

Tweed Coast Market Update 2nd Half 2025

OVERVIEW

In Q2 2025, Tweed Coast* had a median house price of \$1,526,250 and a median unit price of \$1,000,000. This is an annual (Q2 2024 - Q2 2025) softening of -10.8% for houses, while unit price grew by 4.2%. Comparing Q2 2024 and Q2 2025, total sales increased by 4.1% (to 101 sales in Q2 2025) for houses and surged by 54.5% (to 136 sales in Q2 2025) for units. There is a highly-demanded market in Tweed Coast*, particularly units, which has attracted more buyers due to their relatively lower price to houses. A softening in median house price is not uncommon for a blue-chip suburb during current economic conditions, and it presents an opportunity for buyers seeking to enter the market.

CHANGE FROM LAST YEAR HALF YEAR



HOUSE SALES



HOUSE MEDIAN PRICE



HOUSE RENTAL PRICE



UNIT SALES



UNIT MEDIAN PRICE

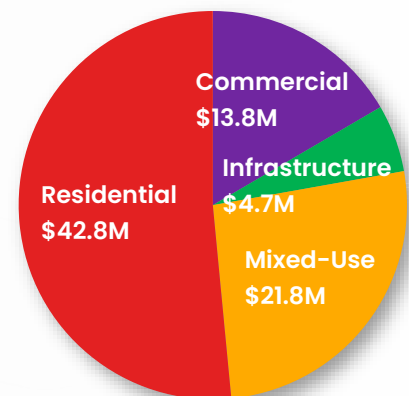


UNIT RENTAL PRICE



FUTURE DEVELOPMENTS

Tweed Coast[£] will see approximately **\$83.1M of new projects commencing construction in 2025.**



A key mixed-use project is 9 Grand Parade (\$12.0M), which will deliver a 3-storey development; including 8 ground-floor commercial tenancies (including 1 restaurant/café and 7 office/retail spaces) with 16 three-bedroom apartments above.

Key residential projects include:

- Kai Residences Kingscliff (14 Units)
- 206 Marine Parade (3 Townhouses)
- 78 & 80 Pearl Street (7 Dwellings)
- 41 Kingscliff Street (13 Units)

Despite several residential projects planned for construction in the Tweed Coast[£] in 2025, these are mostly units. With a limited number of stand-alone housing in the pipeline supply remain insufficient. This will drive up prices higher, across all property types.



50 Units/
Apartments



9
Townhouses



7
Dwellings



MARKET CONDITIONS

MEDIAN PRICE
Q2 2025



\$1.5M



\$1.0M

SALES

AVERAGE DAYS
ON MARKET Q2 2025



94
HOUSE



67
UNIT

MEDIAN PRICE
Q2 2025



\$1,250



\$750

RENTALS

AVERAGE DAYS
ON MARKET Q2 2025



19
HOUSE

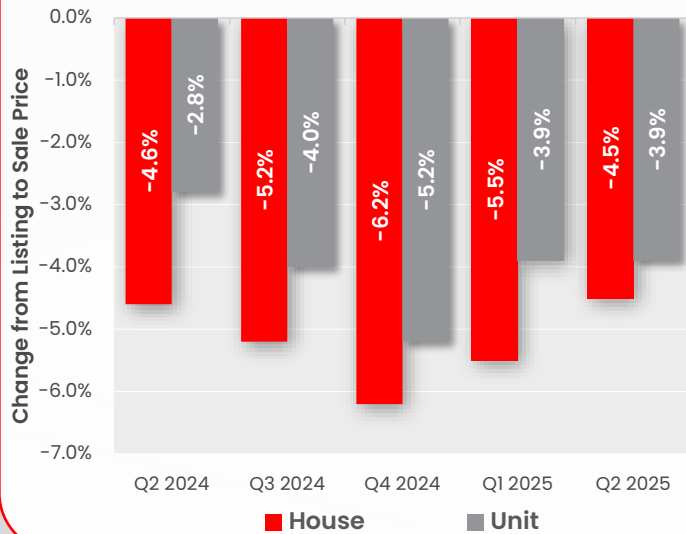


19
UNIT



AVERAGE VENDOR DISCOUNT*

Average vendor discount reflects the average percentage difference between the first list price and final sold price. A lower percentage difference (closer to 0.0%) suggests that buyers are willing to purchase close to the first asking price of a property.



