

# DUNA HOUSE BAROMETER

The latest property market info  
from Duna House network

**Issue 175**  
**January 2026**



**DHS**  
**BÉT**

**PRIME  
MARKET**

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## FORTHCOMING ISSUES

DATE OF ISSUE	CONTENT
12.03.2026	February 2026 data
14.04.2026	Q1 2026 data (with price indices and housing loan data)
12.05.2026	April 2026 data

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## GENERAL INFORMATION CONCERNING THE CONTENT OF THE PRESENT PUBLICATION

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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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## 2026 KICKS OFF WITH A STABILIZING HOUSING MARKET AND A SOARING DEMAND FOR LOANS

**Credit market boom: In January, the volume of residential mortgage loans increased by 88.2% compared to the same period last year.**

**Above the psychological threshold: The average price per sq. m. of concrete block units in Pest exceeded HUF 1 million.**

**Buyers' favourites: District 13 regained its leading position, with nearly 25% of buyers in Budapest wishing to live there.**

The domestic residential property market started 2026 with stabilization and sales figures in line with seasonal patterns. Although turnover was lower than the higher base data from January last year, the decline is more of an illusion than reality: the turnover at the beginning of 2025 was fuelled by a capital injection (the Magyar Állampapír Plusz securities were redeemed), while the current figures reflect a phase of healthy stabilization. According to Duna House estimates, the first month of the year saw 7662 transactions. Based on current expectations, this year as a whole is likely to be similar to last year, with between 110,000 and 130,000 sales. The Buyer Demand Index stood at 79 points in January, which, for the time being, indicates moderate activity. While the number of sales is showing some more cautious dynamics, according to calculations of Credipass the mortgage loan market closed January 2026 on a very strong note, with a total contract value of HUF 235 billion. This performance represents an 88.2% increase compared to the same period in 2025.

Compared to the same period last year, Duna House sales data show price increases in all areas and property types across the country. In the East, the average price per sq. m. for concrete block units rose to HUF 754,000, while in the West, transactions showed even more significant increases: the price level rose to HUF 833,000 for concrete block homes and HUF 557,000 for their brick and mortar counterparts. After an 18% increase, brick and mortar apartments in the East are now priced at HUF 421,000 per sq. m. Only 1% of concrete block owners in the country were willing to change their asking price during the advertising process, while buyers were able to negotiate a 3% reduction. For brick and mortar homes, sellers reduced the asking price by 1-4%, depending on the location and allowed for a 5-6% discount in the negotiation phase.

There was a significant increase in prices in the capital: in Buda, the price per sq. m. of concrete block units exceeded HUF 1.2 million, while on the Pest side, it crossed the psychological threshold of HUF 1 million. Owners of concrete block homes in Buda typically did not change their asking prices, with the average outcome of negotiations being a 3% discount. On the Pest side, asking prices fell by 1%, with the average negotiation also coming in at around 3%. Brick and mortar homes in Buda that changed hands in January sold for an average price of over HUF 1.45 million per sq. m., while in downtown Pest the average price was over HUF 1.55 million, and in the outer areas of Pest around HUF 1 million. Sellers adjusted their asking prices by 3-5%, and buyers' bargaining margin also remained between 3-5%.

District 13 once again topped the list popularity list of the capital's districts, with nearly a quarter of buyers (24.5%) selecting it as their target area. Erzsébetváros (District 7) returned to second place (18.6%), while Újbuda (District 11) and Terézváros (District 6) shared third place with 18.5%. In terms of quality preferences, properties in a very good condition (37%) were the most sought-after in Budapest, while those in a good condition dominated in the country.

In January this year, 33% of buyers in the capital were purchasing for investment purposes, while 30% were acquiring their first home. In the country, most transactions (35%) involved a first home, and investors accounted for 22%. The strongest seller motivation in Budapest was the sale of a previous investment (32%), while in the country it was the sale of an inherited residential property (31%).

