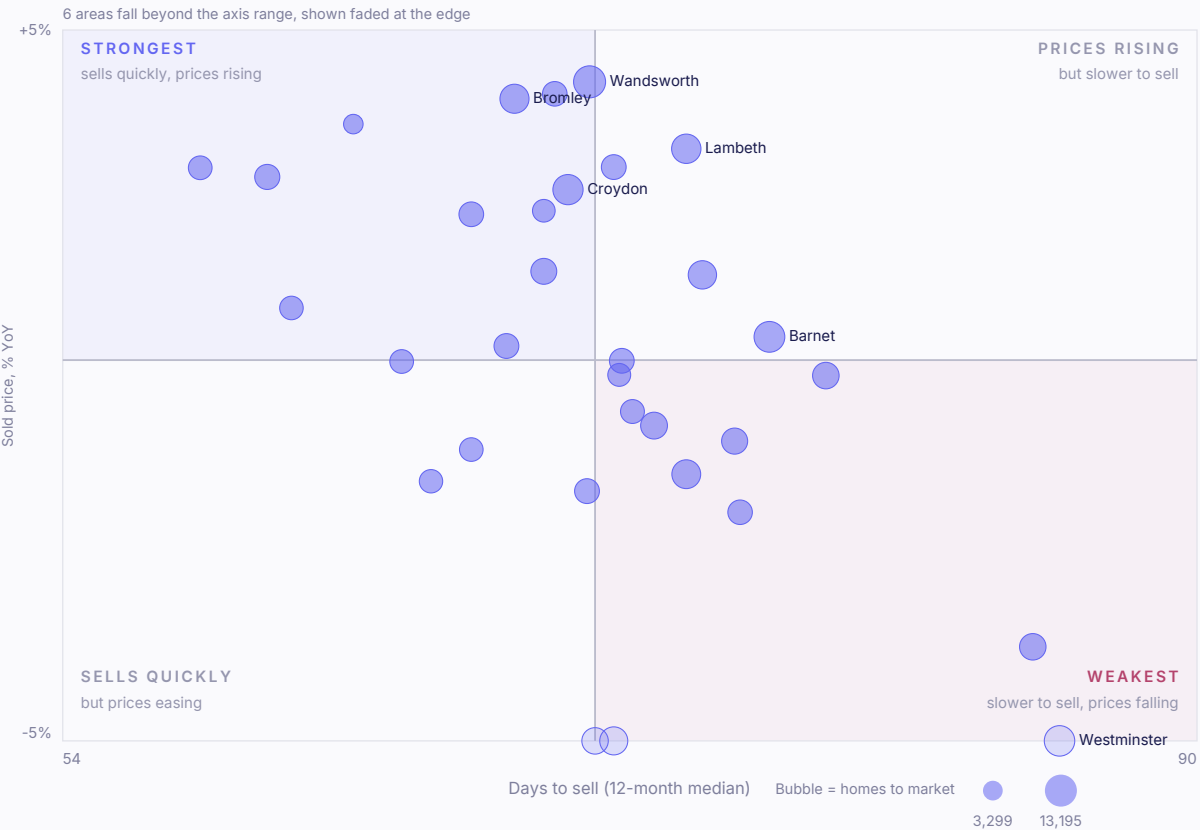
New-build against secondary asking price
Raw comparison; not adjusted for unit size or specification.



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.



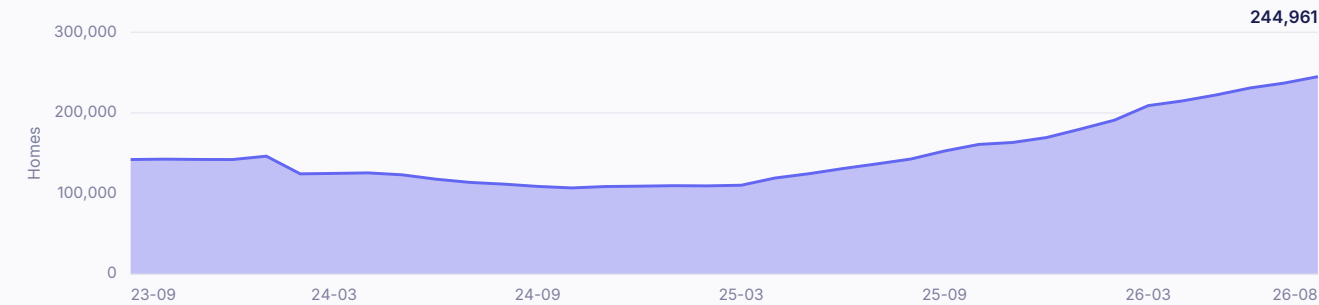
New-build asks sit below secondary in 24 of 33 boroughs. City of London's +75.6% stands well clear of the next, Hammersmith and Fulham at +7.6%, on the thinnest listing count of the 33 at 652 homes. On the scatter, the four widest discounts to asking — Kensington and Chelsea, Westminster, Harrow, Brent — all sold below a year earlier.

