DUNA HOUSE®

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DUNA HOUSE BAROMETER

The latest property market info from Duna House network

Issue 169
July 2025

DHS
BÉT
PRÉMIUM KATEGÓRIA
A Budapesti Értéktőzsdén Prémium kategóriában jegyezve

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FORTHCOMING ISSUES

DATE OF ISSUE	CONTENT
12.09.2025	**August 2025 data**
14.10.2025	**Q3 2025 data (including price indices and housing loan data)**
12.11.2025	**October 2025 data**

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GENERAL INFORMATION CONSERNING 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:

EXECUTIVE SUMMARY

DEMAND FOR RESIDENTIAL PROPERTIES AT A FIVE-YEAR HIGH – HOW OTTHON START SHOOK UP THE ENTIRE HOUSING MARKET

- As a result of the Otthon Start (Home Start) Program, the Demand Index jumped to 77 points, which is the strongest July value in the last five years since COVID.
- Following the announcement of the program, the number of property viewings increased by 16.6%.
- The market remains in wait-and-see mode, however: the number of sales fell by 17.7% compared to the previous year.
- In Budapest, the price of brick and mortar homes rose by 24-36%, and the share of the higher price bracket increased in the country, too.
- In the country, the share of first-time home buyers also soared, a trend that may be further strengthened by the Otthon Start program in the autumn.
- Meanwhile, the loan market remained stable, with Credipass estimating that HUF 135 billion in mortgages were taken out in July.

In July 2025, the domestic housing market continued to trade in line with the usual summer seasonality, with a more subdued number of transactions, while the announcement of the Otthon Start Program triggered a huge surge in demand.

According to Duna House data, **9492** residential properties changed hands during the month, representing a **17.7%** and a **4.2%** decline year-on-year and month-on-month, respectively. In contrast, buyer interest grew spectacularly: the number of property viewings rose by **16.6%**, and the demand index peaked at **77 points**, the strongest July figure in the past five years.

Loan market: Stabilization and strengthening expectations

The mortgage market performed steadily: according to estimates by Credipass, the international financial brand of the Duna House Group, approximately HUF 135 billion in home loans were taken out in July 2025, which is practically identical to the factual data published by MNB, the National Bank of Hungary for July 2024. However, the results for the first seven months of the year are 21% higher than in the same period a year before. With the launch of the Otthon Start Program in the autumn, further growth in demand is expected, which is likely to lead to a fresh increase in lending volumes.

Prices: The upward trend continues

Budapest has seen a marked increase in prices, especially for brick and mortar homes: annual price rises were 36% in Buda, 24% in Pest and 22% in the city centre. The average price of concrete block apartments also continued to rise, reaching HUF 1.08 million in Pest and HUF 1.26 million per sq. m. in Buda. Despite the high prices, buyers have started to negotiate, with discounts of 1-2% in Buda and 3-6% in Pest.

Trends in the country: Strong shift towards the mid-range and high-end categories

Prices have also risen in the country: concrete block apartments are selling for an average of HUF 700-750 thousand per sq. m., while the price of brick and mortar homes properties is stagnating.

In County Pest, the proportion of transactions taking place at prices north of HUF 50 million increased significantly (+13 percentage points), indicating that solvent demand is already picking up, partly due to the more favourable conditions provided by the Otthon Start Program.

Buyer and seller profiles: Restructuring in progress

The share of first-time home buyers decreased in Budapest (12%) and increased in the country (27%). Investment purchases continue to dominate, but it is noticeable that the target segment of the Otthon Start Program, i.e. younger buyers looking to buy their first home, are becoming increasingly active in the country.

As for sellers, the most common motivation continues to be the sale of a former property investment, but moving into a larger home is becoming an increasingly important factor – the latter may also be encouraged by the fixed-rate subsidy available from the autumn.

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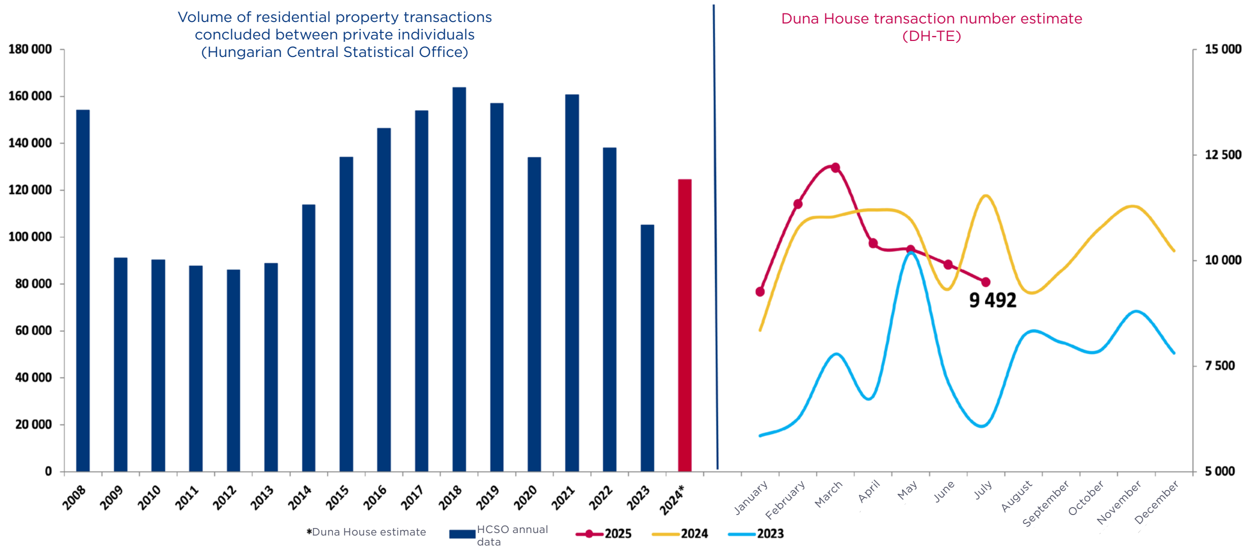
TRANSACTION DATA

