

DUNA HOUSE BAROMETER

The latest property market info
from Duna House network

Issue 163
January 2025



DHS
BÉT

**PRIME
MARKET**

Listed on the Prime Market of
the Budapest Stock Exchange

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FORTHCOMING ISSUES

DATE OF ISSUE	CONTENT
12.03.2025	February 2025 data
14.04.2025	Q1 2025 data (including price indices and housing loan data)
12.05.2025	April 2025 data

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GENERAL INFORMATION CONCERNING THE CONTENT OF THE PRESENT PUBLICATION

Attention! The present publication must not serve as grounds for estimating, or making conclusions in relation of Duna House business profitability.

All data, information, estimates and professional statements presented in the publication are developed based on data gained from the activities of Duna House Holding members, or in some cases are based on subjective experience. Application of those for the entire Hungarian property market may require additional corrections.

Data sources – unless indicated differently at the given section – derive from the database operated by Duna House Holding, the content of which is compiled by members of the network upon their individual judgement and information gained from clients. The operator does not take responsibility for the comprehensiveness of the data. Data presented in the present publication is mainly based on parameters of property transactions in major Hungarian cities given by Duna House branch offices and agents.



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EXECUTIVE SUMMARY

DEMAND IN THE HUNGARIAN HOUSING MARKET HIT A MULTI-YEAR RECORD IN JANUARY

The momentum seen last year in the domestic housing market continued in terms of both transaction numbers and buyer demand. As expected, the year got off to an active start: according to the buyer demand index measured by Duna House, buyers were particularly active on the residential property market in January. The month's score of 98 points represents a much stronger start to the year than in the past two years, and is even two points higher than the buoyant month of January in 2022. Duna House estimates that the first month of the year saw 9267 transactions, a 9 per cent decline on December's results, but still a nearly 11 per cent improvement on January 2024. The company forecasts a period of gradual recovery in both transaction numbers and prices in the housing market, with investment deals playing a major role alongside actual home purchases. As in the real estate market, the mortgage market has also had a busy start to the year, with HUF 120 billion of mortgage loans for residential purposes contracted in January this year, according to data from CrediPass, the Duna House Group's international financial brand in Hungary. This performance represents a 3 per cent volume increase compared to the December data published by MNB, the National Bank of Hungary and a 46 per cent improvement compared to the same period in 2024. Experts also forecast further strengthening in the mortgage market during the year.

With the exception of brick and mortar homes in Eastern Hungary, Duna House sales data show a slight to greater increase in all areas and property types across the country compared to the same period last year. In the East, the average price per sq. m. of concrete block flats rose to HUF 606,000, while in the West, transactions show a smaller, but still double-digit increase for both concrete block and brick and mortar properties. Brick and mortar apartments and houses in the East show an average price per sq. m. of HUF 356,000, after a 7 per cent softening in January sales data. The proprietors were inclined to change the asking price by 2 per cent during the advertising process, while buyer bargaining was 3-4 per cent for concrete block units in the country. Sellers reduced the asking price of brick and mortar homes at a rate of 3-4 per cent, leaving more room for bargaining at 6-7 per cent.

In the capital, prices of concrete block flats have also risen more sharply this year, with prices in Buda exceeding HUF 1 million and in the Pest districts HUF 900,000 per sq. m. Concrete block owners in Buda changed the asking price by only 2 per cent during the advertising process, leaving little room for bargaining at 1 per cent. On the Pest side, sellers opted to increase the asking price rather than reduce it, while they also only gave up 1 per cent to bargaining. Brick and mortar apartments that changed hands in Buda in January sold at an average price north of HUF 1.2 million per sq. m., while the average in the centre of Pest was over HUF 1.3 million and in other areas of Pest HUF 819,000 per sq. m. Sellers softened their advertising prices by 1-4 per cent, while there was a 1-3 per cent margin in buyer bargaining.

The districts of Buda lost their podium place, but District 13 retained its leading position in January 2025, according to the Duna House popularity survey among the districts of the capital. Terézváros (District 6), which used to be particularly popular with investors, returned to second place, while Zugló (District 14) retained its third place.

Not only has the interest in the districts of the capital changed, but buyers' demands regarding the quality of the properties are also changing: in two areas in County Pest and in Budapest, properties in a very good condition have come to the fore.

In January 2025, the share of investor buyers in the capital was 32 per cent, and 25 per cent of buyers were signing a contract for their first home. In the country, most sales involved the acquisition of a first home, while 26 per cent of buyers moved into a larger property, and the share of investors was 24 per cent. The strongest seller motivation in Budapest was selling a previous investment with a share of 34 per cent, while in the country the sale of an inherited property continued to lead the way.

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THREE INTERESTING FACTS

Duna House measured the strongest January demand of the past 3 years.

