

DUNA HOUSE BAROMETER

The latest property market info
from Duna House network

Issue 167
May 2025



DHS
BÉT
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MARKET**
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the Budapest Stock Exchange



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FORTHCOMING ISSUES

DATE OF ISSUE	CONTENT
14.07.2025	Q2 2025 data (including price indices and housing loan data)
12.08.2025	July 2025 data
12.09.2025	August 2025 data

Duna House Barometer is available from the 12th day of each month (forthcoming weekday if weekend) on the webpage: www.dh.hu/en/barometer

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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.



CONTENT:

- | | |
|-----|---|
| 2. | Privacy Policy, Forthcoming issues |
| 4. | Executive Summary |
| 5. | Transaction data |
| 6. | Transaction parameters in Budapest |
| 7. | Transaction parameters in the country |
| 8. | Sales data |
| 9. | Demand Index, Demand for individual districts |
| 10. | Quality preferences, Turnover speed |
| 11. | Client profile: buyers |
| 12. | Client profile: sellers |

EXECUTIVE SUMMARY

HOUSING PRICES CAP OUT WHILE MORTGAGE MARKET GAINS MOMENTUM

Based on data from May 2025, the housing market momentum has stalled, with demand continuing to decline for the second month in a row after a strong start to the year. According to Duna House estimates, 10,262 residential properties were sold nationwide, which is 1.5% less than in April 2025 and 6.5% less than in May last year. At the same time, however, the mortgage market continued to strengthen: data from Credipass show that home loans worth HUF 139 billion were realized in May, which is 9% higher than the April volume and 7% higher than in May last year.

The decline in transaction numbers combined with rising prices indicates a clear consolidation of the housing market, as prices in several segments have reached the point where buyer demand is stalling: This is particularly evident in Budapest, where the annual price increase of 39 per cent for concrete block units in Pest has already brought them close to the price level in Buda. In Buda, the average price per sq. m. of concrete block apartments exceeded HUF 1.1 million, while in Pest it crossed the HUF 1 million mark. Brick and mortar homes also saw strong growth, with Duna House recording price increases of 18 per cent in Pest and 16 per cent in Buda. Meanwhile, the bargaining margin remained minimal: for concrete block homes it was only 1-2 per cent in Budapest and around 3 per cent in the country.

A similar trend prevailed outside the capital: smaller properties remained popular, but the proportion of homes with a floor space between 100 and 120 sq. m. also increased. In the Western counties, the average price of concrete block homes was HUF 720,000 per sq. m., while in the East it was HUF 586,000.

The slowdown in demand is also reflected in the Duna House Demand Index, which fell from 76 points in April to 73 points in May. In terms of demand for the individual districts, Districts 12, 13, 14, 8 and 9 saw the greatest increase, while some districts in the outskirts experienced stagnation or a slight decline.

Buyer preferences continue to shift towards properties in a good condition and ready to occupy. Depending on where they live, 28-40 per cent of buyers were looking for this type of property. Demand for homes in need of a complete renovation was moderate at only 8-11 per cent in Budapest and County Pest.

Despite the slowdown in demand and transaction numbers, the turnover speed of properties remains high. Concrete block homes in Buda were sold in 1.5 months on average, while the same type of units in the country took 2-3 months to sell. Pre-owned brick and mortar homes and houses took 3-4 months to find a new owner in the country and 3 months in the capital.

Among sellers in the capital, those aged 40-50 and 50-60 (with a share of 28 per cent both) were the most active. The main motivation for selling was cashing in on a previous investment (44 per cent), followed by the sale of an inherited property (24 per cent) and moving into a larger home (19 per cent). In the country, 29 per cent of sellers were over 60, and the sale of inherited properties (with a share of 31 per cent) topped the list of motivations, followed by turning a previous investment into cash (27 per cent).

In summary, the market is currently in a state of stretched price-demand equilibrium. Prices are already limiting buyers' room for manoeuvre, but the strengthening of the credit market suggests that the financing environment is stabilizing. Buyers are more conscious and focused on properties in a habitable condition ready for immediate occupation. In the coming months, the market is expected to move towards price corrections and incentives to stimulate demand.

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FACTS TO NOTE

The price of concrete block units in Pest rose by 39 per cent compared to the same period last year, approaching the price level of concrete block homes in Buda.

