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Tweed Market Update
2nd Half 2026

OVERVIEW

In Q2 2026, Tweed* recorded a median house price of $1,306,250 and median unit price of $900,000. This is an annual (Q2 2025 – Q2 2026) growth of 4.5% for houses and 8.4% for units. Thus, now remains an ideal time for owners to capitalise on their investments. Comparing Q2 2025 and Q2 2026, house sales decreased by -21.1% for houses (to 270 sales in Q2 2026), but unit sales increased by 16.5% (to 304 sales in Q2 2026). This confirms an undersupplied house market and a highly demanded unit market, which has supported price growth even with cash rate hikes in 2026. With limited new supply planned in 2026, buyers must 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

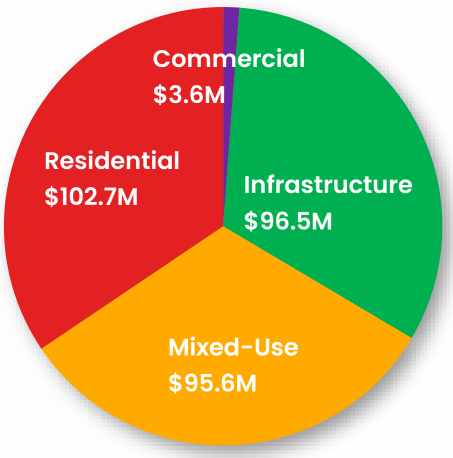
MEDIAN PRICE Q2 2026		AVERAGE DAYS ON MARKET Q2 2026	
House	Unit	HOUSE	UNIT
$1.3M	$900K	65	53

RENTALS

MEDIAN PRICE Q2 2026		AVERAGE DAYS ON MARKET Q2 2026	
House	Unit	HOUSE	UNIT
$1,075	$750	16	23

FUTURE DEVELOPMENTS**

Tweed£ will see approximately **$298.3M of new projects commencing construction in 2026 & 2027**.



A key mixed-use development is 3-7 River Terrace Apartments & Retail Premises ($95.6M), which will construct a 14-story development comprising 72 apartments and 2 ground floor shops.

Key residential projects include:

- Quay Grand (122 Apartments)
- 5 Boundary Lane (11 Apartments)
- 4 Ivory Crescent Units (16 Units)
- 5 Endeavour Parade (15 Units)

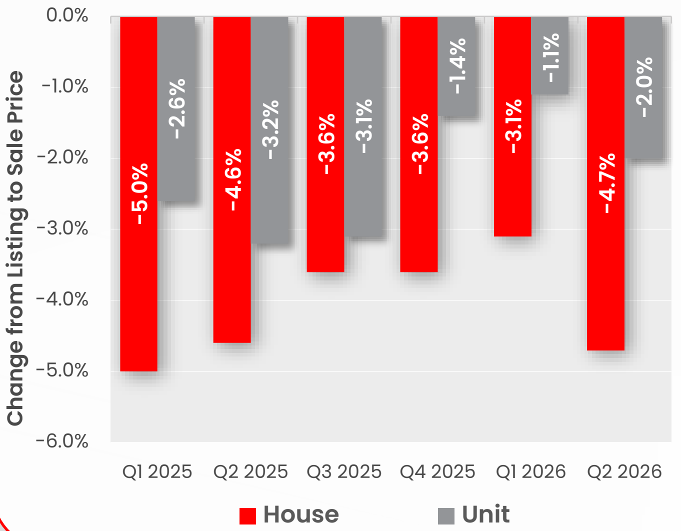
Although there are several residential projects planned, they will only deliver units/apartments. Further, compared to 1,807 unit sales recorded in 2025 this suggests there will not be enough supply in the market.

Furthermore, without any new stand-alone houses in the 2026 pipeline, the existing housing undersupply is likely to worsen. This places more pressure on prices across all property types.

236 Units/ Apartments

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.

