

Tweed Market Update

1st Half 2026



OVERVIEW

In Q4 2025, Tweed* recorded a median house price of \$1,333,500 and a median unit price of \$900,000. This represents an annual (Q4 2024 – Q4 2025) growth of 11.1% for houses and 13.6% for units. This suggests that now is an ideal time for homeowners to transact and capitalize on their investments. Comparing Q4 2024 and Q4 2025, total sales increased by 33.4% (to 475 sales in Q4 2025) for houses and surged by 88.7% (to 466 sales in Q4 2025) for units, highlighting a highly-demanded market. This created a buffer against higher interest rates. With a limited number of new housing supply in the 2026 pipeline, buyers should act fast.

CHANGE FROM LAST YEAR HALF YEAR



	YEAR	HALF YEAR
HOUSE SALES	↑	↑
HOUSE MEDIAN PRICE	↑	↑
HOUSE RENTAL PRICE	↑	↑



UNIT SALES	↑	↑
UNIT MEDIAN PRICE	↑	↑
UNIT RENTAL PRICE	↑	↑



MARKET CONDITIONS

MEDIAN PRICE
Q4 2025

\$1.3M

SALES

\$900K

AVERAGE DAYS
ON MARKET Q4 2025

65
HOUSE

61
UNIT

MEDIAN PRICE
Q4 2025

\$1,200

RENTALS

\$750

AVERAGE DAYS
ON MARKET Q4 2025

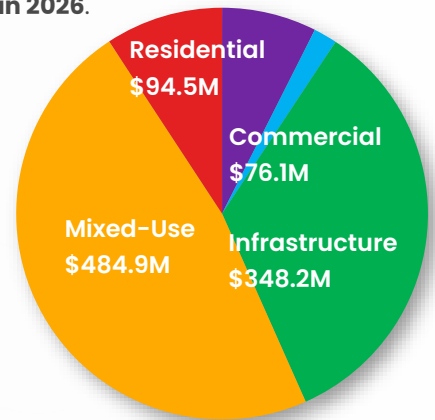
24
HOUSE

19
UNIT



FUTURE DEVELOPMENTS

Tweed[£] will see approximately **\$1.0B** of new projects commencing construction in 2026.



A main infrastructure development is Clarrie Hall Dam Wall Raising Project (\$304.0M), which involves raising the dam wall at Clarrie Hall Dam to increase water storage capacity and enhance long-term water security.

Key residential projects include:

- Quay Grand Apartments Tweed Heads Stages 1 & 2 (122 Apartments)
- 93 Parks Lane & Trutes Terrace Residential Subdivision (78 Lots)
- 42 North Arm Road (18 Dwellings)
- 19 William Street (6 Townhouses)

There are residential projects planned in Tweed[£], which will add new stock. But, compared to Q4 2025 sales this is not enough, especially of 475 houses. Supply will remain insufficient, pushing up prices further; for all property types.



154 Units/
Apartments



13
Townhouses



18
Dwellings



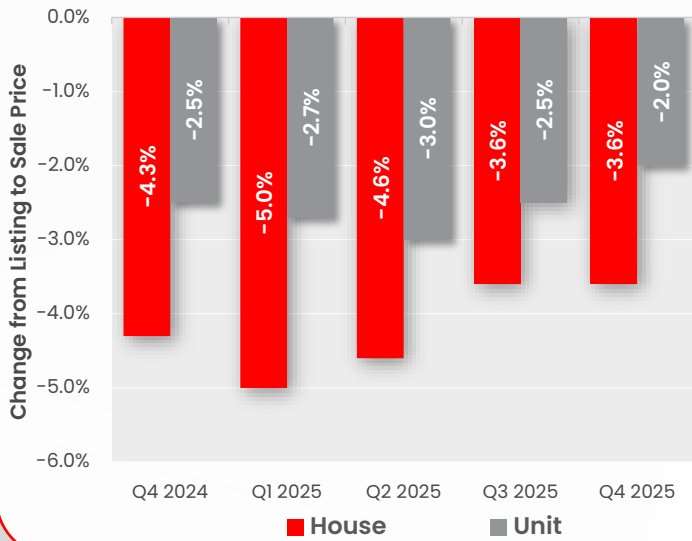
78 Lots



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 Q4 2024 and Q4 2025 have tightened to -3.6% for houses and -2.0% for units. Market conditions in Tweed* still favour buyers in Q4 2025, with vendors accepting offers below initial listing prices. A tighter discount suggest a shift towards a seller's market. As discounting narrows and new supply remains limited, buyers need to act fast before discounts become lesser.