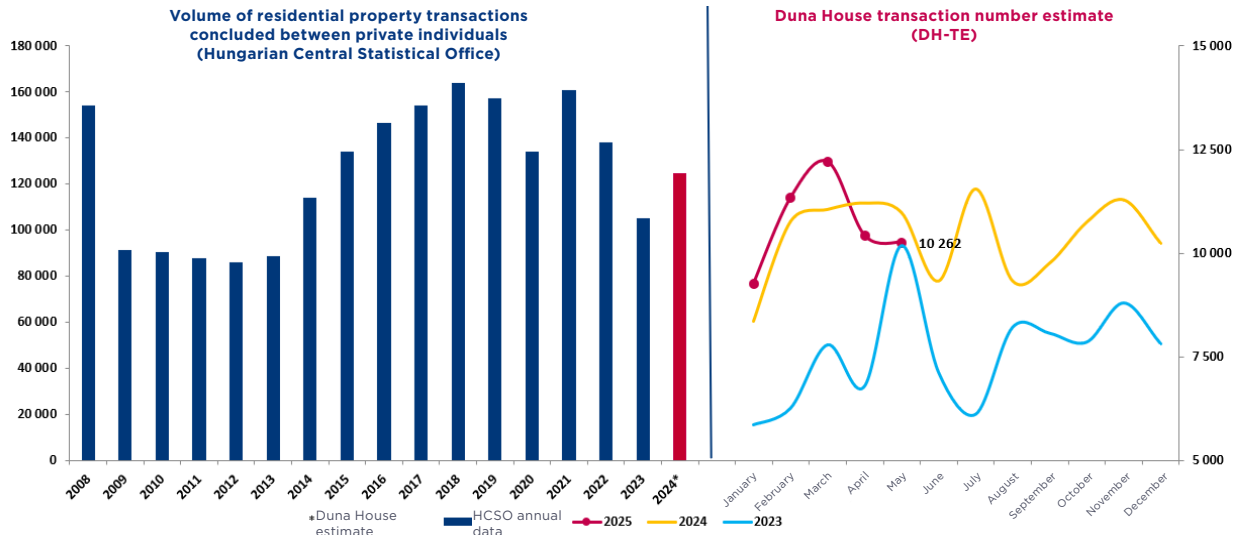
The number of property transactions decreased, while mortgage lending increased.

Reasonably priced properties continue to find buyers quickly, while overpriced homes remain stuck on the market.

TRANSACTION DATA

DUNA HOUSE TRANSACTION NUMBER ESTIMATE (DH-TE)

Duna House presents its monthly Transaction Number Estimate (DH-TE) and Mortgage Forecast below, showing that 10,262 residential property transactions were concluded in May 2025 and residential mortgage contracts worth HUF 139 billion were signed in the whole of Hungary.



After a buoyant start to the year, momentum in the housing market slowed in April and this trend continued in May. The number of sales stabilised and remains below the previous months of dynamic growth.

The stagnation in May was mainly due to the steady rise in house prices, which for the second month in a row have been a noticeable drag on buyer sentiment. Price rises have reached a level where they are now putting a brake on further demand growth.

A decline in transaction numbers was already evident in April and this trend has not reversed in May, pointing to a consolidation in the real estate market. The estimated 10,262 sales in May are 1.5 per cent fewer than in April and represent a 6.5 per cent decline year-on-year.

However, mortgage market volumes continue to grow, with Credipass, the international financial brand of the Duna House Group estimating that the Hungarian mortgage market saw HUF 139 billion worth of loans signed for in May.

This represents a 9 per cent increase on the volume estimated by experts for April and a 7 per cent improvement on the factual figure reported by the Hungarian National Bank for the same period in 2024.

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	11 338	12 200	10 415	10 262							

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.

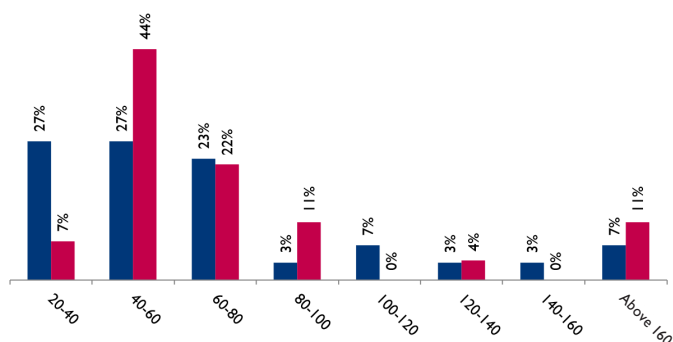
Mortgage forecast: Figures published by Credipass can primarily be used for quick trend forecasts; the National Bank of Hungary publishes the actual figures for the second last month at the beginning of each month.

TRANSACTION PARAMETERS IN BUDAPEST

Among the clients of Duna House in May 2025, most clients on the Buda side of the capital contracted for properties with a floor space between 40-60 sq. m. (44 per cent), while the 60-80 sq. m. category was also popular (22 per cent). 44 per cent of all properties sold at prices between HUF 1.1-1.4 million per sq. m., while almost half of the houses and apartments sold in Buda were worth over HUF 70 million.

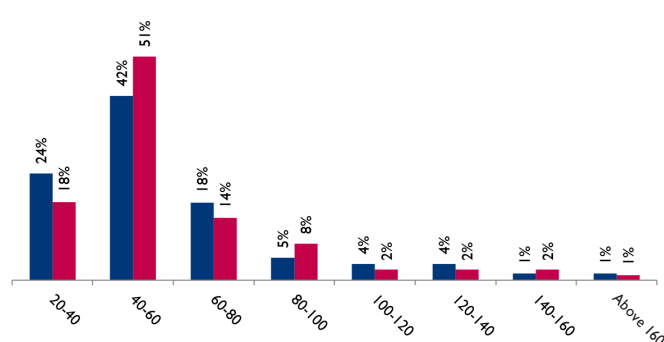
On the Pest side, the highest number of contracts was also for properties with a floor space in the range of 40-60 sq. m. (51 per cent). In the same period last year, most properties were sold at an average price of HUF 600-800,000 per sq. m., but in May this year, the majority of properties were offered at prices north of HUF 1 million per sq. m. Around a quarter of the properties on the Pest side and almost half of those on the Buda side sold for over HUF 70 million.

