

DUNA HOUSE BAROMETER

The latest property market info
from Duna House network

Issue 172
October 2025



DHS
BÉT

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MARKET**

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FORTHCOMING ISSUES

DATE OF ISSUE	CONTENT
12.12.2025	November 2025 data
14.01.2026	Q4 2025 data (with price indices and housing loan data)
12.02.2026	January 2026 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

THE OTTHON START PROGRAM HAS BROUGHT LOWER-INCOME HOMEBUYERS INTO THE PICTURE

There were 11,518 sales in October, which is a 7% monthly decrease, but 7.3% higher than in the previous year.

The Otthon Start Program has increased the proportion of young and lower-income buyers, especially in the country and in the agglomeration areas.

Housing prices and turnover times have stabilized, while concrete block units continue to sell quickly and at good prices.

The Home Start Program changed the balance of power in the housing market in October: homes became more accessible for lower-income and younger buyers, while the market as a whole remained stable. Lending and transaction trends show that the new subsidy scheme not only stimulated the market, but also balanced it.

Transaction volume: lively market with seasonal correction

According to Duna House estimates, 11,518 residential properties changed hands in October 2025, representing a 14.2% decline compared to September, but a 7.3% increase on an annual basis. After the exceptional figures in September, this marks a natural correction, and the market remains buoyant. The impact of the Otthon Start Program was still felt in October: after the rush at the end of the summer, buyer interest remained strong in the autumn months.

Loan market: a quantum leap triggered by Otthon Start

According to Credipass estimates, the amount of residential mortgage loans contracted reached HUF 196 billion in October, representing an 85% monthly and 66% annual increase. This loan market dynamic can be directly attributed to the impact of the Otthon Start Program, which not only stimulated, but also broadened demand.

Buyer profile: younger buyers purchasing their first home making headway

In the October transactions the 30-40 age group dominated, but the proportion of 20-30 year-olds also increased. In Budapest, the proportion of first-time home buyers rose from 21% to 41%, while in the country it rose from 26% to 43%. The majority of buyers are employees, which indicates that the Otthon Start Program has indeed put lower-income home buyers in a position to buy. At the same time, the proportion of investment purchases has decreased.

Sellers' side: supply is stable, investments are being sold

The 50-60 age group continues to be the most active among sellers, but the proportion of sellers aged 30-40 has also increased. The most common motivation for sellers was parting with a previous investment, which ensures a stable supply on the market.

Price trends and turnover speeds: a segmented, accelerating market

The price of concrete block apartments in Budapest stabilized between HUF 1.1 and 1.25 million per sq. m., while the price of brick and mortar homes was around HUF 1.3 million per sq. m. in Buda and HUF 1.2 million per sq. m. in Pest. In the country, the price per sq. m. for brick and mortar properties was HUF 440,000 in the East and HUF 503,000 in the West. Sales times have shortened significantly: in Budapest, concrete block units sold in 55-68 days, while the average time for brick and mortar homes fell below 120 days. This acceleration was particularly noticeable in the case of properties in a good condition and offered at realistic prices.

Regional differences: County Pest and the countryside

In County Pest, 69% of transactions were concluded at prices above HUF 50 million, while in the country, 46% of properties were valued at over HUF 40 million. Based on sq. m. prices, the category above HUF 600,000 dominated with a share of 61% in County Pest. These figures correspond well with the loan limits supported by the Otthon Start Program.

District preferences: District 13 on the top

District 13 remains the most popular in Budapest, with 22.6% of respondents selecting it as their preferred destination. Zugló (District 14) and Újbuda (District 11) follow closely behind with 18.5% each.

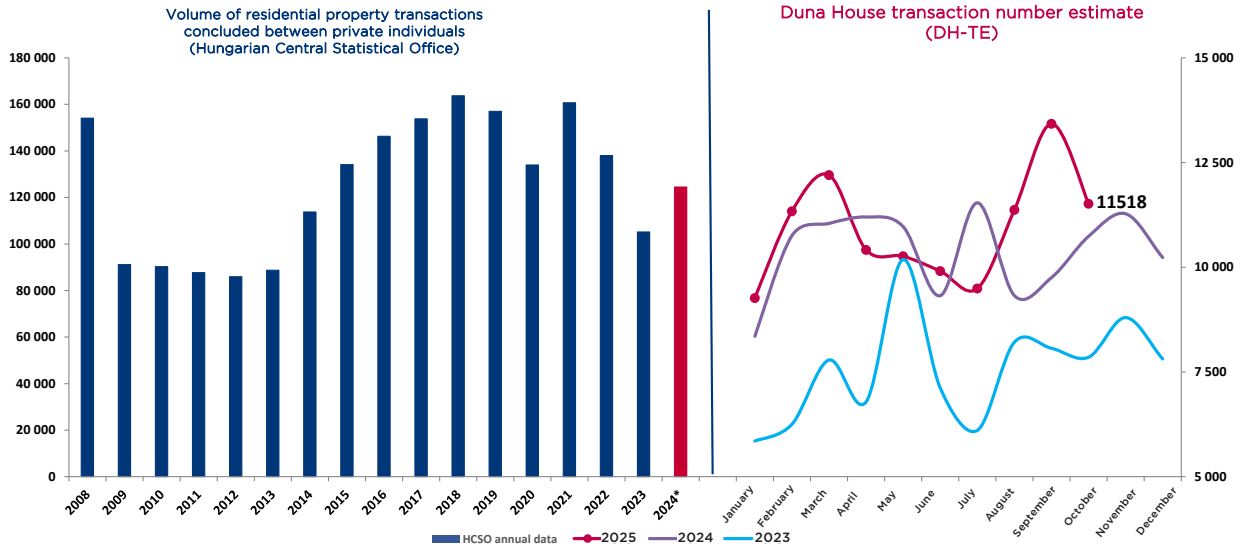
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TRANSACTION DATA

