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Tweed Market Update
2nd Half 2025

OVERVIEW

In Q2 2025, Tweed* recorded a median house price of $1,200,000 and a median unit price of $810,000. This represents an annual (Q2 2024 – Q2 2025) growth of 10.6% for houses and 4.9% for units. This suggests that now is an ideal time for homeowners to transact and capitalize on their investments. Comparing Q2 2024 and Q2 2025, total sales increased by 4.1% (to 251 sales in Q2 2025) for houses but fell by -23.6% (to 288 sales in Q2 2025) for units, highlighting a clear undersupply in the unit market. Combined with a highly demanded house market it has created a buffer against higher interest rates and benefitted from the latest cash rate cuts. With limited supply in the 2025 pipeline, buyers should act fast.

CHANGE FROM LAST	YEAR	HALF YEAR
HOUSE SALES	↑	↑
HOUSE MEDIAN PRICE	↑	↓
HOUSE RENTAL PRICE	↑	↓
UNIT SALES	↓	↓
UNIT MEDIAN PRICE	↑	↑
UNIT RENTAL PRICE	↑	↔

MARKET CONDITIONS

SALES

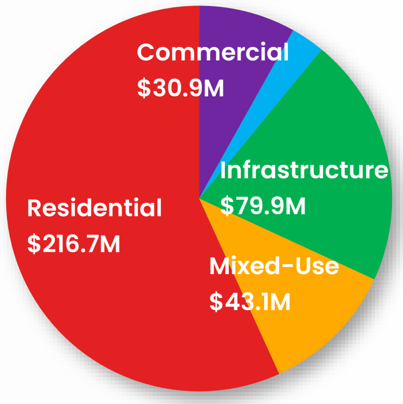
	House	Unit
MEDIAN PRICE Q2 2025	$1.2M	$810K
AVERAGE DAYS ON MARKET Q2 2025	55	75

RENTALS

	House	Unit
MEDIAN PRICE Q2 2025	$900	$720
AVERAGE DAYS ON MARKET Q2 2025	27	21

FUTURE DEVELOPMENTS

Tweed£ will see approximately **$381.4M of new projects commencing construction in 2025**.



A main infrastructure development is Murwillumbah Works Depot (Local Government, $33.6M), constructing a new depot to store Council's fleet vehicles, plant, and machinery.

Key residential projects include:

- Quay Grand Apartments Tweed Heads Stages 1 & 2 (122 Apartments)
- 7-9 Shallow Bay Drive (36 Units)
- Willowborn Townhouses Banora Point (13 Townhouses)
- 78 & 80 Pearl Street (7 Dwellings)
- 1 & 11 Lalina Avenue (15 Townhouses)

There are residential projects planned in Tweed£, which will add new stock. But, compared to Q2 2025 sales this is not enough, especially for houses. Thus supply will remain insufficient, pushing up prices further; for all property types.

357 Units/ Apartments

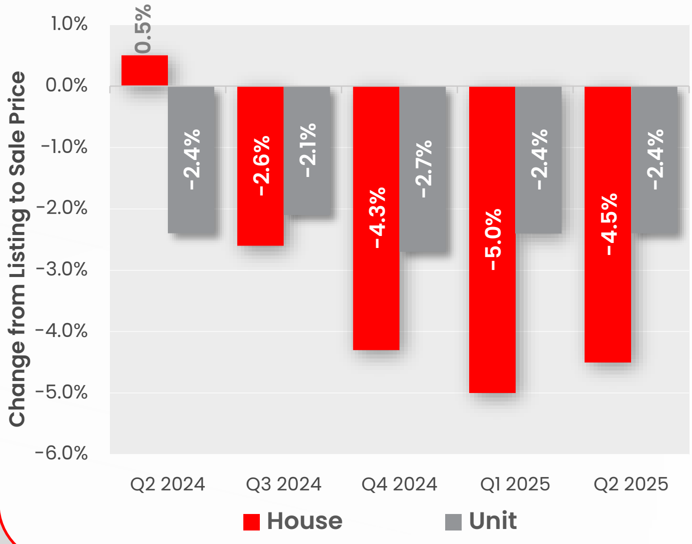
41 Townhouses

11 Dwellings

30 Lots

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.

