



Significant Regional Differences in Housing Market Trends

Despite global uncertainty and an increased risk of future interest rate hikes, the housing market has generally strengthened during the start of the year. Bidding activity has also partially recovered. At the same time, regional differences remain significant, with Stockholm serving as the clearest example of a stronger market.

In March, Stockholm stood out with an average bid premium of +4.8% (the percentage change from the starting price to the final sale price). This is the highest level recorded since June 2022. Aside from Stockholm, only Norrbotten and Uppsala show a positive average bid premium in the apartment market.

In large parts of the country, however, the situation persists where bidding generally starts and concludes below the asking price. The most significant declines are in Värmland and Kronoberg counties, where final prices averaged more than 5% below the starting price.

For the country as a whole, the average bid premium in March was +1.1%, compared to +0.6% in March last year. Viewed from a historical perspective, however, this level remains low.

In the housing (houses/villas) market, most counties also continue to see a negative average bid premium. Again, Stockholm, Uppsala, and Norrbotten stand out. Along with Västernorrland, these were the only counties to report a positive bid premium in March.

Overall, the average bid premium for houses in the country amounted to -1.1%.

Erik Holmberg, Market Analyst at Hemnet, comments:

"The housing market has strengthened during the beginning of the year, but regional differences remain large. A clear example is the price increase during bidding, where Stockholm, Norrbotten, and to some extent Uppsala have shown strong development. One explanation is that eased credit restrictions have increased the motivation to act in the market. This strengthens purchasing power and suggests continued price increases. At the same time, we see geopolitical unrest that risks driving up both inflation and interest rates, which could instead put downward pressure on prices."

Average Bid Premium, March 2026



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County	Bid Premium: Apartments	Bid Premium: Houses
Blekinge	-4.1%	-1.2%
Dalarna	-2.9%	-4.3%
Gotland	-2.4%	-0.3%
Gävleborg	-2.7%	-1.8%
Halland	-0.7%	-1.7%
Jämtland	-1.8%	-1.0%
Jönköping	-1.3%	-4.2%
Kalmar	-4.6%	-3.8%
Kronoberg	-5.2%	-4.4%
Norrbottn	+0.6%	+1.1%
Skåne	-2.1%	-1.4%
Stockholm	+4.8%	+0.8%
Södermanland	-4.1%	-3.3%
Uppsala	+0.8%	+2.7%
Värmland	-5.0%	-1.5%
Västerbotten	-1.7%	-0.2%
Västernorrland	-3.1%	-6.4%
Västmanland	-1.2%	+0.6%
Västra Götaland	-0.7%	-1.0%
Örebro	-2.9%	-2.7%
Östergötland	-2.6%	-0.8%
National Average	+1.1%	-1.1%

For more information, please contact:

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About Hemnet

Hemnet operates the leading property platform in Sweden. The company emerged as an industry initiative in 1998 and has since transformed into a "win-win" value proposition for the housing market. By offering a unique combination of relevant products, insights and inspiration, Hemnet has built lasting relationships with buyers, sellers, and agents for more than 25 years. Hemnet shares a mutual passion for homes with its stakeholders and is driven by being an independent go-to-place for people to turn to for the various housing needs that arise through life. This is mirrored in the company's vision to be the key to your property journey, supplying products and services to improve efficiency, transparency and mobility on the housing market. Hemnet is listed on Nasdaq Stockholm ('HEM').

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