

DUNA HOUSE BAROMETER

The latest property market info
from Duna House network

Issue 160
October 2024



DHS
BÉT

**PRIME
MARKET**

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FORTHCOMING ISSUES

DATE OF ISSUE	CONTENT
12.12.2024	November 2024 data
13.01.2025	Q4 2024 data (including price indices and housing loan data)
12.02.2025	January 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

INVESTOR RALLY IN THE OCTOBER DOMESTIC RESIDENTIAL PROPERTY MARKET

In October 2024 the residential property market closed another strong month with 10 738 transactions estimated by Duna House, up 10% on the previous month and 36.74% better than in the same month last year. The sustained momentum of buyers, and thus of the segment, is also confirmed by the Duna House Demand Index which showed a 10-point increase compared to September. Thanks to strong buying and selling activity, the Duna House team expects a buoyant period in both the property and in the mortgage markets for the coming months. According to the Hungarian data of Credipass, the international financial brand of the Duna House Group, housing mortgage contracts worth HUF 117 billion were signed in October this year. Compared to the September data published by MNB, the National Bank of Hungary, the volume increased by 3%, but in comparison to MNB data for the same period last year the segment performed 128% stronger in October this year.

In Budapest the proportion of buyers signing a purchase contract with an investment in mind reached a record high of 40% – the average purchase price was HUF 58.7 million. Although in the past months two districts in Buda, Újbuda (District 11) and District 2 had attracted the highest interest, the October survey of Duna House showed that District 13 regained the title of the most sought after district with a popularity score of 19.4%, while the two Buda districts mentioned above dropped to second and third place, respectively. The news of the abolition of short-term rental further dampened demand for inner city districts, with Erzsébetváros (District 7) and Terézváros (District 6) now only coming in sixth and eighth place, respectively.

The growth of transaction numbers and buying activity also has an impact on prices, with a milder increase in the capital this time, while in the country the rise in price per sq. m. is slightly more pronounced, according to Duna House sales data for October 2024. For concrete block homes in the capital there was a double-digit increase in October 2024 compared to the same period last year – this and the firm resolve of owners was posing some challenge to buyers. Sellers hardly changed the guide price at all during the advertising process and left only a narrow 2-4% room for bargaining, so buyers paid an average of HUF 873 000 per sq. m. concrete block units on the Buda side and HUF 100 000 less, 773 000 per sq. m. in Pest. Brick and mortar homes in Buda that changed hands in October sold for an average of over HUF 1.2 million per sq. m., while in the inner city and in the remaining districts of Pest the average was close to HUF 1.1 million and HUF 779 000 per sq. m., respectively. Owners eased 2-3% on the advertised price, while the buyers' margin was 2-5%.

The recovery of the market is also reflected in the sq. m. prices in the country, with the average price paid for a concrete block dwelling rising to HUF 536 000 per sq. m. in the East and HUF 562 000 in the West. Here too, there were only minimal changes in the asking price (1-2%), while buyers' margin for bargaining was 3-5%. Sellers softened the asking price of brick and mortar properties in the country by 4-5% during the advertising process, leaving more room for bargaining at 7-8%. In Eastern and Western Hungary, the average sq. m. price of brick and mortar apartments and houses was the same, around HUF 403 000. Even though in the country the leading motivation was buying a first home, the number of investors was only 1 percentage point lower than of those buying their first home. 25% of all contracts were concluded for investment purposes, an increase of 5 percentage points compared to last year. In the country, buyers spent HUF 30.9 million on a residential property investment and HUF 35.5 million on a first home.

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THREE INTERESTING FACTS

Investor activity in the capital was at an all-year high this month, with 40% of purchases in October motivated by investment.

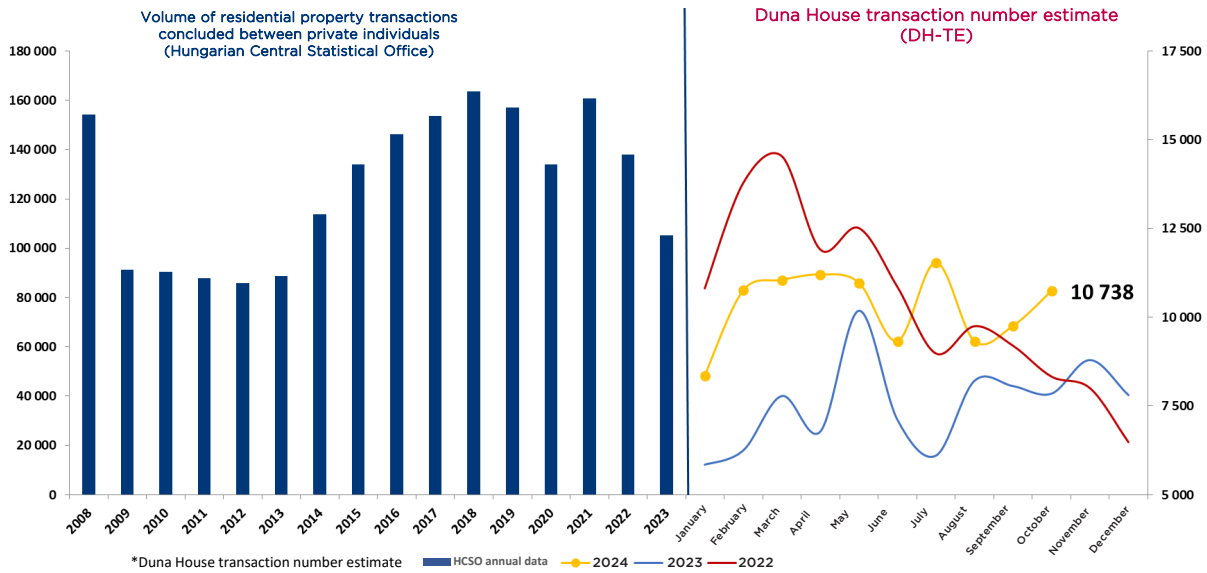
Once again, District 13 was the most sought-after location in Budapest.

