Living City Report
LEIDEN
2025



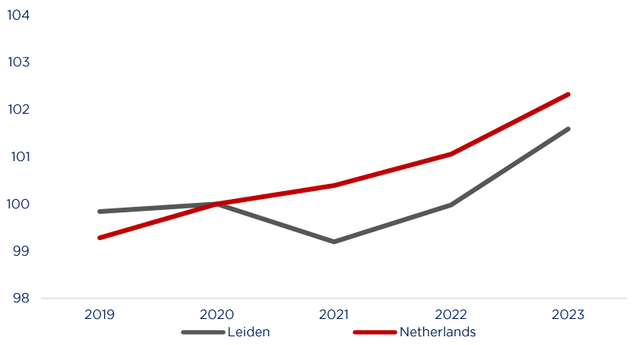
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MARKET FUNDAMENTALS

	Y-Y Chg %. (2024/2025)	12-Month Forecast
70,487 Households	+1,81%	▲
€459,073 Average transaction price Q1 2025	+9,4%	▲
€1,711 Average rent Q1 '25	+9,3%	▲

Source: CBS and Brainbay.
Edit: C&W.

Population growth
Leiden municipality vs. Netherlands. Index 2020=100



Source: CBS, edit: C&W.

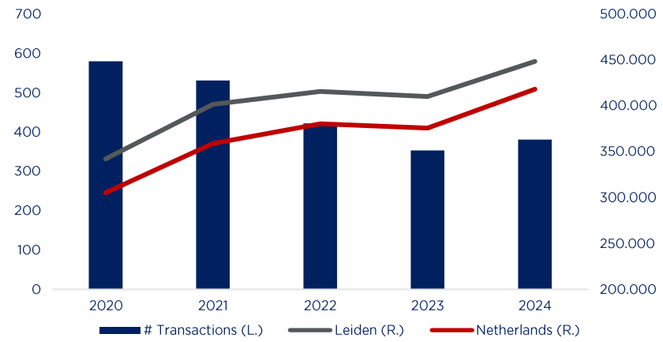
POPULATION GROWTH ON THE RISE, LEADING TO INCREASING PRICES
Leiden, the vibrant city nicknamed 'Key City' of the Netherlands, seamlessly blends a rich historical heritage with a dynamic, modern atmosphere. With its iconic canals, historic city center, and renowned university, Leiden is a highly desirable place to live for students, young professionals, and families alike. The city's housing market is tight, with strong demand for both owner-occupied and rental properties. To address this growing need, 8,800 new homes are planned by 2030, as outlined in the 2022-2026 local policy agreement "Living Together in Leiden." Through this initiative, the municipality aims not only to ease market pressure but also to create a sustainable, livable, and diverse residential environment for current and future residents.

Owner-Occupier Market
The real estate market in Leiden recorded 2,267 sales transactions in the private sector between 2020 and 2024, including apartments and houses. Over this four-year period, the average transaction price was €398,154, while the 2024 full year average price has increased to €448,457.
Price Range: Most properties in Leiden were sold within a price range of €255,000 to €550,000, positioning the city's housing market above the Dutch national average of €230,000 to €506,000.
Time on Market: Dwellings in Leiden are typically sold within 35 days, which is 7 days faster than the national average of 42 days.
Bidding Trends: 80% of transactions involved overbidding, with an average overbid of €38,588, which is above the national average of €27,190.
Highest sqm price: Neighborhoods Binnenstad Noord (€5,538 per sqm) and Binnenstad Zuid (€5,480 per sqm) command the highest price per square meter in Leiden.
Significant Price Growth: Up until early March 2025, the Boerhaavedistrict recorded a 31% increase in property prices compared to 2024, bringing the current price per square meter to €4,966.

Rental Market
Between 2020 and 2024, Leiden recorded 1,026 rental transactions in the private sector. In 2024, the average rent reached €1,620 per property per month, reflecting a 9.3% increase compared to 2023 - higher than the national increase of 8.0%.
Rental Duration: Properties in Leiden remain on the market for an average of 51 days, compared to the national average of 46 days.
Highest Price per m²: Binnenstad Noord recorded the highest rental price at €22.28 per m² per month.
Significant Price Increase: In 2024, the Stationsdistrict saw a 26% increase in average rental prices compared to the previous year, reaching €18.30 per m² per month.

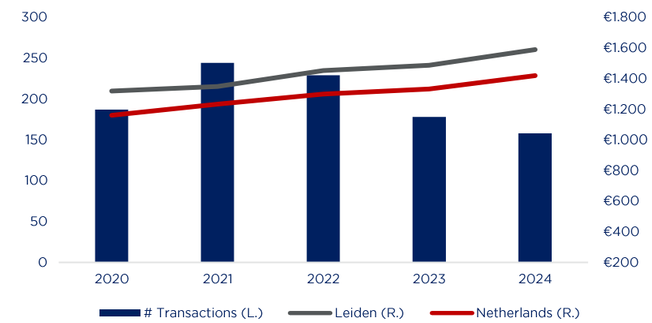
Living investment market
The residential or 'Living' investment volume in Leiden is largely determined by the availability of upcoming (new) construction developments, amid sustained strong interest from investors. As a result, the Leiden housing investment market experiences a somewhat volatile trajectory. Over the past three years, annual investment volumes have been irregular, primarily driven investment opportunity of private investors or private real estate enterprises.

Transactions and sales price
Leiden municipality, in # (L.) and price in EUR (R.)



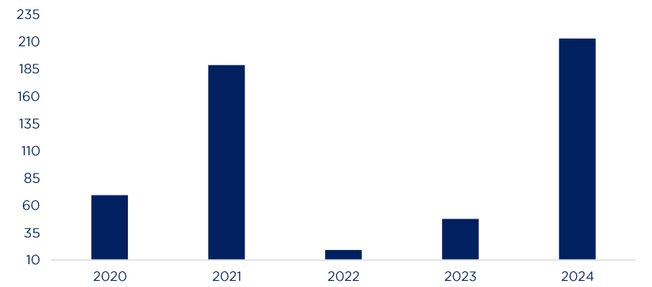
Source: Brainbay, edit: C&W.

PRS transactions and rental prices
Leiden municipality, in # (L.) and EUR p/m (R.)



source: Brainbay, edit: C&W.

Living investment volume
Leiden Municipality, in EUR mln.



Source: C&W.

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