DUNA HOUSE TRANSACTION NUMBER ESTIMATE (DH-TE)

Duna House presents its monthly Transaction Number Estimate (DH-TE) and Mortgage Forecast below, showing that 9492 residential property transactions were concluded in July 2025 and residential mortgage contracts worth HUF 135 billion were signed in the whole of Hungary.



July was a quiet month on the domestic housing market, as is typical for the summer, but the impact of the Otthon Start Program was quickly reflected in increased interest.

Based on Duna House's own data, an estimated **9492** sales were made nationwide in July 2025, representing a **17.7%** decline in the number of transactions compared to the same period last year. Looking at the previous month, our data show a **4.2%** decline, which is in line with seasonality.

That said, increased interest is already evident on the back of the Otthon Start Program: the number of property viewings organised by sales agents rose by **16.6%** compared to the period following the announcement of the program. This phenomenon will be reflected in transaction numbers in the coming months.

In July, based on domestic data from Credipass, the international financial brand of the Duna House Group, the loan volume was an estimated HUF 135 billion, which is essentially the same as the previous month's estimate. The July figure represents a 1% increase compared to the factual data published by MNB, the National Bank of Hungary for the same period last year. The sustained strong lending indicators are driven by dynamic price growth in the housing market and also by growing demand for loans. As a result of the Otthon Start Program, further significant growth in the loan market is expected in the autumn months.

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	9 908	9 492					

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.

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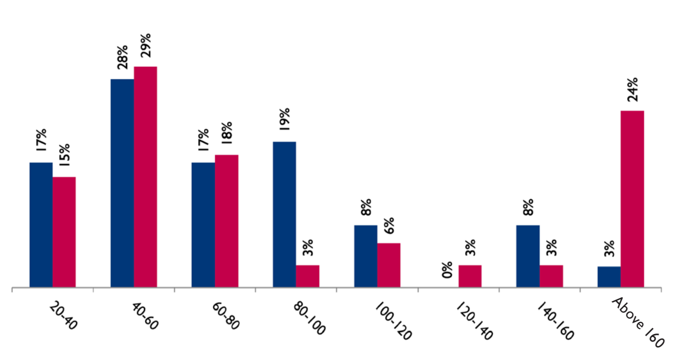
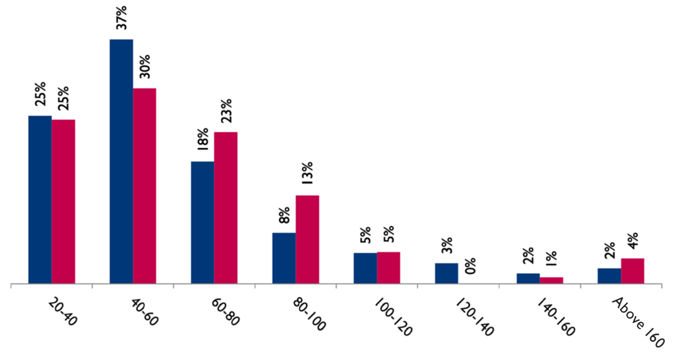
TRANSACTION PARAMETERS IN BUDAPEST

Based on Duna House sales data, in July there was strong demand in Buda primarily for apartments between 40 and 60 sq. m. and those exceeding 160 sq. m., with sales in these categories accounting for 29% and 24% of the total, respectively. While at this time last year approximately 30% of apartments in Buda were sold at prices below HUF 1 million per sq. m., these price tags completely disappeared from the market by July this year. More than half of all sales took place in the HUF 1.2-1.6 million per sq. m. range, while nearly a quarter of transactions were in the HUF 1.6 million and above price bracket, a significant increase compared to 11% a year earlier. There has also been a spectacular change in the purchase price of properties: while in July 2024 only 39% of sales were for apartments priced north of HUF 70 million, by July this year this figure rose to 65%. Apartments between 40 and 60 sq. m. dominated on the Pest side, too, accounting for 30% of sales. There has also been a significant shift in sq. m. prices: in 2024 28% of properties sold were priced at HUF 600,000-800,000 per sq. m., but the share of this price bracket has now fallen to 4%, while the number of apartments sold in the HUF 1 million and above category has increased dramatically. In Pest, too, properties priced above HUF 70 million were the most common in sales.