The Duna House Demand Index shows a 10-point increase compared to the previous month.

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 10 738 residential property transactions were concluded in October 2024 and residential mortgage contracts worth HUF 117 billion were signed in the whole of Hungary.



With 10 738 transactions estimated by Duna House for October the real estate market closed another strong month, up 10% on the previous month and 36.74% better than in the same period last year. Duna House estimates that this year's real estate transaction figures for October were only 2% below the 105 000 reported by the Hungarian Central Statistical Office for last year. Thanks to strong buying and selling propensity, the momentum is expected to continue for the rest of the year, so the Duna House team anticipates an active period in the coming months.

According to data collected in Hungary by Credipass, the international financial brand of the Duna House Group, the mortgage market saw HUF 117 billion in contracted residential mortgage loans in October 2024. This represents a mere 3% increase in volume compared to the September data of the National Bank of Hungary (MNB), but compared to the MNB figures for the same period last year, the segment performed 128% stronger in October this year.

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

	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
2021	11 185	14 569	15 630	13 511	14 198	13 615	11 185	11 304	11 807	11 526	11 022	11 422
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		

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

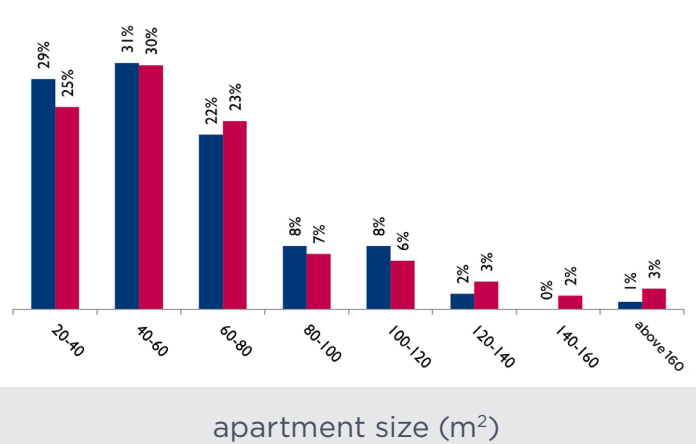
According to October sales data collected by Duna House, 28% of transactions closed on the Buda side of the capital involved homes with a floor space of 40-60 sq. m., but 60-80 sq. m. properties were also in demand, accounting for 25% of all transactions. The share of homes sold in Buda at prices between HUF 900 000 and 1 million and 1.2 million and 1.4 million was equal at 18%. More than half (55%) of the properties that found a new owner were worth over HUF 70 million. On the Pest side, Duna House clients were more interested in apartments between 40-60 sq. m. (30%) and 20-40 sq. m. (25%). Most (27%) of the apartments were sold at HUF 600 000 and 800 000 per sq. m. The percentage of transactions closed at prices above HUF 40-50 million and HUF 70 million was equal at 21%.

BUDA

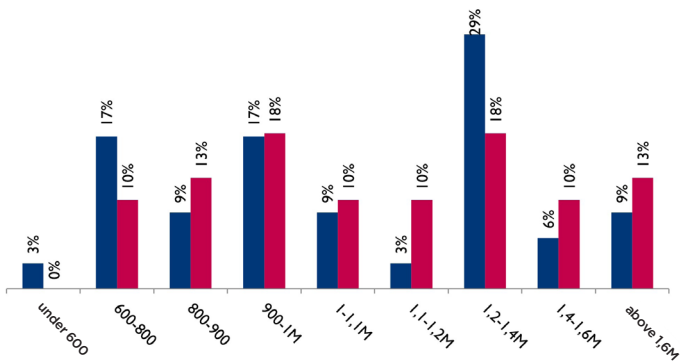


apartment size (m²)