DUNA HOUSE TRANSACTION NUMBER ESTIMATE (DH-TE)

Duna House presents its monthly Transaction Number Estimate (DH-TE) and Mortgage Forecast below, showing that 11,518 residential property transactions were concluded in October 2025 and residential mortgage contracts worth HUF 196 billion were signed in the whole of Hungary.



Activity in the residential property market remained brisk in October thanks to the Otthon Start Program (OSP). According to estimates based on proprietary data from Duna House, 11,518 residential properties changed hands nationwide, representing a 7.3% increase compared to the same period last year.

At the same time, there was a 14.2% decline compared to the previous month.

The OSP already led to a spectacular increase in the number of transactions in August, which peaked in September with 13,426 sales – it is important to note that October saw a decline compared to those earlier highs.

The loan market saw a record monthly jump in October. According to domestic data from Credipass, the international financial brand of the Duna House Group, the volume of mortgage loans for housing purposes in October is estimated at HUF 196 billion, which is 85% higher than the September figure. There was also a significant 66% increase year-on-year compared to the figures published by the National Bank of Hungary for the same month last year.

The October data clearly indicate that the demand generated by the OSP has led to a spectacular pick-up in both the real estate and loan markets. The dynamics of the loan market are particularly noteworthy: in line with our September forecast, the impact of the OSP was already felt strongly in October, immediately bringing with it record loan volumes.

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	11 369	13 426	11 518		

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.

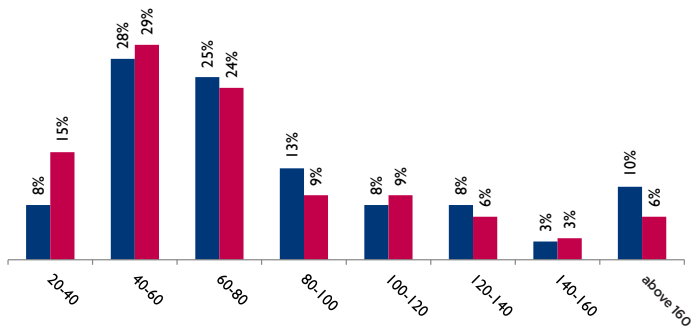
Mortgage forecast: Figures published by Credipass can primarily be used for quick trend forecasts; the National Bank of Hungary publishes the actual figures for the second last month at the beginning of each month.

TRANSACTION PARAMETERS IN BUDAPEST

According to October sales data of Duna House, 29% of sales on the Buda side of the capital were for properties with a floor space between 40 and 60 sq. m., but properties measuring 60 to 80 sq. m. were also in demand, accounting for 24% of all transactions. There was a significant decline in the turnover of properties in the mid-price bracket in Buda: the proportion of apartments priced between HUF 900,000 and HUF 1.1 million per sq. m. fell from 28% to 6% in one year. Sixty-four percent of transactions in Buda were concluded at a purchase price above HUF 70 million.

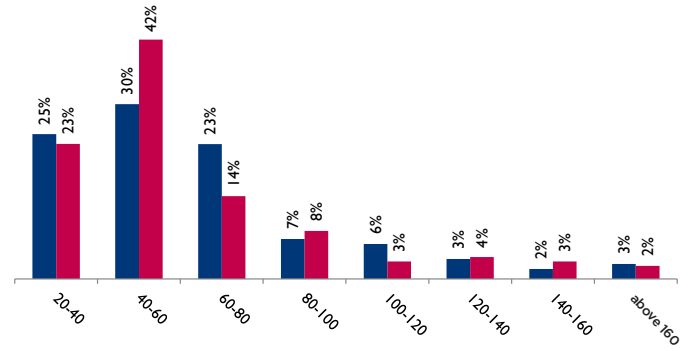
On the Pest side, Duna House customers were more interested in apartments between 40-60 (42%) and 20-40 sq. m. (23%). At this time last year, the typical price per sq. m. in Pest was HUF 600,000-900,000, but by October 2025, properties priced at HUF 1.2-1.6 million were the most popular. Fifty percent of properties in Pest that found new owners were in the HUF 40-70 million price range.