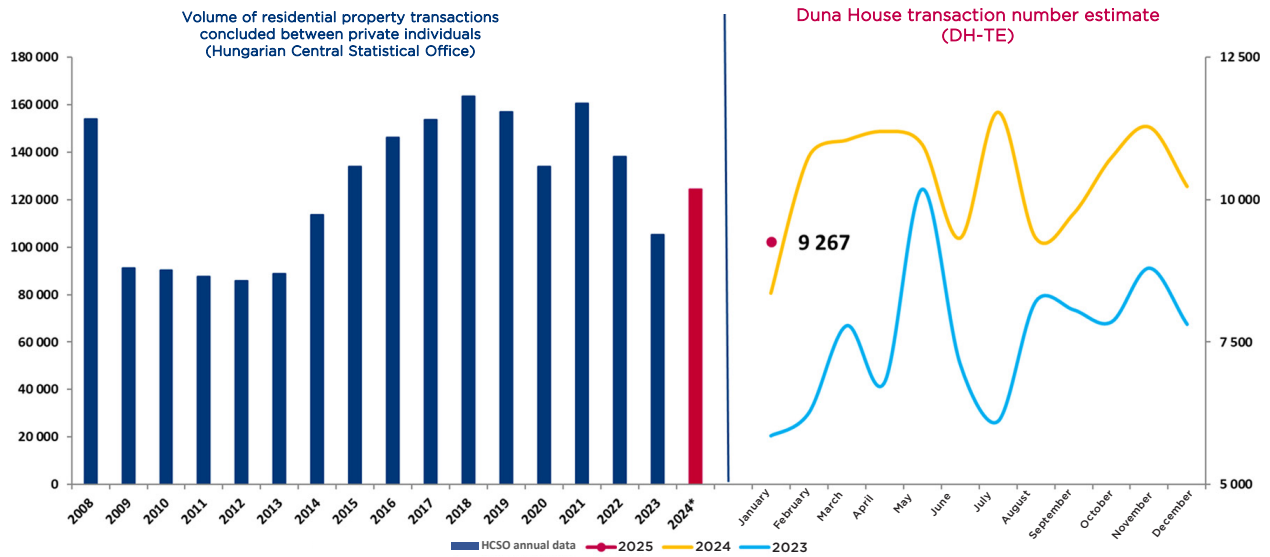
The Buda districts slipped back, while Terézváros (District 6) was again among the most sought-after districts of the capital.

Investors in Budapest and first-home buyers in the country constituted the key buyer groups.

TRANSACTION DATA

DUNA HOUSE TRANSACTION NUMBER ESTIMATE (DH-TE)

The Duna House Group presents its monthly Transaction Number Estimate (DH-TE) and Mortgage Forecast below, showing that 9267 residential property transactions were concluded in January 2025 and residential mortgage contracts worth HUF 120 billion were signed in the whole of Hungary.



The momentum of the past year continued into the new year, with the first month of the domestic housing market off to an active start, as expected. According to Duna House estimates, January saw 9267 transactions, down 9 per cent on the previous month, but up nearly 11 per cent on January 2024. According to the company’s forecast, the real estate market will see a gradual recovery in both transaction numbers and prices, with investment sales playing a major role alongside home purchases.

According to data from Credipass, the international financial brand of the Duna House Group in Hungary, the mortgage market in January 2025 saw HUF 120 billion in contracted residential mortgage loans. This represents a 3 per cent volume increase compared to the December data published by the National Bank of Hungary and a 46 per cent improvement compared to the same period in 2024. Similar to the housing market, the mortgage market is expected to continue to strengthen over the course of the year.

THE TABLE BELOW SHOWS MONTHLY TRANSACTION VOLUME ESTIMATES OF DUNA HOUSE.

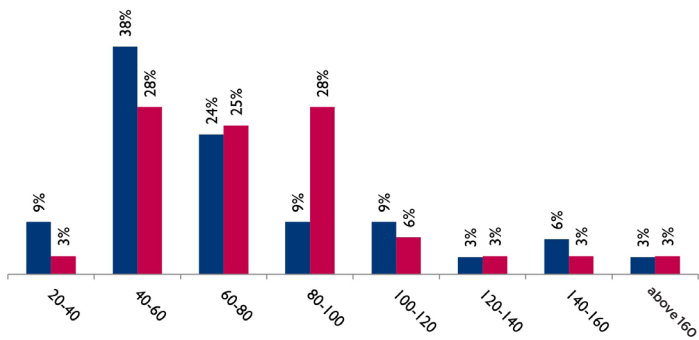
	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
2022	10 815	13 793	14 548	11 911	12 519	10 859	8 978	9 748	9 200	8 326	8 000	6 474
2023	5 853	6 253	7 787	6 787	10 187	7 120	6 107	8 213	8 067	7 853	8 800	7 813
2024	8 354	10 754	11 046	11 200	10 969	9 323	11 538	9 323	9 754	10 738	11 277	10 231
2025	9 267											

Methodology behind DH-TE: Regardless of the time of year, the most important indicator of the real estate market is the annual number of sale transactions. The DH-TE figure is an estimate published by Duna House and it reflects interim approximate data. The estimate is based on the number of monthly property transactions brokered by Duna House and the estimated market share of Duna House. The estimate of the current monthly market share of Duna House is based on the following indicators: 1. Data published by the Hungarian Central Statistical Office on transactions among private individuals. Since the Statistical Office publishes data with several months’ delay, market share can be adjusted retroactively which also results in a more accurate estimate as well. **Please note:** After 2016 and as a consequence of the boom in newly-built apartments, pre-contracted purchase transactions appear in the statistics of the Statistical Office with a delay of several months or even one or two years, after the capital transfer tax has been levied, which results in anomalies in the statistics. 2. The number of Energy Certificates issued; 3. Subjective assessment based on other management information from Duna House Holding. **Please also note** that DH-TE data cannot be used for defining the volume of transactions brokered by Duna House, or for estimating the business profit of Duna House Holding or for the drawing of any related conclusions. **Mortgage forecast:** Figures published Credipass can primarily be used for quick trend forecasts; the National Bank of Hungary publishes the actual figures for the second last month at the beginning of each month.

