

Q1

Q2

Q3

Q4

2024

Overview of the
Dutch property
market

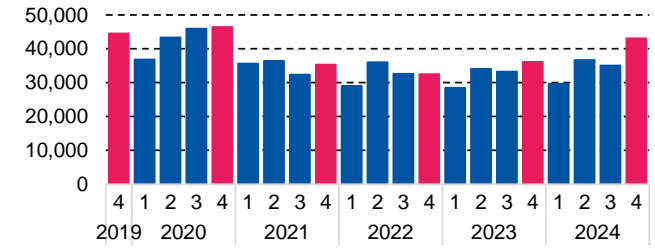


Number of transactions

The number of transactions shows how many houses were sold by NVM property brokers in one quarter.

| Number of transactions | 2023-4 | 2024-3 | 2024-4 | %-jr. | %-kw |
|------------------------|---------------|---------------|---------------|------------|------------|
| Mid-terrace house | 9,106 | 8,648 | 10,843 | 19% | 25% |
| End-terrace house | 5,063 | 4,651 | 5,583 | 10% | 20% |
| Semi-detached | 5,433 | 4,967 | 6,112 | 13% | 23% |
| Detached | 5,472 | 5,546 | 6,386 | 17% | 15% |
| Apartment | 11,063 | 11,249 | 14,185 | 28% | 26% |
| Total | 36,137 | 35,061 | 43,109 | 19% | 23% |

Number of transactions

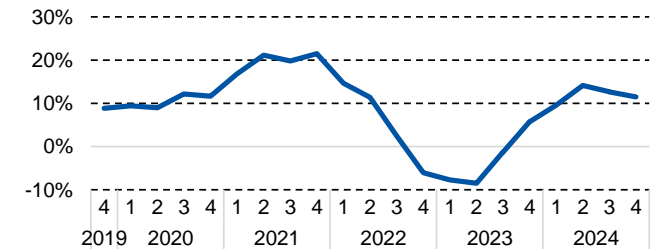


Transaction price

The transaction price is the (median) sales price of all houses sold in one quarter.

| Transaction price (x 1.000 euro) | 2023-4 | 2024-3 | 2024-4 | %-jr. | %-kw |
|----------------------------------|------------|------------|------------|--------------|-------------|
| Mid-terrace house | 397 | 437 | 449 | 12.9% | 2.7% |
| End-terrace house | 416 | 458 | 474 | 14.0% | 3.5% |
| Semi-detached | 474 | 516 | 528 | 11.6% | 2.4% |
| Detached | 629 | 681 | 702 | 11.5% | 3.0% |
| Apartment | 362 | 389 | 396 | 9.3% | 1.6% |
| Total | 436 | 474 | 483 | 11.5% | 2.5% |

Price trends year on year

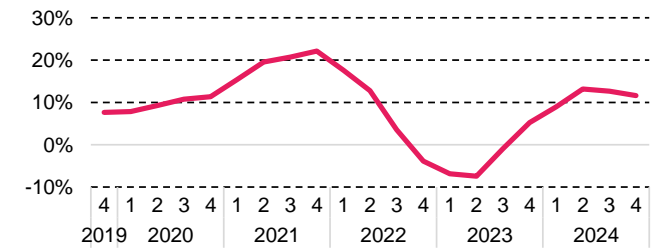


Square metre prices

The square metre transaction price is the (median) square metre price of all houses sold in one quarter. The sales price is divided by the number of square metres of usable living space.

| Square metre prices (euro/m2 living space) | 2023-4 | 2024-3 | 2024-4 | %-jr. | %-kw |
|--|--------------|--------------|--------------|--------------|-------------|
| Mid-terrace house | 3,603 | 3,966 | 4,052 | 12.5% | 2.2% |
| End-terrace house | 3,600 | 3,964 | 4,056 | 12.7% | 2.3% |
| Semi-detached | 3,614 | 3,940 | 3,986 | 10.3% | 1.2% |
| Detached | 3,853 | 4,164 | 4,227 | 9.7% | 1.5% |
| Apartment | 4,824 | 5,247 | 5,426 | 12.1% | 2.7% |
| Total | 4,016 | 4,404 | 4,521 | 11.6% | 2.1% |

Square metre price trends year on year

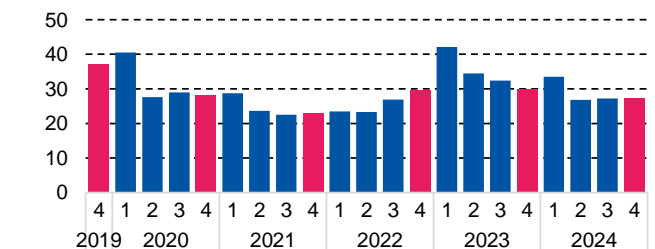


Time to sell

The time to sell (also referred to as the transaction time) is the time presented in days between the moment a house is put up for sale and the date of sale, with the date of the full signature of the deed at the property agent's office being the guiding factor.