BUDA

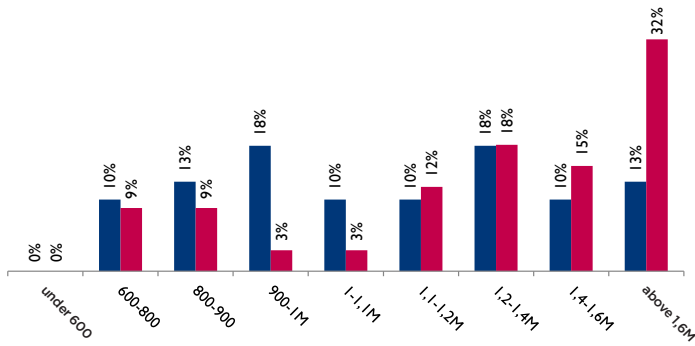


apartment size (m²)

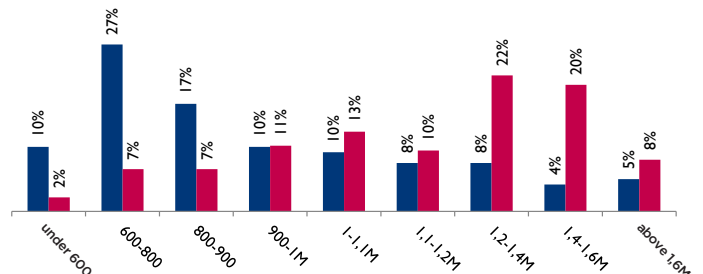
PEST



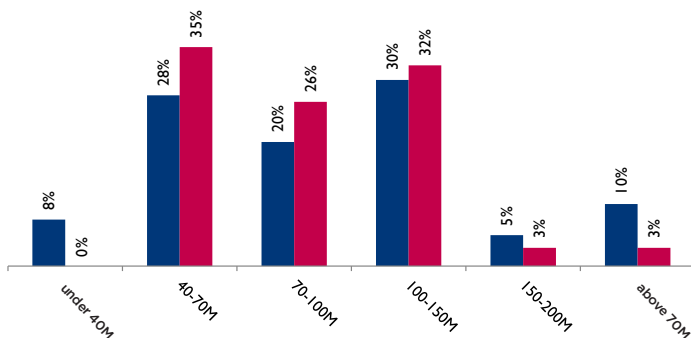
apartment size (m²)



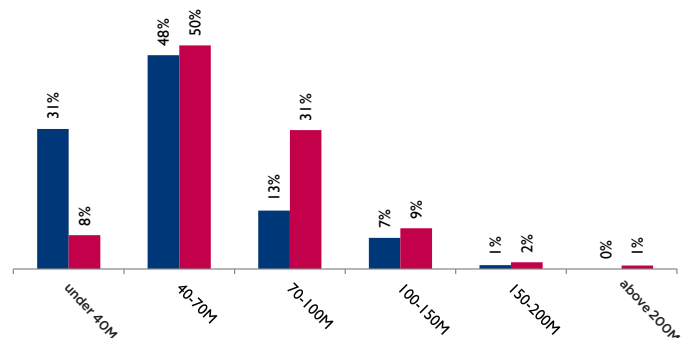
sq. m. price (in thousand HUF)



sq. m. price (in thousand HUF)



apartment price (in million HUF)



apartment price (in million HUF)

■ October 2024 ■ October 2025

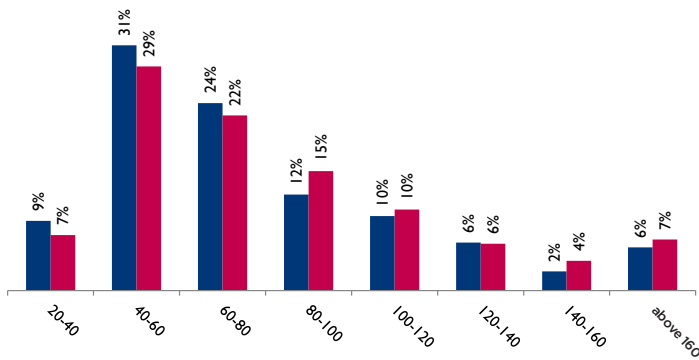
Based on properties sold by Duna House Franchise Network.

TRANSACTION PARAMETERS IN THE COUNTRY

Duna House experts observed the highest demand for properties with a floor space between 40 and 60 sq. m. nationwide, with the exception of central Hungary. Twenty-eight percent of houses and apartments were sold for less than HUF 250,000 per sq. m., while 46% fell into the price category north of HUF 600,000 per sq. m. Buyers contracted for another 46% of properties at prices exceeding HUF 40 million in October this year.

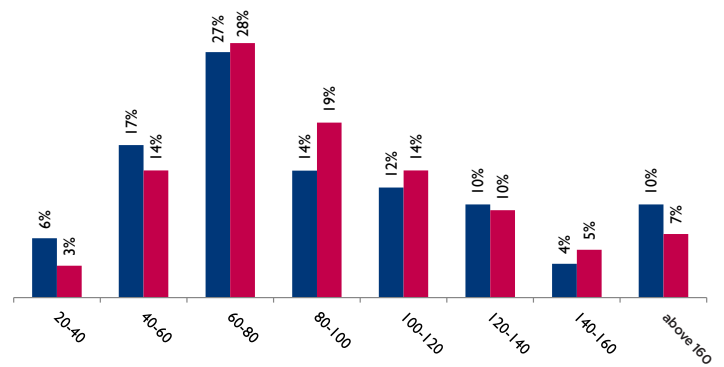
In County Pest, 28% of transactions involved homes between 60 and 80 sq. m., and 19% involved homes larger than 80 to 100 sq. m. In terms of sq. m. prices, the category above HUF 600,000 dominated with a 61% share. Sixty-nine percent of sales were concluded at prices north of HUF 50 million.