TRANSACTION PARAMETERS IN BUDAPEST

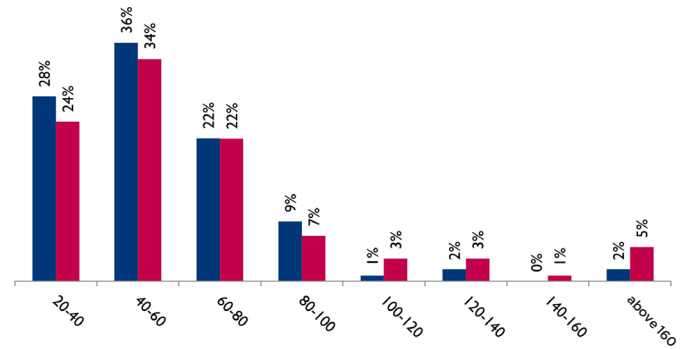
According to the January sales data of Duna House, the proportion of properties with a floor space between 40-60 and 80-100 sq. m. was 28 per cent each, the same as on the Buda side of the capital. A quarter of the transactions closed at prices between HUF 1.2-1.4 million per sq. m. Last month 59 per cent of the apartments on sale in Buda were sold for over HUF 70 million. In the Pest districts, Duna House clients were mostly looking for apartments between 40-60 sq. m. (34 per cent) and 20-40 sq. m. (24 per cent). In terms of price per sq. m., properties in almost all categories sold at almost the same rate on the Pest side in January, with the HUF 600-800 thousand and HUF 800-900 thousand per sq. m. categories rising by 15 per cent each. 30 per cent of transactions closed at purchase prices above HUF 70 million.

BUDA

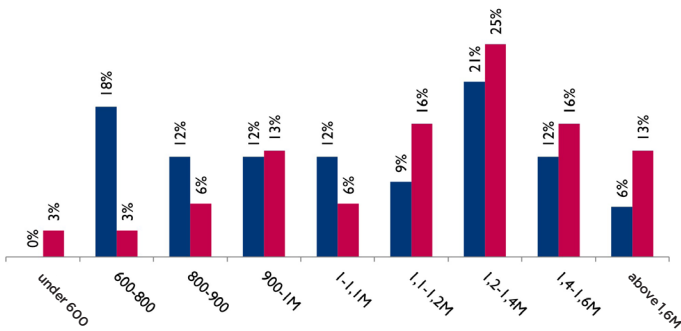


apartment size (m²)

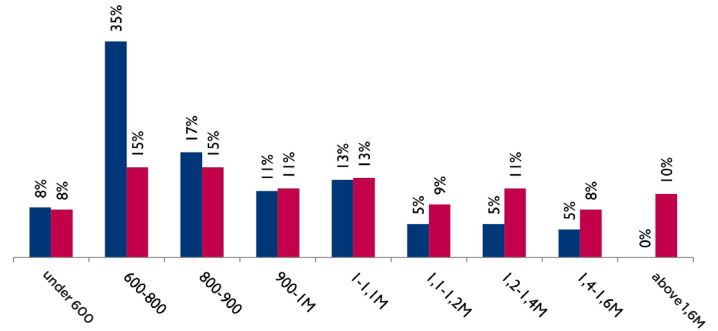
PEST



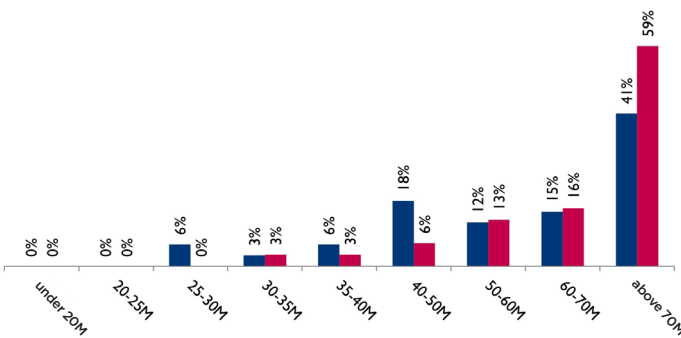
apartment size (m²)



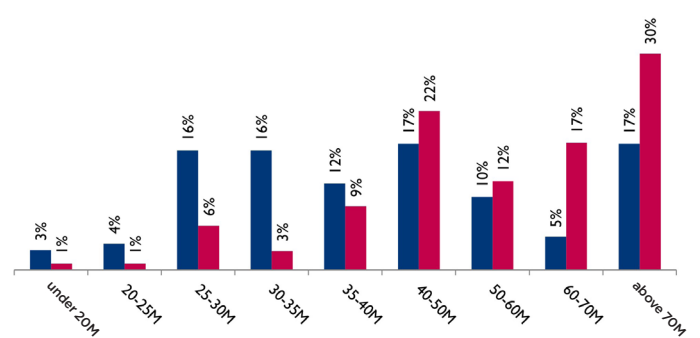
sq. m. price (in thousand HUF)



sq. m. price (in thousand HUF)



apartment price (in million HUF)



apartment price (in million HUF)

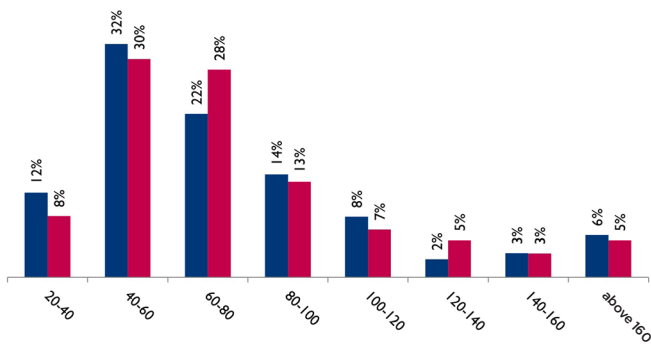
■ January 2024 ■ January 2025

Based on properties sold by Duna House Franchise Network.