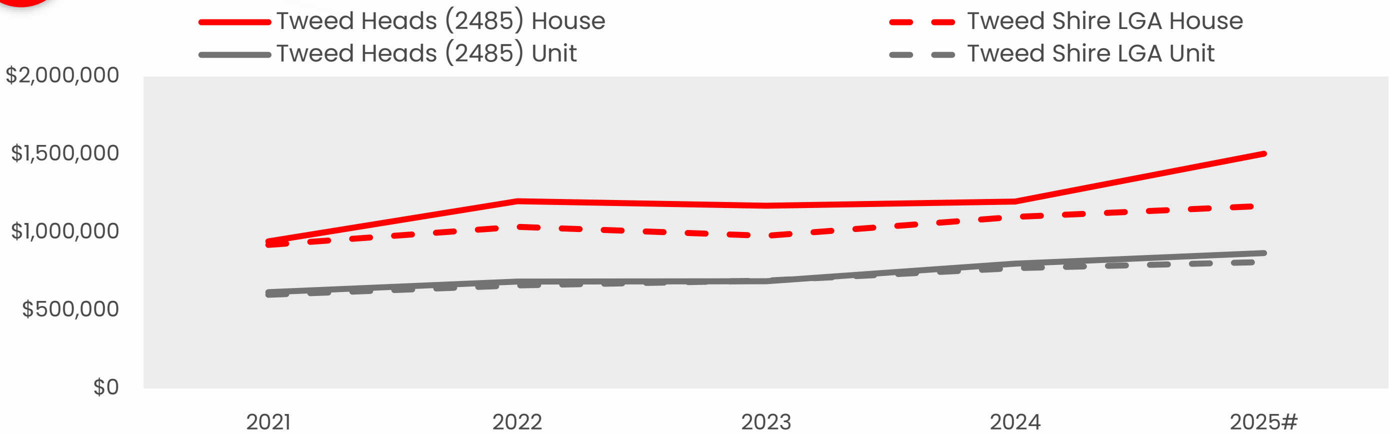


Average vendor discounts between Q2 2024 and Q2 2025 have swung from a premium to a discount of -4.5% for houses, indicating a transition from a seller's market to a buyer's market. For units, the discount remained steady at -2.4%; which creates a stable market for first home buyers and an opportunity in a rising price market. The Tweed* market still favour buyers now, as the final sales price is till below the initial listing prices. Thus, buyers must act fast.

The suburb of Tweed has outperformed the wider Tweed Shire Local Government Area (LGA) in both house and units prices for the past 5 years. This continued in 2025#, with a notable growth in house prices.

Most of the homes sold in Tweed* in 2025# were in the most affordable price bracket, with 38.3% of houses sold below $1,049,999. The premium bracket also performed well, with 35.1% of houses sold above $1.35M. This benefits both homeowners and buyers. In contrast, most of the units (31.3%) sold were in the premium bracket above $950K. Options in the middle price brackets are also available for both property types, offering opportunities for buyers across different budgets.