COUNTRYWIDE (EXCLUDING CENTRAL HUNGARY)

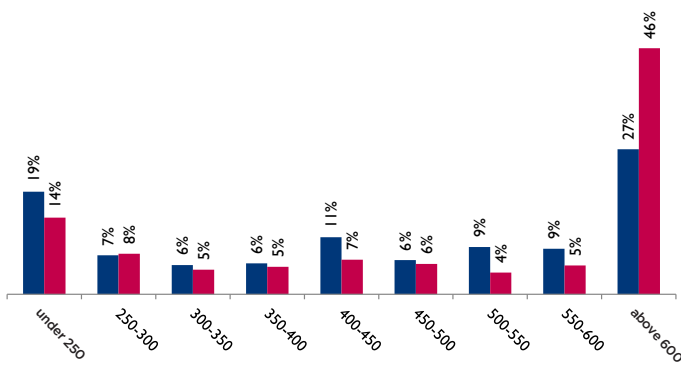


apartment size (m²)

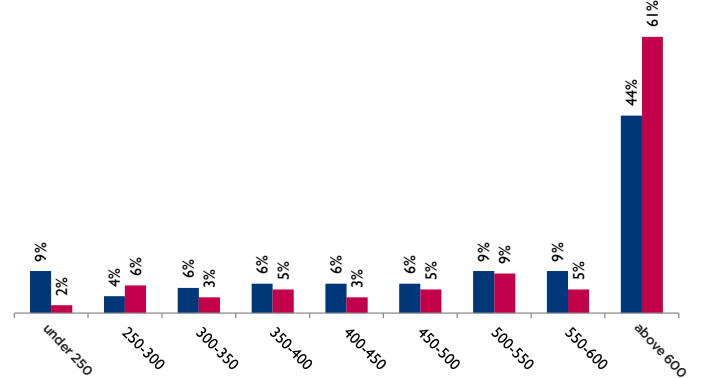
COUNTY PEST



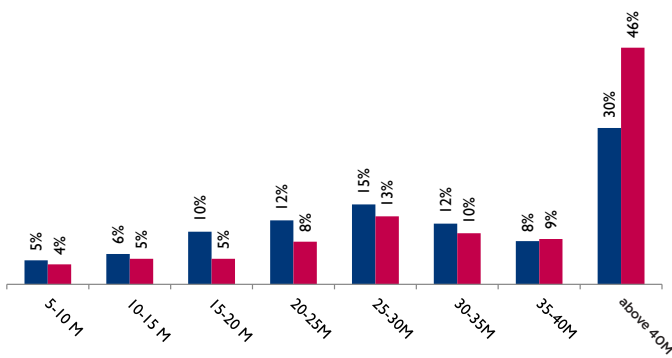
apartment size (m²)



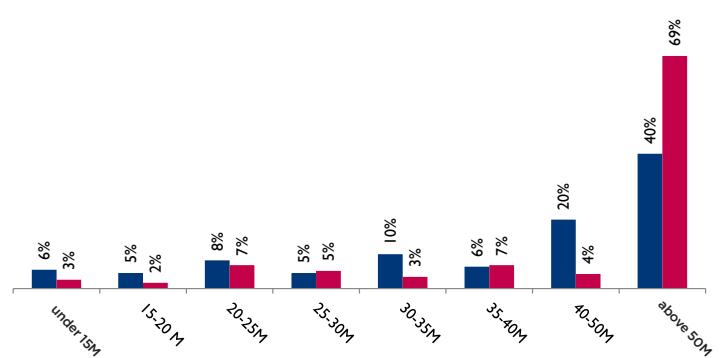
sq. m. price (in thousand HUF)



sq. m. price (in thousand HUF)



apartment price (in million HUF)



apartment price (in million HUF)

■ October 2024 ■ October 2025

Based on properties sold by Duna House Franchise Network.

SALES DATA - PRICES - BARGAINING MARGINS

Duna House's sales data for October 2025 shows significant price increases both in the capital and in the country. The average price per sq. m. for concrete block units rose to HUF 685,000 in the East and HUF 752,000 in the West. There were only minimal changes in the asking price (1-2%), while buyer's discount was 2-5% for concrete block units in the country. The asking price for brick and mortar homes in the country was reduced by 4-6% by sellers during the advertising process, while also leaving a larger margin for negotiation of 5-8%. In October 2025, the average price per sq. m. of brick and mortar apartments and houses was around HUF 440,000 in Eastern Hungary and HUF 503,000 in the Western part of the country.