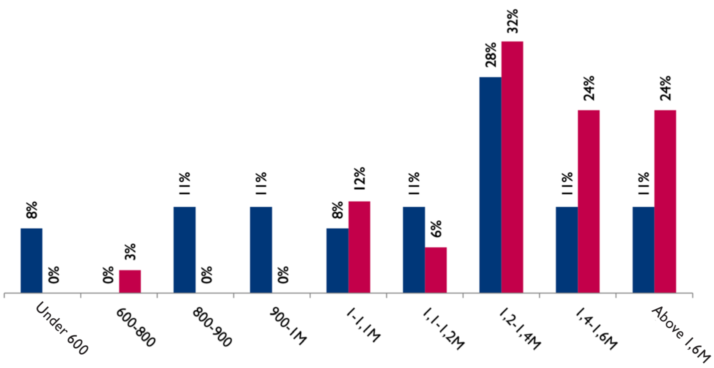
BUDA	PEST

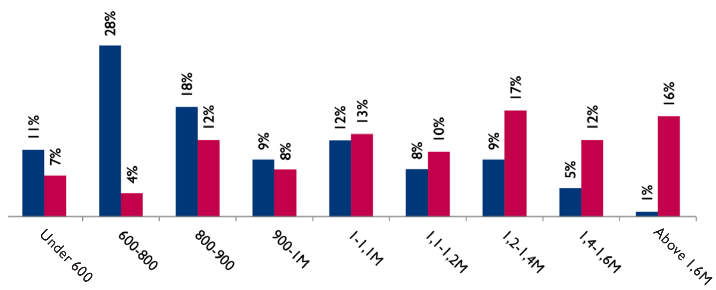




Apartment size (sq. m.)

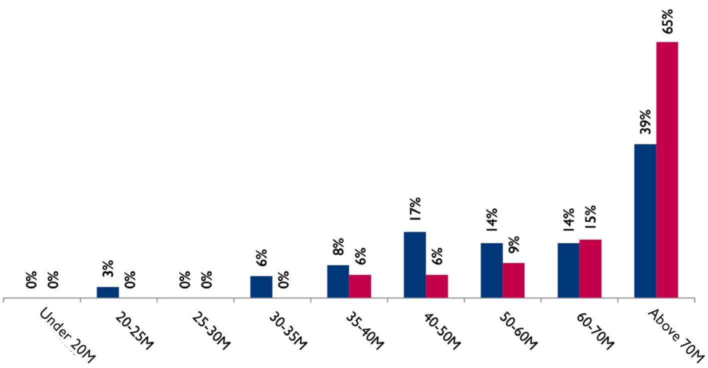
Apartment size (sq. m.)

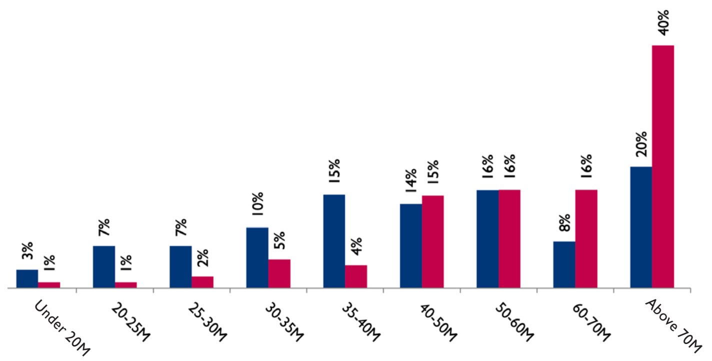




Sq. m. price (in thousand HUF)

Sq. m. price (in thousand HUF)





Apartment price (in million HUF)

Apartment price (in million HUF)

July 2024 July 2025

Based on properties sold by the Duna House Franchise Network.

TRANSACTION PARAMETERS IN THE COUNTRY

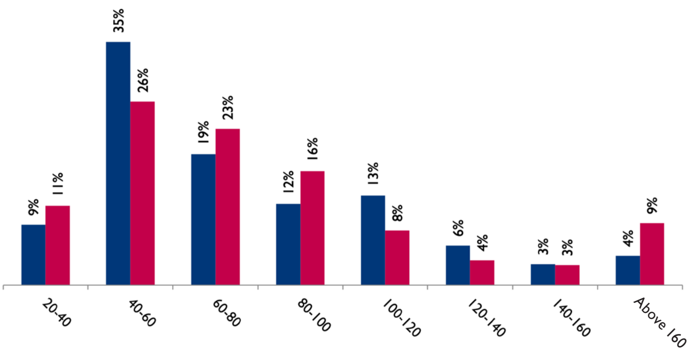
Properties with a floor space between 40 and 60 sq. m. were in highest demand nationwide (26%), with the exception of Central Hungary. Only 19% of sales were concluded at a price of HUF 250,000 sq. m., while most of the properties sold (43%) were at the opposite end of the scale, in the price category above HUF 600,000 per sq. m. In terms of property value, the category above HUF 40 million dominated with a 40% majority.

According to Duna House sales data, in July 2025, 21% of homes sold in County Pest had a floor space of 80-100 sq. m., while 16% fell into the 60-80 sq. m. category.