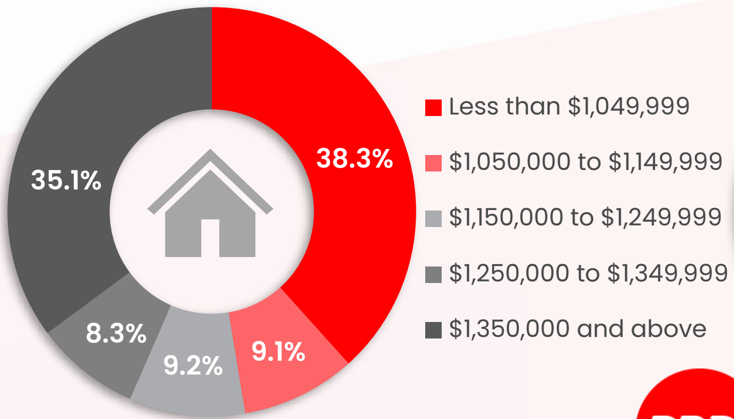
MARKET COMPARISON



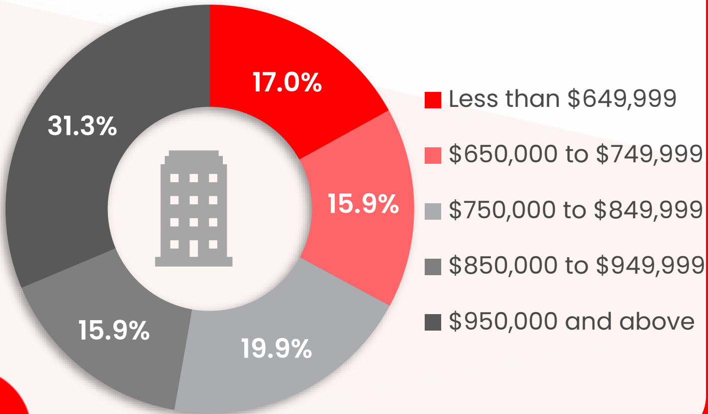
The market comparison graph provides a comparative trend for median price of houses and units over the past 5 years. The main LGA chosen was based on their proximity to the main suburb analysed, which is Tweed.

PRICE BREAKDOWN 2025

HOUSES SOLD



UNITS SOLD



RENTAL GROWTH 2025€

House rental yield in Tweed¥ was 3.8% as of June 2025, slightly higher than Tweed Shire (3.6%) but on par with Gold Coast Main (3.8%). This is paired with a 20.0% growth in median house rental price in the past 12 months to Q2 2025, at $900 per week. During this same time, the number of houses rented declined significantly, by -44.8% (to 16 houses). This indicates a clear undersupplied house rental market, in need for more investors to enter the market.

2- bedroom houses have provided investors with a significant +25.0% rental growth annually, achieving a median rent of $700 per week.

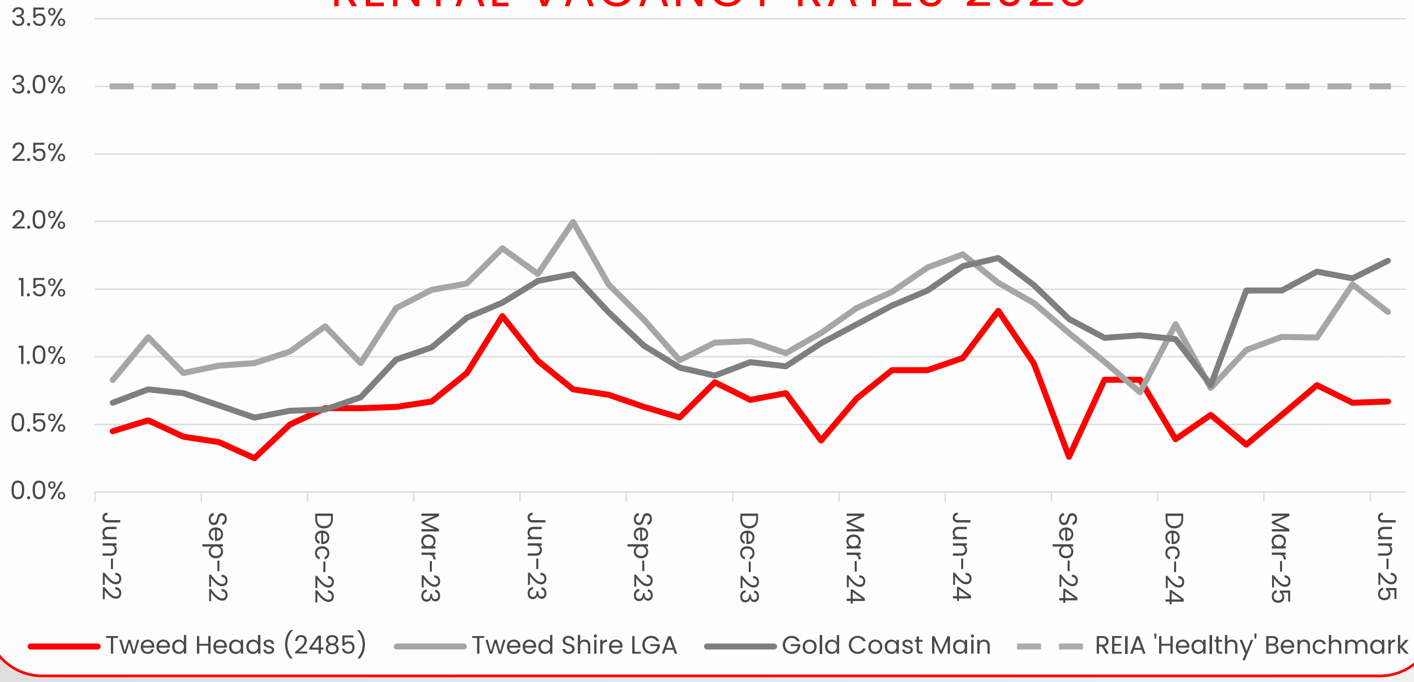
Tweed¥ recorded a vacancy rate of 0.7% in June 2025, lower than the Tweed Shire average of 1.2% and Gold Coast Main's average of 1.7%. Vacancy rates have decreased in the past 12 months, indicating an even tighter the market. Furthermore, a 0.7% vacancy rate is significantly below the Real Estate Institution of Australia's healthy benchmark of 3.0%, thus a quicker occupancy of rental homes in Tweed¥. This creates an ideal environment for investors, even with house and unit (thus entry) prices having risen over the past 12 months to Q2 2025.

