Rental market research

2025

An analysis of the evolution of the housing rental market in the Netherlands from July 2025 onwards, focusing on price trends, contributing factors, and forecasts for the upcoming year.

uButler

Executive summary

The Dutch housing market is set for notable changes in 2025, with a projected 7% rebound in property prices driven by housing scarcity and negative sentiment on rising interest rates. Existing regulations aim to improve rental affordability and support first-time homebuyers amidst lower property availability. However, supply remains tight due to zoning, permit delays, and labor shortages in construction. While household incomes are rising, housing prices in the Netherlands remain on an upward trajectory past 2025, as structural supply constraints and sustained demand limit the impact of affordability improvements. This summary offers important insights for stakeholders to navigate the evolving Dutch housing landscape effectively

Rental prices and availability

1.1 General Market Overview

Mid 2025, the Dutch private rental market is faced with extraordinary challenges characterized by an unprecedented decline in available rental properties and persistently high demand. In the past year, the private sector rental homes have fallen by 40,4%, resulting in only 12.274 properties available during the fourth quarter of 2024. In Q1 2025, availability dropped by 35.5%, where availability response rates increased by 47% (compared to 42% the year prior). This trend is reflected internally at uButler, where, on average, only 25% of applications resulted in a viewing. This illustrates the shrinking supply and the steadily growing competition among renters[1].

This has caused a considerable increase in rent prices. According to NVM & VGM, the average amount paid by Dutch tenants increased by 9.6% year-on-year, with the average monthly rent reaching €1781 (€19,64 per square meter), up from €1730 in 2024[2]. This marks a point where rental growth has exceeded inflation.

The financial accessibility of these homes has become increasingly limited, since prospective tenants are now required to earn at least €5340 gross monthly income to qualify, well above the national average income of €3458 in 2025. Compared to the 2024 estimate of €5200, alongside a decrease in national average dutch income (€3666 in 2024) the level of inaccessibility for the average tenant continues to follow an upward trend[3].

1 - Nussupbekova, T. (2025, June 2). *The Netherlands' Residential Property Market Analysis 2025*. Global Property Guide.
2 - Lopman, R. (2025, April 10). *Flink Meer Verkopen in 1E kwartaal 2025 met prijsdemping door Veel "Uitpondwoningen."* NVM.
3- Pararius Press Release. (2025, April 16). *Rents in Dutch unregulated housing sector outpace inflation*. Rent in Dutch unregulated housing sector outpace inflation.

Following the same trend from end-of-year 2024, the shortage is most pronounced in the lower segment of the private rental market, where properties with monthly rents ranging between €1185 and €1500 are especially in demand. This segment represents 30.1% of the market supply but attracted more than 44.2% of tenant interest. Notably, with more competition in the lower priced segments, a higher proportion of responses are pushed to the mid-range segment, where demand now exceeds supply[4].

In addition to these factors, new legislation like the Affordable Rent Act (Elaborated on 3.1 Wet Betaalbare Huur), which was implemented in mid-2024, has represented a further intervention of the market. These initiatives point out that the pressing imperative of policy intervention has become important to dealing with the growing supply-demand imbalance and assuring greater access to housing within the private rental sector.

Policy intervention is not free from adverse effects. For instance, rent controls, especially for social housing, which, in theory, protect tenants and improve affordability, also risks discouraging landlords from renting, contributing to the falling supply in the private sector. Similarly, the first-time buyers tax benefit and mortgage lending standards, increases purchasing power and thus demand, without affecting supply much, causing upward pressure on prices[5]

The increasing imbalance, due to changes in policy and a dynamic market, places more and more pressure on the Dutch rental market, from which we expect to see more focus on policy market intervention in the coming years. The prices that rentals will realize are bound to continue upward, pushed by persistent high demand, limited supply, and these new regulatory measures..

4 - Pararius Press Release. (2025b, April 22). Rental report Q1 2025: Rising rents and shrinking supply put Dutch rental market under pressure.
5 - Schilder, F., & Scherpenisse, R. (2018). Policy and practice, affordable housing in the Netherlands. PBL.

Major cities such as Amsterdam, Eindhoven, The Hague, and Rotterdam have more sensitivity to this dynamic. The result of this demand is reflected in the speed at which listings turn over; they are only on the websites for an average of 9 days in Q2 2025 before being let. The rental process has almost halved in length from Q1 2024[6]. The following are trends and factors projected to influence the rental market for 2025:

	Average Price (€/m²)	Change YoY Q1 2024 - Q1 2025
Amsterdam	€27	+1.2%
Eindhoven	€18.1	+4.5%
Den Haag	€20.6	+6.4%
Utrecht	€21.2	+4.5%
Rotterdam	€20.8	+8%

Would you like to see the full report?

Send a email to info@ubutler.nl
With the code "Full-Housing-Report-Q3-2025" to receive the complete report, with more regional market insights

Click here for access

uButler