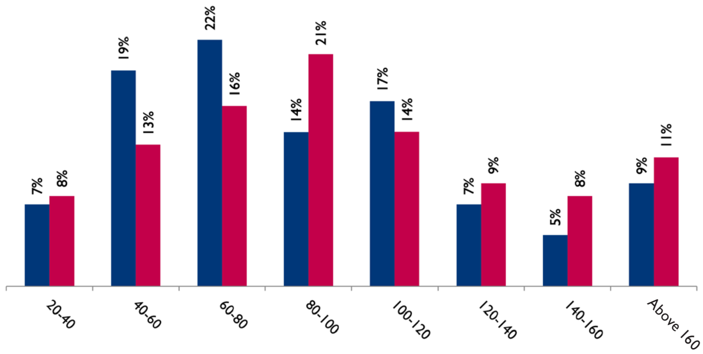
In terms of sq. m. prices, nearly half (47%) of the deals closed were in the HUF 600,000 and above range. The share of properties sold for more than HUF 50 million in County Pest rose by 13 percentage points compared to last year.

COUNTRYWIDE (EXCLUDING CENTRAL HUNGARY)

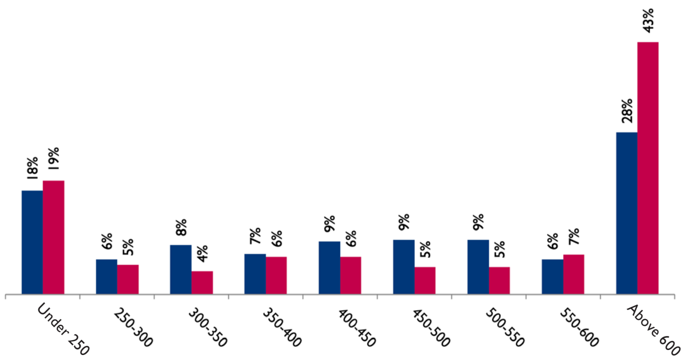
PEST COUNTY



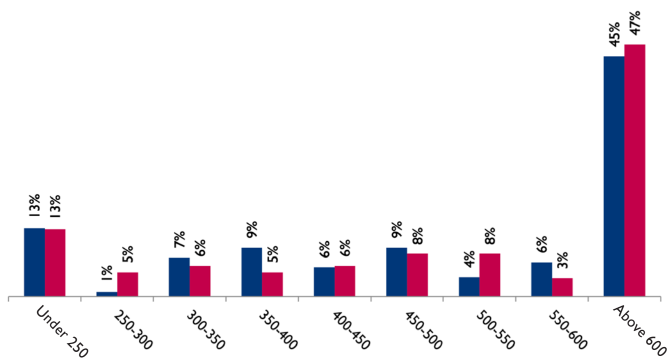
Apartment size (sq. m.)



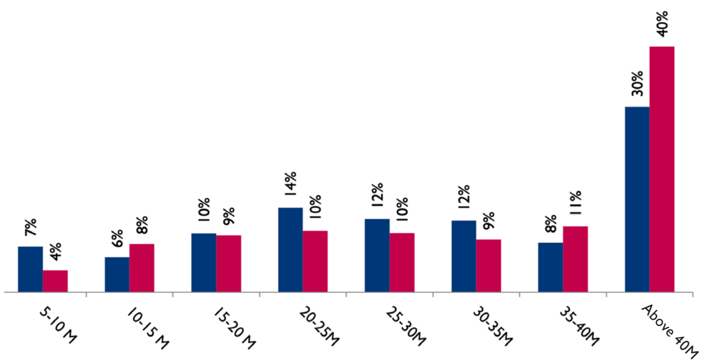
Apartment size (sq. m.)



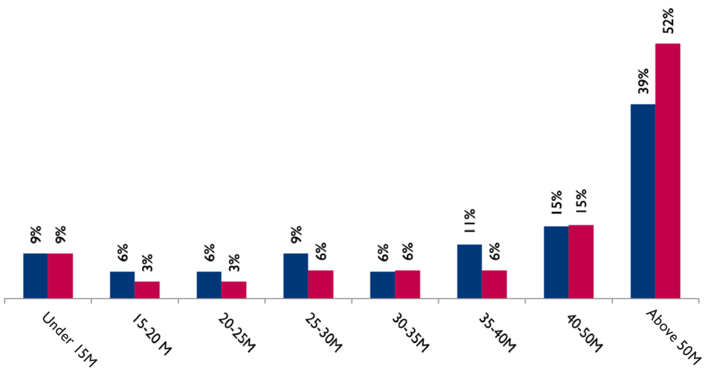
Sq. m. price (in thousand HUF)



Sq. m. price (in thousand HUF)



Apartment price (in million HUF)



Apartment price (in million HUF)

■ July 2024 ■ July 2025

Based on properties sold by the Duna House Franchise Network.

SALES DATA – PRICES – BARGAINING MARGINS

According to Duna House data for July 2025, the average price per sq. m. of concrete block apartments rose both in the country and in the capital. Buyers can expect an average price of HUF 757,000 per sq. m. in the Eastern part of the country and HUF 704,000 in the Western counties, the former being associated with a 1% change in the asking price and a 4% buyer's bargain. In the West, owners reduced their asking prices by 2%, with a bargaining margin also at 4%. However, prices for brick and mortar properties are stagnating nationwide compared to the same period last year, with an average price per sq. m. of HUF 370,000 in the East and HUF 482,000 in the West. Owners reduced their asking prices by 4-6% during the advertising phase and allowed for a 6% bargaining margin.

