

Hunter Valley Market Update

1st Half 2026



OVERVIEW

In Q4 2025, Hunter Valley* recorded a median house price of \$835,000 and a median unit price of \$620,000. This represents an annual (Q4 2024 – Q4 2025) price growth of 12.8% for houses and 14.4% for units. Between Q4 2024 – Q4 2025 total sales increased, by 10.3% for houses (to sales in Q4 2025) and a significant 55.9% for units (to 53 sales in Q4 2025). The Hunter Valley house and unit markets have seen strong price growth, despite increases in sales numbers, highlighting strong demand. Thus, investors and home buyers must act fast and capitalise on the current opportunity to enter the property market, before prices rise in the future.

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



\$835K



\$620K

SALES

AVERAGE DAYS
ON MARKET Q4 2025



HOUSE



UNIT

MEDIAN PRICE
Q4 2025



\$650



\$540

RENTALS

AVERAGE DAYS
ON MARKET Q4 2025



HOUSE

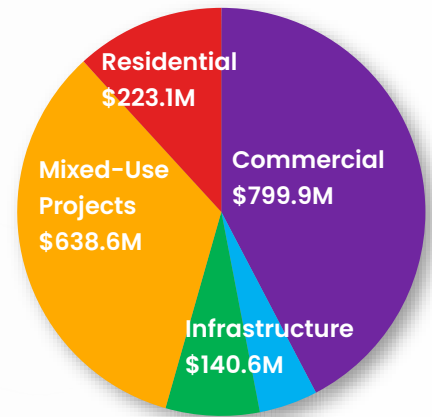


UNIT



FUTURE DEVELOPMENTS

Hunter Valley will see approximately **\$1.9B of new developments due to commence construction in 2026.**



There are several residential projects bringing new stock to Hunter Valley. These include:

- Cessnock Road Residential Subdivision (322 Land Lots)
- Robert Road & Springfield Drive Units (31 Units)
- 124 New England Highway Mixed Use (6 Townhouses / Child Care Centre)
- 30 & 32 Owlpen Lane (4 Dwellings)

Most of the incoming supply in Hunter Valley is residential land lots, which will take time to build (into a new home). There are new units, townhouses, and houses planned; however, compared to Q4 2025 sales of 246 houses, this is not enough. Thus, more pressure will be placed on prices, for all stock types.



104 Units/
Apartments



10
Townhouses



33
Dwellings



1,817 Lots



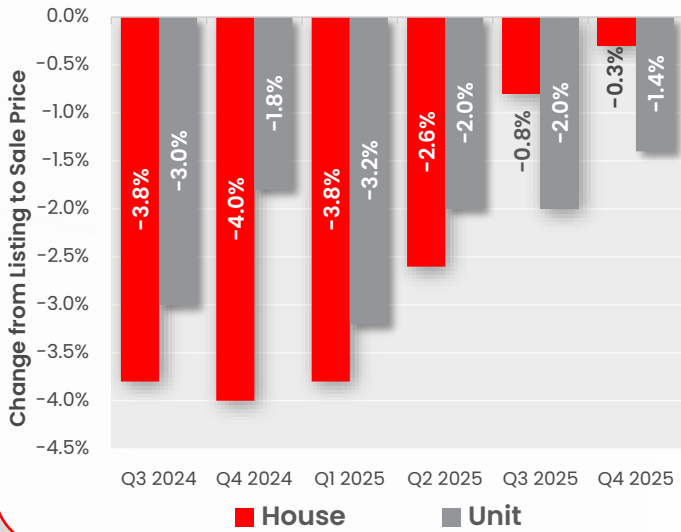
AVERAGE VENDOR DISCOUNT*

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.