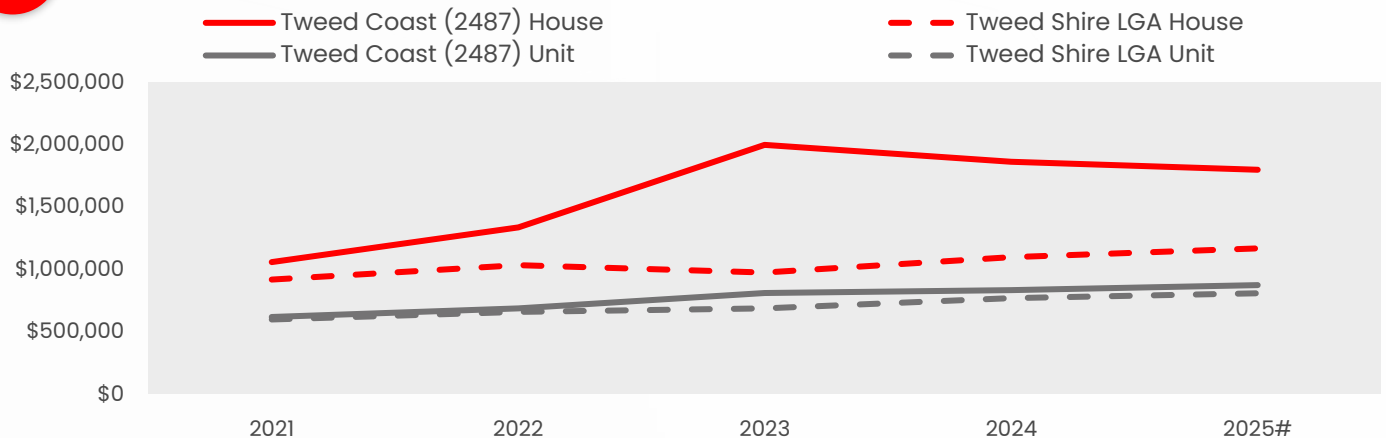
Average vendor discounts between Q2 2024 and Q2 2025 have tightened slightly to -4.5% for houses and remained stable at -3.9% for units. The market in Tweed Coast* currently still favor buyers, as sellers are willing to accept below initial listing prices. That said, the limited number of new supply suggest these discounts are unlikely to last; especially for houses. With a slightly more affordable median house price in Q2 2025, now is the time to act.

The suburb of Tweed Coast has outperformed the wider Tweed Shire Local Government Area (LGA) in house and unit median prices for the past 5 years. 2025# saw this continue, even with a slower price growth in Tweed Coast.

Most of the homes sold in Tweed Coast* in 2025# were in the premium bracket of above \$1.7M (42.9%) for houses and above \$1.15M (53.2%) for units. This benefits owners seeking to capitalize on their investments. The most affordable price brackets also performed well, with 35.4% of houses sold below \$1,399,999 and 23.6% of units sold below \$849,999; presenting opportunities for first-home buyers. There are options in the middle price brackets, confirming there is a home for every budget.



MARKET COMPARISON

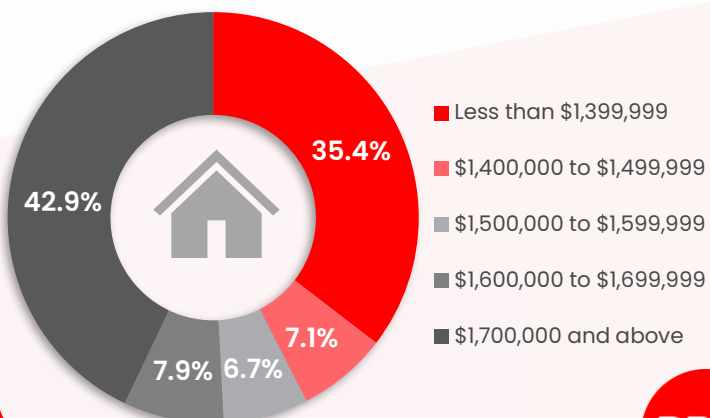


The market comparison graph provides a comparative trend for median price of houses and units over the past 5 years. The main LGA chosen was based on their proximity to the main suburb analysed, which is Tweed Coast.