PANEL: COUNTRYWIDE

	EAST				WEST			
	price	m ² price	change in listing price	bargain	price	m ² price	change in listing price	bargain
October 2024	33 831 000	608 000	2%	5%	29 644 000	562 000	1%	3%
October 2025	38 287 000	685 000	1%	2%	39 127 000	752 000	1%	2%

BRICK: COUNTRYWIDE

	EAST				WEST			
	price	m ² price	change in listing price	bargain	price	m ² price	change in listing price	bargain
October 2024	32 764 000	403 000	4%	8%	34 620 000	403 000	5%	7%
October 2025	40 849 000	440 000	6%	5%	42 012 000	503 000	4%	6%

In the case of concrete block apartments in the capital, Duna House sales data for October 2025 shows an annual price increase of over 40%, which is even higher than that seen in the country. During the advertising process, owners reduced the asking price by only 1-3%, leaving a narrow, 2-4% margin for negotiation, so buyers paid an average of HUF 1,243,000 per sq. m. for concrete block homes on the Buda side and HUF 1,154,000 per sq. m. on the Pest side. Brick and mortar homes in Buda that changed hands in October sold for an average price of nearly HUF 1.3 million per sq. m., while in downtown Pest the average price was slightly above HUF 1.2 million per sq. m. In other areas of Pest, the average was HUF 1 million per sq. m. Sellers reduced their asking prices by 1-3%, leaving buyers a further 2-5% room for negotiation.

PANEL: BUDAPEST

	BUDA				PEST			
	price	m ² price	change in listing price	bargain	price	m ² price	change in listing price	bargain
October 2024	48 113 000	873 000	1%	4%	42 850 000	773 000	1%	2%
October 2025	70 458 000	1 243 000	2%	3%	57 262 000	1 154 000	3%	2%

BRICK: BUDAPEST

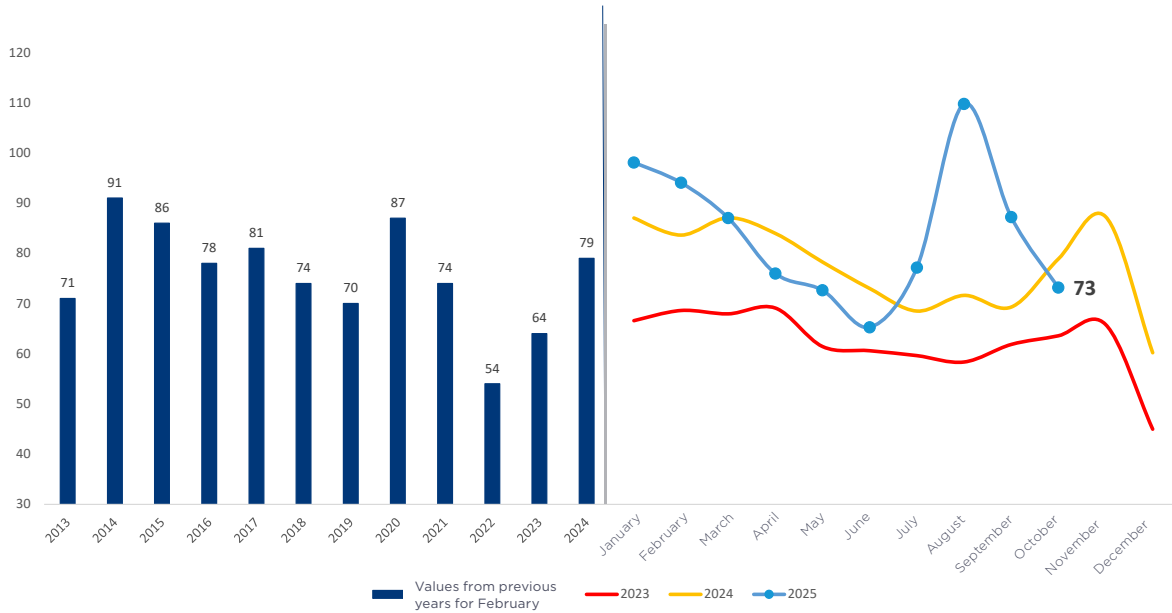
	BUDA				PEST				INNER CITY			
	price	m ² price	change in listing price	bargain	price	m ² price	change in listing price	bargain	price	m ² price	change in listing price	bargain
October 2024	123 242 000	1 230 000	2%	3%	54 648 000	779 000	2%	5%	62 542 000	1 095 000	3%	2%
October 2025	103 026 000	1 267 000	1%	2%	69 102 000	1 022 000	1%	2%	73 929 000	1 238 000	2%	3%

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

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

BUYERS - DEMAND INDEX

In October 2025, due to the Otthon Start Program, residential property market demand fell from a record high of 110 points in August to 87 points in September and 73 points in October, according to data from Duna House. This figure is close to the average demand seen in October of previous years. Due to the market-stimulating effect of the Otthon Start Program, Duna House still expects a strong fourth quarter in terms of both buyer demand and the number of completed transactions.