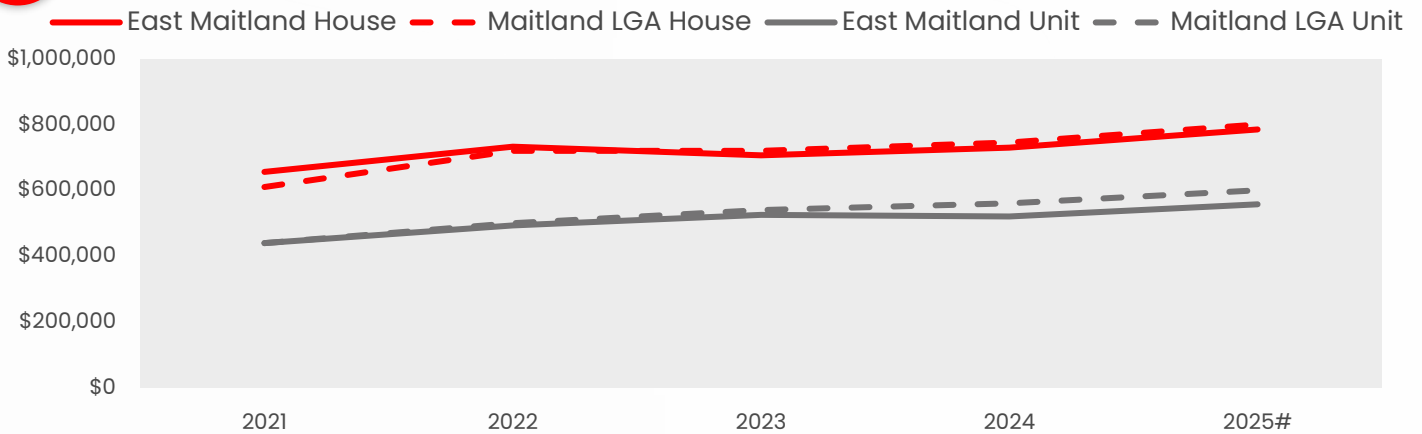
In the past 12 months to Q4 2025 average vendor discount for houses and units have tightened significantly, to smaller discounts of -0.3% and -1.4% respectively. Market conditions in Hunter Valley* still slightly favour house and unit buyers, where owners are willing to accept below the initial listing prices. However, Q4 2025 recorded the tightest discounts in the past 2 years, indicating a definite shift towards a seller's market. Thus, buyers should act fast to secure a discount.

The suburb of East Maitland has historically tracked on par with the Maitland Local Government Area (LGA) for median house and unit prices for the past 5 years. This continued in 2025, with both East Maitland and the Maitland LGA showing a similar price growth trajectory and pace.

Most of the houses sold in Hunter Valley* in 2025 were in the middle price bracket of \$750,000 to \$849,999 (28.3%) and the more affordable price bracket between \$650,000 to \$749,999 (23.1%). In contrast, most of the units sold (34.3%) were in the premium price point of \$650,000 and above. That said, there are opportunities (23.8% of unit sales) in the middle price bracket of \$550,000-\$599,999. This suggests there is an opportunity for all budgets in Hunter Valley*.



MARKET COMPARISON

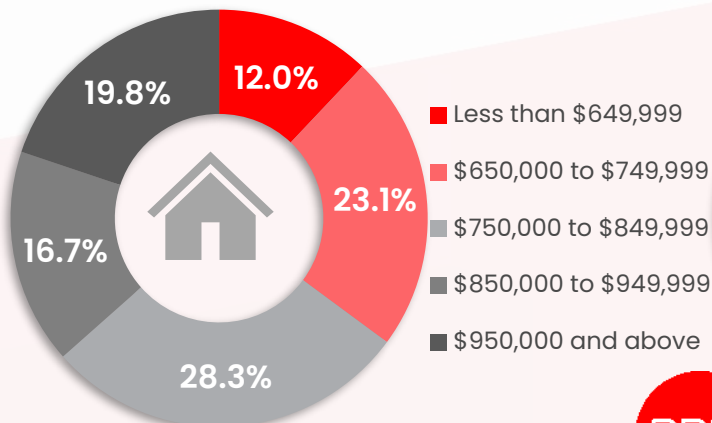


The market comparison graph provides a comparative trend for the median price of houses and unit in the past 5 years. The main LGA was chosen based on their proximity to the main suburb analysed, which is Hunter Valley.