BUDA

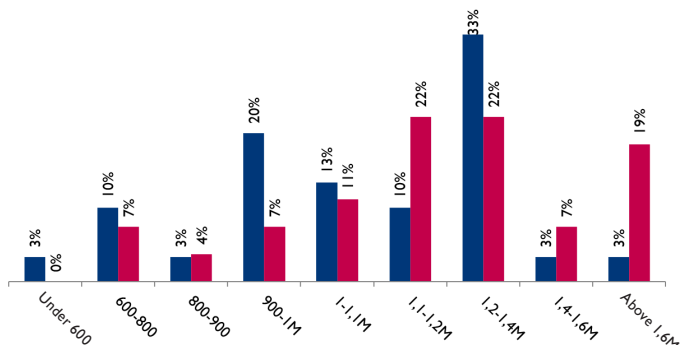


Apartment size (sq. m.)

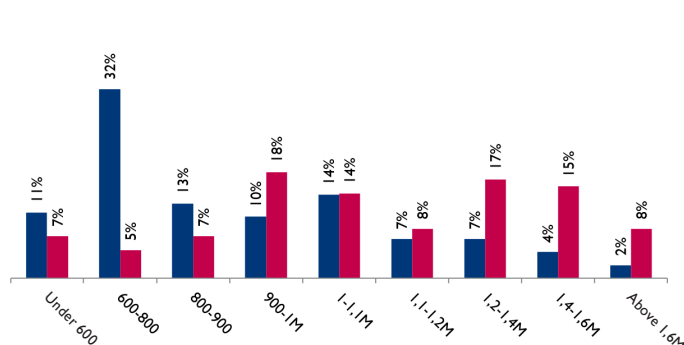
PEST



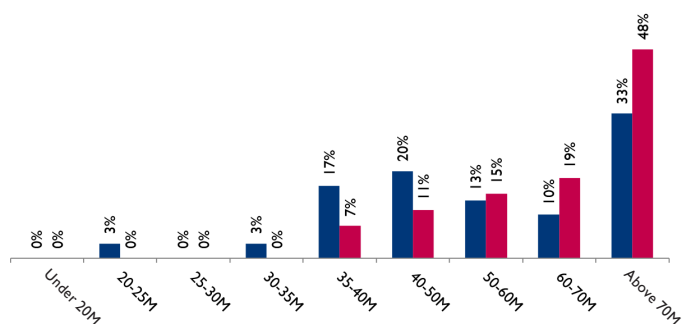
Apartment size (sq. m.)



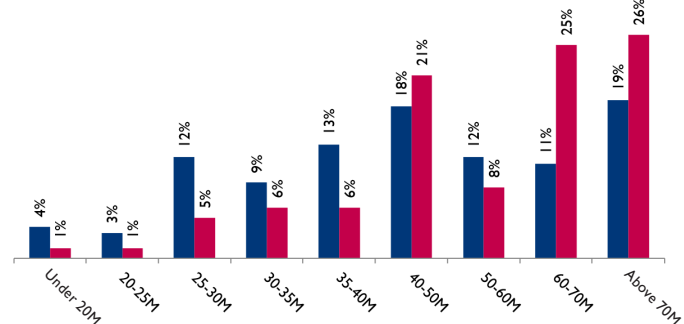
Sq. m. price (in thousand HUF)



Sq. m. price (in thousand HUF)



Apartment price (in million HUF)



Apartment price (in million HUF)

■ May 2024 ■ May 2025

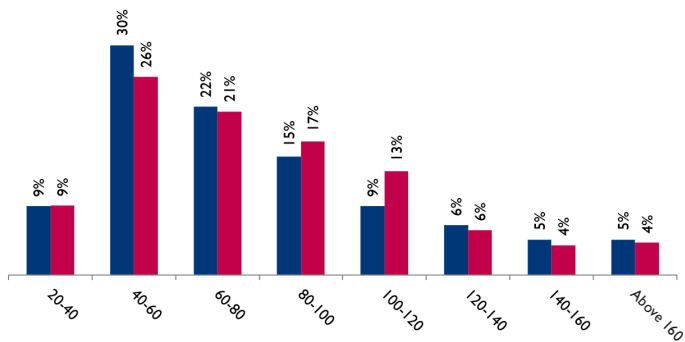
Based on properties sold by the Duna House Franchise Network.

TRANSACTION PARAMETERS IN THE COUNTRY

Nationwide (excluding Central Hungary), 26 per cent of transactions were for homes between 40-60 sq. m., but the 60-80 sq. m. category was also popular. Looking at the data from the previous year, we can see that the share of smaller homes remained at 9 per cent, while that of larger properties with a floor space between 100-120 sq. m. increased. 38 per cent of all properties sold were priced above HUF 600,000 per sq. m., while 23 per cent had a price tag below HUF 250,000 per sq. m.