BLOCK COUNTRYWIDE

	EAST				WEST			
	price	sq. m. price	change in listing price	bargain	price	sq. m. price	change in listing price	bargain
July 2024	31 005 000	573 000	4%	4%	27 902 000	550 000	2%	5%
July 2025	41 435 000	757 000	1%	4%	35 539 000	704 000	2%	4%

BRICK COUNTRYWIDE

	EAST				WEST			
	price	sq. m. price	change in listing price	bargain	price	sq. m. price	change in listing price	bargain
July 2024	32 067 000	374 000	6%	8%	37 571 000	466 000	4%	6%
July 2025	35 308 000	370 000	6%	6%	41 247 000	482 000	4%	6%

The price of concrete block units rose in the capital, too, increasing to HUF 1,257,000 per sq. m. in Buda and HUF 1,081,000 per sq. m. in Pest in July this year. There was a significant, 9% change in the asking price on the Buda side, but only 1% on the Pest side. In Buda there was a 1% bargaining margin, while on the Pest side, buyers had 3% room for negotiation compared to the asking price. Contrary to the trend in the country, average sq. m. prices for brick and mortar apartments rose significantly in July this year. Following a 36% increase in Buda, prices are now expected to reach HUF 1,544,000 per sq. m., while in Pest the price increase was 24% and 22% in the city centre. Owners in Buda and Pest reduced their asking prices by 5%, but sellers in the city centre were not forced to lower their prices. Buyers' bargaining margin was 2% in the Buda districts, while sellers reduced their prices 4-6% in the city centre and in other areas of Pest, based on transactions that took place in July 2025.

BLOCK BUDAPEST

	BUDA				PEST			
	price	sq. m. price	change in listing price	bargain	price	sq. m. price	change in listing price	bargain
July 2024	40 900 000	930 000	0%	1%	38 600 000	820 000	2%	3%
July 2025	64 080 000	1 257 000	9%	1%	60 935 000	1 081 000	1%	3%

BRICK BUDAPEST

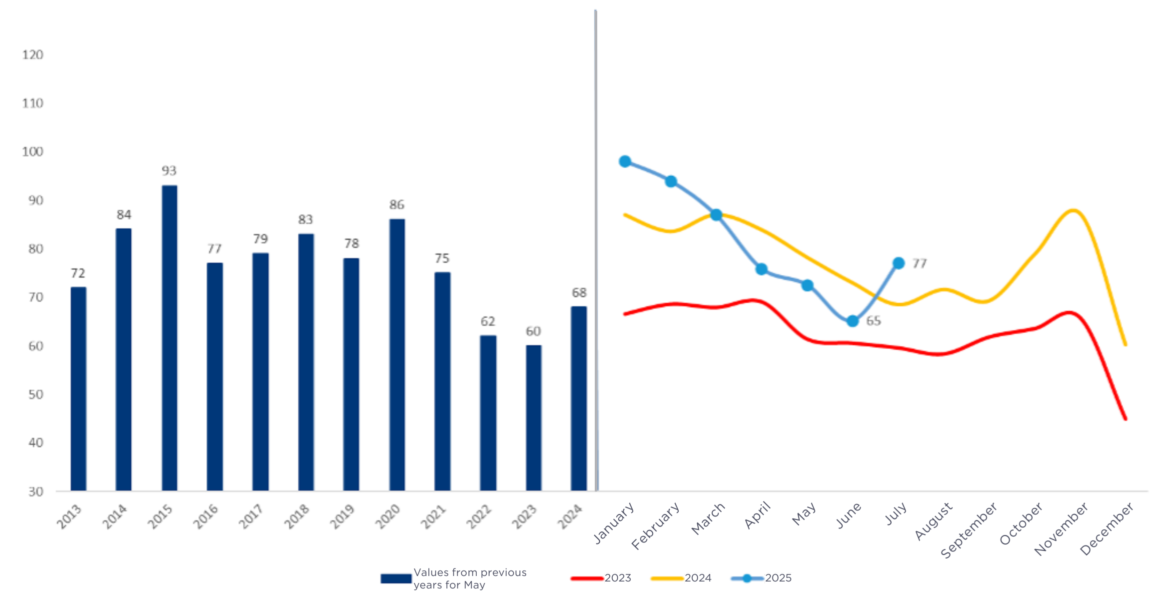
	BUDA				PEST				INNER CITY			
	price	sq. m. price	change in listing price	bar-gain	price	sq. m. price	change in listing price	bar-gain	price	sq. m. price	change in listing price	bar-gain
July 2024	88 630 000	1 135 000	2%	7%	48 975 000	781 000	4%	5%	75 041 000	1 125 000	4%	4%
July 2025	169 411 000	1 544 000	5%	2%	68 278 000	969 000	5%	4%	66 668 000	1 374 000	0%	6%