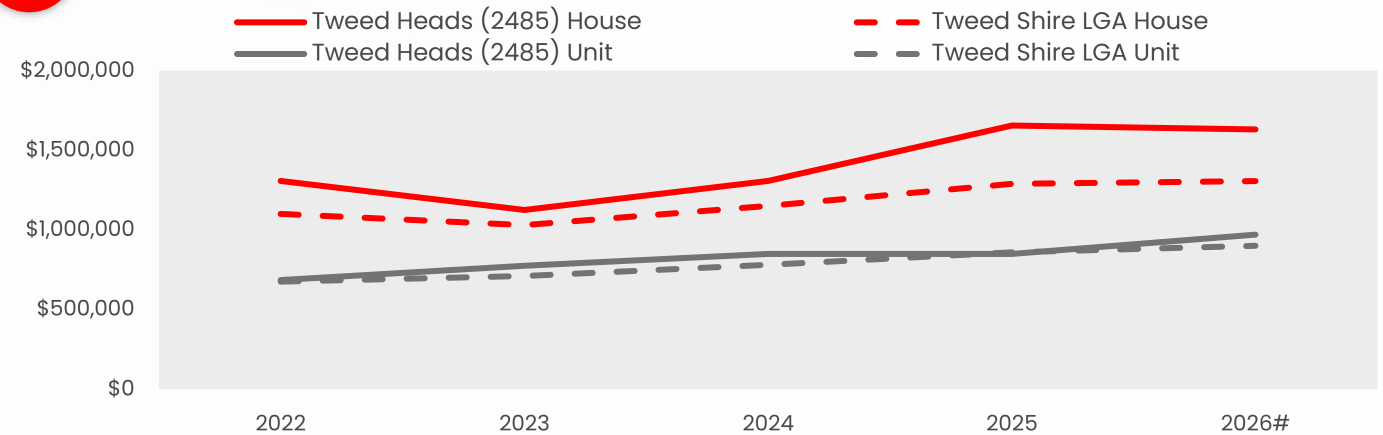


Average vendor discounts between Q2 2025 and Q2 2026 remained on par at -4.7% for houses but have widened to -2.0% for units. Market conditions in Tweed* favour buyers in Q2 2026, with vendors accepting offers below first listed prices. For units, a tighter discount suggest a shift towards a seller's market, and with the unit market continuously undersupplied this suggests that buyers must act fast.

The suburb of Tweed has outperformed the wider Tweed Shire LGA in house prices, while unit prices have remained broadly on par over the past 5 years. This trend continued in 2026#, with median prices in both the suburb and LGA trending in the same direction.

Most of the homes sold in Tweed* in 2026# were in the premium price point of above $1,450,000 for houses (37.3%) and above $1,050,000 for units (31.1%). This benefits owners looking to transact and capitalize on their investment. The most affordable price points also recorded strong activity, with 36.4% of houses sold below $1,149,999 and 25.8% of units sold below $749,999, providing opportunities for first home buyers. Overall, Tweed* continues to offer diverse housing options across a broad range of budgets.

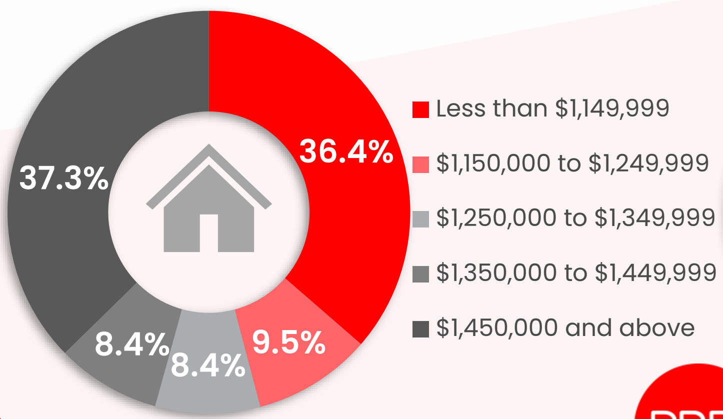
MARKET COMPARISON



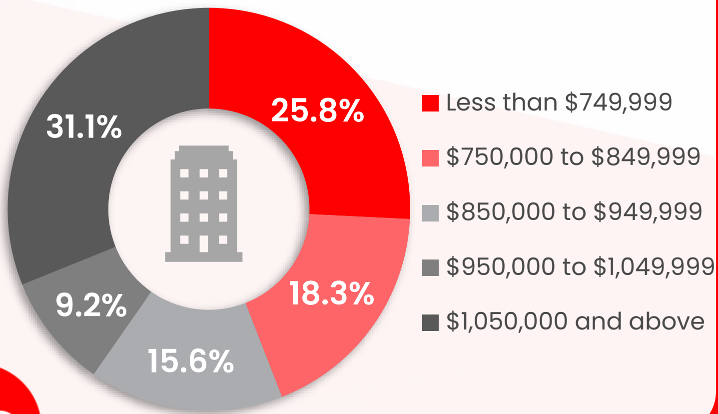
The market comparison graph provides a comparative trend for median price of houses and units over the past 5 years. The main LGA chosen was based on their proximity to the main suburb analysed, which is Tweed.