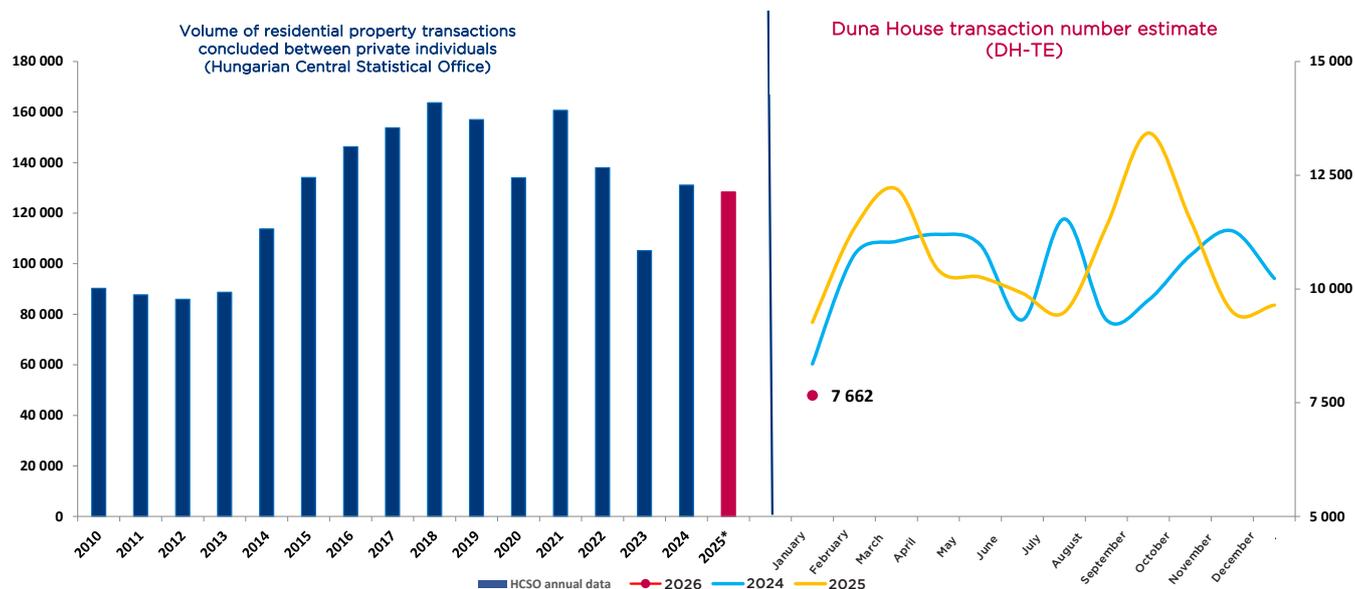
**Further information:**  
**Péter Szegő**  
**Head Analyst**  
**+36 30 312 5333**  
**szego.peter@dh.hu**

**DH Group Nyrt.**  
**Credipass Kft.**  
**1027 Budapest, Kapás utca 6-12.**  
**+36 1 555 2222**  
**www.dh.hu**

# 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 7662 residential property transactions were concluded in January 2026 and residential mortgage contracts worth HUF 235 billion were signed in the whole of Hungary.



For the domestic residential property market 2026 started with moderate activity and a total of 7662 transactions. Although this volume falls short of last year's exceptional baseline data, the decline is only an illusion: turnover at the beginning of 2025 was fuelled by a capital injection (MÁP+ disbursements), while the current figures reflect a phase of healthy stabilization and a market start that was in line with seasonality. Duna House expects this year to be similar to last year, with between 110,000 and 130,000 sales.

While the number of transactions reflects some more cautious dynamics, the housing loan market continues to soar. In January, approximately HUF 235 billion in residential mortgages were taken out nationwide, representing an astonishing 88.2% increase compared to the same period last year. According to Credipass analysis, demand for loans is likely to remain high for the rest of the year, which could lead to a further upturn in the entire residential property market in the coming 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	9267	11 338	12 200	10 415	10 262	9908	9492	11369	13426	11518	9503	9646
2026	7662											

**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.

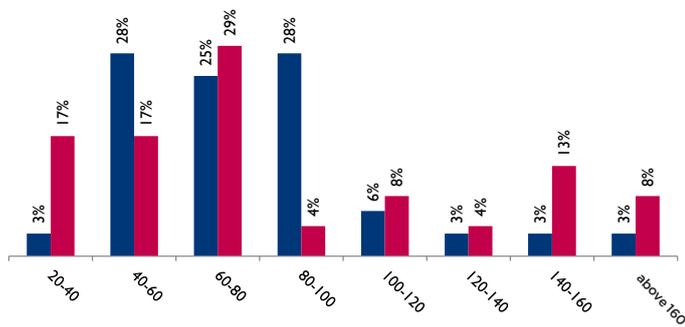
Please also note that DH-TE data cannot be used for defining the volume of transactions brokered by Duna House, or for estimating the business profit of Duna House Holding or for the drawing of any related conclusions.

**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

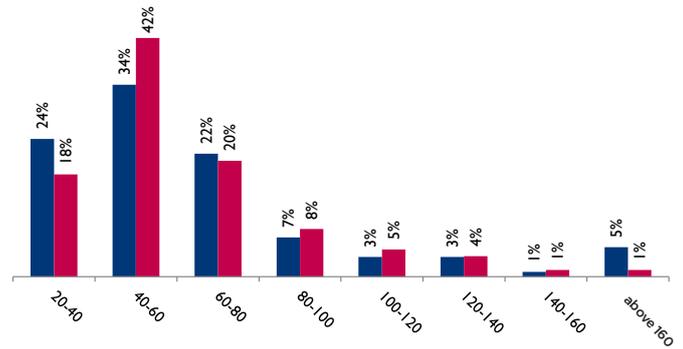
Based on January sales data from Duna House, nearly one-third (29%) of sales on the Buda side were for properties between 60 and 80 sq. m., while the share of apartments larger than 120 sq. m. also increased significantly compared to trends a year earlier. In Buda, one-third of transactions were concluded at a price per sq. m. exceeding HUF 1.6 million, and a quarter of the apartments sold in the past month changed hands at a purchase price between HUF 70 and 100 million. In the districts of Pest, demand was primarily for apartments between 40 and 60 sq. m. (42%), while the share of properties between 60 and 80 sq. m. was 20%. In terms of sq. m. prices, the share of apartments below HUF 1 million fell to a third in one year. Most transactions were in the HUF 1-1.1 million and HUF 1.2-1.4 million per sq. m. price brackets, each accounting for 20% of the total, while nearly half (47%) of sales were concluded at prices between HUF 40 and 70 million.