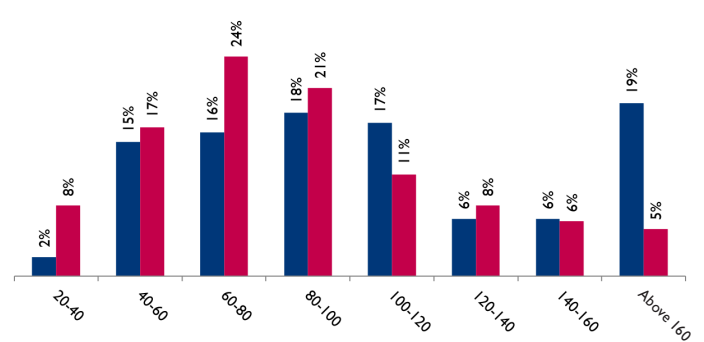
Most (38 per cent) of the properties sold were worth over HUF 40 million. 24 per cent of the properties sold in County Pest had a floor space between 60-80 sq. m. The value of apartments larger than 160 sq. m. fell significantly from 19 per cent to 5 per cent. 46 per cent of them were sold for over HUF 600 000 per sq. m. Among Duna House's transactions in County Pest, the most common property value in May 2025 was above HUF 50 million.

COUNTRYWIDE (EXCLUDING CENTRAL HUNGARY)

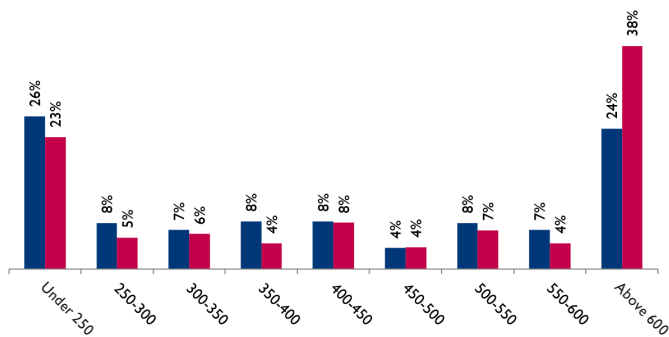


Apartment size (sq. m.)

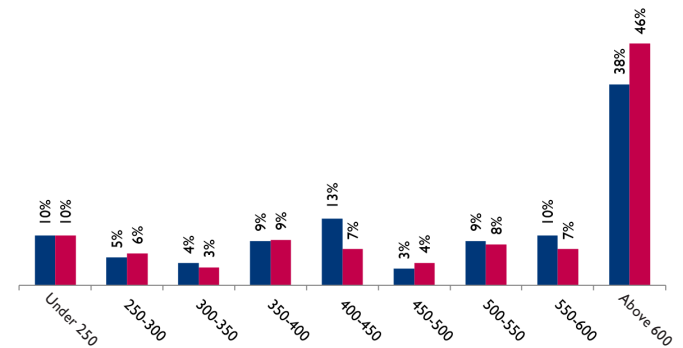
PEST COUNTY



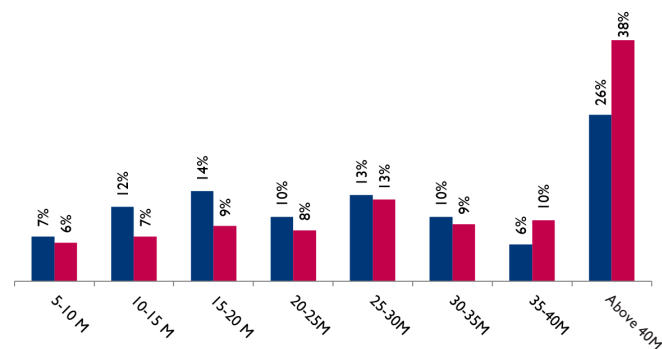
Apartment size (sq. m.)



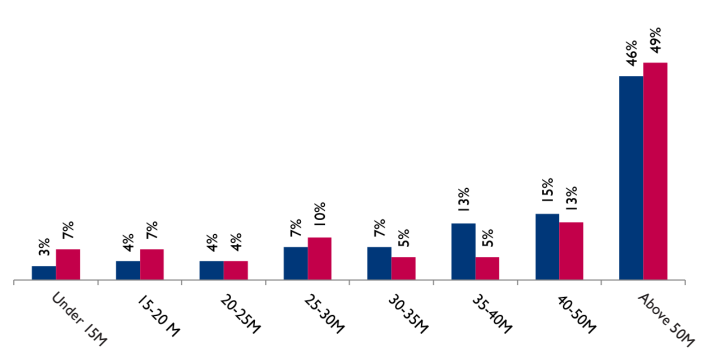
Sq. m. price (in thousand HUF)



Sq. m. price (in thousand HUF)



Apartment price (in million HUF)



Apartment price (in million HUF)

■ May 2024 ■ May 2025

Based on properties sold by the Duna House Franchise Network.

SALES DATA – PRICES – BARGAINING MARGINS

On average, prices of concrete block flats increased by 25 per cent, while the average price per sq. m. of brick and mortar homes increased significantly in Western Hungary and moderately in the Eastern part of the country. In the East, buyers paid an average of HUF 586,000 per sq. m. for concrete block homes, while in the West they paid HUF 720,000 for the same type of property. Owners of concrete block homes in the country did not lower the asking price by more than 3 per cent in the bargaining process. During the listing period for brick and mortar homes, sellers reduced prices by an average of 4-7 per cent, with buyers bargaining at 6-7 per cent. In the East, the average price for a pre-owned brick and mortar home was HUF 359,000, while the average price in the Western counties was around HUF 484,000 per sq. m.