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

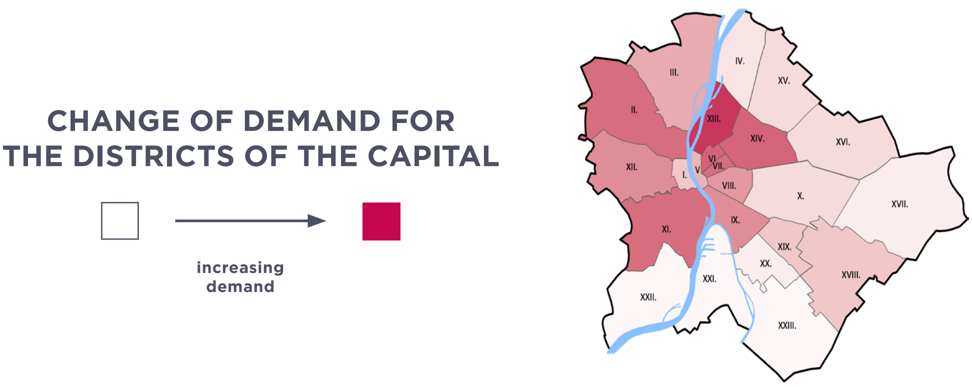
While transaction numbers show the usual summer decline, the sharp rise in new buyer registrations in July already suggests that the Otthon Start Program could cause the domestic housing market to boom in the fall. In July, housing market demand rose by 12 percentage points compared to the previous month. The Duna House Demand Index currently stands at 77 points, which is the strongest July figure since 2020.



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

In July this year, the popularity of Angyalföld (District 13) remained strong in the list of the most sought-after districts in the capital, with 23% of property buyers indicating Angyalföld (District 13) as their preferred location, according to a survey conducted by Duna House. Zugló (District 14) ranked second again, while Terézváros (District 6) came in third.



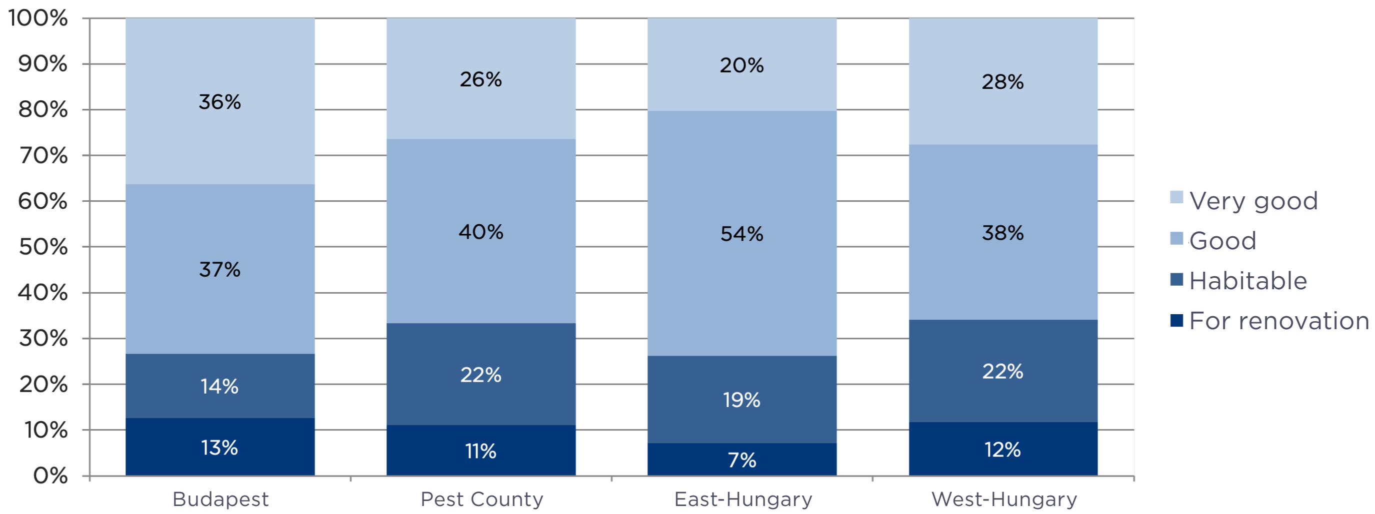
Methodology: Our clients with a purchase intention indicate their preferred districts (more at the same time) when meeting our agents. The above preference map is put together based on this "popularity information".

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.

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

QUALITY PREFERENCES

According to sales data from Duna House for July 2025, properties in a „good condition" were in highest demand across the country, followed by apartments in a „very good" condition. Homes in need of renovation were most popular among buyers in Budapest (13%), followed by Western Hungary (12%), County Pest (11%), while in Eastern Hungary their share was a mere 7%.



TURNOVER SPEED (TIME NEEDED TO SELL)

According to Duna House data for July, concrete block units continue to sell the fastest: in the country, they sold in an average of 70 days, while in Budapest, they often found buyers within two months. Brick and mortar apartments and houses took an average of three months to sell in the capital, while in the country the typical selling time was 3.5-4 months. These data indicate an acceleration by approximately one month in almost all market segments compared to the selling times a year earlier.