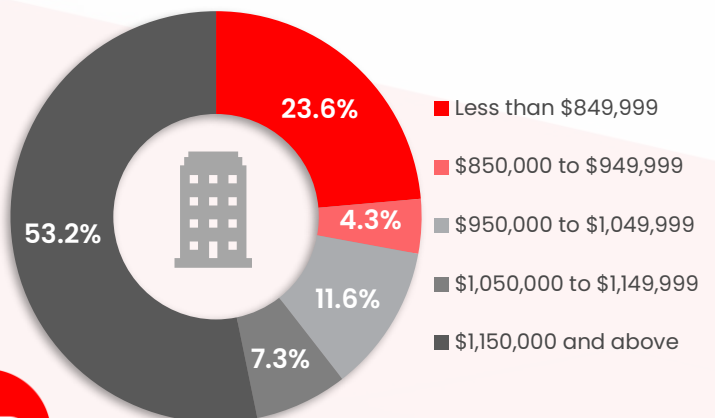


PRICE BREAKDOWN 2025

HOUSES SOLD



UNITS SOLD





RENTAL GROWTH 2025€

House rental yields in Tweed Coast[‡] was 3.8% as of June 2025, on par with Gold Coast (3.8%) but higher than Tweed Shire (3.6%). This is paired with a 28.2% growth in median house rental price over the past 12 months to Q2 2025, at \$1,250 per week, along with a -40.8% decline in the number of houses rented (to 29 houses in Q2 2025). This indicates a severely undersupplied house rental market in Tweed Coast[‡], thus, there is still room for investors to enter the market.

4+ bedroom houses have provided investors with a significant +18.2% rental growth annually, achieving a median rent of \$1,300 per week.

Tweed Coast[‡] recorded a vacancy rate of 2.0% in June 2025, above the Tweed Shire average of 1.3% and Gold Coast Main's average of 1.7%. Vacancy rates have declined in the past 12 months, from 2.5% in June 2024, indicating an even tighter rental market. Further, a 2.0% vacancy rate is still well below the Real Estate Institution of Australia's healthy benchmark of 3.0%, indicating a quicker occupancy of rental homes in Tweed Coast[‡] market. This indicates a sustainable environment for investors, especially with a more affordable house price in the past 12 months.