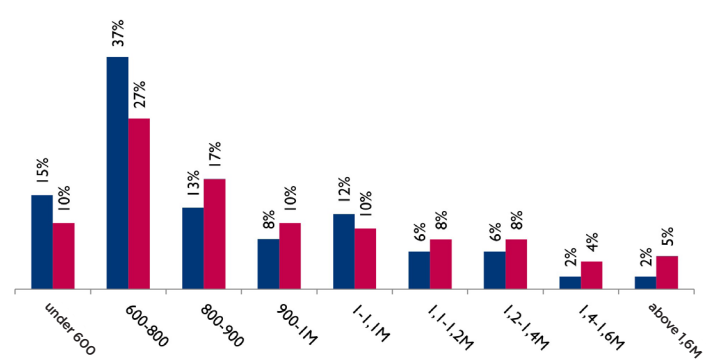
PEST



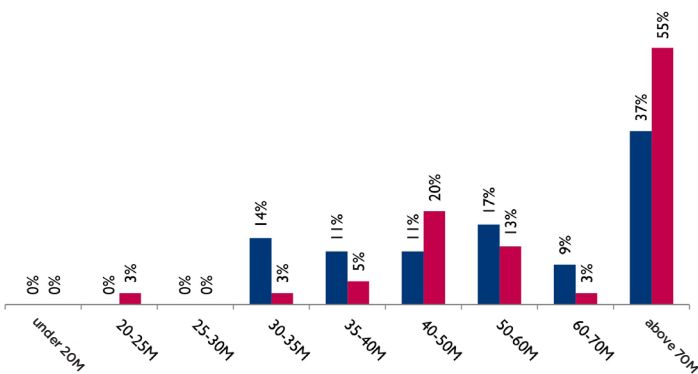
apartment size (m²)



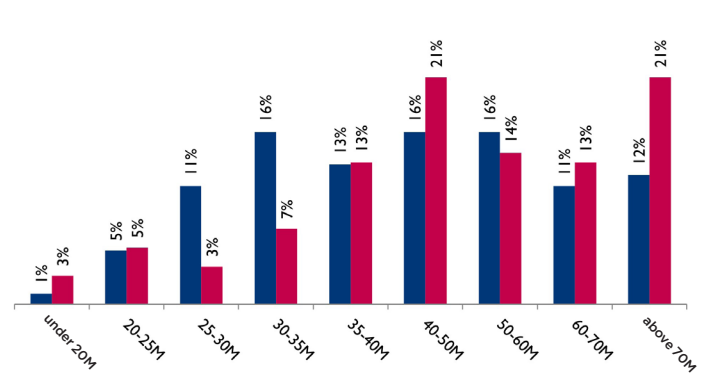
sq. m. price (in thousand HUF)



sq. m. price (in thousand HUF)



apartment price (in million HUF)



apartment price (in million HUF)

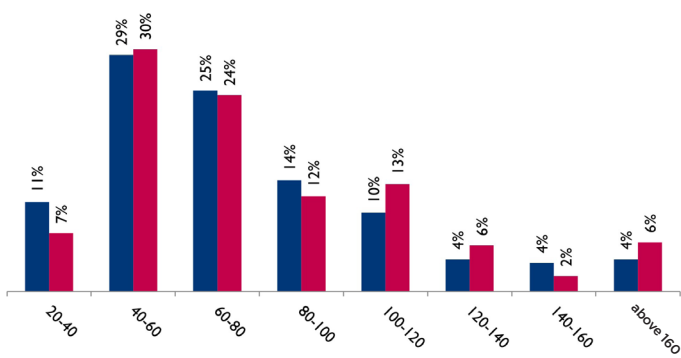
■ October 2023 ■ October 2024

Based on properties sold by Duna House Franchise Network.

TRANSACTION PARAMETERS IN THE COUNTRY

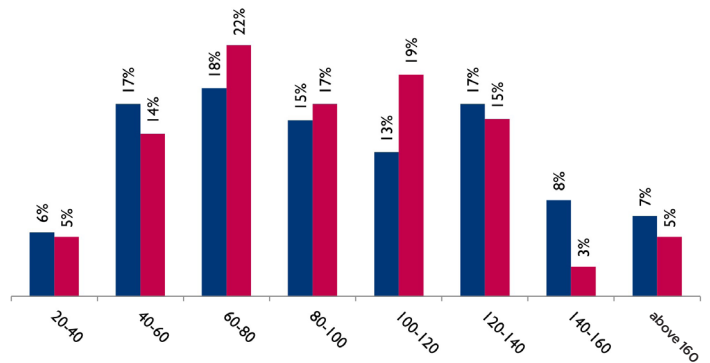
Duna House experts observed the strongest demand for properties between 40-60 sq. m. nationwide, with the exception of Central Hungary. 28% of the houses and apartments were sold at prices below HUF 250 000 per sq. m., while 19% fell in the ,HUF 600 000 per sq. m. or above' price category. This October 24% of properties were sold at prices north of HUF 40 million. In County Pest 22% and 19% of transactions involved homes between 60-80 sq. m. and 100-120 sq. m., respectively. In terms of price per sq. m., the category above HUF 600,000 dominated with 40%, similar to the same period last year, with more than a third of sales closing at prices exceeding HUF 50 million.