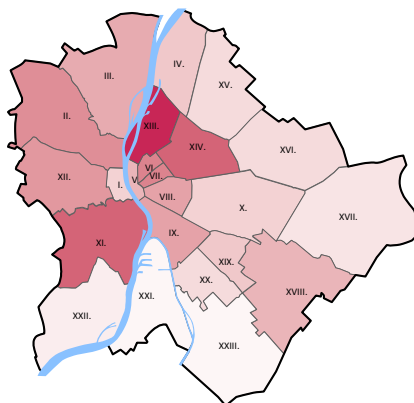
Methodology behind Demand Index: The basis of the estimate is the activity registered by our agents in various, mainly major cities and Duna House offices. Corrections are made depending on the number of active agents and working days. The Demand Index is an important indication of buyer side's reactions 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 October 2025, District 13 remains the most popular district in the capital: according to a survey by Duna House, 22.6% of property buyers indicated it as their preferred area. Zugló (District 14) and Újbuda (District 11) tied for second and third place with 18.5%. The Top 10 most popular districts also include Districts 7, 6, 2, 12, 8, 9, and 3, in that order.

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

INTEREST TOWARD THE DISTRICTS IN BUDAPEST:

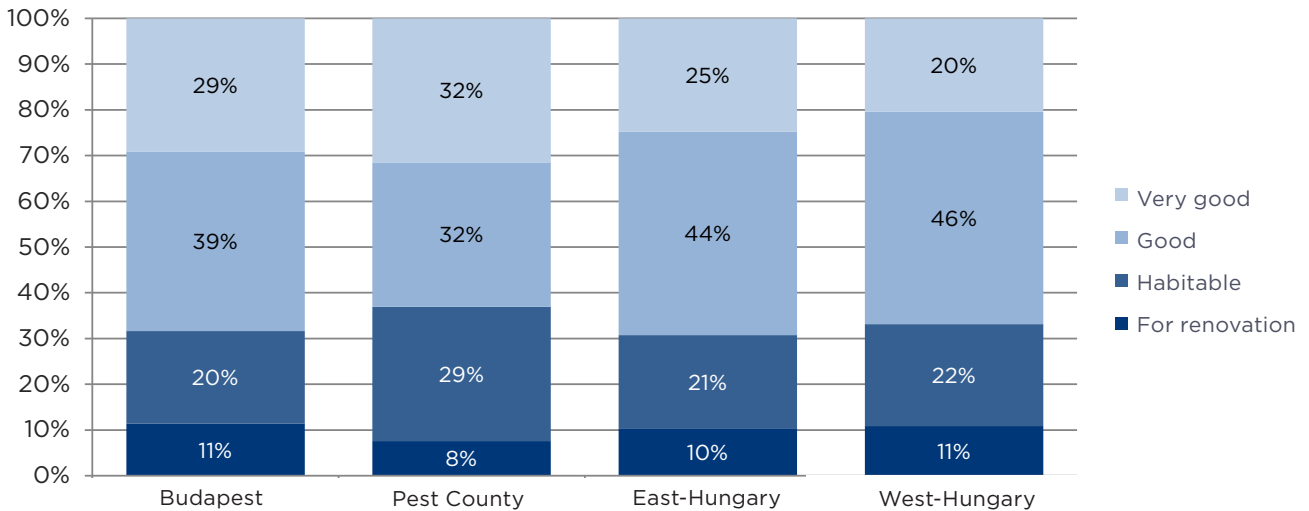


Methodology: Our clients with a purchase intention indicate their preferred districts (more at the same time) when meeting our agents. The above preference map is put together based on this "popularity information".

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

QUALITY PREFERENCES

Based on Duna House’s sales data for October 2025, most contracts (32-46%) were signed for properties in a “good” condition. The second most sought-after condition category was “very good”. The propensity to renovate was lowest in County Pest, at 8%, while in the capital and in Western Hungary, an equal 11% of contracts were signed for homes awaiting a complete modernization. The proportion of homes in need of a refurbishment was the lowest in County Pest, at around 8%.



TURNOVER SPEED (TIME NEEDED TO SELL)

According to Duna House’s October data, concrete block units continue to sell the fastest in the country, with those in the capital city changing hands within an average of two months on the Pest side and only 68 days on average in Buda. The turnover rate for brick and mortar apartments is slower nationwide, with an average of 3-3.5 months in the country. According to Duna House data, it takes an average of 2.5 months to sign a contract in Pest, Buda, and the downtown areas of the capital. October 2025 data showed a significant acceleration in almost all segments, in some cases by 40 days compared to the sales times one year earlier.

PANEL

TIME NEED OF SALE (DAY)

	EAST	WEST	BUDA	PEST
October 2024	92	90	76	64
October 2025	65	78	68	55

BRICK

TIME NEED OF SALE (DAY)

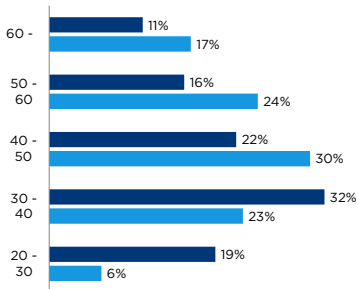
	EAST	WEST	BUDA	PEST	INNER CITY
October 2024	148	153	126	123	114
October 2025	102	109	81	81	80