2 BEDROOMS

+4.0%



3 BEDROOMS

+5.9%

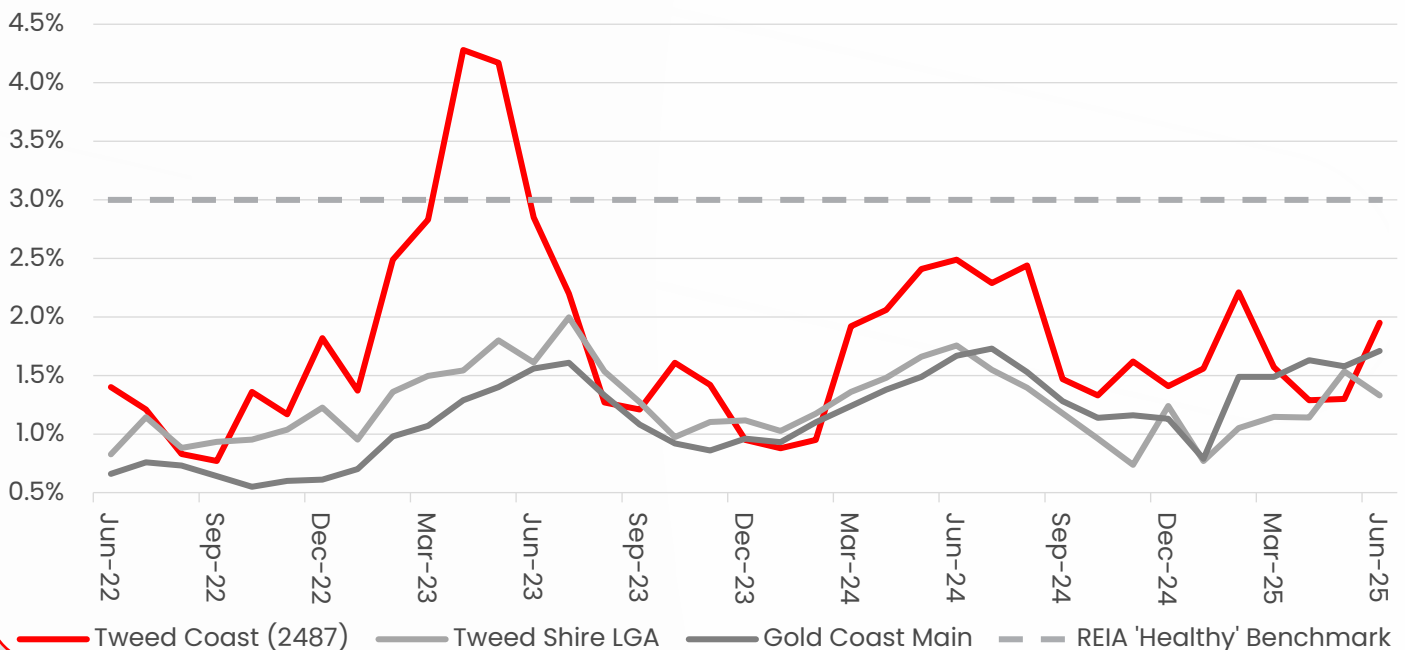


4 BEDROOMS

+18.2%



RENTAL VACANCY RATES 2025



RENTAL YIELD 2025§



3.8%

Tweed Coast[‡]



3.6%

Tweed Shire LGA



3.8%

Gold Coast Main



6.7%

Tweed Coast[‡]