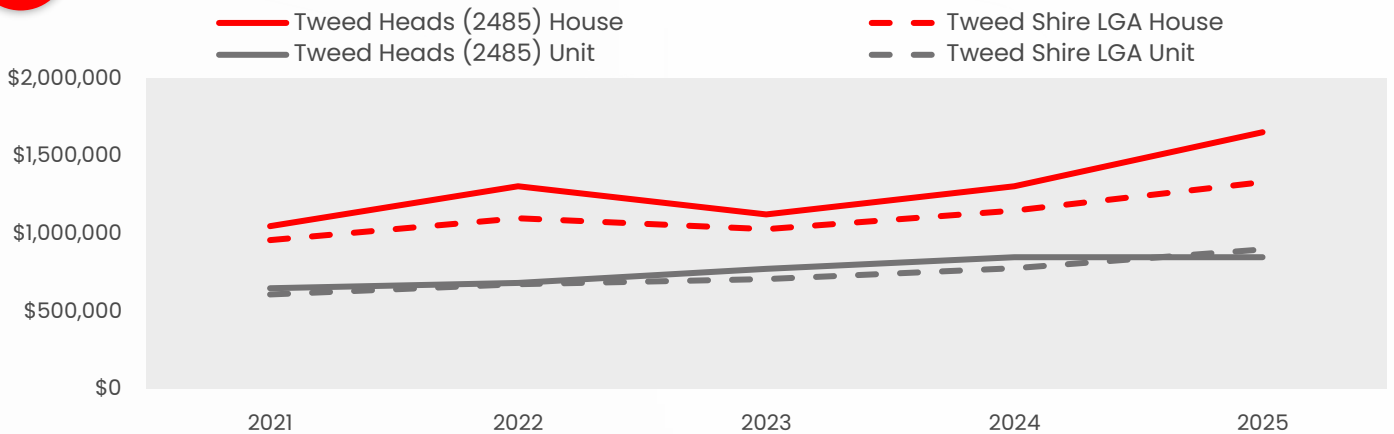


The suburb of Tweed Heads has outperformed the wider Tweed Shire LGA in house prices, while unit prices have remained on par for the past 5 years. In 2025, house prices have increased significantly, re-establishing the suburb as a premium market. The unit market remains an opportunity for first home buyers.

Most of the homes sold in Tweed* in 2025 were equally split between the premium price bracket (36.5% of houses sold above \$1.45M) and the most affordable price point (36.3% of houses sold below \$1.15M). This benefits both owners and buyers. Similarly, most of the units sold were in the premium bracket above \$1.05M (28.2%) and the most affordable price point of less than \$749,999 (26.1%). This suggests there is a home for all budgets in Tweed*.



MARKET COMPARISON

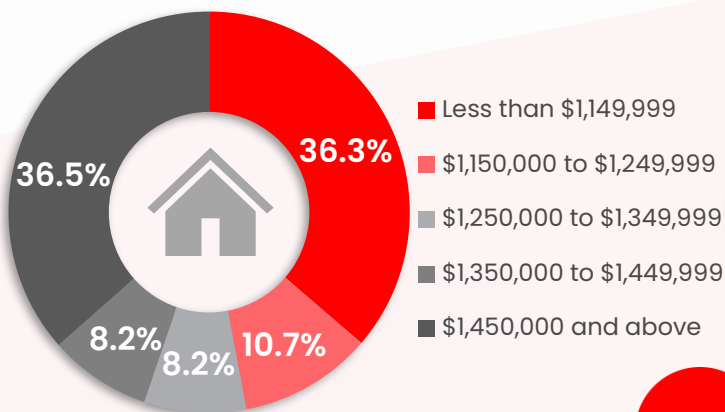


The market comparison graph provides a comparative trend for median price of houses and units over the past 5 years. The main LGA chosen was based on their proximity to the main suburb analysed, which is Tweed.