## BUDA

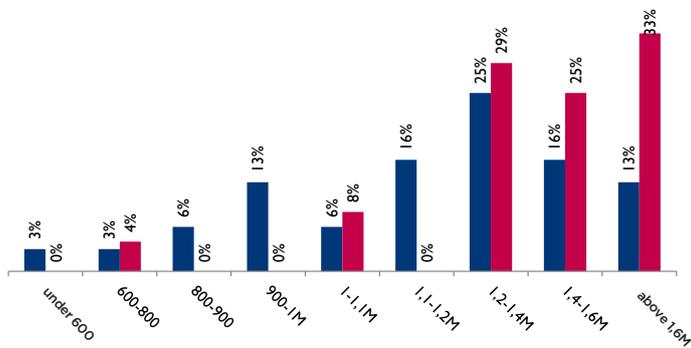


apartment size (m<sup>2</sup>)

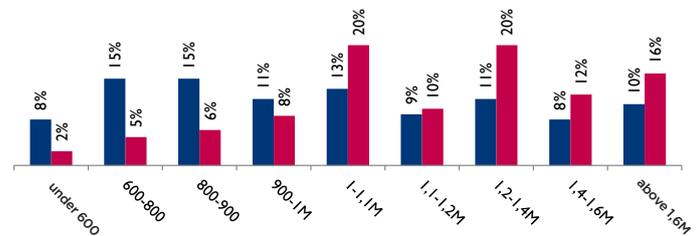
## PEST



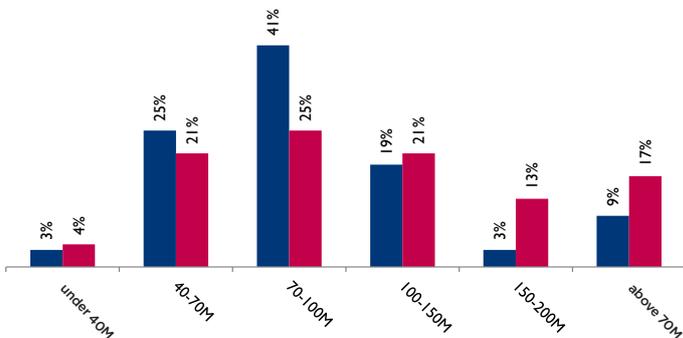
apartment size (m<sup>2</sup>)



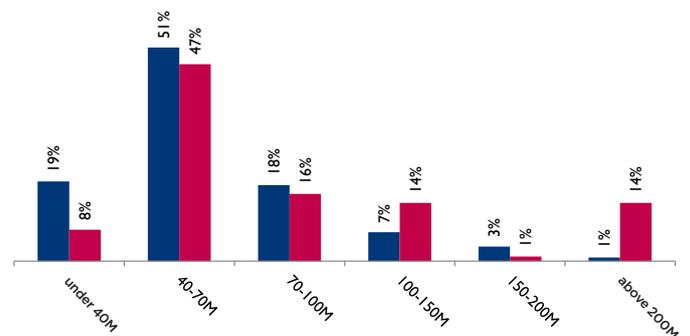
sq. m. price (in thousand HUF)



sq. m. price (in thousand HUF)



apartment price (in million HUF)



apartment price (in million HUF)

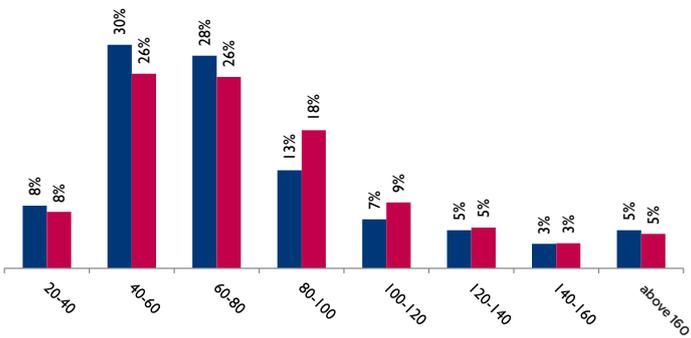
■ Jan 2025 ■ Jan 2026

Based on properties sold by Duna House Franchise Network.

# TRANSACTION PARAMETERS IN THE COUNTRY

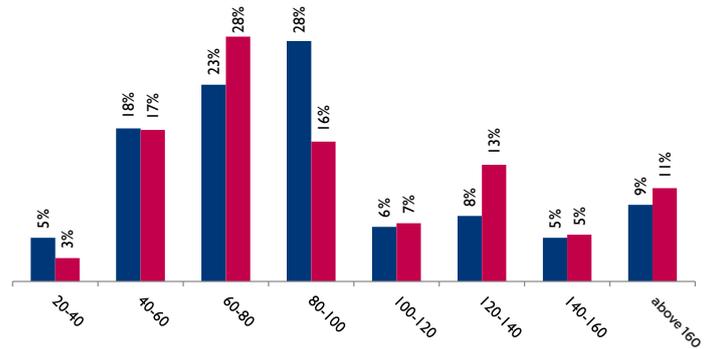
In the country overall - excluding Central Hungary - properties between 40 and 60 sq. m. and between 60 and 80 sq. m. accounted for 26% of transactions each. Trends in sq. m. prices show a similar pattern to that in Buda, with the difference that nationally, the dividing line is a sq. m. price of HUF 650,000: in price ranges below this, the proportion of properties sold decreased, while in categories above this, it increased significantly. Although most sales continued to be in the HUF 25-45 million price range, the share of properties priced north of HUF 45 million rose significantly, from 18% to 39% in one year. In County Pest, the strongest demand was for properties with a floor space of 60-80 sq. m., which accounted for 28% of transactions. Twenty-one percent of the houses and apartments sold were priced above HUF 1 million per sq. m., while nearly a quarter (23%) of sales were concluded at prices between HUF 70 and 90 million in January.