COUNTRYWIDE (EXCLUDING CENTRAL HUNGARY)

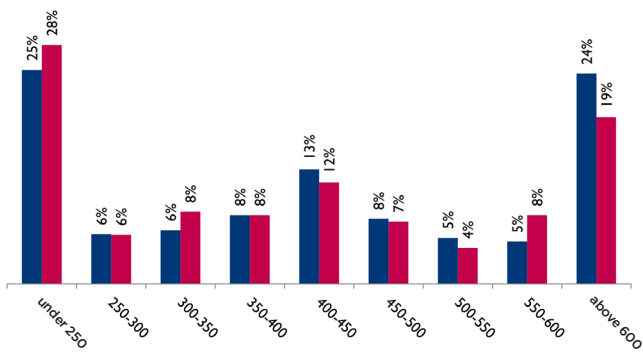


apartment size (m²)

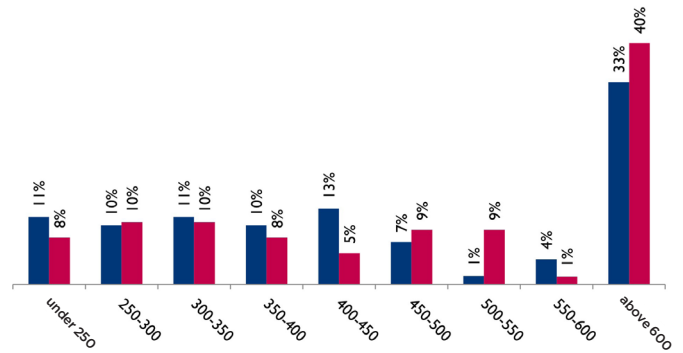
COUNTY PEST



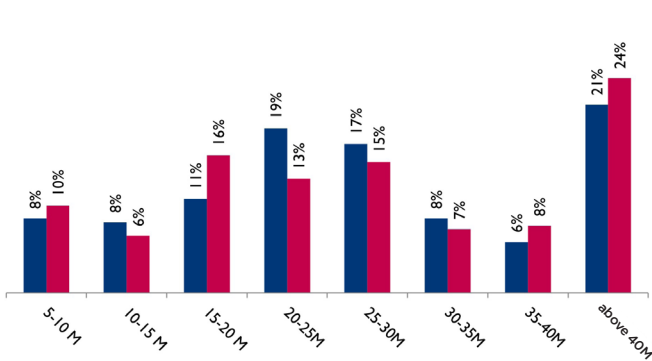
apartment size (m²)



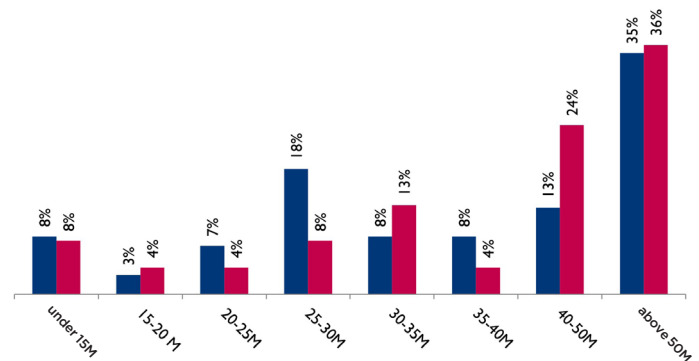
sq. m. price (in thousand HUF)



sq. m. price (in thousand HUF)



apartment price (in million HUF)



apartment price (in million HUF)

■ October 2023 ■ October 2024

Based on properties sold by Duna House Franchise Network.

SALES DATA - PRICES - BARGAINING MARGINS

The transaction data collected by Duna House for October 2024 show a moderate price increase in the capital, while in the country the increase was more significant, reaching double digits. The average price paid for a concrete block home in the East and in the West of Hungary increased to HUF 536 000 per sq. m. and HUF 562 000 per sq. m., respectively. There were minimal (1-2%) changes in the asking price, while buyer bargaining was 3-5% for concrete block units in the country. Sellers softened the asking price for brick and mortar homes in the country by 4-5% during the advertising process, leaving more room for bargaining at 7-8%. In October 2024 the average price per sq. m. of brick and mortar apartments and houses in Eastern and Western Hungary was the same, around HUF 403 000 in October 2024.

PANEL: COUNTRYWIDE

	EAST				WEST			
	price	m ² price	change in listing price	bargain	price	m ² price	change in listing price	bargain
October 2023	25 329 000	424 000	3%	5%	25 325 000	504 000	2%	5%
October 2024	28 754 000	536 000	2%	5%	29 644 000	562 000	1%	3%

BRICK: COUNTRYWIDE

	EAST				WEST			
	price	m ² price	change in listing price	bargain	price	m ² price	change in listing price	bargain
October 2023	31 634 000	345 000	5%	8%	28 601 000	349 000	8%	7%
October 2024	32 764 000	403 000	4%	8%	34 620 000	403 000	5%	7%

This October Duna House sales data showed a double-digit price increase for concrete block flats in the capital, too, but in a more moderate manner than in the country. During the advertising process, owners hardly changed the asking price and left a narrow, 2-4% room for bargaining, so buyers paid an average of HUF 873 000 for concrete block apartments on the Buda side and HUF 100 000 less, HUF 773 000 per sq. m. in Pest. The average price per sq. m. of brick and mortar homes in Buda that changed hands in October exceeded HUF 1.2 million, while in downtown Pest and in the remaining districts of Pest the average was close to HUF 1.1 million and HUF 779 000 per sq. m., respectively. Sellers eased 2-3% on the advertised price, while there was a margin of 2-5% for buyers' bargain.