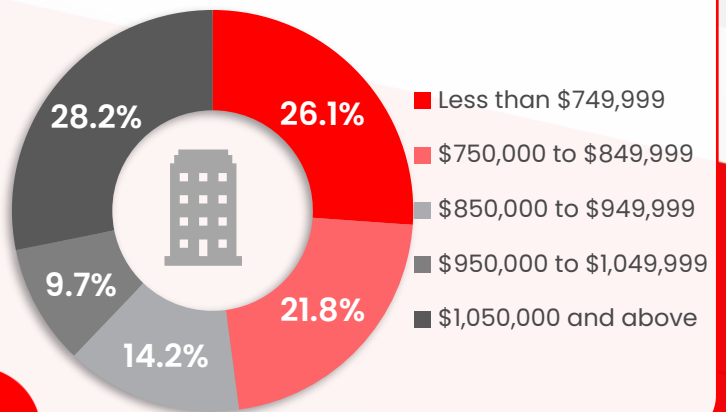


PRICE BREAKDOWN 2025

HOUSES SOLD



UNITS SOLD





RENTAL GROWTH 2025€

House rental yield in Tweed* was 4.3% as of December 2025, higher than Tweed Shire (3.5%) and Gold Coast Main (3.5%). This is paired with a 31.9% surge in median house rental price in the past 12 months to Q4 2025, at \$1,200 per week, along with a 33.3% growth in the number of houses rented (to 20 houses). This indicates a highly-demanded and competitive house rental market, one that is in need for more investors to enter the market.

2+ bedroom houses have provided investors with a significant +27.2% rental growth annually, achieving a median rent of \$725 per week.

Tweed* recorded a vacancy rate of 0.9% in December 2025, lower than Tweed Shire average of 1.1% and Gold Coast Main's average of 1.3%. Vacancy rates have increased in the past 12 months, due to investors re-entering the market. However, a 0.9% 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 prices (thus, entry prices) increasing in the past 12 months to Q4 2025.