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

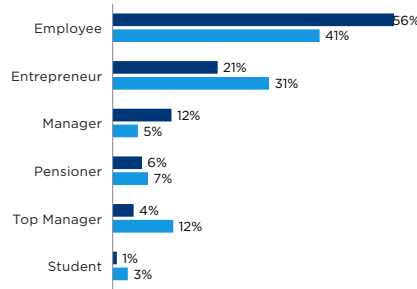
According to data on contracts signed in the capital with the assistance of Duna House, the 30-40 age group was the most active in October this year, accounting for 32% of buyers, while the 40-50 age group accounted for 22%. An exceptionally high 56% of buyers were employees, which is a significant increase compared to 41% in October last year. At the same time, the proportion of those signing contracts for investment purchases in Budapest fell significantly, from 31% to 21% in October 2025. All this suggests that the Otthon Start Program has been able to put lower-income homebuyers in a position to make a purchase. The proportion of buyers acquiring their first home increased significantly, from 21% to 41%. Residential property investors spent HUF 67.2 million on purchases in the capital, while first-time homebuyers spent HUF 66.1 million.

BUYERS' AGE IN BUDAPEST



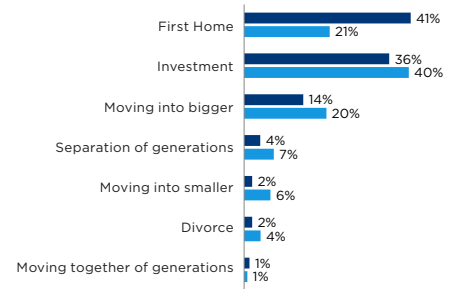
AGE	AVERAGE PRICE	m ²
20 - 30	64 054 000	60
30 - 40	73 310 000	66
40 - 50	78 544 000	73
50 - 60	78 312 000	57
60 -	75 921 000	58

BUYERS' STATUS IN BUDAPEST



STATUS	AVERAGE PRICE	m ²
Employee	63 369 000	58
Top Manager	93 100 000	66
Manager	82 836 000	75
Pensioner	70 000 000	60
Student	70 000 000	33
Entrepreneur	88 160 000	86

MOTIVATION IN BUDAPEST

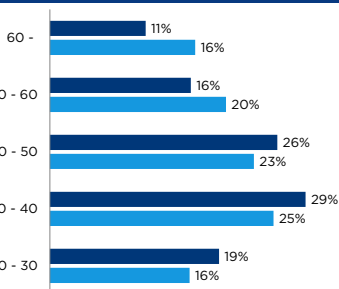


SITUATION	AVERAGE PRICE	m ²
Investment	67 225 000	54
First Home	66 076 000	60
Separation of generations	87 550 000	69
Moving together of generations	75 250 000	68
Moving into smaller	72 300 000	58
Moving into bigger	111 260 000	112
Divorce	78 867 000	70

BUYER PROFILE IN THE COUNTRY

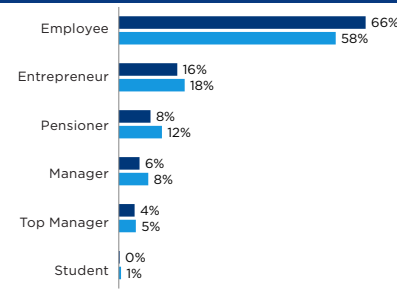
In October 2025, 29% of home-buyers in the country belonged to the 30-40 age group. 66% of Duna House clients were employees. The purchase of a first home was also the leading motivation in the country, its proportion increasing to 43% in October this year, compared to 26% in October last year. The proportion of investment purchases fell significantly here, too, from 25% to 17%. Buyers spent HUF 36.9 million on residential property investments and HUF 45.4 million on a first home

BUYERS' AGE IN THE COUNTRY



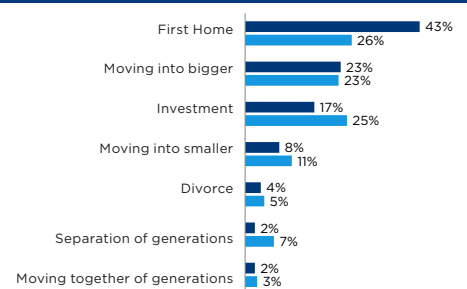
AGE	AVERAGE PRICE	m ²
20 - 30	38 605 000	85
30 - 40	58 222 000	96
40 - 50	51 245 000	84
50 - 60	43 219 000	80
60 -	38 979 000	71

BUYERS' STATUS IN THE COUNTRY



STATUS	AVERAGE PRICE	m ²
Employee	44 745 000	86
Top Manager	66 569 000	95
Manager	64 012 000	86
Pensioner	40 655 000	72
Student	38 000 000	67
Entrepreneur	51 676 000	84

MOTIVATION IN THE COUNTRY



SITUATION	AVERAGE PRICE	m ²
Investment	36 917 000	65
First Home	45 372 000	82
Separation of generations	48 920 000	73
Moving together of generations	56 989 000	98
Moving into smaller	34 700 000	67
Moving into bigger	64 760 000	111
Divorce	34 394 000	63

■ October 2024 ■ October 2024

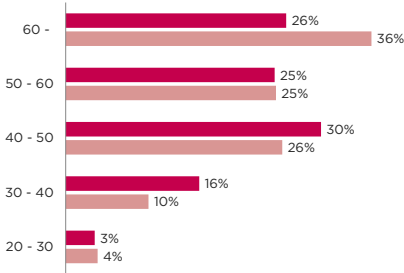
Under our methodology investment as a motivation includes all property transactions that, judged by the buyer's characteristics, can be considered as an investment, i.e. this is not a strictly business category. It includes all family investments and short-term investors who buy a property in a poor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