PANEL: BUDAPEST

	EAST				WEST			
	price	m ² price	change in listing price	bargain	price	m ² price	change in listing price	bargain
October 2023	34 800 000	765 000	10%	2%	34 814 000	682 000	5%	4%
October 2024	48 113 000	873 000	1%	4%	42 850 000	773 000	1%	2%

BRICK: BUDAPEST

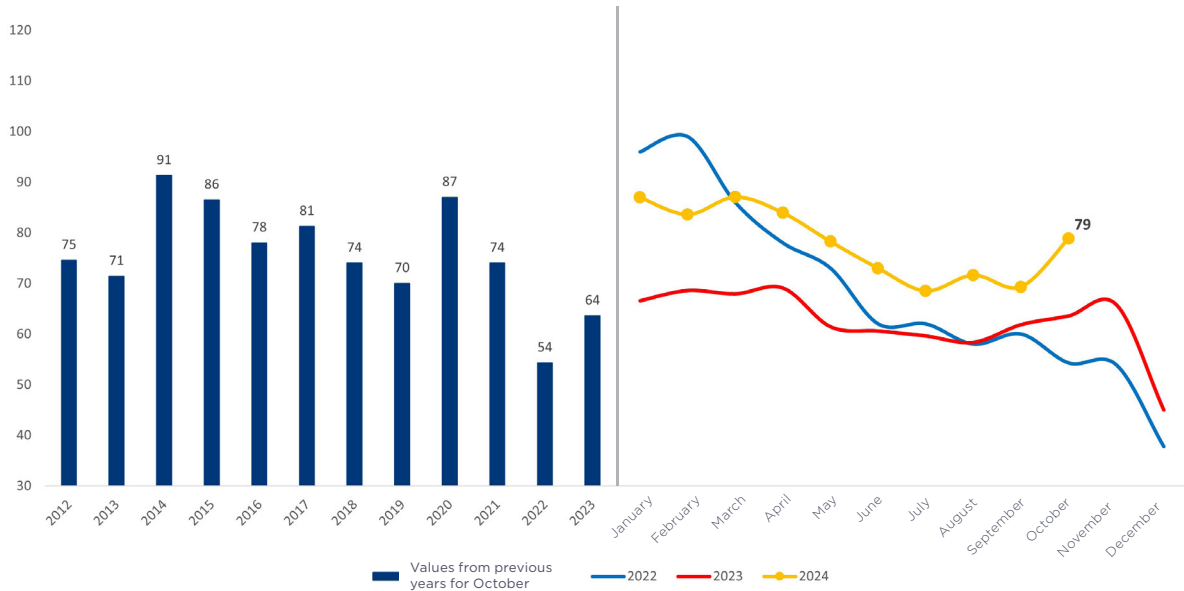
	BUDA				PEST				INNER CITY			
	price	m ² price	change in listing price	bargain	price	m ² price	change in listing price	bargain	price	m ² price	change in listing price	bargain
October 2023	80 534 000	1 158 000	7%	5%	46 866 000	730 000	3%	6%	60 274 000	1 023 000	5%	7%
October 2024	123 242 000	1 230 000	2%	3%	54 648 000	779 000	2%	5%	62 542 000	1 095 000	3%	2%

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

Duna House experts predict an active end of the year in the Hungarian residential property market; according to the company's estimates October closed with a 10% higher number of transactions than the previous month. The persistent momentum of buyers and thus of the segment is also confirmed by the Duna House Demand Index, which showed a 10-point increase compared to September. The index is 5-25 points above the October values of the last three years, but only 8 points below the November 2020 reading, which was a prominent year in terms of demand.

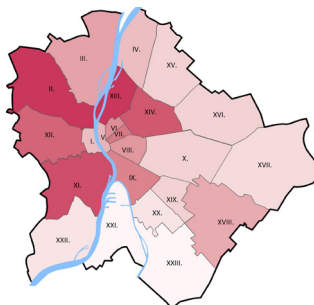


Methodology behind Demand Index: The basis of the estimate is the activity registered by our agents in various, mainly major cities and Duna House offices. Corrections are made depending on the number of active agents and working days. The Demand Index is an important indication of buyer side's reactions 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

Despite the fact that in the past months the districts on the Buda side of the city, primarily District 11 (Újbuda) and District 2 were in the focus of interest, the October Duna House survey showed that District 13 reclaimed the title of the most popular district again, with 19.4% of buyers indicating it as their district of choice in their quest for a new property, and the two Buda districts mentioned above dropped to second and third place. The news of the ban on short-term renting further dampened demand for inner city districts, with District 7 (Erzsébetváros) and District 6 (Terézváros) now only coming in sixth and eighth place, respectively.