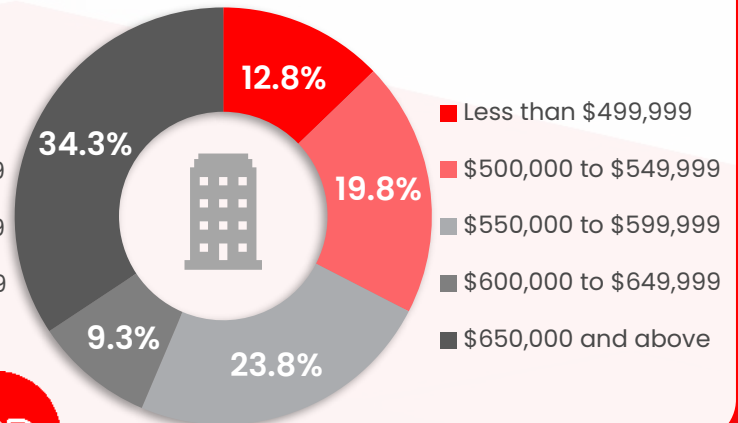


PRICE BREAKDOWN 2025#

HOUSES SOLD



UNITS SOLD





RENTAL GROWTH 2025€

House rental yields in the Hunter Region[‡] was 3.4% in December 2025, higher than the Sydney Metro (2.6%). This was paired with a 4.8% increase in median house rental price in the past 12 months to Q4 2025, at \$650 per week. The number of houses rented increased, by 9.7%, to 124 rentals in Q4 2025. There is a highly demanded rental market in the Hunter Region[‡]. This is beneficial to investors, especially those looking for a more affordable option to Sydney Metro.

2-bedroom houses have provided investors with +10.4% rental growth annually, achieving a median rent of \$530 per week.

The Hunter Region[‡] recorded a vacancy rate of 1.5% in December 2025, which is lower than the Maitland LGA 1.8% and Sydney Metro 1.8% average. Vacancy rates in the Hunter Region[‡] have increased in the past 12 months, due to more investors in the market. However, a 1.5% vacancy rate is well below the Real Estate Institution of Australia's healthy benchmark of 3.0%, therefore quicker occupancy of rental homes in Hunter Region[‡]. This is a conducive environment for investors, even with a higher median houses and unit sales price (thus, entry price) in Q4 2025.