TRANSACTION PARAMETERS IN THE COUNTRY

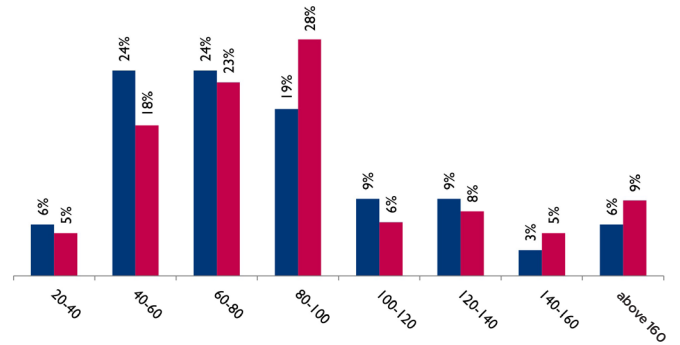
Nationally, with the exception of Central Hungary, homes between 40-60 sq. m. accounted for 30 per cent of transactions, but the 60-80 sq. m. category was also popular. In terms of price per sq. m., those above HUF 600,000 were in the majority with 26 per cent, while a fifth of sales closed at below HUF 250,000 per sq. m. Most (26 per cent) of the properties sold were worth over HUF 40 million. Duna House experts found the highest demand for properties with a floor space between 80-100 sq. m. in County Pest. 63 per cent of houses and flats were sold at prices above HUF 600,000 per sq. m., while more than half (54 per cent) of the properties were sold at prices north of HUF 50 million in January this year.

COUNTRYWIDE (EXCLUDING CENTRAL HUNGARY)

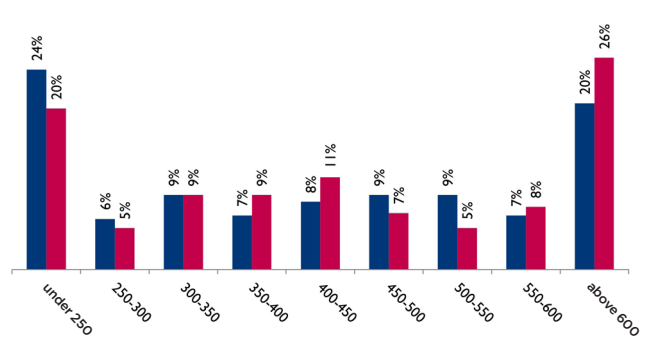


apartment size (m²)

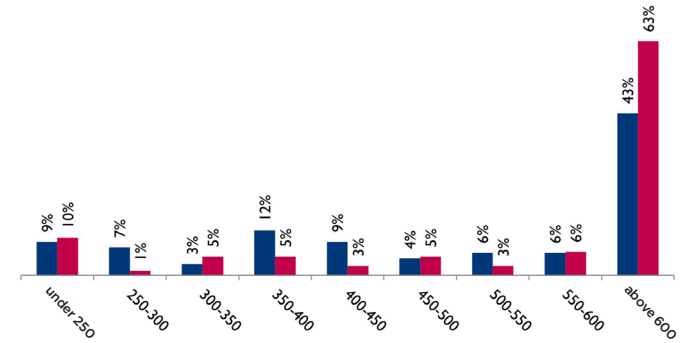
COUNTY PEST



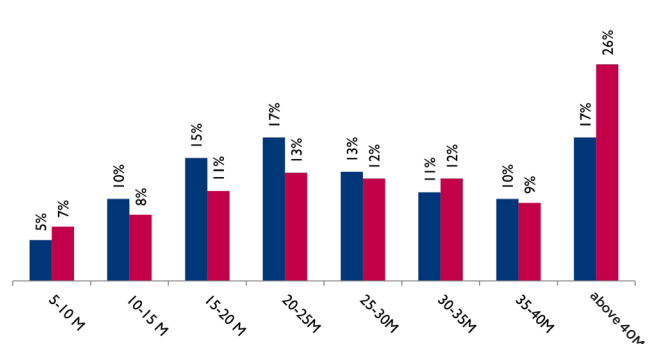
apartment size (m²)



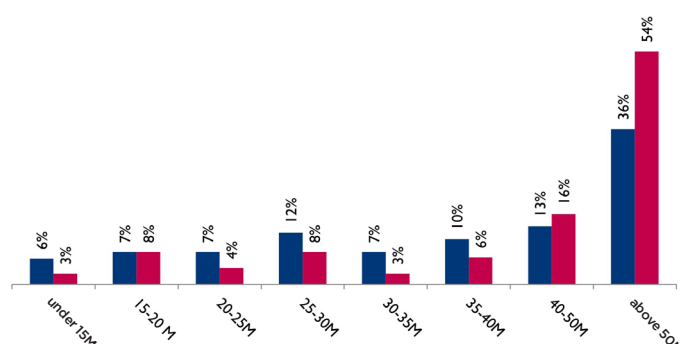
sq. m. price (in thousand HUF)



sq. m. price (in thousand HUF)



apartment price (in million HUF)



apartment price (in million HUF)

■ January 2024 ■ January 2025

Based on properties sold by Duna House Franchise Network.

SALES DATA - PRICES - BARGAINING MARGINS

Compared to the same period of the previous year, Duna House sales data show a higher or lower price increase in all areas and property types across the country, with the exception of brick and mortar homes in Eastern Hungary. In the East, the average price per sq. m. of concrete block units rose to HUF 606,000, while in the West, transactions show a milder, but still double-digit increase for both concrete block and brick and mortar properties. For the latter, the price level rose to HUF 425,000, and for concrete block apartments to HUF 573,000 per sq. m. in the West. Brick and mortar offerings in the East, after a 7 per cent easing in January, showed a price of HUF 356,000 per sq. m. Owners were inclined to change the asking price by 2 per cent during the advertising process, while buyer bargaining was 3-4 per cent for concrete block homes in the country. Sellers reduced the asking price of brick and mortar properties at a rate of 3-4 per cent, leaving more room for bargaining at 6-7 per cent.