INTEREST TOWARD THE DISTRICTS IN BUDAPEST:



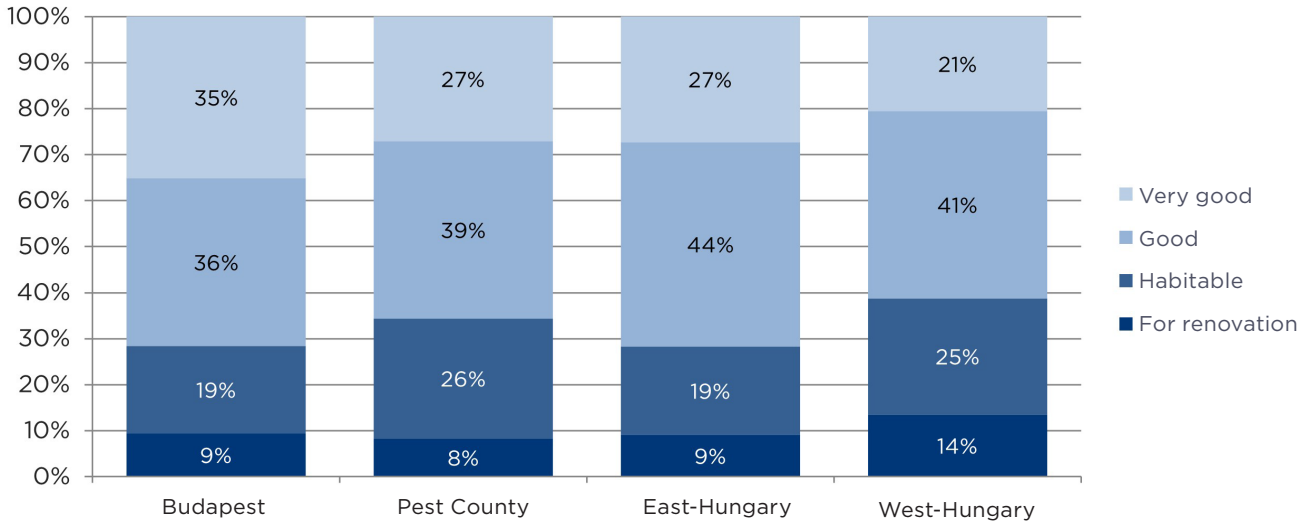
Methodology: Our clients with a purchase intention indicate their preferred districts (more at the same time) when meeting our agents. The above preference map is put together based on this "popularity information".

DISTRICT	OCTOBER 2023	OCTOBER 2024
Bp. 01.	10,2%	8,4%
Bp. 02.	16,9%	18,6%
Bp. 03.	14,4%	10,9%
Bp. 04.	10,0%	8,6%
Bp. 05.	9,5%	9,4%
Bp. 06.	13,5%	12,5%
Bp. 07.	13,3%	14,2%
Bp. 08.	9,6%	11,2%
Bp. 09.	10,9%	13,0%
Bp. 10.	5,4%	6,3%
Bp. 11.	17,8%	17,0%
Bp. 12.	13,3%	15,9%
Bp. 13.	16,1%	19,4%
Bp. 14.	15,4%	16,8%
Bp. 15.	6,7%	6,3%
Bp. 16.	6,4%	6,3%
Bp. 17.	4,6%	5,4%
Bp. 18.	9,2%	9,7%
Bp. 19.	8,3%	6,6%
Bp. 20.	7,8%	5,1%
Bp. 21.	4,2%	2,9%
Bp. 22.	4,4%	4,8%
Bp. 23.	2,6%	2,0%

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

Based on the October 2024 data collected by Duna House properties in a 'good' condition were the most popular choice across the country with a share ranging between 36% and 44%, while in the capital those in a 'very good' condition also had a similar share. The propensity to renovate was lowest in County Pest (8%), while in the capital and in Eastern Hungary 9% of contracts were for a home in need of complete modernisation. That said, in Western Hungary the share of homes to be renovated was stronger at 14%.



TURNOVER SPEED (TIME NEEDED TO SELL)

Data collected by Duna House for October show that concrete block units continued to sell in the shortest time in the entire country, with taking just over 2 months in the capital and an average of 3 months in the other parts of Hungary. Duna House data show that brick and mortar apartments and houses took an average of 4 months to sell in Budapest, while in the country they took an average of 5 months to find a new owner.

PANEL				
TIME NEED OF SALE (DAY)				
	EAST	WEST	BUDA	PEST
October 2023	75	104	101	102
October 2024	92	90	76	64

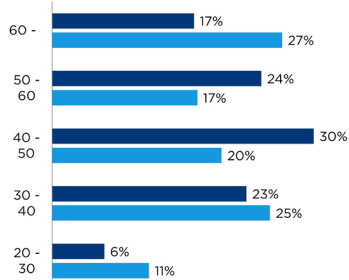
BRICK					
TIME NEED OF SALE (DAY)					
	EAST	WEST	BUDA	PEST	INNER CITY
October 2023	151	137	126	109	158
October 2024	148	153	126	123	114

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.

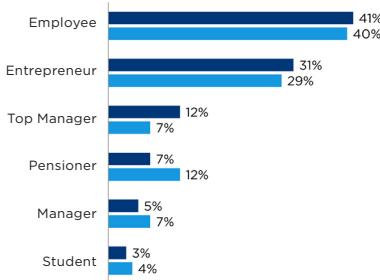
BUYER PROFILE IN BUDAPEST

Based on data of contracts concluded in the capital city with the assistance of Duna House, the most active group of buyers in October this year were the 40-50 year olds with a share of 30%, while those between 50-60 years of age had a share of 24%. 41% of buyers were employees. In Budapest, the share of investor buyers set a new record for the year with 40%; first-time buyers accounted for 21% of clients. Investors and first-time buyers spent HUF 58.7 million and HUF 56.5 million on property purchases in the capital, respectively.