## COUNTRYWIDE (EXCLUDING CENTRAL HUNGARY)

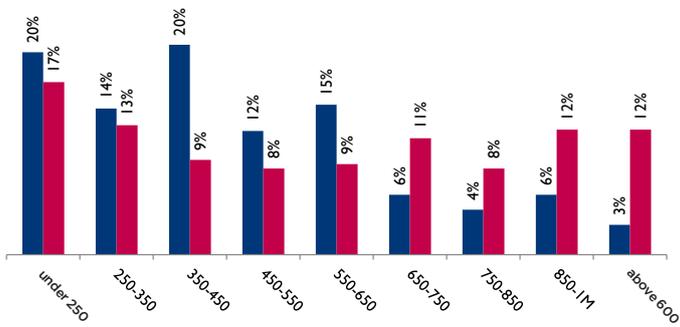


apartment size (m<sup>2</sup>)

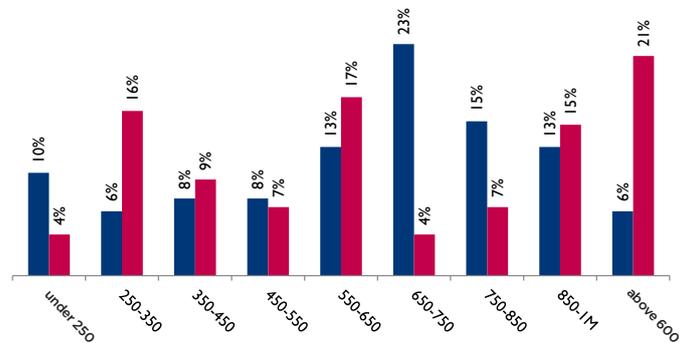
## COUNTY PEST



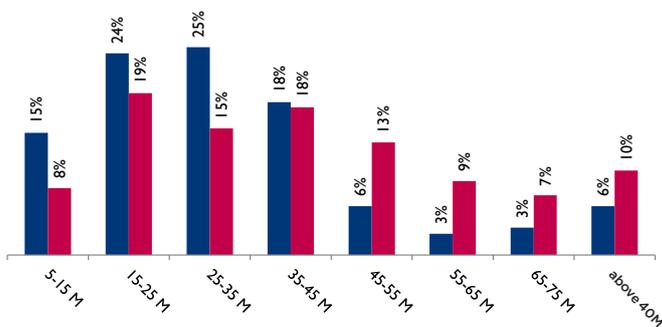
apartment size (m<sup>2</sup>)



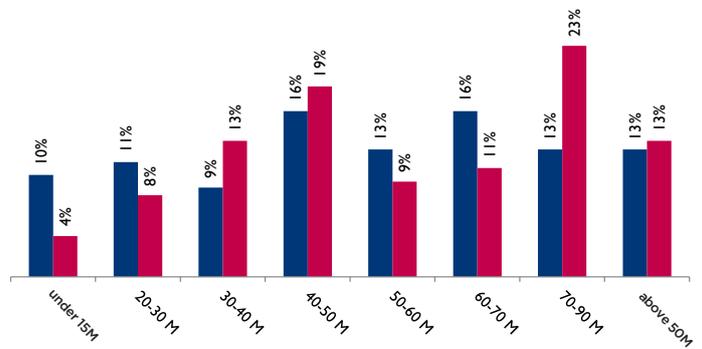
sq. m. price (in thousand HUF)



sq. m. price (in thousand HUF)



apartment price (in million HUF)



apartment price (in million HUF)

■ Jan 2025 ■ Jan 2026

Based on properties sold by Duna House Franchise Network.

## SALES DATA - PRICES - BARGAINING MARGINS

Compared to figures recorded during the same period last year, Duna House sales data show price increases in all areas and for all types of real estate across the country. In the East, the average price per sq. m. for concrete block units rose from HUF 606,000 to HUF 754,000, while in the West, transactions showed even more significant price increases for both concrete block and brick and mortar homes. In the latter case, prices rose from HUF 425,000 to HUF 557,000, while for the former, from HUF 573,000 per sq. m. to HUF 833,000 per sq. m. Based on January sales data, prices of brick and mortar properties in the East showed an 18% increase, reaching HUF 421,000 per sq. m. Only 1% of owners were willing to change their asking price during the advertising process, while buyers were able to negotiate a 3% discount on concrete block units in the country. Sellers reduced the asking price of brick and mortar properties by 1-4% and allowed for a larger negotiation margin of 5-6%.