BLOCK				
TIME NEED OF SALE/DAY				
	EAST	WEST	BUDA	PEST
July 2024	88	104	96	80
July 2025	70	74	55	53

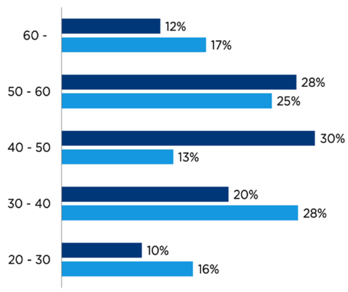
BRICK					
TIME NEED OF SALE/DAY					
	EAST	WEST	BUDA	PEST	INNER CITY
July 2024	138	134	132	121	119
July 2025	95	114	91	83	85

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

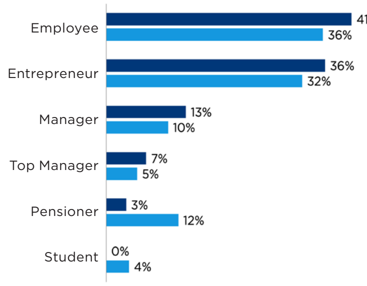
According to data collected by Duna House, in July 2025, 30% of home buyers in Budapest were between the ages of 40 and 50, while the proportion of those aged 50 to 60 was also significant, reaching 28%. Forty-one percent of buyers in the capital were employees and 36% were self-employed. Forty-one percent of buyers were motivated by making an investment, while the proportion of first-time home buyers fell by half compared to last year, to 12%. On average, buyers spent HUF 88.4 million on investment purchases, while first-time buyers shelled out HUF 69.8 million on their first home.

BUYERS' AGE IN BUDAPEST



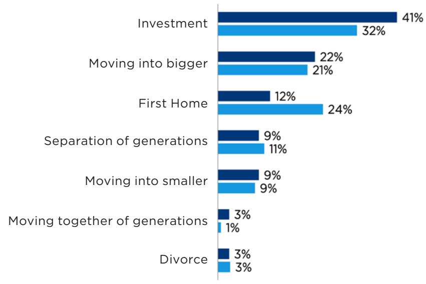
AGE	AVERAGE PRICE	sq. m.
20 - 30	71 895 000	61
30 - 40	121 010 000	88
40 - 50	89 324 000	76
50 - 60	74 718 000	59
60 -	69 884 000	59

BUYERS' STATUS IN BUDAPEST



STATUS	AVERAGE PRICE	sq. m.
Employee	83 268 000	71
Top Manager	126 484 000	82
Manager	74 610 000	80
Pensioner	49 364 000	37
Student	-	-
Entrepreneur	103 729 000	83

MOTIVATION IN BUDAPEST

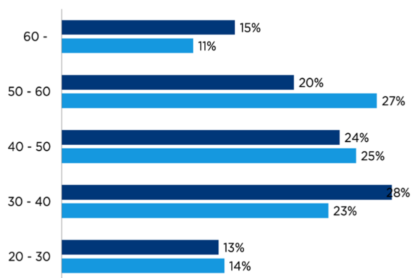


SITUATION	AVERAGE PRICE	sq. m.
Investment	88 445 000	68
First Home	69 754 000	64
Separation of generations	67 087 000	56
Moving together of generations	88 334 000	147
Moving into smaller	63 578 000	54
Moving into bigger	122 149 000	98
Divorce	74 334 000	62

BUYER PROFILE IN THE COUNTRY

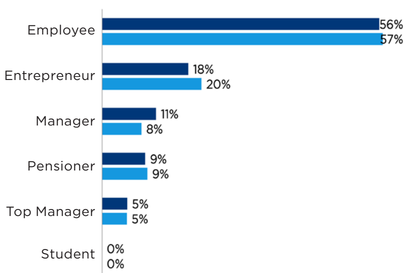
Based on sales outside the capital concluded with the assistance of Duna House, the 30-40 age group proved to be the most active in July 2025, accounting for 28% of buyers, while those aged 40-50 accounted for 24%. The majority (56%) of buyers were employees and their purchases were primarily driven by the intention to make an investment (29%), with nearly one in four customers were moving into a larger home. In contrast to Budapest, the proportion of first-time home buyers in the country rose significantly compared to last year, from 19% to 27%. Investors spent an average of HUF 36.4 million, those moving into larger homes parted with an average sum of HUF 63.1 million, while first-time homebuyers spent HUF 43.6 million on their acquisitions.

BUYERS' AGE IN THE COUNTRY



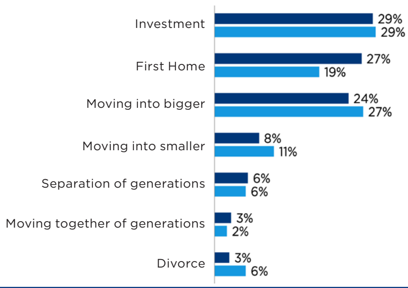
AGE	AVERAGE PRICE	sq. m.
20 - 30	39 309 000	85
30 - 40	51 984 000	99
40 - 50	44 368 000	86
50 - 60	39 430 000	73
60 -	45 834 000	77

BUYERS' STATUS IN THE COUNTRY



STATUS	AVERAGE PRICE	sq. m.
Employee	41 461 000	90
Top Manager	65 457 000	99
Manager	52 947 000	94
Pensioner	38 313 000	79
Student	-	-
Entrepreneur	54 247 000	89

MOTIVATION IN THE COUNTRY



SITUATION	AVERAGE PRICE	sq. m.
Investment	36 426 000	72
First Home	43 638 000	88
Separation of generations	39 678 000	75
Moving together of generations	42 700 000	120
Moving into smaller	44 550 000	63
Moving into bigger	63 640 000	124
Divorce	64 294 000	91