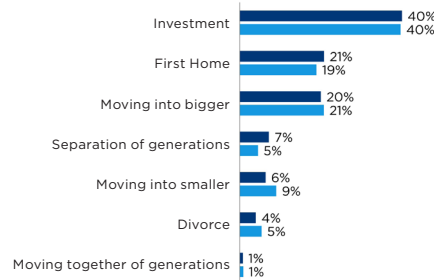
BUYERS' AGE IN BUDAPEST



BUYERS' STATUS IN BUDAPEST



MOTIVATION IN BUDAPEST



AGE	AVERAGE PRICE	m²
20 - 30	55 343 000	79
30 - 40	63 733 000	64
40 - 50	67 017 000	73
50 - 60	67 359 000	71
60 -	55 590 000	59

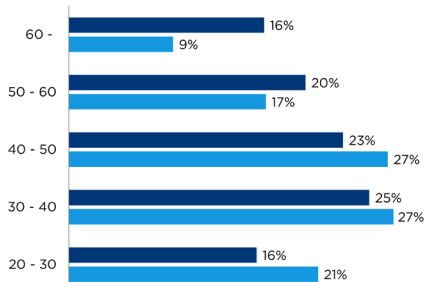
STATUS	AVERAGE PRICE	m²
Employee	59 863 000	68
Top Manager	146 519 000	111
Manager	46 580 000	49
Pensioner	42 500 000	62
Student	47 000 000	55
Entrepreneur	74 488 000	75

SITUATION	AVERAGE PRICE	m²
Investment	58 712 000	53
First Home	56 506 000	66
Separation of generations	65 582 000	71
Moving together of generations	70 000 000	235
Moving into smaller	64 425 000	67
Moving into bigger	84 296 000	92
Divorce	35 780 000	50

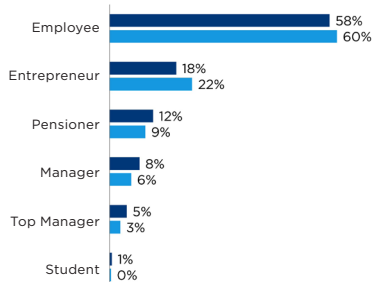
BUYER PROFILE IN THE COUNTRY

In October 2024, a quarter of home buyers in the country were in the 30-40 age group and 58% of Duna House clients were employees. In the country, the leading motivation was buying a first home, but its share fell to 26% in October this year from 34% a year ago. Investor buyers were just 1 percentage point behind first home buyers, with one in every four contracts signed for investment purposes, an increase of 5 percentage points on last year. Buyers spent HUF 30.9 million on an investment purchase and HUF 35.5 million on their first home.

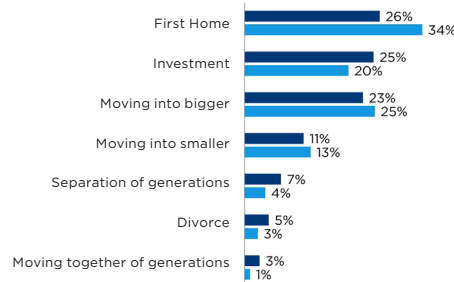
BUYERS' AGE IN THE COUNTRY



BUYERS' STATUS IN THE COUNTRY



MOTIVATION IN THE COUNTRY



AGE	AVERAGE PRICE	m²
20 - 30	36 999 000	86
30 - 40	47 868 000	97
40 - 50	38 028 000	78
50 - 60	31 958 000	70
60 -	36 177 000	74

STATUS	AVERAGE PRICE	m²
Employee	36 627 000	82
Top Manager	69 426 000	101
Manager	44 714 000	79
Pensioner	31 588 000	75
Student	37 500 000	91
Entrepreneur	43 263 000	85

SITUATION	AVERAGE PRICE	m²
Investment	30 921 000	70
First Home	35 511 000	83
Separation of generations	37 057 000	77
Moving together of generations	42 590 000	110
Moving into smaller	26 512 000	65
Moving into bigger	57 655 000	109
Divorce	44 819 000	67

■ October 2023 ■ October 2024

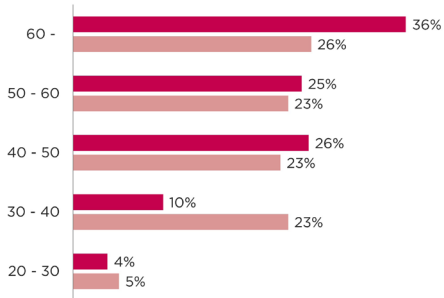
Under our methodology investment as a motivation includes all property transactions that, judged by the buyer's characteristics, can be considered as an investment, i.e. this is not a strictly business category. It includes all family investments and short-term investors who buy a property in a poor 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

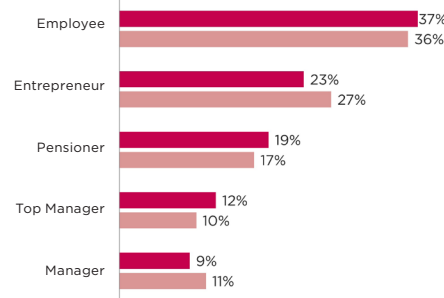
According to data from October 2024, 36% of sales in the capital were made by people aged 60 and over and 37% of buyers were employees. The most common motivation for selling was cashing in on a previous investment at 26%. 23% of sellers were parting with their previous home to move into a larger one. Selling an inherited property was responsible for 22% of all sales this October.