BLOCK COUNTRYWIDE								
EAST					WEST			
	price	sq. m. price	change in listing price	bargain	price	sq. m. price	change in listing price	bargain
May 2024	24 496 000	469 000	3%	6%	29 731 000	573 000	3%	4%
May 2025	33 487 000	586 000	1%	3%	38 692 000	720 000	1%	3%

BRICK COUNTRYWIDE								
EAST					WEST			
	price	sq. m. price	change in listing price	bargain	price	sq. m. price	change in listing price	bargain
May 2024	27 390 000	333 000	5%	7%	31 718 000	391 000	5%	7%
May 2025	32 722 000	359 000	7%	7%	39 843 000	484 000	4%	6%

In May 2025, the price level of concrete block units in the capital continued to show the strongest price increases: in Buda, the average price paid for a similar home was above HUF 1.1 million, while in the Pest districts the average price per sq. m. exceeded HUF 1 million. The price of concrete block flats in Pest was practically equal to that in Buda, with a 39 per cent increase in Pest and only 16 per cent in Buda. The price of concrete block homes in Pest remained unchanged, and the bargaining rate was only 2 per cent. On the Buda side, sellers reduced their asking prices by an average of 1 per cent, and bargaining was only possible up to 2 per cent. The price per sq. m. of brick and mortar homes in Pest rose by around 18 per cent from HUF 823,000 in May last year to HUF 974,000. Flats in Buda were 16 per cent more expensive on average, while in the centre of Pest the average price rose to levels north of HUF 1.2 million. The asking price of brick and mortar apartments in Buda changed by an average of 6 per cent, and even then buyers still had the opportunity to get a 4 per cent bargain. On the Pest side and in the city centre, there was also the possibility of a 4 per cent bargain, but the asking price was reduced by 2 per cent only.

BLOCK BUDAPEST								
BUDA					PEST			
	price	sq. m. price	change in listing price	bargain	price	sq. m. price	change in listing price	bargain
May 2024	50 134 000	971 000	-1%	3%	40 375 000	757 000	1%	4%
May 2025	64 950 000	1 130 000	1%	2%	53 773 000	1 051 000	0%	2%

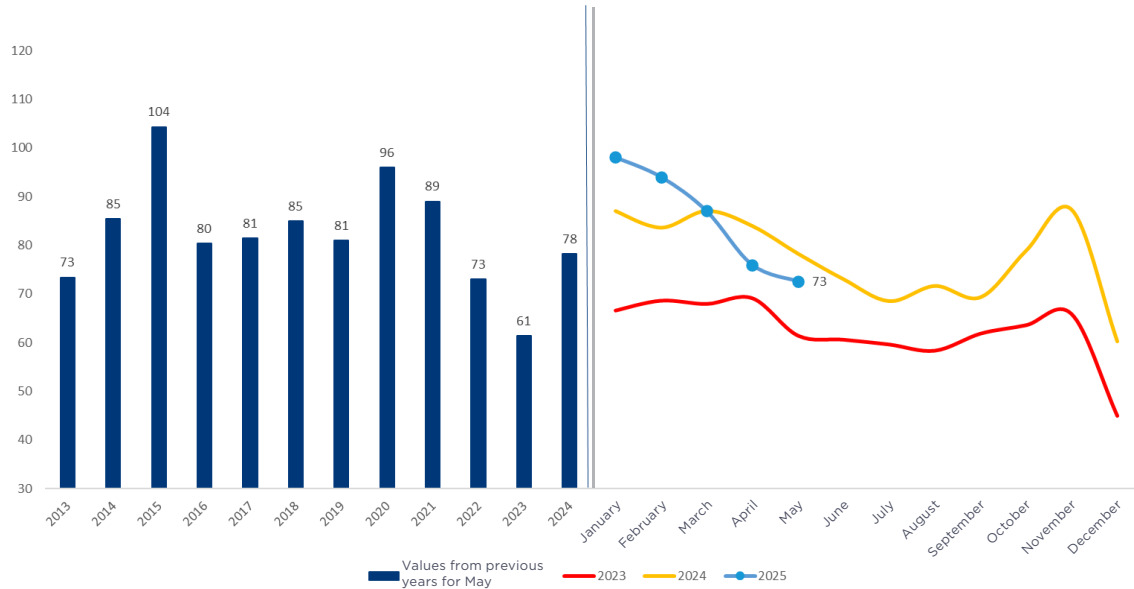
BRICK BUDAPEST												
BUDA					PEST				INNER CITY			
	price	sq. m. price	change in listing price	bargain	price	sq. m. price	change in listing price	bargain	price	sq. m. price	change in listing price	bargain
May 2024	84 895 000	1 018 000	2%	6%	50 973 000	823 000	4%	3%	61 332 000	1 091 000	2%	3%
May 2025	113 242 000	1 185 000	6%	4%	56 013 000	974 000	2%	4%	85 376 000	1 262 000	0%	4%

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

According to the Buyer Demand Index measured by Duna House, the activity of potential buyers in the domestic housing market decreased last month. Compared to April, the index is 3 points lower at 73, down from the May 2024 reading of 78, but still well above the record low of 61 in 2023.