### PANEL: COUNTRYWIDE

	EAST				WEST			
	price	m <sup>2</sup> price	change in listing price	bargain	price	m <sup>2</sup> price	change in listing price	bargain
<b>Januar 2025</b>	24 840 000	606 000	2%	3%	31 097 000	573 000	2%	4%
<b>Januar 2026</b>	43 650 000	754 000	1%	3%	43 685 000	833 000	1%	3%

### BRICK: COUNTRYWIDE

	EAST				WEST			
	price	m <sup>2</sup> price	change in listing price	bargain	price	m <sup>2</sup> price	change in listing price	bargain
<b>Januar 2025</b>	26 733 000	356 000	3%	6%	34 937 000	425 000	4%	7%
<b>Januar 2026</b>	35 362 000	421 000	1%	6%	47 109 000	557 000	4%	5%

In the capital, there was a significant increase in prices in both the brick and mortar and in the concrete block markets over the course of a year. In Buda, the average price per sq. m. for concrete block units exceeded HUF 1.2 million, while in the districts of Pest, the psychological threshold of HUF 1 million was exceeded. Owners of concrete block units in Buda typically did not change their asking prices during the advertising period, but offered an average bargaining margin of 3%. On the Pest side, asking prices fell by an average of 1%, while the bargaining margin was also around 3%. In January 2026, brick and mortar apartments in Buda changed hands at an average price exceeding HUF 1.45 million per sq. m. In downtown Pest, the average price was even higher, exceeding HUF 1.55 million, while in the outer areas of Pest, the price level around HUF 1 million per sq. m. dominated. Sellers typically adjusted their asking prices by 3-5%, while buyers' bargaining power also ranged between 3-5%.

### PANEL: BUDAPEST

	BUDA				PEST			
	price	m <sup>2</sup> price	change in listing price	bargain	price	m <sup>2</sup> price	change in listing price	bargain
<b>Januar 2025</b>	65 830 000	1 034 000	2%	1%	48 850 000	908 000	-1%	1%
<b>Januar 2026</b>	67 000 000	1 234 000	0%	3%	56 839 000	1 055 000	1%	3%

### BRICK: BUDAPEST

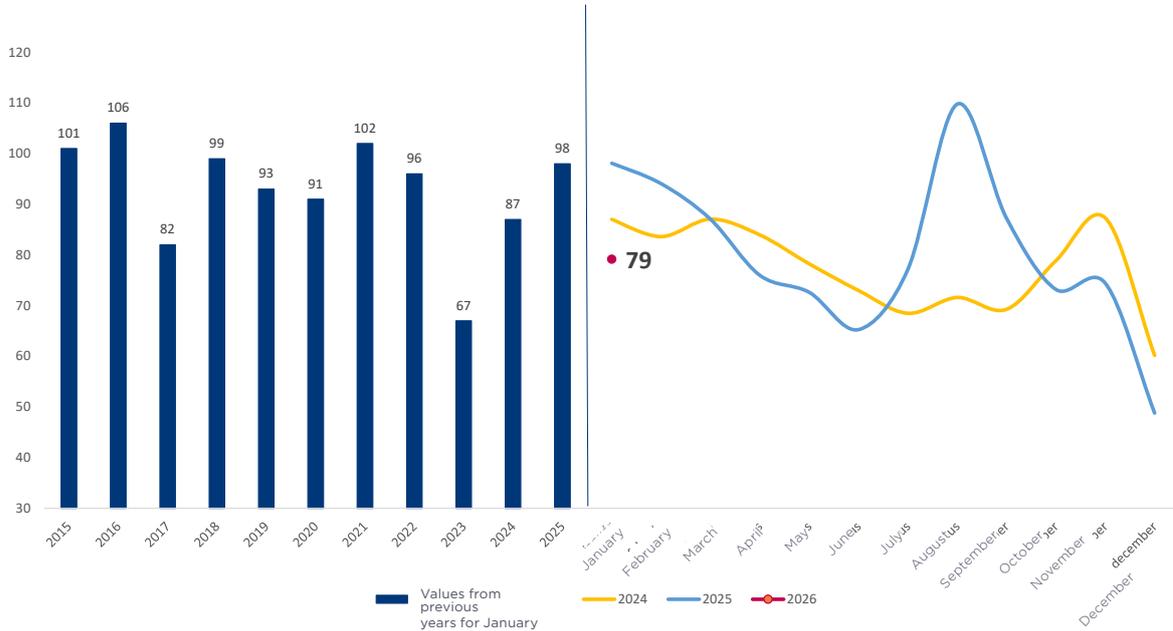
	BUDA				PEST				INNER CITY			
	price	m <sup>2</sup> price	change in listing price	bargain	price	m <sup>2</sup> price	change in listing price	bargain	price	m <sup>2</sup> price	change in listing price	bargain
<b>Januar 2025</b>	102 094 000	1 212 000	1%	1%	62 210 000	819 000	4%	2%	76 097 000	1 349 000	2%	3%
<b>Januar 2026</b>	132 853 000	1 453 000	3%	3%	73 971 000	1 086 000	3%	5%	91 754 000	1 555 000	5%	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

According to the Customer Demand Index measured by Duna House, prospective buyers showed moderate activity in the Hungarian residential housing market in January 2026. The 79 points measured during the month is the second lowest value in the last 10 years.