4.5%

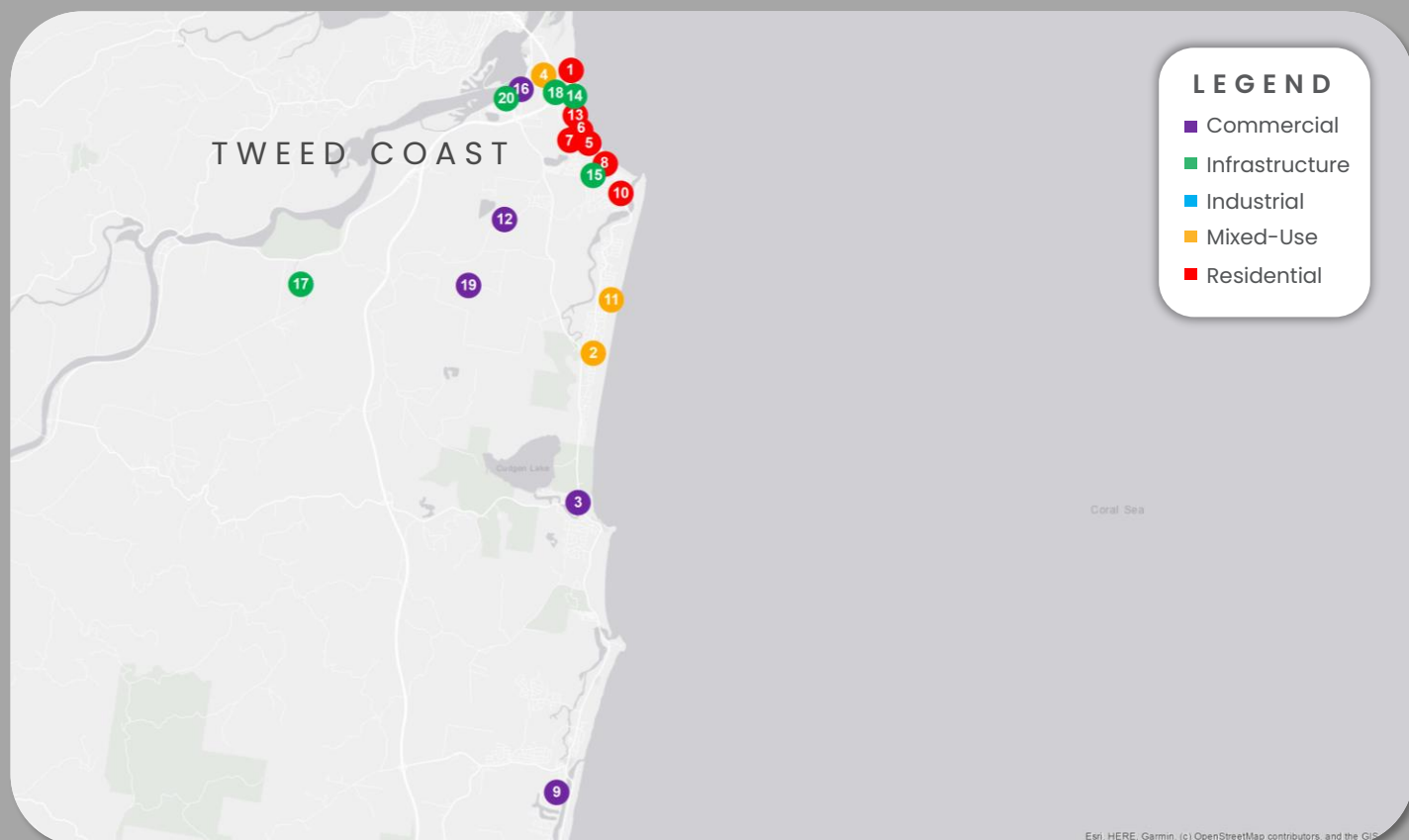
Tweed Shire LGA



4.9%

Gold Coast Main

PROJECT DEVELOPMENT MAP 2025^A



#	Project [£]	Type	Estimated Value [¤]	Commence Date [¥]
1	Kai Residences Kingscliff (14 Units)	Residential	\$17,027,742	2/12/2025
2	9 Grand Parade Mixed Use Development (Commercial + Residential - 16 Units)	Mixed-Use	\$12,028,478	8/12/2025
3	2 Altona & Tweed Coast Roads Earthworks & Drainage	Commercial	\$6,840,940	8/12/2025
4	Gardn Church Chinderah Stages 1-5 (Mixed by Tenant Types)	Mixed-Use	\$6,616,036	24/12/2025
5	246 Marine Parade Units (7 Units)	Residential	\$6,160,000	9/12/2025
6	206 Marine Parade Townhouses (3 Townhouses)	Residential	\$5,931,200	24/02/2025
7	41 Kingscliff Street Residential Unit (13 Units)	Residential	\$5,000,000	10/01/2025
8	78 & 80 Pearl Street Dwellings (7 Dwellings)	Residential	\$4,068,270	28/11/2025
9	Pottsville Tavern Alterations & Additions	Commercial	\$3,500,000	1/09/2025
10	19 Sutherland Street Dual Occupancies Stages 1-3 (3 Townhouses)	Residential	\$3,250,000	10/11/2025
11	65 Cylinders Drive Apartments & Food & Drink Premises (Commercial + Residential - 5 Apartments)	Mixed-Use	\$3,200,000	15/09/2025
12	607 Cudgen Road Tourist Accommodation Alterations & Additions	Commercial	\$1,525,000	2/12/2025
13	75 Kingscliff Street Townhouses (3 Townhouses)	Residential	\$1,380,000	19/12/2025
14	Kingscliff North Holiday Park Relocatable Homes (Local Government)	Infrastructure	\$1,266,198	17/02/2025
15	Tweed Shire Council Footpath Rehabilitation (Local Government)	Infrastructure	\$1,000,000	10/02/2025
16	130 Chinderah Bay Drive Commercial Building Stage 1 & 2	Commercial	\$1,000,000	17/12/2025
17	Tweed Recycling Landfill Centre Waste Transfer Station Upgrade (Local Government)	Infrastructure	\$900,000	16/06/2025
18	Kingscliff North Holiday Parks Electrical & Trenching Works (Local Government)	Infrastructure	\$800,000	10/02/2025
19	396 Melaleuca Road Farm Stay Accommodation Buildings & Farm Buildings	Commercial	\$584,100	18/03/2025
20	Turnock Park Carpark (Local Government)	Infrastructure	\$500,000	13/01/2025



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REFERENCES

* Tweed Coast sales market data and key indicators encapsulates aggregate property market conditions within suburbs of Fingal Head, Chinderah, Cudgen, Kingscliff, Casuarina, Bogangar, Cabarita Beach, Hastings Point, and Pottsville.

** Estimated values are based on construction value provided by the relevant data authority and does not reflect commercial and/or re-sale value.

2025 encapsulates sales transactions for 1st Half 2025 (01/01/2025 – 30/06/2025) only, other years encapsulates sales transactions for the full year (i.e 01/01 to 31/12 of the relevant year).

€ Annual rental growth is a comparison between Q2 2024 (01/04/2024 – 30/06/2024) and Q2 2025 (01/04/2025 – 30/06/2025) house median rent figures.

¥ Tweed Coast rental market data encapsulates aggregate property conditions within the postcode of 2487.

§ Rental yields shown are as reported as of June 2025.

▲ Project development map showcases a sample of upcoming projects only, due to accuracy of addresses provided by the data provider for geocoding purposes.

£ Projects refers to the top developments within the postcodes of 2487 and 2489.

μ Estimated value is the value of construction costs provided by relevant data authority, it does not reflect the project's sale/commercial value.

ψ Commencement date quoted for each project is an approximate only, as provided by the relevant data authority, PRD does not hold any liability to the exact date.

Source: APM Pricfinder, Cordell Connect database, SQM Research, Esri ArcGIS.

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