2 BEDROOMS
25.0%

3 BEDROOMS
+0.0%

4 BEDROOMS
+3.9%

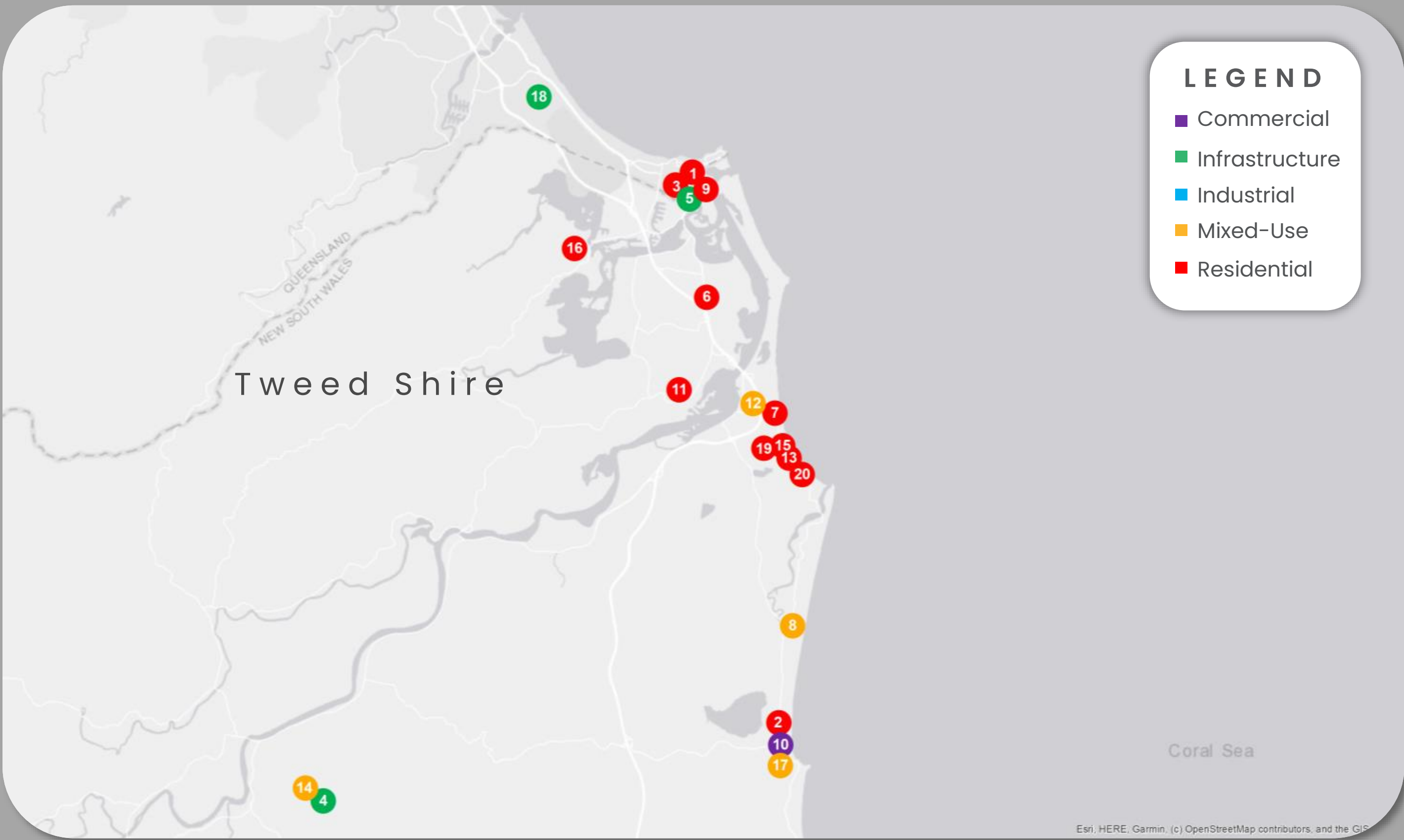
RENTAL VACANCY RATES 2025



RENTAL YIELD 2025§

3.8%	**3.6%**	**3.8%**	**4.3%**	**4.5%**	**4.9%**
Tweed¥	Tweed Shire LGA	Gold Coast Main	Tweed¥	Tweed Shire LGA	Gold Coast Main

PROJECT DEVELOPMENT MAP 2025₳



#	Project£	Type	Estimated Valueµ	Commence Dateψ
1	Quay Grand Apartments Tweed Heads Stages 1 & 2 (122 Apartments)	**Residential**	$60,450,121	5/12/2025
2	Caba Residences (20 Apartments)	**Residential**	$35,000,000	24/03/2025
3	7-13 Pearl Street Apartments (96 Apartments)	**Residential**	$33,806,480	14/03/2025
4	Murwillumbah Works Depot (Local Government)	**Infrastructure**	$33,628,501	6/01/2025
5	Tweed Heads Mid Rise General Housing (State Government - 80 Units)	**Infrastructure**	$20,000,000	15/09/2025
6	7-9 Shallow Bay Drive Units (36 Units)	**Residential**	$19,260,643	12/12/2025
7	Kai Residences Kingscliff (14 Units)	**Residential**	$17,027,742	2/12/2025
8	9 Grand Parade Mixed Use Development (Commercial + Residential - 16 Units)	**Mixed-Use**	$12,028,478	8/12/2025
9	3 Ivory Crescent Units (9 Units)	**Residential**	$8,039,778	19/12/2025
10	2 Altona & Tweed Coast Roads Earthworks & Drainage	**Commercial**	$6,840,940	8/12/2025
11	Willowborn Townhouses Banora Point (13 Townhouses)	**Residential**	$6,666,000	14/10/2025
12	Garden Church Chinderah Stages 1-5 (Various Tenant Types)	**Mixed-Use**	$6,616,036	24/12/2025
13	246 Marine Parade Units (7 Units)	**Residential**	$6,160,000	9/12/2025