PANEL: COUNTRYWIDE

	EAST				WEST			
	price	m ² price	change in listing price	bargain	price	m ² price	change in listing price	bargain
January 2024	24 319 000	473 000	5%	3%	26 191 000	507 000	1%	4%
January 2025	24 840 000	606 000	2%	3%	31 097 000	573 000	2%	4%

BRICK: COUNTRYWIDE

	EAST				WEST			
	price	m ² price	change in listing price	bargain	price	m ² price	change in listing price	bargain
January 2024	29 448 000	383 000	6%	8%	30 530 000	359 000	6%	6%
January 2025	26 733 000	356 000	3%	6%	34 937 000	425 000	4%	7%

In the capital, the price level of concrete block units has also risen above HUF 1 million per sq. m. in Buda, while in the Pest districts the price paid for concrete block homes exceeded HUF 900,000 per sq. m. Owners of concrete block units in Buda reduced the asking price by only 2 per cent during the advertising phase, leaving little room for bargaining at 1 per cent. On the Pest side, owners opted to increase the asking price rather than reduce it, and they also conceded only 1 per cent in the bargaining process. Brick and mortar apartments in Buda that changed hands in January sold at an average price of over HUF 1.2 million per sq. m., while the average price in the centre of Pest was over HUF 1.3 million and HUF 819,000 per sq. m. in other areas of Pest. Sellers softened their advertising prices by 1-4 per cent, while there was a 1-3 per cent margin left for buyer bargaining.

PANEL: BUDAPEST

	EAST				WEST			
	price	m ² price	change in listing price	bargain	price	m ² price	change in listing price	bargain
January 2024	28 000 000	778 000	14%	0%	39 620 000	702 000	5%	4%
January 2025	65 830 000	1 034 000	2%	1%	48 850 000	908 000	-1%	1%

BRICK: BUDAPEST

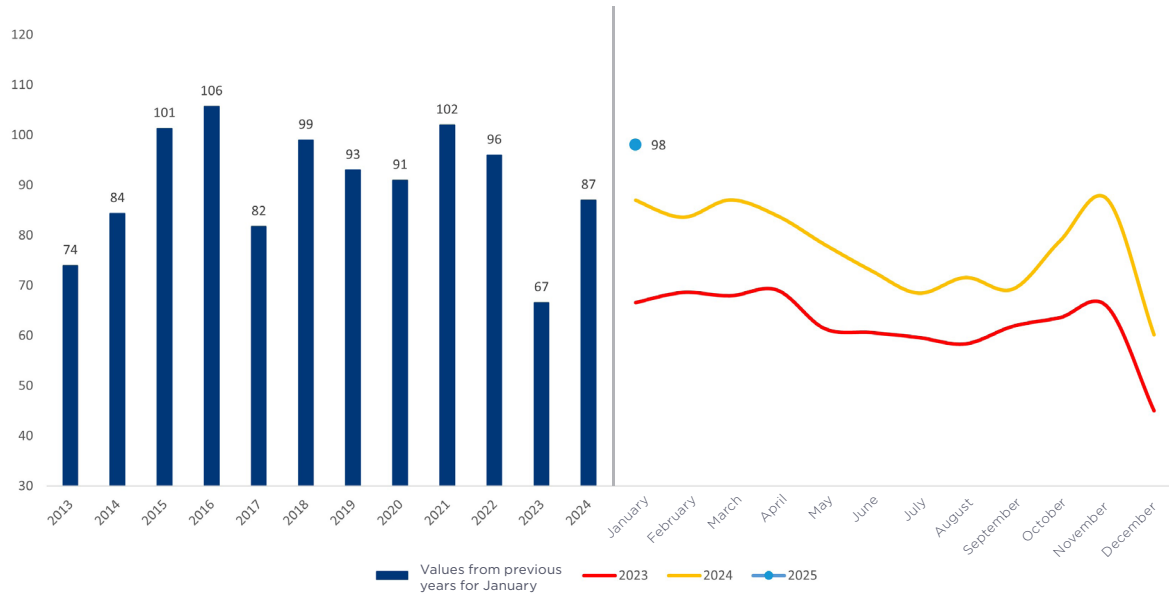
	BUDA				PEST				INNER CITY			
	price	m ² price	change in listing price	bargain	price	m ² price	change in listing price	bargain	price	m ² price	change in listing price	bargain
January 2024	76 021 000	1 051 000	4%	4%	43 435 000	806 000	5%	4%	55 060 000	1 046 000	6%	4%
January 2025	102 094 000	1 212 000	1%	1%	62 210 000	819 000	4%	2%	76 097 000	1 349 000	2%	3%

Based on purchase prices of the given period of properties brokered by Duna House.

Methodology: Change in the listing price is the difference between the first price indicated by the seller in the Duna House assignment and the last registered price at the time of the appearance of the buyer. Bargain shows additional changes in the price agreed upon by the seller and buyer. The two indicators together give a good picture of the difference in price between the original idea of the seller and the actual final price.

BUYERS - DEMAND INDEX

Buyers were extremely active on the Hungarian property market in January, according to the Duna House Buyer Demand Index. The month's score of 98 points represents a much stronger start to the year than in the past two years, and is two points higher than the buoyant month of January 2022.



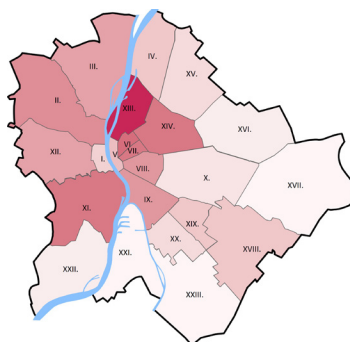
Methodology behind Demand Index: The basis of the estimate is the activity registered by our agents in various, mainly major cities and Duna House offices. Corrections are made depending on the number of active agents and working days. The Demand Index is an important indication of buyer side's reactions to political decision or solutions offered by the financial sector. Demand Index is a quantitative indicator which has no direct connection with the realized or future transaction numbers. The latter is a qualitative issue highly affected by market environment and available financial product.