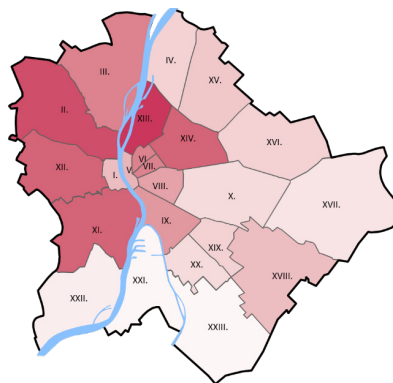


Methodology behind Demand Index: The basis of the estimate is the activity registered by our agents in various, mainly major cities and Duna House offices. Corrections are made depending on the number of active agents and working days. The Demand Index is an important indication of buyer side's reactions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

There is a general increase in demand in almost all districts of the capital. The largest increases were recorded in Districts 12, 13 and 14, with all three showing a boost of 2.9 to 3.5 percentage points. Among the inner city districts, demand for Districts 8 and 9 also increased significantly (+2.5 per cent and +2.7 per cent, respectively). However, some districts have seen a decrease in demand, such as District 6, while Districts 4, 18 and 19 have stagnated.

CHANGE OF DEMAND FOR THE DISTRICTS OF THE CAPITAL



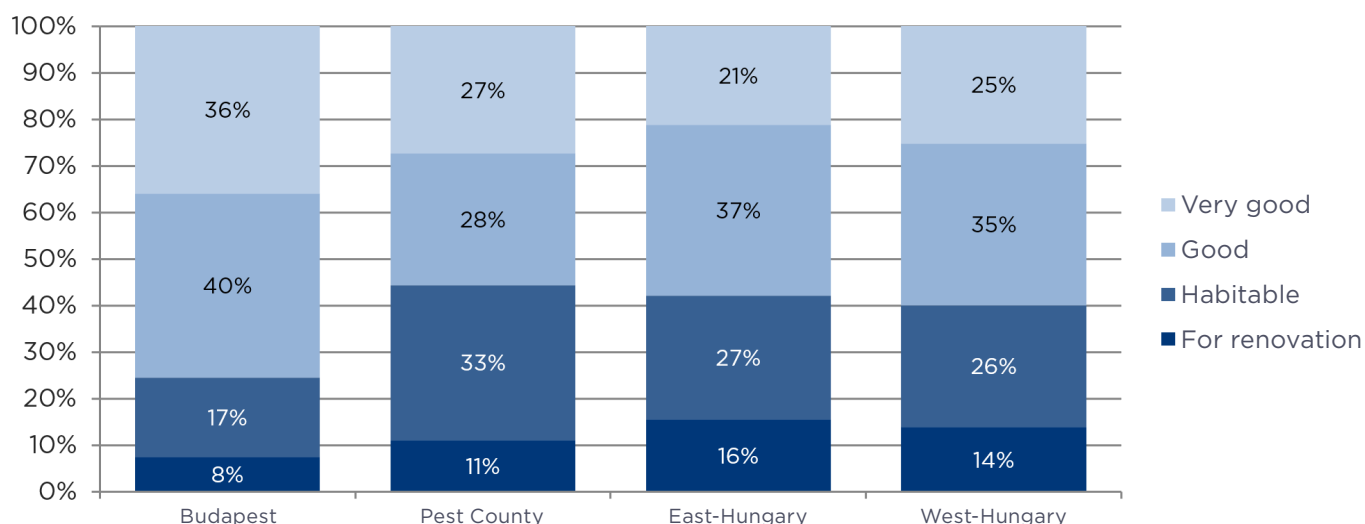
DISTRICT	MAY 2024	MAY 2025
District 1	7,7%	9,1%
District 2	15,9%	18,2%
District 3	13,6%	13,8%
District 4	7,8%	7,5%
District 5	9,7%	9,8%
District 6	14,6%	14,2%
District 7	14,1%	14,3%
District 8	8,6%	11,1%
District 9	9,5%	12,2%
District 10	5,4%	6,8%
District 11	16,1%	16,5%
District 12	12,7%	16,2%
District 13	17,2%	20,1%
District 14	13,5%	16,4%
District 15	5,3%	7,8%
District 16	4,8%	7,5%
District 17	4,5%	5,8%
District 18	9,0%	8,8%
District 19	7,7%	7,6%
District 20	5,7%	6,4%
District 21	2,2%	3,4%
District 22	4,3%	4,9%
District 23	1,8%	2,8%

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

In May this year, Duna House's clients nationwide preferred properties in a good condition (28-40 per cent), with the second most sought-after type being the lower-priced "habitable" category (17-33 per cent). The highest propensity to renovate was recorded in Pest (33 per cent). 16 per cent of sales completed in Eastern Hungary and 14 per cent of those in Western Hungary included a home in need of a complete renovation.



TURNOVER SPEED (TIME NEEDED TO SELL)

According to Duna House data, despite two months of moderating demand and declining transaction numbers, the pace of real estate turnover is still fast. Concrete block units in Buda took the shortest time, 1.5 months on average, to change hands, while the sale of concrete block homes in the country took just over 2-3 months on average to sell. Pre-owned brick and mortar apartments and houses took 3-4 months to sell in the country, while in the capital it took 3 months to close a successful deal.