SELLERS' AGE BUDAPEST



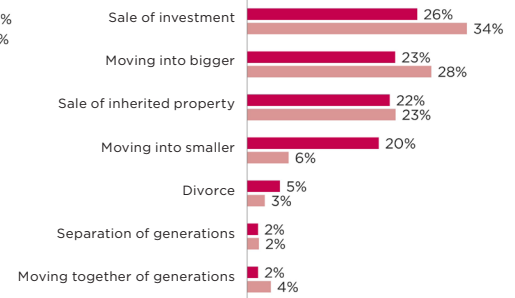
AGE	AVERAGE PRICE	m ²
20 - 30	50 830 000	57
30 - 40	53 954 000	56
40 - 50	63 143 000	64
50 - 60	70 079 000	71
60 -	84 698 000	91

SELLERS' STATUS BUDAPEST



STATUS	AVERAGE PRICE	m ²
Employee	56 040 000	61
Top Manager	152 929 000	112
Manager	69 519 000	63
Pensioner	59 936 000	84
Entrepreneur	60 912 000	64

MOTIVATION BUDAPEST

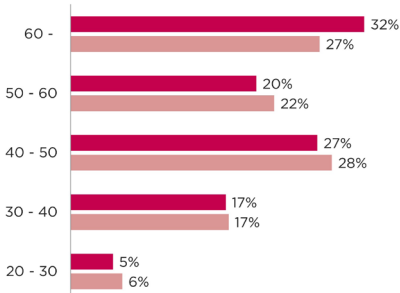


SITUATION	AVERAGE PRICE	m ²
Sale of investment	60 253 000	52
Separation of generations	54 500 000	88
Moving together of generations	47 750 000	60
Moving into smaller	110 813 000	114
Moving into bigger	60 284 000	61
Sale of inherited property	55 408 000	69
Divorce	57 834 000	77

SELLER PROFILE IN THE COUNTRY

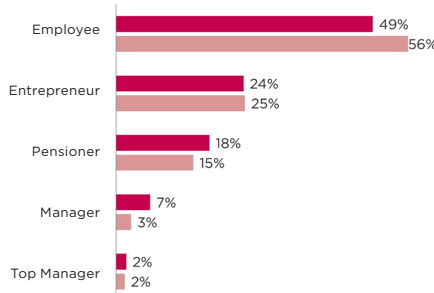
According to Duna House sales data, in October this year nearly one-third of all sellers were aged 60 and over, and 20% were aged between 50 and 60. Almost half (49%) of all sellers worked as employees and 24% were self-employed. In the country, the majority (28%) of owners were motivated to sell their inherited property, while 24% were parting with a property investment. The proportion of those moving into a larger property was the same as last year at 19%.

SELLERS' AGE IN THE COUNTRY



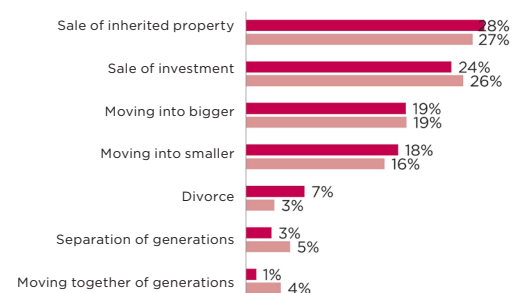
AGE	AVERAGE PRICE	m ²
20 - 30	38 837 000	81
30 - 40	34 779 000	73
40 - 50	43 931 000	88
50 - 60	34 783 000	82
60 -	35 983 000	83

SELLERS' STATUS IN THE COUNTRY



STATUS	AVERAGE PRICE	m ²
Employee	36 615 000	79
Top Manager	58 034 000	96
Manager	44 035 000	81
Pensioner	30 754 000	74
Entrepreneur	50 180 000	102

MOTIVATION IN THE COUNTRY



SITUATION	AVERAGE PRICE	m ²
Sale of investment	41 240 000	83
Separation of generations	34 075 000	81
Moving together of generations	65 175 000	80
Moving into smaller	47 242 000	102
Moving into bigger	40 608 000	73
Sale of inherited property	30 615 000	78
Divorce	52 900 000	114

■ October 2023 ■ October 2024

In seller profile data analysis an updated methodology has been introduced, which partly explains the significant change in the "sale of a property investment" row in recent months.

An overhead photograph of a meeting table. On the left, a person in a grey suit is seated. In the center, a woman in a white blazer is looking at a laptop. On the right, another person in a white blazer is looking at a smartphone. The table is cluttered with documents, a laptop, a tablet, a ruler, and a pen. The background is a light-colored wall.

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