DEMAND FOR INDIVIDUAL DISTRICTS

The Buda districts have lost their place on the podium, but in January 2025 District 13 retained its leading position according to the Duna House popularity survey among the districts of the capital. 24 per cent of clients planning to buy a home in Budapest named District 13 as their preferred location. District 6 (Terézváros, 18.3 per cent), which used to be a popular choice for investors, has returned to second place, while District 14 (Zugló) has retained third place with 18 per cent of votes. District 7 (Erzsébetváros) came in fourth.

DISTRICT	JANUARY 2024	JANUARY 2025
Bp. 01.	7,7%	9,1%
Bp. 02.	15,1%	15,9%
Bp. 03.	12,5%	13,8%
Bp. 04.	7,5%	9,8%
Bp. 05.	9,4%	11,0%
Bp. 06.	14,5%	18,3%
Bp. 07.	15,5%	18,0%
Bp. 08.	10,5%	14,5%
Bp. 09.	10,7%	14,8%
Bp. 10.	5,2%	6,9%
Bp. 11.	16,7%	17,6%
Bp. 12.	13,8%	13,9%
Bp. 13.	18,1%	24,0%
Bp. 14.	14,7%	18,0%
Bp. 15.	6,0%	7,8%
Bp. 16.	6,6%	6,0%
Bp. 17.	4,6%	4,9%
Bp. 18.	8,8%	9,9%
Bp. 19.	7,0%	9,8%
Bp. 20.	4,6%	7,4%
Bp. 21.	2,8%	4,5%
Bp. 22.	4,8%	5,3%
Bp. 23.	1,5%	3,2%

INTEREST TOWARD THE DISTRICTS IN BUDAPEST:

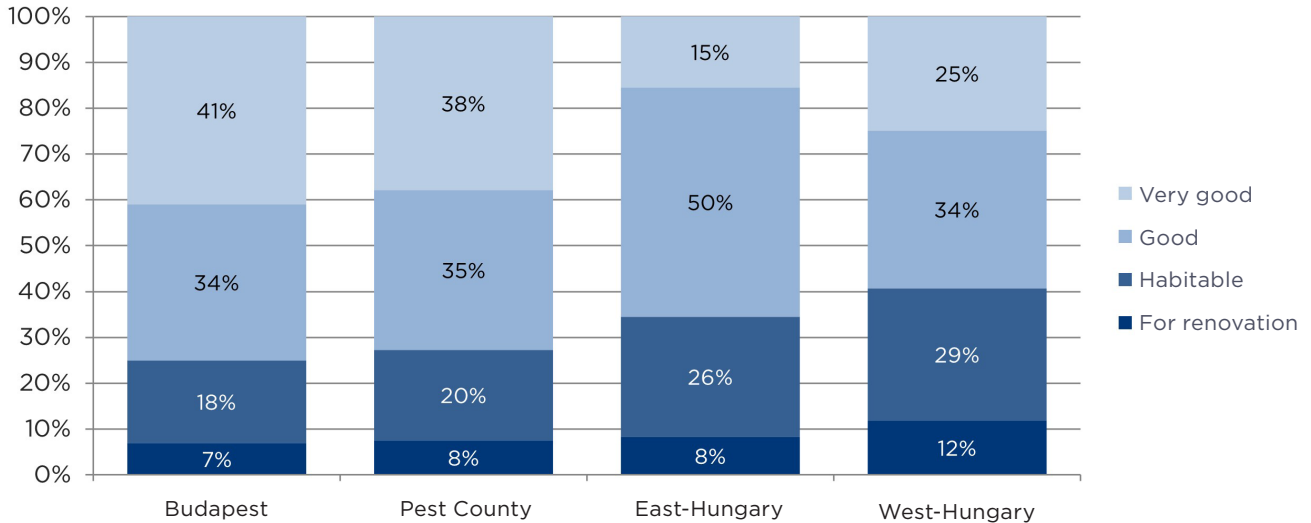


Methodology: Our clients with a purchase intention indicate their preferred districts (more at the same time) when meeting our agents. The above preference map is put together based on this "popularity information".

Data is analysed based on real estate transactions brokered by Duna House. The territorial distribution of DH transactions may differ from the territorial distribution of the market as a whole. Duna House Holding pursues its real estate agency activities mainly in Budapest and in major cities. Duna House Holding does not make corrections in view of the differences in territorial distribution between its own transactions and of the market in general.

QUALITY PREFERENCES

According to Duna House's January 2025 sales data, in County Pest and Budapest properties in a very good condition were chosen by 38-41 per cent of buyers, while in Western and Eastern Hungary the category of homes in a good condition dominated with shares of 34 per cent and 50 per cent, respectively. The propensity to renovate was lowest in the capital at 7 per cent, while 8 per cent each of sales in Pest and Eastern Hungary were for homes in need of a complete renovation. The West had the highest proportion of homes in need of an overhaul at 12 per cent.



TURNOVER SPEED (TIME NEEDED TO SELL)

According to the company's January data, it took the least time to sell a concrete block apartment in the capital, with 2.4 months on average. In the East, it took three months, while in the West it took slightly longer. The sale of brick and mortar apartments and houses in the capital took more than 3.5 months on average, according to Duna House transaction data, while in the country it took more than 4 months to successfully close a deal.

PANEL				
TIME NEED OF SALE (DAY)				
	EAST	WEST	BUDA	PEST
January 2024	96	109	137	139
January 2025	93	104	74	72

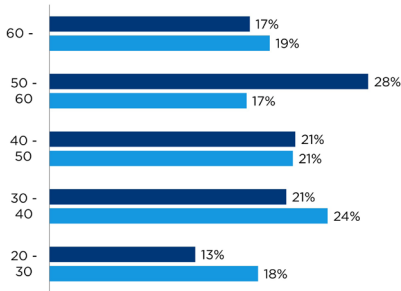
BRICK					
TIME NEED OF SALE (DAY)					
	EAST	WEST	BUDA	PEST	INNER CITY
January 2024	147	137	141	135	150
January 2025	131	125	114	123	96

Data is assessed based on real estate sold by Duna House. Territorial distribution of transactions brokered by Duna House may differ from the territorial distribution of the market in whole. Duna House Holding carries out its real estate agency activities mainly in Budapest and major cities. Duna House Holding does not make corrections in relation of the territorial distribution of own and market transactions.