BLOCK				
TIME NEED OF SALE/DAY				
	EAST	WEST	BUDA	PEST
May 2024	87	79	99	89
May 2025	71	82	46	52

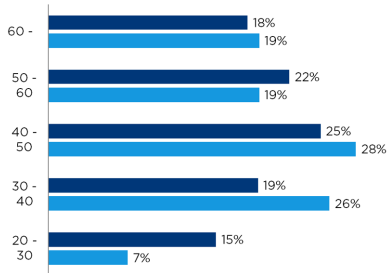
BRICK					
TIME NEED OF SALE/DAY					
	EAST	WEST	BUDA	PEST	INNER CITY
May 2024	113	109	120	106	101
May 2025	104	122	99	94	92

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.

BUYER PROFILE IN BUDAPEST

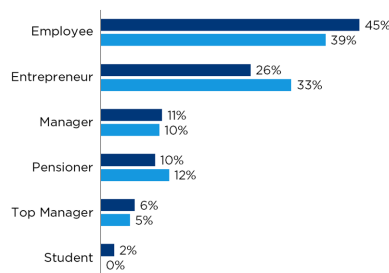
According to the data of the transactions closed in May with the help of Duna House, the most active group of buyers were the 40-50 and 50-60 year olds, with a share of 25 per cent and 22 per cent, respectively. The majority (45 per cent) of buyers were employees. In May this year, 42 per cent of buyers in the capital were making an investment and 26 per cent were first-time buyers. Investors spent an average of HUF 68.7 million on property purchases in Budapest, while first-time home buyers spent HUF 57.8 million.

BUYERS' AGE IN BUDAPEST



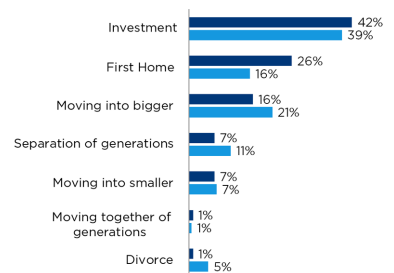
AGE	AVERAGE PRICE	sq. m.
20 - 30	58 392 000	46
30 - 40	65 805 000	66
40 - 50	76 687 000	79
50 - 60	75 789 000	62
60 -	61 595 000	55

BUYERS' STATUS IN BUDAPEST



AGE	AVERAGE PRICE	sq. m.
Employee	62 390 000	63
Top Manager	75 100 000	72
Manager	71 767 000	59
Pensioner	57 238 000	52
Student	64 750 000	45
Entrepreneur	82 036 000	81

MOTIVATION IN BUDAPEST

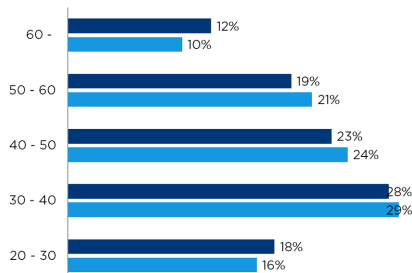


SITUATION	AVERAGE PRICE	sq. m.
Investment	68 747 000	66
First Home	57 853 000	48
Separation of generations	69 749 000	52
Moving together of generations	218 000 000	321
Moving into smaller	52 150 000	52
Moving into bigger	80 186 000	85
Divorce	105 000 000	81

BUYER PROFILE IN THE COUNTRY

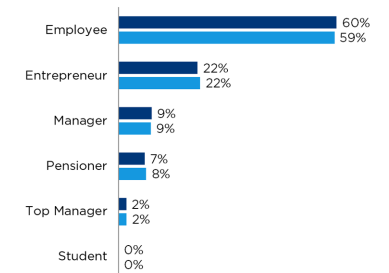
In May 2025, 28 per cent and 23 per cent of home buyers in the country were in the 30-40 and 40-50 age group, respectively. 60 per cent of buyers outside the capital were employees. Most (31 per cent) of all sales contracts in the country were signed by first-time buyers, but investor buyers and those moving into a larger property were also active, at 22 per cent and 26 per cent, respectively. Buyers spent an average of HUF 34.9 million on a property investment and HUF 39.4 million on their first home.

BUYERS' AGE IN THE COUNTRY



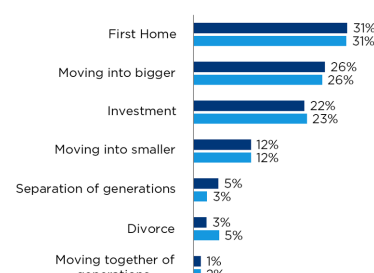
AGE	AVERAGE PRICE	sq. m.
20 - 30	38 197 000	90
30 - 40	43 978 000	84
40 - 50	43 222 000	80
50 - 60	45 117 000	83
60 -	45 716 000	75

BUYERS' STATUS IN THE COUNTRY



STATUS	AVERAGE PRICE	sq. m.
Employee	38 600 000	81
Top Manager	92 743 000	139
Manager	46 195 000	88
Pensioner	35 457 000	70
Student	53 500 000	70
Entrepreneur	50 884 000	92