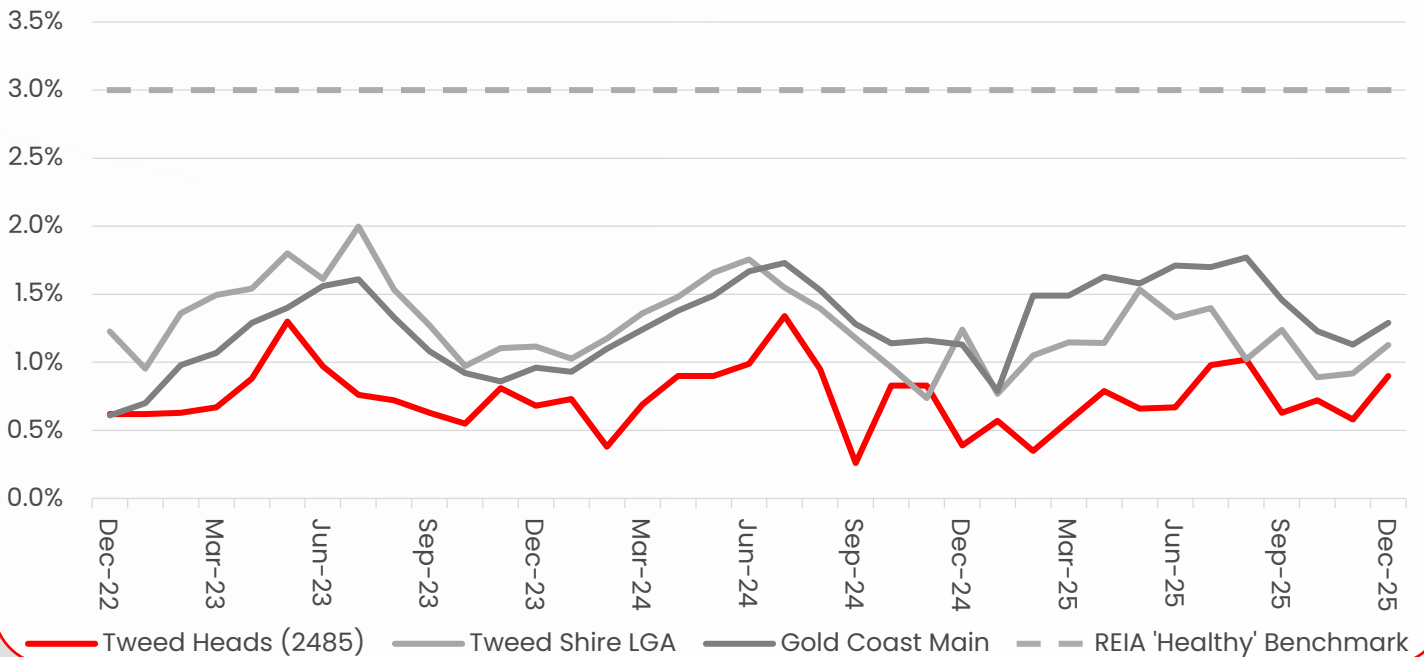
2 BEDROOMS
+27.2%

3 BEDROOMS
+8.5%

4 BEDROOMS
+13.6%



RENTAL VACANCY RATES 2025



RENTAL YIELD 2025§



4.3%

Tweed*



3.5%

Tweed Shire LGA



3.5%

Gold Coast Main



5.7%

Tweed*



5.0%

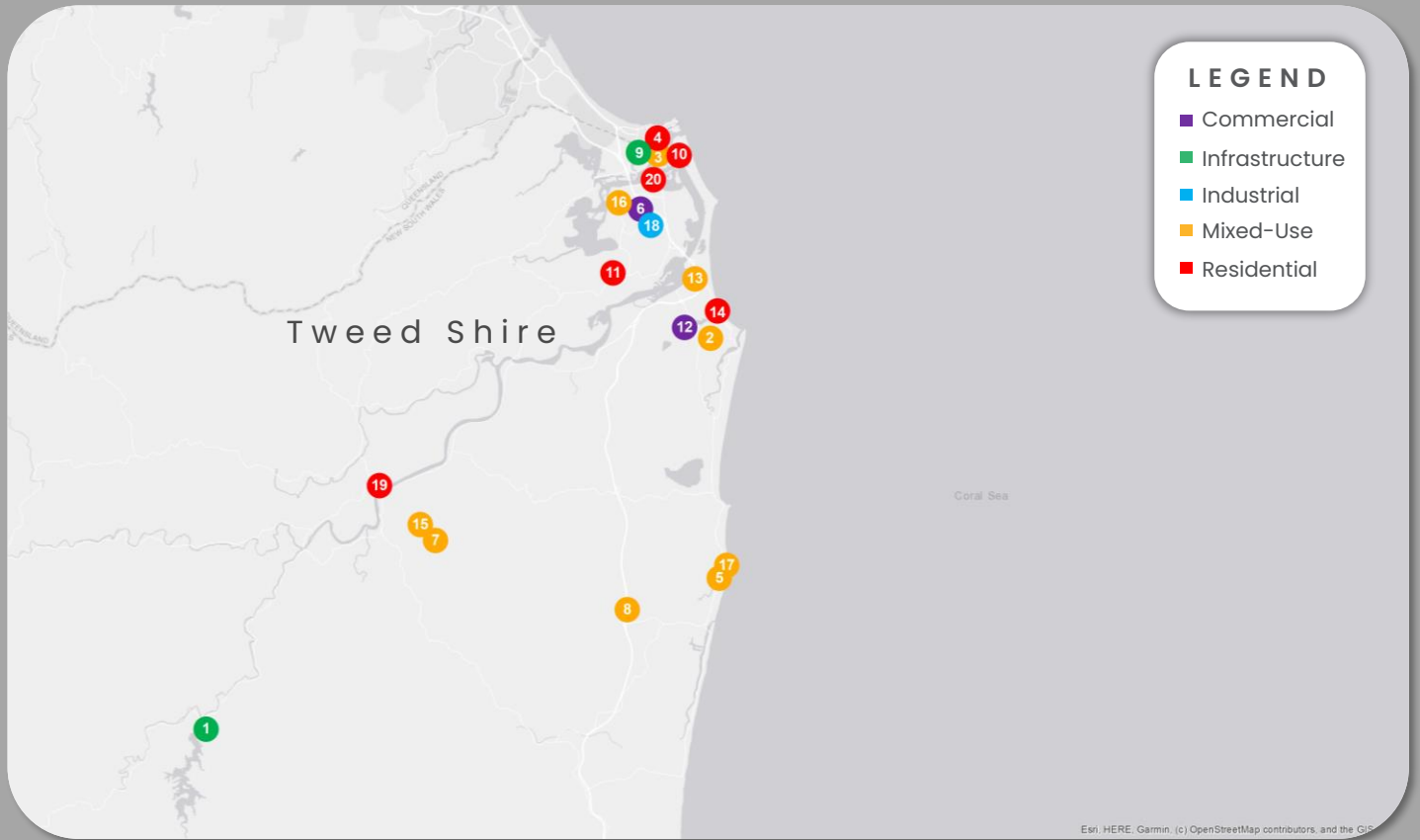
Tweed Shire LGA



4.0%

Gold Coast Main

PROJECT DEVELOPMENT MAP 2026 ^A



Esi, HERE, Garmin, (c) OpenStreetMap contributors, and the GIS

#	Project [£]	Type	Estimated Value ^µ	Commence Date ^ψ
1	Clarrie Hall Dam Wall Raising Project (Local Government)	Infrastructure	\$304,000,000	14/12/2026
2	Uniting Kingscliff Redevelopment (199 Independent Living Units + Commercial)	Mixed-Use	\$233,670,882	9/12/2026
3	3-7 River Terrace Apartments & Retail Premises (Residential - 72 Apartments + Commercial)	Mixed-Use	\$95,599,635	1/07/2026
4	Quay Grand Apartments Tweed Heads (122 Apartments)	Residential	\$60,450,121	5/06/2026
5	Tricare Hastings Point Retirement Village & Aged Care Facility (Various Tenant Types)	Mixed-Use	\$60,000,000	21/09/2026
6	Bunnings Warehouse Tweed Heads South	Commercial	\$44,550,000	5/08/2026
7	208 Lundberg Drive Mixed Use Development (Various Tenant Types)	Mixed-Use	\$38,800,000	10/11/2026
8	931 & 1023 Cudgera Creek Road Agricultural & Industrial Development (Various Tenant Types)	Mixed-Use	\$31,401,850	16/06/2026
9	Tweed Heads Mid Rise General Housing (State Government - 80 Units)	Infrastructure	\$20,000,000	15/12/2026
10	4 Ivory Crescent Units (16 Units)	Residential	\$9,917,492	30/10/2026