BUYER PROFILE IN BUDAPEST

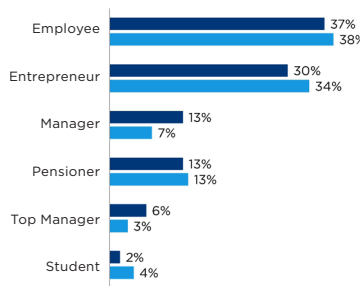
An analysis of the buyer side data of the January transactions in the capital completed with the assistance of Duna House shows that the most active group of buyers was the group aged 50-60 years with 28 per cent, while the 30-40 and 40-50 year-olds were the most active with a share of 21 per cent each. The majority (37 per cent) of buyers were employees. In January this year, 32 per cent of buyers in the capital were signing a purchase contract for investment purposes; 25 per cent were buying their first home. Investors and first-time homebuyers spent HUF 68 million and HUF 52.7 million, respectively, on residential property purchases in the capital.

BUYERS' AGE IN BUDAPEST



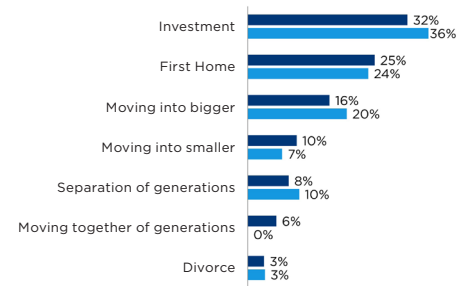
AGE	AVERAGE PRICE	m ²
20 - 30	61 112 000	57
30 - 40	66 192 000	73
40 - 50	70 230 000	71
50 - 60	70 218 000	71
60 -	80 341 000	71

BUYERS' STATUS IN BUDAPEST



STATUS	AVERAGE PRICE	m ²
Employee	58 085 000	68
Top Manager	73 729 000	59
Manager	65 415 000	56
Pensioner	63 935 000	55
Student	46 700 000	39
Entrepreneur	80 568 000	91

MOTIVATION IN BUDAPEST

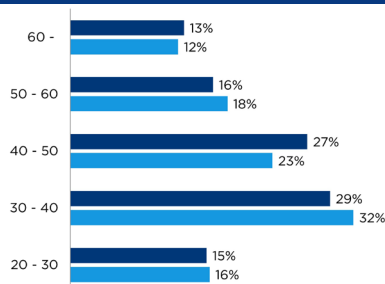


SITUATION	AVERAGE PRICE	m ²
Investment	68 062 000	59
First Home	52 735 000	60
Separation of generations	62 880 000	52
Moving together of generations	63 158 000	108
Moving into smaller	63 492 000	54
Moving into bigger	120 165 000	130
Divorce	58 473 000	58

BUYER PROFILE IN THE COUNTRY

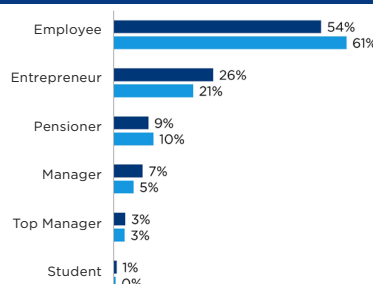
In January 2025, 29 per cent of buyers in the country were in the 30-40 age group, and more than half (54 per cent) of them were employees. Most (28 per cent) of all sales involved the acquisition of a first home, while 26 per cent of buyers were moving into a larger property in the country. The share of investors was 24 per cent, with the average amount spent on a property being HUF 31.6 million. First-time home buyers spent an average of HUF 32.2 million, while buyers in the country spent more, HUF 52.9 million on larger properties.

BUYERS' AGE IN THE COUNTRY



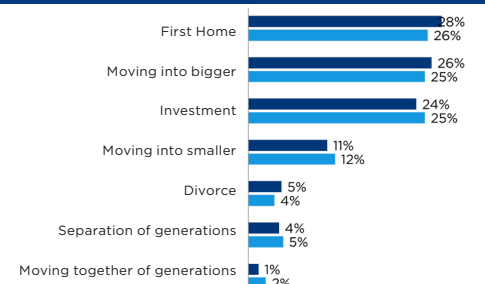
AGE	AVERAGE PRICE	m ²
20 - 30	38 092 000	83
30 - 40	38 329 000	81
40 - 50	36 576 000	77
50 - 60	49 603 000	88
60 -	41 908 000	69

BUYERS' STATUS IN THE COUNTRY



STATUS	AVERAGE PRICE	m ²
Employee	36 693 000	78
Top Manager	63 488 000	101
Manager	43 375 000	73
Pensioner	35 373 000	77
Student	32 825 000	57
Entrepreneur	42 912 000	92

MOTIVATION IN THE COUNTRY



SITUATION	AVERAGE PRICE	m ²
Investment	31 604 000	70
First Home	32 224 000	77
Separation of generations	32 088 000	76
Moving together of generations	52 250 000	199
Moving into smaller	39 797 000	66
Moving into bigger	52 921 000	106
Divorce	42 548 000	71

■ January 2024 ■ January 2025

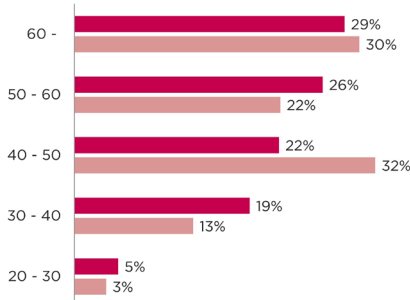
Under our methodology investment as a motivation includes all property transactions that, judged by the buyer's characteristics, can be considered as an investment, i.e. this is not a strictly business category. It includes all family investments and short-term investors who buy a property in a poor state of repair, renovate it and sell it on immediately. These latter buyers have a favourable effect on improving the overall state of repair of the existing pool of properties and are, in view of current construction industry and property market conditions, performing a welcome activity.