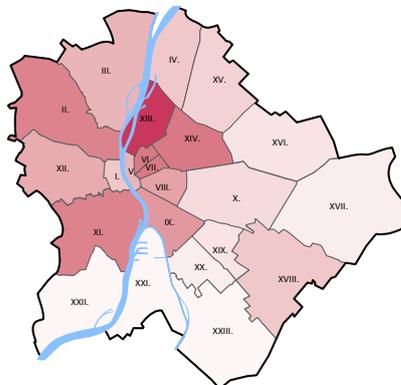


**Methodology behind Demand Index:** The basis of the estimate is the activity registered by our agents in various, mainly major cities and Duna House offices. Corrections are made depending on the number of active agents and working days. The Demand Index is an important indication of buyer side's reactions 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 January 2026, following its second place in December, District 13 once again took the lead in Duna House's popularity survey. Nearly a quarter (24.5%) of clients planning to purchase residential property in Budapest indicated this district as their primary target area. Erzsébetváros (District 7), which had previously been highly sought after by investors, returned to second place with a share of 18.6%. Meanwhile, the districts of Buda almost slipped off the podium: the consistently popular Újbuda (District 11) tied with Terézváros (District 6) for third place with a popularity rating of 18.5%.

## INTEREST TOWARD THE DISTRICTS IN BUDAPEST:



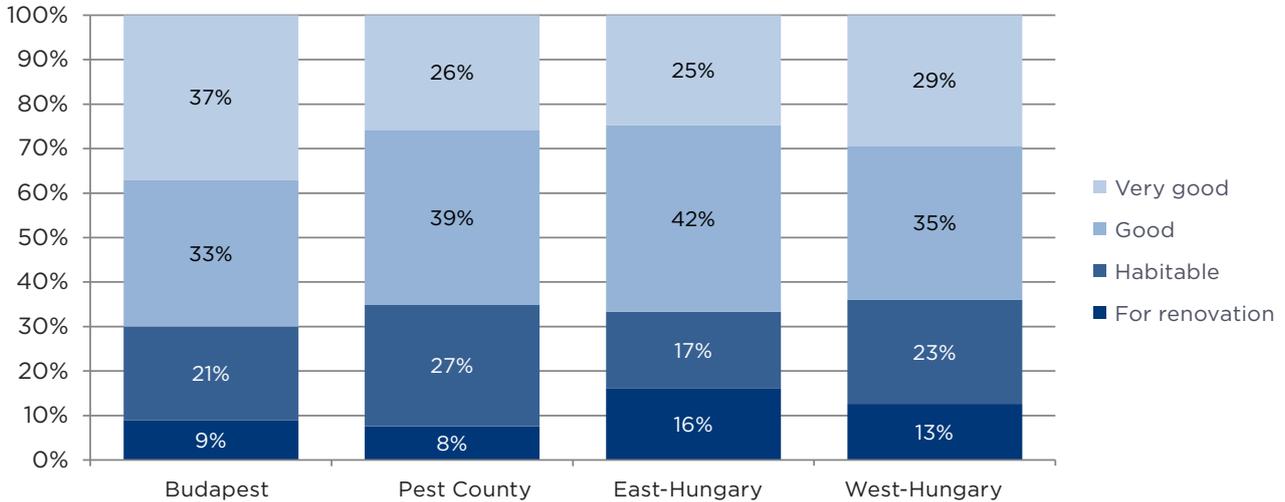
DISTRICT	JANUAR 2024	JANUAR 2025
Bp. 01.	9,1%	8,3%
Bp. 02.	15,9%	15,9%
Bp. 03.	13,8%	13,6%
Bp. 04.	9,8%	10,6%
Bp. 05.	11,0%	11,2%
Bp. 06.	18,3%	18,5%
Bp. 07.	18,0%	18,6%
Bp. 08.	14,5%	12,8%
Bp. 09.	14,8%	15,6%
Bp. 10.	6,9%	8,3%
Bp. 11.	17,6%	18,5%
Bp. 12.	13,9%	14,0%
Bp. 13.	24,0%	24,5%
Bp. 14.	18,0%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

**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 January 2026, most buyers (37%) in Budapest chose properties in a „very good” condition, while in County Pest and in Eastern Hungary, the „good” category dominated with a share of 39-42%. Propensity to renovate was lowest in County Pest and in the capital, at 8-9%, while in Western and Eastern Hungary, 13-16% of sales involved homes in need of a complete overhaul.



## TURNOVER SPEED (TIME NEEDED TO SELL)

According to data from Duna House for January 2026, concrete block units Eastern Hungary and Buda took the least time to sell, averaging around 60 days. In the West, it took slightly longer, 74 days on average, to sell an apartment. According to Duna House transaction data, brick and mortar apartments and houses in the capital took an average of around three months to find a new owner, while in the countryside it took 3.5 months to successfully close a deal.