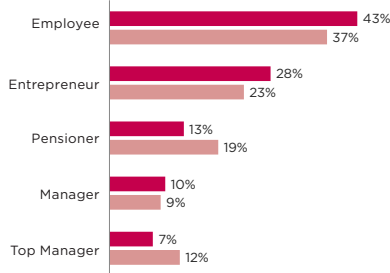
SELLER PROFILE IN BUDAPEST

According to data from October 2025, 30% of sales in the capital involved sellers aged between 40 and 50, with 43% of clients were employees. The most common motivation to sell with a share of 38% was cashing in on a previous investment. This proportion had increased significantly compared to 26% in October last year. Twenty-three percent of sellers sold an inherited residential property. The proportion of sellers moving into a larger home was 18%.

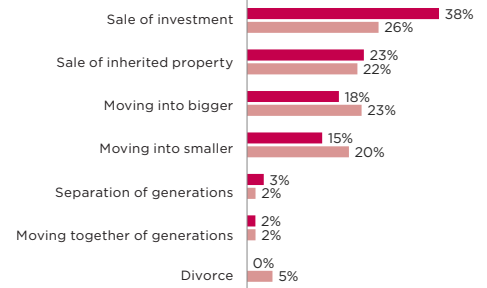
SELLERS' AGE BUDAPEST



SELLERS' STATUS BUDAPEST



MOTIVATION BUDAPEST



AGE	AVERAGE PRICE	m ²
20 - 30	65 980 000	60
30 - 40	84 957 000	67
40 - 50	67 761 000	59
50 - 60	78 287 000	69
60 -	71 760 000	68

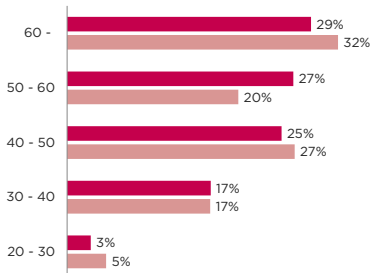
STATUS	AVERAGE PRICE	m ²
Employee	61 935 000	56
Top Manager	88 858 000	73
Manager	81 389 000	71
Pensioner	59 884 000	54
Entrepreneur	94 377 000	82

SITUATION	AVERAGE PRICE	m ²
Sale of investment	75 845 000	61
Separation of generations	86 100 000	79
Moving together of generations	51 000 000	47
Moving into smaller	85 878 000	82
Moving into bigger	65 941 000	62
Sale of inherited property	72 286 000	66
Divorce	-	-

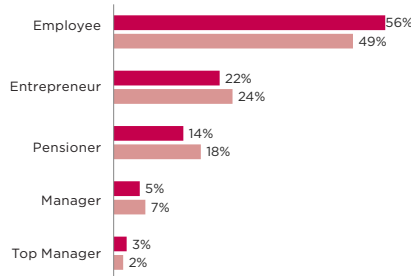
SELLER PROFILE IN THE COUNTRY

According to Duna House sales data, in October 2025, 29% of sellers were over 60 years old, and 27% were between 50 and 60 years. More than half (56%) of all sellers were employees and 22% were self-employed. In the country, in 29% of cases, owners were motivated to sell an inherited property, while 26% sold a home they had purchased as an investment, while the proportion of those moving into a larger home was 19%, the same as in the previous year.

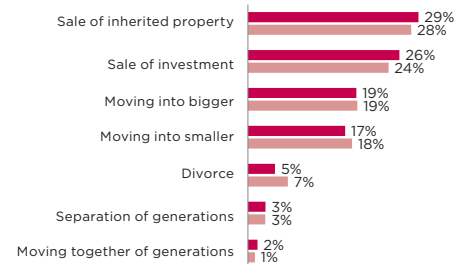
SELLERS' AGE IN THE COUNTRY



SELLERS' STATUS IN THE COUNTRY



MOTIVATION IN THE COUNTRY



AGE	AVERAGE PRICE	m ²
20 - 30	40 567 000	68
30 - 40	38 455 000	80
40 - 50	55 180 000	89
50 - 60	47 831 000	89
60 -	42 588 000	78

STATUS	AVERAGE PRICE	m ²
Employee	43 102 000	87
Top Manager	100 100 000	124
Manager	65 987 000	97
Pensioner	36 589 000	70
Entrepreneur	58 020 000	86

SITUATION	AVERAGE PRICE	m ²
Sale of investment	52 240 000	76
Separation of generations	90 323 000	169
Moving together of generations	27 200 000	69
Moving into smaller	53 748 000	109
Moving into bigger	48 984 000	75
Sale of inherited property	37 398 000	81
Divorce	74 027 000	101

■ October 2024 ■ October 2025

An overhead view of a meeting table with several people seated around it. The table is cluttered with documents, a laptop, a tablet, and other office supplies. The scene is brightly lit, and the people are engaged in discussion.

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