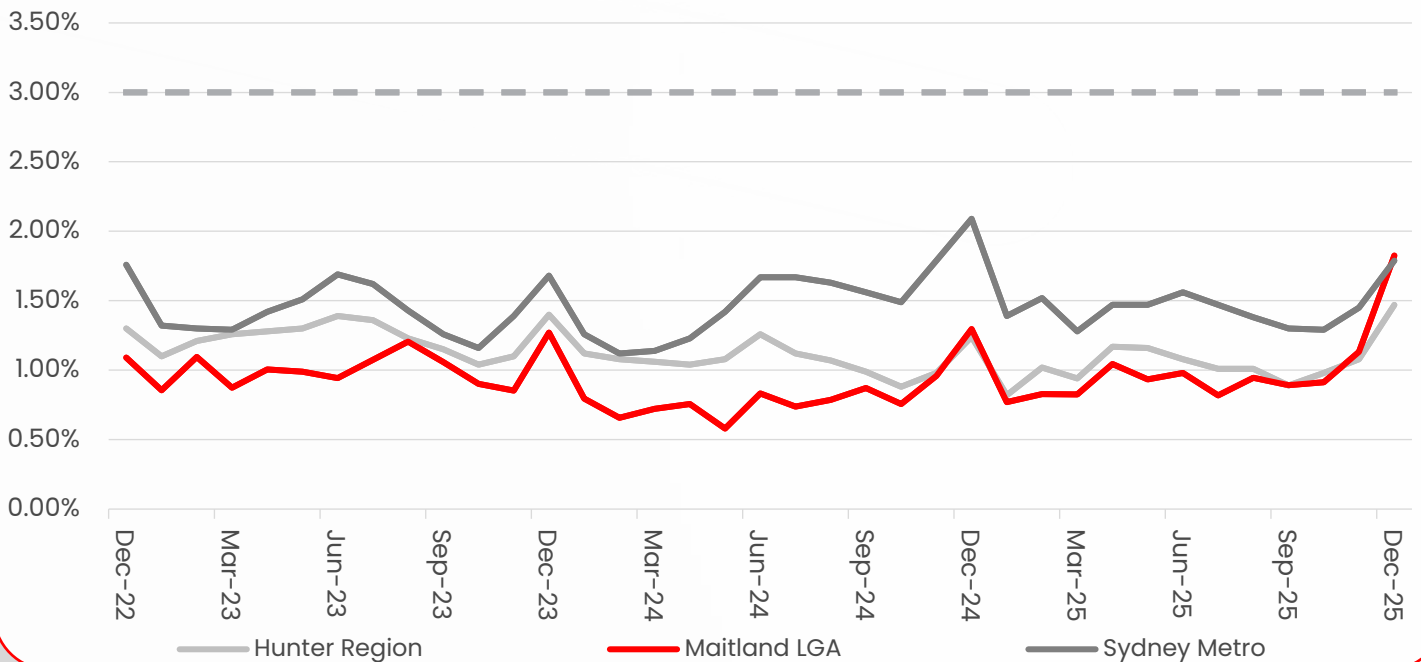
 2 BEDROOMS
+10.4%

 3 BEDROOMS
+3.4%

 4 BEDROOMS
+4.5%



RENTAL VACANCY RATES 2025



RENTAL YIELD 2025§



3.5%

Hunter Region[‡]



3.7%

Maitland LGA



2.7%

Sydney Metro



4.3%

Hunter Region[‡]



