

MARKET FUNDAMENTALS

	YOY Chg (2023/2024)	12-Month Forecast
84,273 Households	+1.27%	
€378,974 Average transaction price	+13.2%	
€1,277 Average Rental Price	+9.3%	

Source: CBS and Brainbay.
Edited by C&W.

RIISING HOUSING STOCK AND INCREASING PRICES

Arnhem, an iconic city in the Netherlands, is renowned for its largest city park, Sonsbeek, the Rhine River, and rich cultural heritage. As the capital of Gelderland, it blends history, nature, and modernity. Known for its fashion district, Modekwartier, and the charming 7straatjes, Arnhem offers a unique living experience. Strategically located between the Randstad and the German border, Arnhem boasts excellent road and rail connections, making it an attractive location for both residents and businesses. As part of the Green Metropolis Region, Arnhem has signed a so-called 'Housing Deal' with the government, expressing the intention to add 33,000 homes to the stock by 2030, promising a prosperous and sustainable future for investors.

Owner-Occupier Market

Arnhem's real estate market recorded 4,269 private sector sales transactions between 2020 and 2024, encompassing both apartments and houses. Over these four years, the average transaction price was €324,714, with the current average rising to €378,974.

Price Range: Most homes in Arnhem sold for prices ranging between €202,000 and €441,000, closely mirroring the national price range.

Time on Market: Homes in Arnhem are listed for an average of 38 days, which is 4 days shorter than the national average of 42 days.

Overbidding: In 70% of transactions, overbidding occurred, with an average overbid of €23,968. This is slightly below the national average of €27,190.

Highest Price per m²: The neighborhoods Burgemeesterswijk and Hoogkamp with €4,281 per m².

Significant Price Increase: In 2025, the neighborhood of Schaarsbergen saw a remarkable 76% increase in property prices compared to 2024, with the current price per square meter now at €4,095.

Rental Market

During the same period 2020-2024, Arnhem recorded 1,410 private sector rental transactions. In 2024, the average rental price reached €1,277, marking a 9.3% increase from 2023, which is higher than the national increase of 7.9%.

Time on Market: Properties in Arnhem are listed for an average of 39 days, compared to the national average of 46 days.

Highest Price per m²: The neighborhood of Klingelbeek with €19 per m² per month.

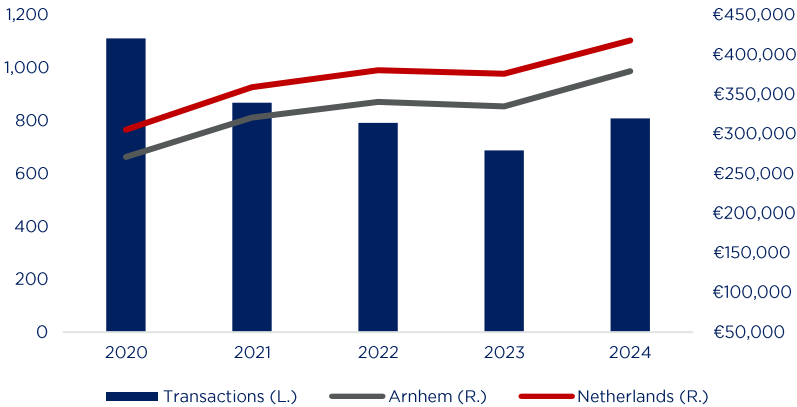
Notable Price Surge: In 2024, the neighborhood of Elderveld experienced a 37% increase in rental prices compared to the previous year. The average price per square meter now stands at €9.80 per m² per month.

Investment Market

The total investment volume in Arnhem declined after 2020, mainly due to a scarcity of investment opportunities, followed by economic uncertainties that led to market corrections. Since 2024, there appears to be a reverse trend, and the investment volume is increasing again. The investment volume is accounted for by the existing stock, with institutional investors responsible for majority of the transaction dynamics, followed by some private equity funds.

Transactions and sales price

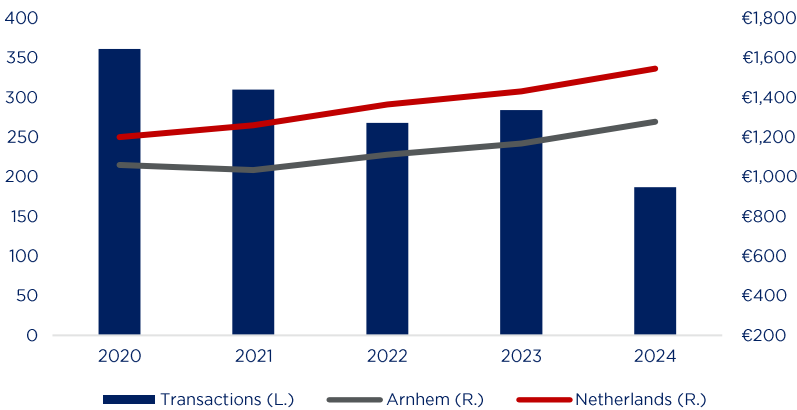
Municipality Arnhem, in quantities (L.) and EUR (R.)



Source: Brainbay. Edited by: C&W.

Transactions and rental price

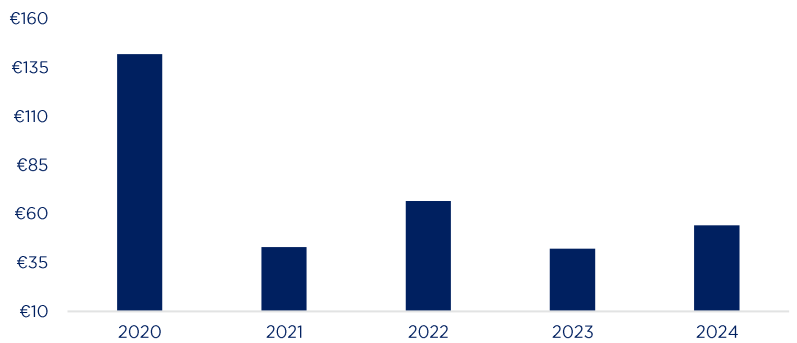
Municipality Arnhem, in quantities (L.) and EUR p/m (R.)



Source: Brainbay. Edited by: C&W.

Total investment volume

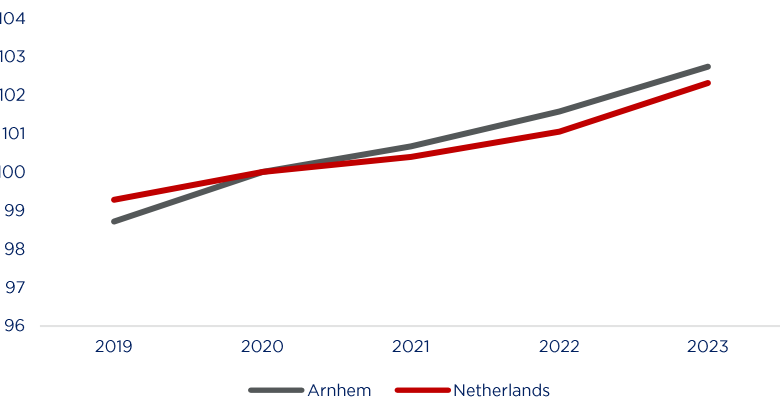
Municipality Arnhem, in EUR mln.



Source: C&W.

Housing Stock Development

New additions Arnhem vs. Netherlands. Index 2020=100



Source: CBS. Edited by: C&W.