| Time to sell in days | 2023-4 | 2024-3 | 2024-4 |
|----------------------|-----------|-----------|-----------|
| Mid-terrace house | 24 | 23 | 24 |
| End-terrace house | 25 | 25 | 25 |
| Semi-detached | 29 | 26 | 26 |
| Detached | 48 | 38 | 38 |
| Apartment | 28 | 26 | 27 |
| Total | 30 | 27 | 27 |

Time to sell in days



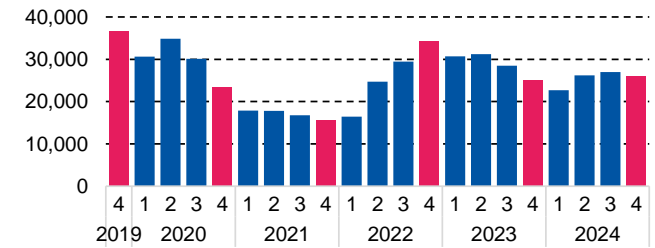


Property availability

Property availability shows the number of houses available by NVM property agents at the end of the quarter.

| Property availability | 2023-4 | 2024-3 | 2024-4 | %-jr. | %-kw |
|-----------------------|---------------|---------------|---------------|-----------|------------|
| Mid-terrace house | 4,003 | 4,644 | 4,255 | 6% | -8% |
| End-terrace house | 2,772 | 2,937 | 2,961 | 7% | 1% |
| Semi-detached | 3,409 | 3,294 | 3,119 | -8% | -5% |
| Detached | 7,620 | 7,933 | 7,250 | -5% | -9% |
| Apartment | 7,236 | 8,158 | 8,291 | 15% | 2% |
| Total | 25,040 | 26,966 | 25,877 | 3% | -4% |

Property availability

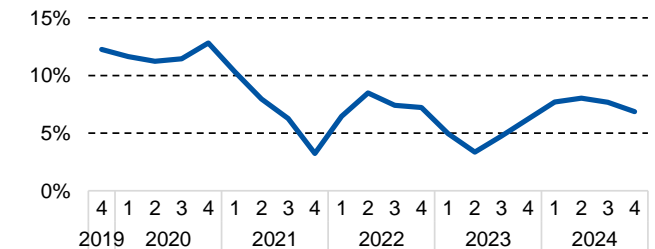


Asking price

The asking price is the (median) asking price of all houses available at the end of the quarter.

| Asking price (x 1.000 euro) | 2023-4 | 2024-3 | 2024-4 | %-jr. | %-kw |
|--------------------------------|------------|------------|------------|-------------|-------------|
| Mid-terrace house | 427 | 455 | 449 | 5.2% | -1.5% |
| End-terrace house | 466 | 490 | 497 | 6.8% | 1.5% |
| Semi-detached | 516 | 554 | 544 | 5.3% | -1.8% |
| Detached | 808 | 861 | 893 | 10.4% | 3.7% |
| Apartment | 411 | 430 | 437 | 5.1% | 0.9% |
| Total | 555 | 583 | 586 | 6.9% | 1.0% |

Asking price trends year on year

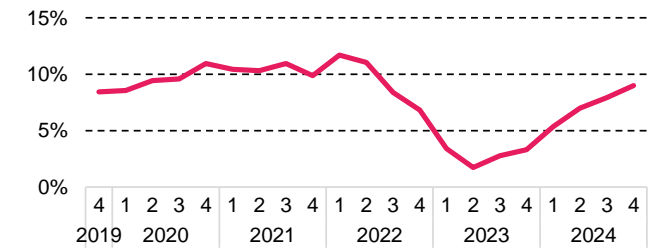


Square metre prices

The asking price per square metre is the (median) square metre price of all houses available at the end of the quarter. The asking price is divided by the number of square metres of usable living space.

| Square metre prices (euro/m2 living space) | 2023-4 | 2024-3 | 2024-4 | %-jr. | %-kw |
|---|--------------|--------------|--------------|-------------|-------------|
| Mid-terrace house | 3,612 | 3,848 | 3,872 | 7.2% | 0.6% |
| End-terrace house | 3,620 | 3,882 | 3,940 | 8.8% | 1.5% |
| Semi-detached | 3,674 | 3,903 | 3,944 | 7.3% | 1.0% |
| Detached | 4,096 | 4,362 | 4,456 | 8.8% | 2.1% |
| Apartment | 4,692 | 5,177 | 5,294 | 10.9% | 1.4% |
| Total | 4,080 | 4,412 | 4,508 | 9.0% | 1.4% |

Square metre asking price trends year on year

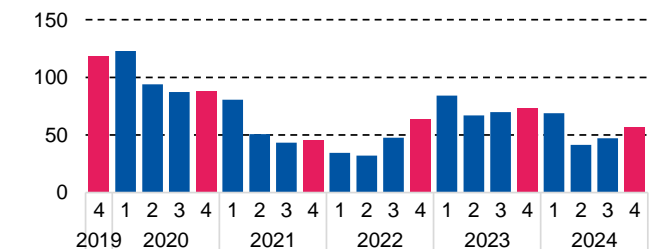


Validity of the offer

The validity of the offer shows how many days houses have been available for sale. It is about the difference in days between the moment a house is put up for sale and the last day of the quarter.