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

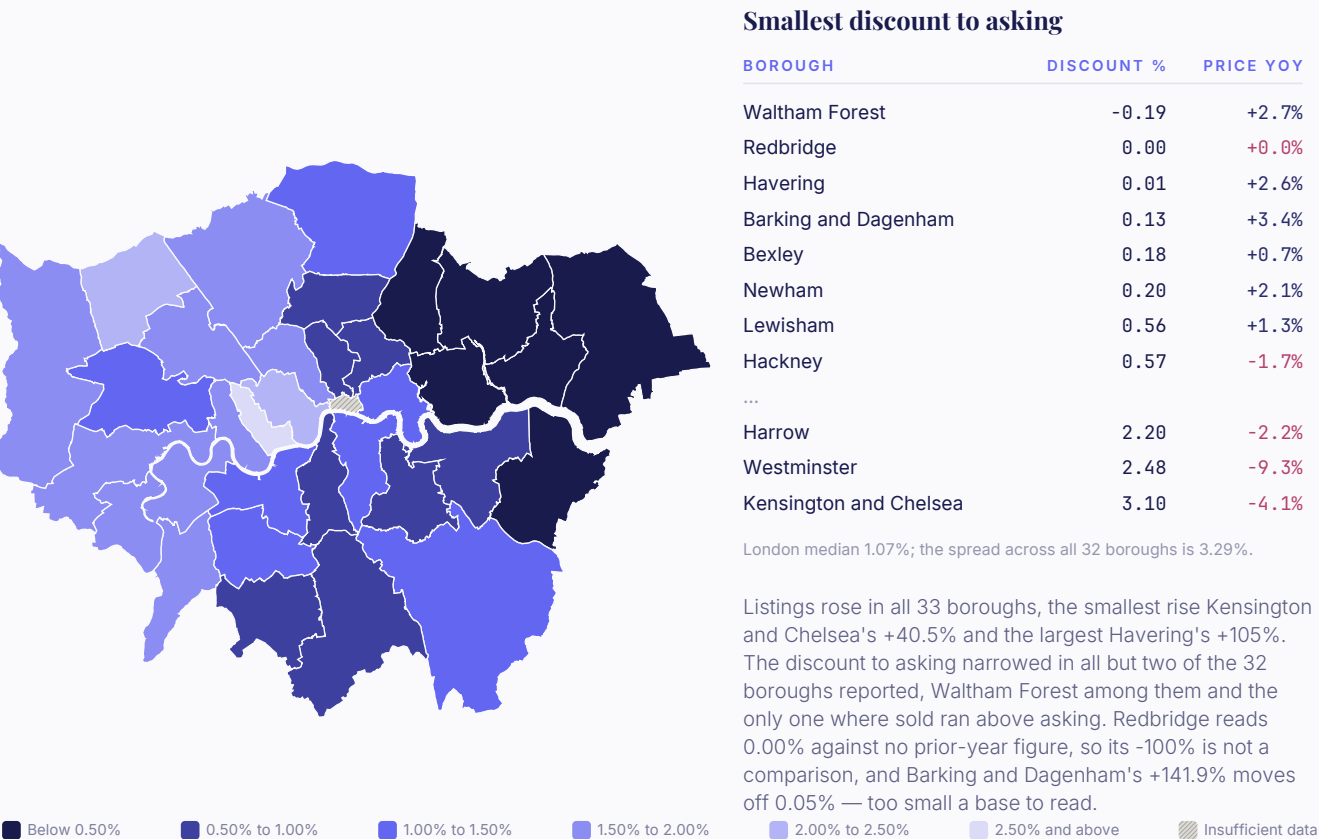


Supply is +71.5% against a year earlier.

Where demand is strongest

Median discount to asking price, 12 months to 2025-12. 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.



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 2026-09-21, IrOtherTransactions 2026-06-03, planning 2026-09-25, poi 2024-12-17, postcodes 2022-08-05.

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