11	93 Parks Lane & Trutes Terrace Residential Subdivision (78 Lots)	Residential	\$9,298,000	24/06/2026
12	2 Altona & Tweed Coast Roads Earthworks & Drainage	Commercial	\$6,840,940	29/05/2026
13	Garden Church Chinderah Stages 1-5 (Various Tenant Types)	Mixed-Use	\$6,616,036	24/12/2026
14	246 Marine Parade Units (7 Units)	Residential	\$6,160,000	9/12/2026
15	199-201 Lundberg Drive Light Industrial Units & Take Away Food & Drink Premises (Industrial + Commercial)	Mixed-Use	\$6,006,000	19/10/2026
16	1 Lonkeet Drive Mixed Use Development (Residential - 7 Townhouses + Commercial)	Mixed-Use	\$5,083,100	16/12/2026
17	25 Tweed Coast Road Units & Shops (Residential - 9 Units + Commercial)	Mixed-Use	\$5,000,000	18/12/2026
18	30 Enterprise Avenue & Parkside Drive Light Industrial Units Stages 1 & 2 (20 Light Industrial Units)	Industrial	\$4,950,000	29/06/2026
19	42 North Arm Road Dwellings Stages 1 & 2A-2R (18 Dwellings)	Residential	\$4,108,000	14/05/2026
20	19 William Street Townhouses (6 Townhouses)	Residential	\$1,293,000	18/09/2026

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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 the full year 2025 (01/01/2025 – 31/12/2025).

€ Annual rental growth is a comparison between Q4 2024 (01/10/2024 – 31/12/2024) and Q4 2025 (01/10/2025 – 31/12/2025) 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 December 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 Pricerfinder, Cordell Connect database, SQM Research, Esri ArcGIS.

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