5.7%

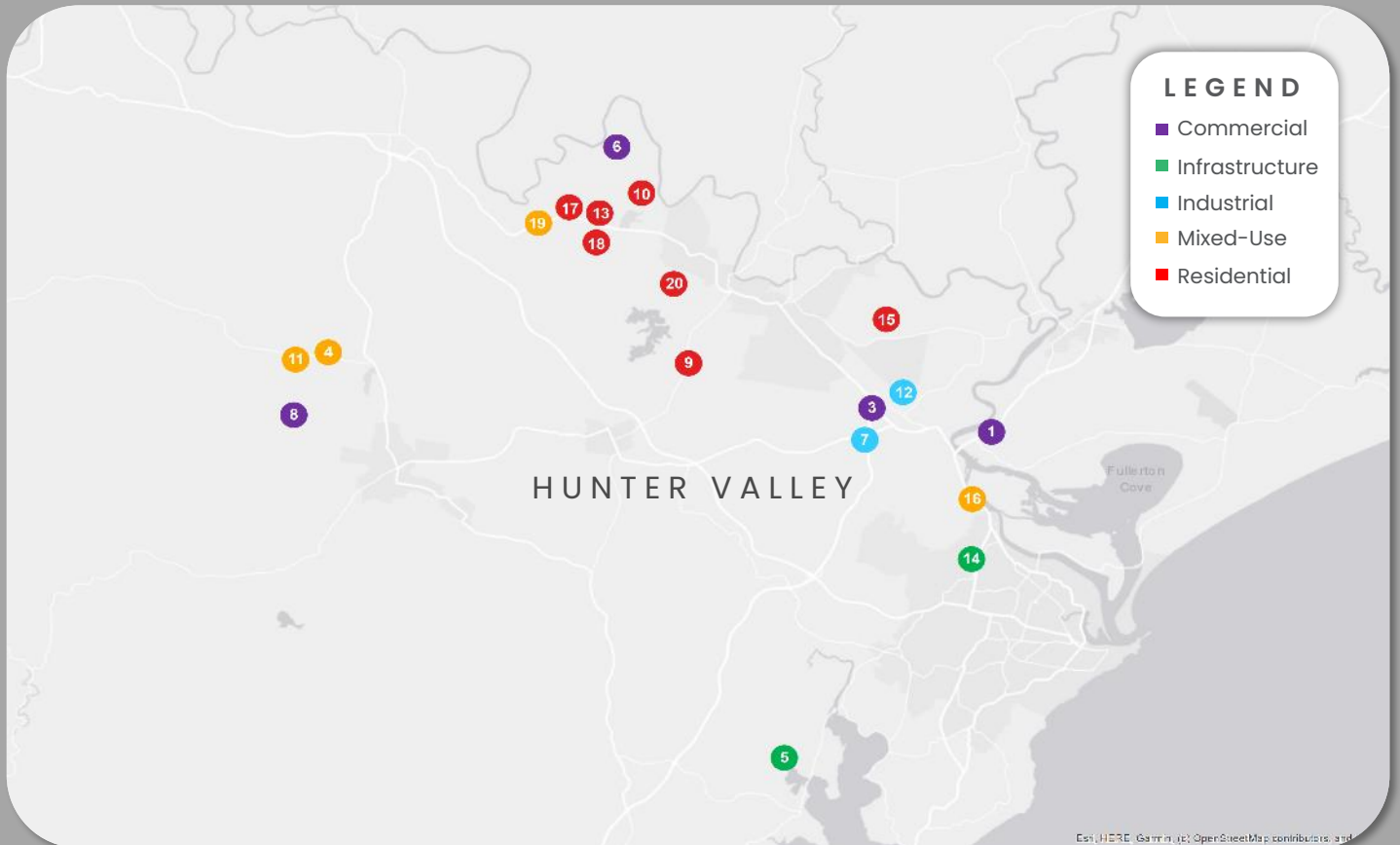
Maitland LGA



4.3%

Sydney Metro

PROJECT DEVELOPMENT MAP 2026 ^A



#	Project [£]	Type	Estimated Value ^µ	Commence Date ^ψ
1	Newcastle Gas Fired Tomago Power Station	Commercial	\$400,000,000	4/06/2026
2	Hunter Central Logistics Estate (Hcle) Stages 1, 1a & 1b (Warehouses/Offices/11 Industrial Subdivision Lots)	Mixed-Use	\$261,550,000	23/02/2026
3	Beresfield Battery Energy Storage System	Commercial	\$203,313,000	23/09/2026
4	Cedar Mill Hunter Valley (Museum/Convention Space/Hotel/Winery/Brewery/Restaurants)	Mixed-Use	\$191,250,708	14/12/2026
5	Fassifern To Hexham Freight Rail Bypass - Lower Hunter Freight Corridor (State Government)	Infrastructure	\$80,000,000	14/07/2026
6	559 Anambah Road Manufactured Home Estate Stages 1 & 2	Commercial	\$46,613,618	11/12/2026
7	198 Lenaghans Drive Industrial Subdivision Stages 2-7 - Hunter Business Park	Industrial	\$32,710,600	10/08/2026
8	509 De Beyers Road Tourist Accommodation Buildings	Commercial	\$29,977,947	17/09/2026
9	457, 463, 501, 507 & 527 Cessnock Road Residential Subdivision (322 Residential Lots)	Residential	\$29,155,192	6/04/2026
10	381 Anambah Road Residential Subdivision Stages 1-4 (173 Lots)	Residential	\$28,893,993	23/10/2026
11	Hunter Valley Pokolbin Gardens Additions (Conference Centre/Function Centre/Nursery/Storage Facility)	Mixed-Use	\$26,664,000	10/06/2026
12	Beresfield Frozen Storage & Distribution Facility	Industrial	\$24,969,512	4/08/2026
13	2 Cantwell Road Residential Subdivision Stages 1-10 (262 Lots)	Residential	\$24,607,818	19/08/2026
14	Richmond Vale Rail Trail (Local Government)	Infrastructure	\$23,100,000	6/02/2026
15	173 Mcfarlanes & 507 Raymond Terrace Roads Residential Subdivision (264 Residential Lots)	Residential	\$21,923,066	20/05/2026
16	5-7 Maitland Road Mixed Use Development (Warehouse/Office/Service Station/Food & Drink Premises)	Mixed-Use	\$21,635,684	4/12/2026
17	20-20a Cantwell Road & New England Highway Residential Subdivision Stages 1-3 (138 Residential Lots)	Residential	\$19,474,178	2/10/2026
18	346 Robert Road & Springfield Drive Units (31 Units)	Residential	\$8,363,384	10/06/2026
19	124 New England Highway Mixed Use Development (6 Townhouses/ Child Care Centre)	Mixed-Use	\$6,562,311	13/11/2026
20	30 & 32 Owlpen Lane Dwellings (4 Dwellings)	Residential	\$1,882,000	25/11/2026

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RESEARCH SERVICES

Our research services span over every suburb, LGA, and state within Australia; captured in a variety of standard and customised products, and include:

- Advisory and consultancy
- Market analysis including profiling and trends
- Primary qualitative and quantitative research
- Demographic and target market analysis
- Geographic information mapping
- Project analysis including product and pricing recommendations
- Rental and investment return analysis

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REFERENCES

* Hunter Valley sales market data and key indicators encapsulates aggregate property market conditions within the suburbs of Aberglasslyn, Ashtonfield, East Maitland, Rutherford and Thornton.

** 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 2025 full year (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.

¥ Hunter Valley rental market data encapsulates aggregate property conditions within the postcode of 2323.

§ Rental yields and vacancy rates 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 suburb of 2320, 2321, 2322 and 2323.

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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