### PANEL

#### TIME NEED OF SALE (DAY)

	EAST	WEST	BUDA	PEST
Januar 2024	93	104	74	72
Januar 2025	63	74	57	66

### BRICK

#### TIME NEED OF SALE (DAY)

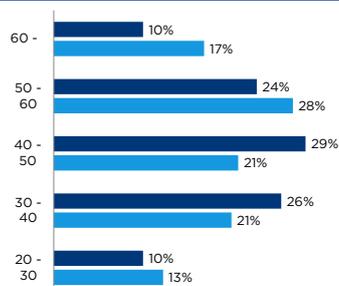
	EAST	WEST	BUDA	PEST	INNER CITY
Januar 2024	131	125	114	123	96
Januar 2025	104	110	98	101	77

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

## BUYER PROFILE IN BUDAPEST

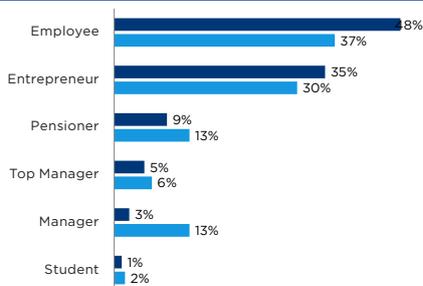
An analysis of buyer-related data from transactions in the capital in January, conducted with the assistance of Duna House, shows that the most active buyer group with a share of 29% was those aged 40-50, followed, with a share of 26%, by those aged 30-40. The majority (48%) of buyers were employees. In January this year, 33% of buyers in the capital were purchasing for investment purposes, while 30% were buying their first home. Investors spent HUF 84 million on residential property purchases in the capital, while first-time buyers spent HUF 74 million.

### BUYERS' AGE IN BUDAPEST



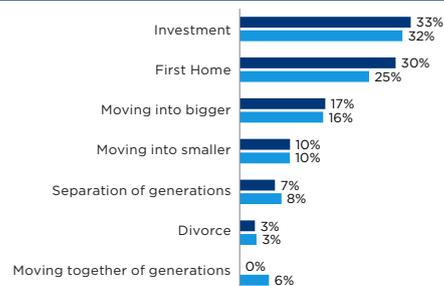
AGE	AVERAGE PRICE	m <sup>2</sup>
20 - 30	84 731 000	62
30 - 40	74 674 000	62
40 - 50	92 193 000	79
50 - 60	77 508 000	62
60 -	121 410 000	83

### BUYERS' STATUS IN BUDAPEST



STATUS	AVERAGE PRICE	m <sup>2</sup>
Employee	70 645 000	56
Top Manager	63 250 000	57
Manager	80 750 000	90
Pensioner	81 358 000	65
Student	152 233 000	69
Entrepreneur	120 082 000	98

### MOTIVATION IN BUDAPEST

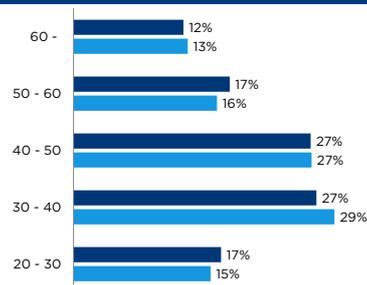


SITUATION	AVERAGE PRICE	m <sup>2</sup>
Investment	83 926 000	62
First Home	73 947 000	59
Separation of generations	70 072 000	57
Moving together of generations	-	-
Moving into smaller	84 700 000	63
Moving into bigger	122 633 000	113
Divorce	82 000 000	67

## BUYER PROFILE IN THE COUNTRY

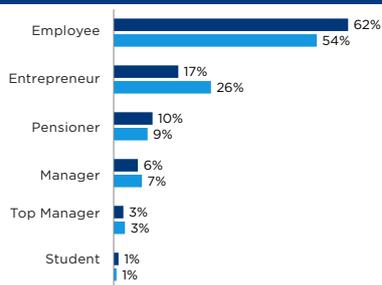
Based on sales data from January 2026, 31% of transactions in the capital involved sellers over the age of 60, while 42% of clients were employees. The strongest motivation for sellers in Budapest was the sale of a previous investment (32%), while 23% of all sellers moved into a larger property and 23% were selling their previous home because they had inherited a property.

### BUYERS' AGE IN THE COUNTRY



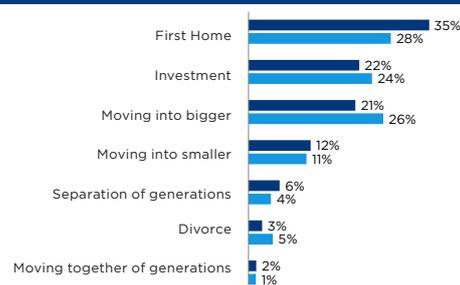
AGE	AVERAGE PRICE	m <sup>2</sup>
20 - 30	43 475 000	89
30 - 40	54 096 000	92
40 - 50	49 470 000	88
50 - 60	41 899 000	73
60 -	46 558 000	78

### BUYERS' STATUS IN THE COUNTRY



STATUS	AVERAGE PRICE	m <sup>2</sup>
Employee	44 651 000	79
Top Manager	57 400 000	73
Manager	73 740 000	108
Pensioner	45 367 000	71
Student	52 000 000	42
Entrepreneur	54 096 000	109

### MOTIVATION IN THE COUNTRY



SITUATION	AVERAGE PRICE	m <sup>2</sup>
Investment	42 482 000	73
First Home	44 801 000	81
Separation of generations	36 425 000	75
Moving together of generations	46 500 000	114
Moving into smaller	50 085 000	71
Moving into bigger	65 466 000	113
Divorce	59 985 000	77