| Validity of the offer in days | 2023-4 | 2024-3 | 2024-4 |
|----------------------------------|-----------|-----------|-----------|
| Mid-terrace house | 42 | 24 | 35 |
| End-terrace house | 52 | 24 | 38 |
| Semi-detached | 62 | 30 | 42 |
| Detached | 118 | 88 | 96 |
| Apartment | 58 | 35 | 46 |
| Total | 74 | 47 | 57 |

Validity of the offer in days

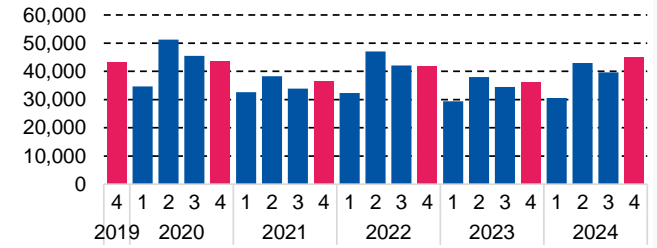


No. of houses put up for sale

The number of houses put up for sale shows how many houses were put up for sale for the first time in one quarter.

| # put up for sale | 2023-4 | 2024-3 | 2024-4 | %-jr. | %-kw |
|-------------------|---------------|---------------|---------------|------------|------------|
| Mid-terrace house | 8,743 | 9,326 | 10,929 | 25% | 17% |
| End-terrace house | 4,889 | 5,101 | 5,709 | 17% | 12% |
| Semi-detached | 5,164 | 5,291 | 6,253 | 21% | 18% |
| Detached | 5,623 | 6,587 | 6,578 | 17% | 0% |
| Apartment | 11,629 | 13,303 | 15,642 | 35% | 18% |
| Total | 36,048 | 39,608 | 45,111 | 25% | 14% |

Number of houses put up for sale

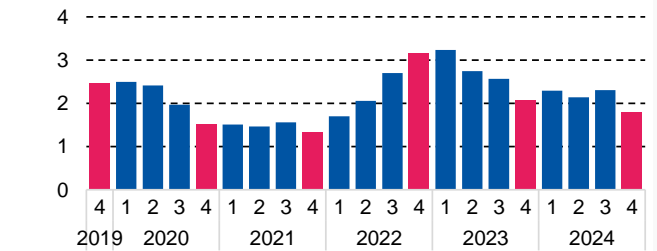


Shortage indicator

The shortage provides an approximation of options prospective buyers have on the housing market. It is calculated as availability at the start of a quarter divided by the number of transactions signed in the same quarter.

| Shortage indicator | 2023-4 | 2024-3 | 2024-4 |
|--------------------|------------|------------|------------|
| Mid-terrace house | 1.3 | 1.6 | 1.2 |
| End-terrace house | 1.6 | 1.9 | 1.6 |
| Semi-detached | 1.9 | 2.0 | 1.5 |
| Detached | 4.2 | 4.3 | 3.4 |
| Apartment | 2.0 | 2.2 | 1.8 |
| Total | 2.1 | 2.3 | 1.8 |

Shortage indicator

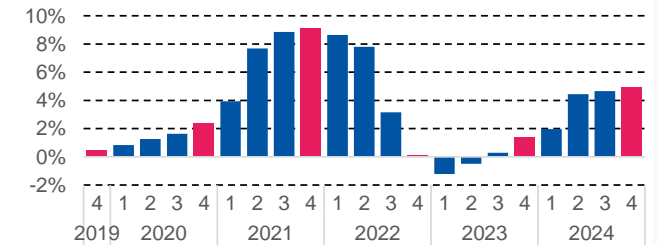


Asking price vs selling price

The difference between the two shows the difference in percentages between the last asking price of a property and the transaction price eventually. A positive difference means the amount paid exceeds the asking price.

| Asking-selling price difference in % | 2023-4 | 2024-3 | 2024-4 |
|--------------------------------------|-------------|-------------|-------------|
| Mid-terrace house | 3.0% | 7.0% | 6.9% |
| End-terrace house | 1.6% | 5.2% | 5.3% |
| Semi-detached | 0.6% | 3.3% | 3.8% |
| Detached | -1.7% | -0.1% | 0.0% |
| Apartment | 1.8% | 5.6% | 5.9% |
| Total | 1.4% | 4.7% | 4.9% |

Asking price versus selling price



% beyond the asking price

The percentage beyond the asking price is the percentage of total houses sold beyond the asking price.

| > the asking price in percentages | 2023-4 | 2024-3 | 2024-4 |
|-----------------------------------|------------|------------|------------|
| Mid-terrace house | 66% | 81% | 81% |
| End-terrace house | 57% | 74% | 75% |
| Semi-detached | 48% | 66% | 69% |
| Detached | 28% | 43% | 44% |
| Apartment | 56% | 73% | 74% |
| Total | 53% | 69% | 71% |

% beyond the asking price