Data presented above relating to age, status and reason of purchase have been acquired through voluntary declarations of our clients. Therefore, they qualify as a sample and are regarded as estimates.

SELLER PROFILE IN BUDAPEST

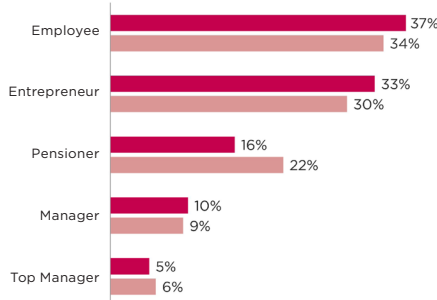
According to seller data for January 2025, 29 per cent of transactions in the capital involved sellers aged 60 and over, and 37 per cent of all sellers were employees. The strongest motivation for selling in Budapest was cashing in on a previous investment, at 34 per cent, while 26 per cent of sellers were parting with their previous home in order to move into a larger property. Selling an inherited property accounted for only 17 per cent of sales this time.

SELLERS' AGE BUDAPEST



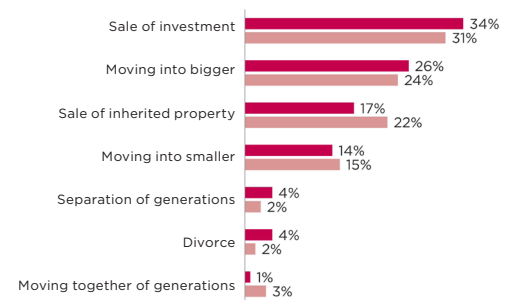
AGE	AVERAGE PRICE	m ²
20 - 30	47 817 000	45
30 - 40	70 792 000	62
40 - 50	77 065 000	66
50 - 60	66 041 000	80
60 -	83 530 000	85

SELLERS' STATUS BUDAPEST



STATUS	AVERAGE PRICE	m ²
Employee	51 429 000	58
Top Manager	94 000 000	70
Manager	74 240 000	62
Pensioner	78 262 000	97
Entrepreneur	84 389 000	76

MOTIVATION BUDAPEST

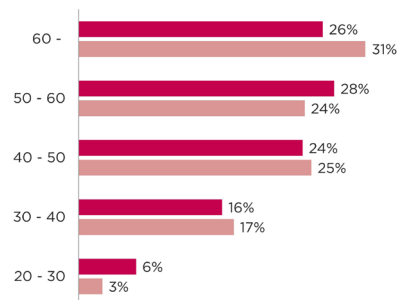


SITUATION	AVERAGE PRICE	m ²
Sale of investment	73 830 000	55
Separation of generations	136 180 000	152
Moving together of generations	42 500 000	45
Moving into smaller	72 869 000	113
Moving into bigger	63 840 000	55
Sale of inherited property	66 705 000	72
Divorce	108 740 000	140

SELLER PROFILE IN THE COUNTRY

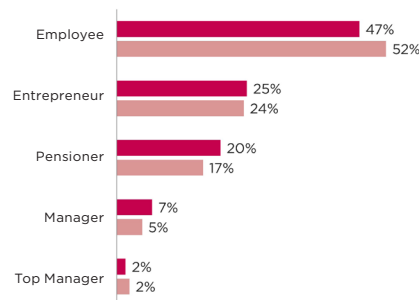
According to sales data from Duna House, 26 per cent of sellers in January this year were aged 60 and above, while 28 per cent were aged 50-60. 47 per cent of those selling property were employees and 25 per cent were self-employed. In the country, the sale of inherited properties continued to lead the ranking (29 per cent), while in 26 per cent of cases the motivation was the sale of a property previously bought as an investment.

SELLERS' AGE IN THE COUNTRY



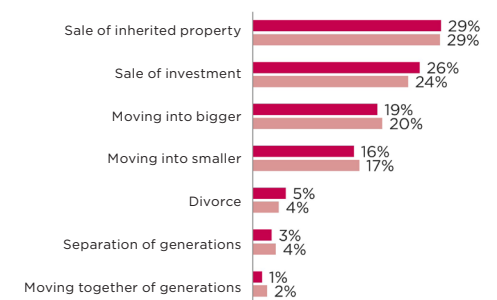
AGE	AVERAGE PRICE	m ²
20 - 30	29 760 000	77
30 - 40	37 145 000	86
40 - 50	42 634 000	82
50 - 60	37 309 000	81
60 -	34 294 000	76

SELLERS' STATUS IN THE COUNTRY



STATUS	AVERAGE PRICE	m ²
Employee	34 094 000	80
Top Manager	84 500 000	120
Manager	55 441 000	87
Pensioner	31 808 000	73
Entrepreneur	50 005 000	87

MOTIVATION IN THE COUNTRY



SITUATION	AVERAGE PRICE	m ²
Sale of investment	43 353 000	81
Separation of generations	38 199 000	77
Moving together of generations	19 950 000	64
Moving into smaller	44 126 000	89
Moving into bigger	43 725 000	74
Sale of inherited property	30 228 000	84
Divorce	43 558 000	92

■ January 2024 ■ January 2025

An overhead view of a meeting table with several people seated around it. The table is covered with documents, a laptop, and other office supplies. The background is a light-colored wall with a dark blue L-shaped graphic element in the top right corner.

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