■ Január 2024 ■ Január 2025

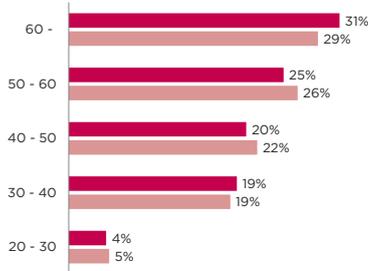
Under our methodology investment as a motivation includes all property transactions that, judged by the buyer's characteristics, can be considered as an investment, i.e. this is not a strictly business category. It includes all family investments and short-term investors who buy a property in a poor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

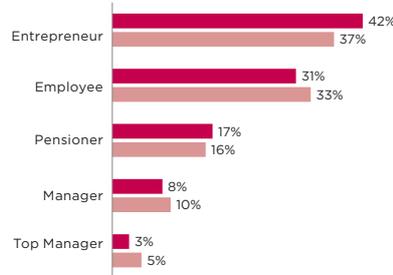
## SELLER PROFILE IN BUDAPEST

Based on sales data from January 2026, 31% of transactions in the capital involved sellers over the age of 60, while 42% of clients were employees. The strongest motivation for sellers in Budapest was the sale of a previous investment (32%), while 23% of all sellers moved into a larger property and 23% were selling their previous home because they had inherited a property.

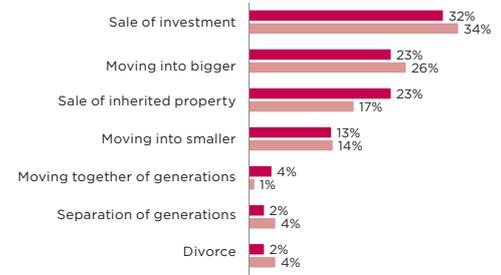
### SELLERS' AGE BUDAPEST



### SELLERS' STATUS BUDAPEST



### MOTIVATION BUDAPEST



AGE	AVERAGE PRICE	m <sup>2</sup>
20 - 30	103 059 000	58
30 - 40	62 733 000	51
40 - 50	95 627 000	88
50 - 60	87 933 000	63
60 -	94 382 000	77

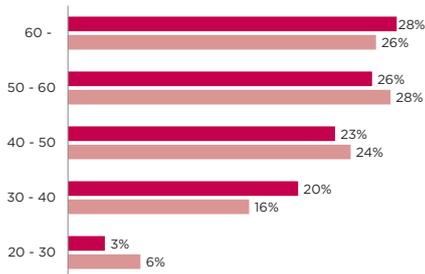
STATUS	AVERAGE PRICE	m <sup>2</sup>
Employee	68 680 000	62
Top Manager	65 500 000	45
Manager	83 650 000	80
Pensioner	84 917 000	77
Entrepreneur	104 723 000	72

SITUATION	AVERAGE PRICE	m <sup>2</sup>
Sale of investment	96 633 000	63
Separation of generations	131 500 000	101
Moving together of generations	38 000 000	49
Moving into smaller	86 091 000	79
Moving into bigger	68 242 000	52
Sale of inherited property	79 379 000	74
Divorce	71 000 000	63

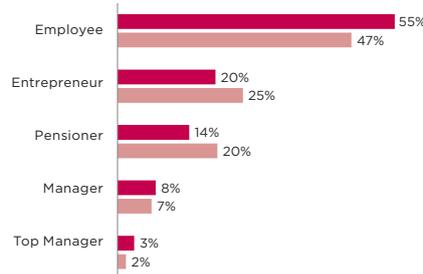
## SELLER PROFILE IN THE COUNTRY

According to Duna House sales data, 28% of sellers in January this year were over 60 years old, while 26% were aged between 50 and 60 years. Fifty-five percent of sellers were employees, while 20% were self-employed. In the country, the sale of inherited properties continued to lead the way (31%), while in 25% of cases, clients were motivated to sell homes they had previously purchased as investments.

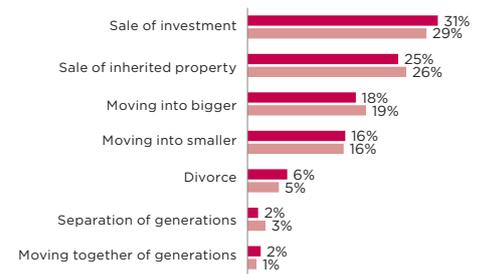
### SELLERS' AGE IN THE COUNTRY



### SELLERS' STATUS IN THE COUNTRY



### MOTIVATION IN THE COUNTRY



AGE	AVERAGE PRICE	m <sup>2</sup>
20 - 30	35 878 000	65
30 - 40	45 518 000	78
40 - 50	53 630 000	79
50 - 60	50 322 000	94
60 -	42 552 000	86

STATUS	AVERAGE PRICE	m <sup>2</sup>
Employee	41 236 000	81
Top Manager	63 843 000	78
Manager	66 207 000	96
Pensioner	48 358 000	84
Entrepreneur	56 958 000	88

SITUATION	AVERAGE PRICE	m <sup>2</sup>
Sale of investment	50 197 000	75
Separation of generations	66 625 000	111
Moving together of generations	30 180 000	77
Moving into smaller	55 187 000	91
Moving into bigger	49 396 000	71
Sale of inherited property	42 707 000	88
Divorce	51 373 000	101

■ Jan 2024 ■ Jan 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 background is a light-colored wall with a dark blue L-shaped graphic element in the top right corner.

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