July 2024 July 2025

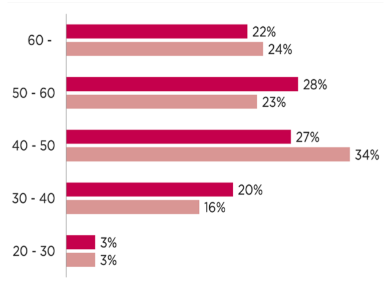
Under our methodology investment as a motivation includes all property transactions that, judged by the buyer's characteristics, can be considered as an investment, i.e. this is not a strictly business category. It includes all family investments and short-term investors who buy a property in a poor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

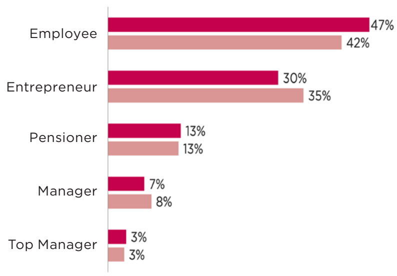
Twenty-eight percent of property owners in the capital were between the ages of 50 and 60, and 47% of sellers were employees. The most common reason for selling was to cash in on a previous investment (34%), followed by moving into a bigger place at 23%.

SELLERS' AGE IN BUDAPEST



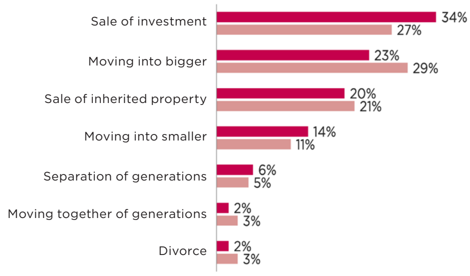
AGE	AVERAGE PRICE	sq. m.
20 - 30	46 883 000	55
30 - 40	70 030 000	58
40 - 50	73 475 000	66
50 - 60	81 995 000	70
60 -	137 168 000	99

SELLERS' STATUS IN BUDAPEST



STATUS	AVERAGE PRICE	sq. m.
Employee	62 847 000	60
Top Manager	183 834 000	125
Manager	83 917 000	85
Pensioner	83 500 000	77
Entrepreneur	102 643 000	80

MOTIVATION IN BUDAPEST

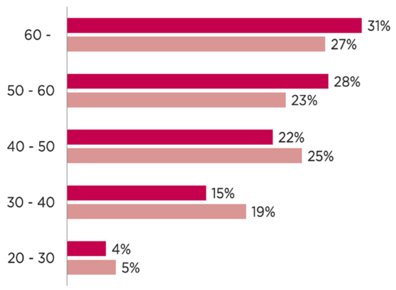


MOTIVATION	AVERAGE PRICE	sq. m.
Sale of investment	95 237 000	65
Separation of generations	112 567 000	117
Moving together of generations	68 800 000	80
Moving into smaller	99 258 000	105
Moving into bigger	85 616 000	57
Sale of inherited property	79 134 000	80
Divorce	57 450 000	60

SELLER PROFILE IN THE COUNTRY

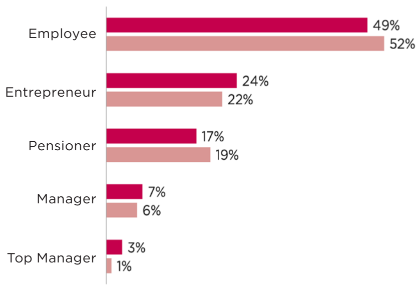
According to data from Duna House for July 2025, 31% of sellers in the country were over the age of 60 and 49% of them were employees. The most common reason for selling was the sale of a previous residential property investment, which was the motivation in 33% of cases.

SELLERS' AGE IN THE COUNTRY



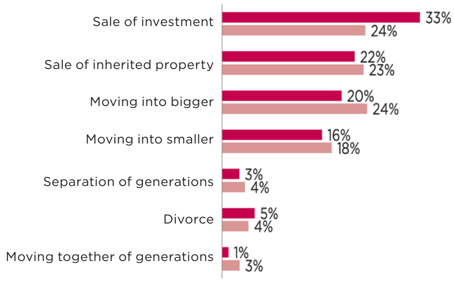
AGE	AVERAGE PRICE	sq. m.
20 - 30	35 858 000	89
30 - 40	46 244 000	89
40 - 50	48 281 000	86
50 - 60	46 889 000	93
60 -	39 011 000	80

SELLERS' STATUS IN THE COUNTRY



STATUS	AVERAGE PRICE	sq. m.
Employee	40 478 000	92
Top Manager	61 043 000	104
Manager	54 334 000	99
Pensioner	32 346 000	69
Entrepreneur	56 278 000	91

MOTIVATION IN THE COUNTRY



MOTIVATION	AVERAGE PRICE	sq. m.
Sale of investment	43 489 000	74
Separation of generations	53 650 000	114
Moving together of generations	26 300 000	75
Moving into smaller	59 535 000	110
Moving into bigger	42 199 000	75
Sale of inherited property	33 690 000	88
Divorce	67 327 000	119

July 2024 July 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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