14	199-201 Lundberg Drive Light Industrial Units & Take Away Food & Drink Premises (Various Tenant Types)	**Mixed-Use**	$6,006,000	24/10/2025
15	206 Marine Parade Townhouses (3 Townhouses)	**Residential**	$5,931,200	24/02/2025
16	1 & 11 Lalina Avenue Townhouses (15 Townhouses)	**Residential**	$5,200,000	5/06/2025
17	25 Tweed Coast Road Units & Shops (Commercial + Residential - 9 Units)	**Mixed-Use**	$5,000,000	18/12/2025
18	Tweed Multi Modal Corridor Study (State Government)	**Infrastructure**	$5,000,000	5/05/2025
19	41 Kingscliff Street Residential Unit (13 Units)	**Residential**	$5,000,000	10/01/2025
20	78 & 80 Pearl Street Dwellings (7 Dwellings)	**Residential**	$4,068,270	28/11/2025

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RESEARCH SERVICES

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- Geographic information mapping
- Project analysis including product and pricing recommendations
- Rental and investment return analysis

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REFERENCES

* Tweed sales market data and key indicators encapsulates aggregate property market conditions within the Tweed Shire Local Government Area.

** 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 rental market data encapsulates aggregate property conditions within the postcode of 2485.

§ 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 Tweed Shire Local Government Area.

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 Pricefinder, Cordell Connect database, SQM Research, Esri ArcGIS.

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