MOTIVATION IN THE COUNTRY



SITUATION	AVERAGE PRICE	sq. m.
Investment	34 964 000	66
First Home	39 422 000	84
Separation of generations	34 848 000	71
Moving together of generations	60 000 000	134
Moving into smaller	45 648 000	74
Moving into bigger	55 918 000	110
Divorce	33 512 000	78

■ May 2024 ■ May 2025

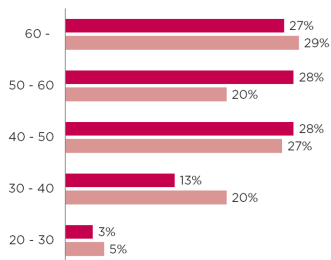
Under our methodology investment as a motivation includes all property transactions that, judged by the buyer's characteristics, can be considered as an investment, i.e. this is not a strictly business category. It includes all family investments and short-term investors who buy a property in a poor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

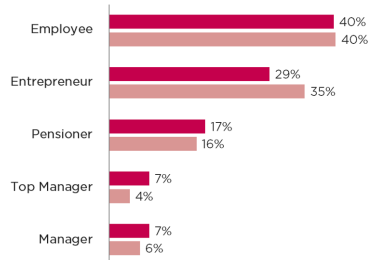
SELLER PROFILE IN BUDAPEST

The largest proportion of sellers in the capital (with an equal share of 28%) were aged between 40-50 and 50-60. The share of the latter age group has increased significantly by around 8 per cent compared to a year ago. 40 per cent of all owners selling their homes were employees. In the capital, 44 per cent were motivated by the sale of a previous investment, 24 per cent of sellers were parting with an inherited property and 19 per cent were offering their property for sale in order to move into a larger home.

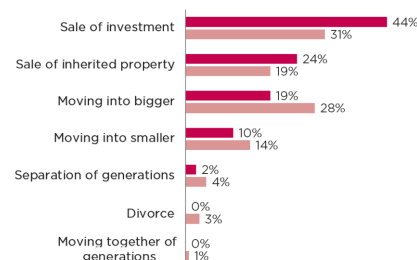
SELLERS' AGE IN BUDAPEST



SELLERS' STATUS IN BUDAPEST



MOTIVATION IN BUDAPEST



AGE	AVERAGE PRICE	sq. m.
20 - 30	54 167 000	54
30 - 40	76 334 000	61
40 - 50	75 407 000	65
50 - 60	61 782 000	64
60 -	70 486 000	65

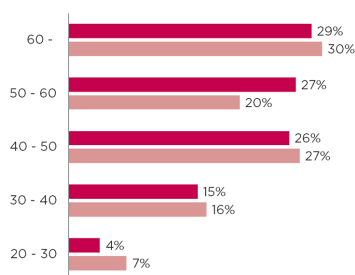
STATUS	AVERAGE PRICE	sq. m.
Employee	62 665 000	68
Top Manager	102 000 000	90
Manager	72 300 000	59
Pensioner	53 648 000	50
Entrepreneur	76 962 000	65

SITUATION	AVERAGE PRICE	sq. m.
Sale of investment	72 282 000	56
Separation of generations	59 995 000	51
Moving together of generations	-	-
Moving into smaller	93 289 000	111
Moving into bigger	83 763 000	63
Sale of inherited property	54 565 000	61

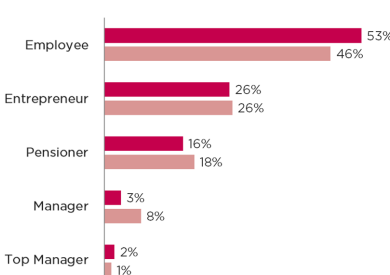
SELLER PROFILE IN THE COUNTRY

According to Duna House sales data, 29 per cent of sellers in the country in May this year were in the 60+ age group. 53 per cent of those selling a residential property were employees and 26 per cent were self-employed. In the country, the sale of an inherited property was the top reason for selling (31%), while in 27% of cases the reason for selling was cashing in on a previous investment.

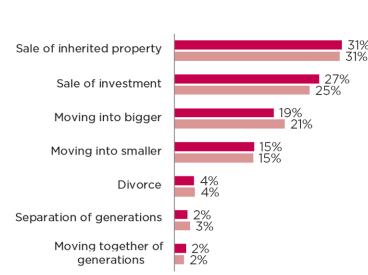
SELLERS' AGE IN THE COUNTRY



SELLERS' STATUS IN THE COUNTRY



MOTIVATION IN THE COUNTRY



AGE	AVERAGE PRICE	sq. m.
20 - 30	37 186 000	72
30 - 40	40 616 000	82
40 - 50	41 490 000	84
50 - 60	44 030 000	84
60 -	41 019 000	87

STATUS	AVERAGE PRICE	sq. m.
Employee	36 429 000	81
Top Manager	71 250 000	97
Manager	74 130 000	105
Pensioner	35 740 000	85
Entrepreneur	55 429 000	91

SITUATION	AVERAGE PRICE	sq. m.
Sale of investment	43 139 000	70
Separation of generations	55 500 000	104
Moving together of generations	33 215 000	82
Moving into smaller	63 343 000	124
Moving into bigger	43 285 000	76
Sale of inherited property	33 000 000	85
Divorce	36 350 000	91

■ May 2024 ■ May 2025

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. 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.



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