PRICE BREAKDOWN 2026#

HOUSES SOLD



UNITS SOLD



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RENTAL GROWTH 2026€

House rental yield in Tweed¥ was 4.3% as of June 2026, higher than Tweed Shire (4.0%) and Gold Coast Main (3.9%). This is paired with a 19.4% surge in median house rental price in the past 12 months to Q2 2026, at $1,075 per week, along with a 11.8% growth in the number of houses rented (to 19 houses). This indicates a highly-demanded and competitive house rental market in Tweed¥, one that is in need for more investors to enter the market.

3- bedroom houses have provided investors with +6.8% rental growth annually, achieving a median rent of $908 per week.

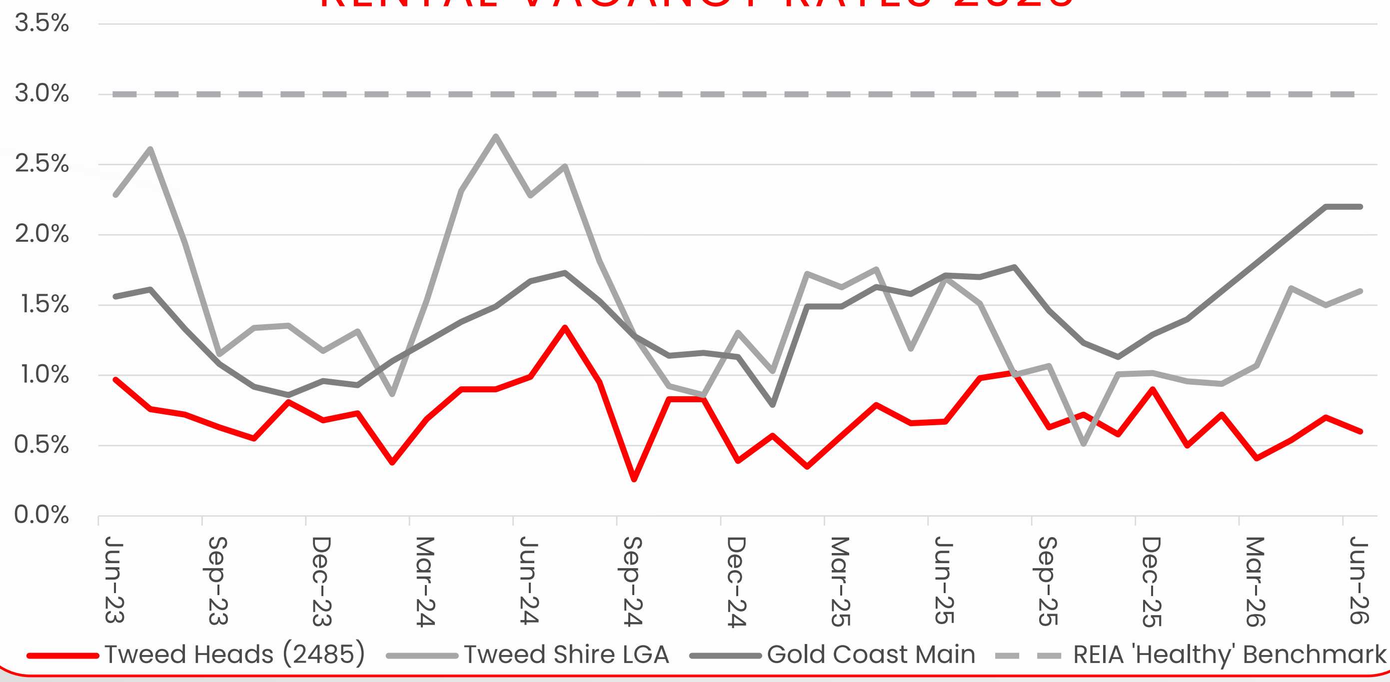
Tweed¥ recorded a vacancy rate of 0.6% in June 2026, lower than Tweed Shire average of 1.6% and Gold Coast Main's average of 2.2%. Vacancy rates have decreased slightly in the past 12 months, indicating a tighter rental market. Further, a 0.6% vacancy rate is significantly below the Real Estate Institute 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 a higher median house and unit sale prices (thus, entry prices) in the past 12 months to Q2 2026.

2 BEDROOMS
+0.0%

3 BEDROOMS
+6.8%

4 BEDROOMS
+2.2%

RENTAL VACANCY RATES 2026



RENTAL YIELD 2026§

4.3%	**4.0%**	**3.9%**	**4.3%**	**6.0%**	**4.5%**
Tweed¥	Tweed Shire LGA	Gold Coast Main	Tweed¥	Tweed Shire LGA	Gold Coast Main

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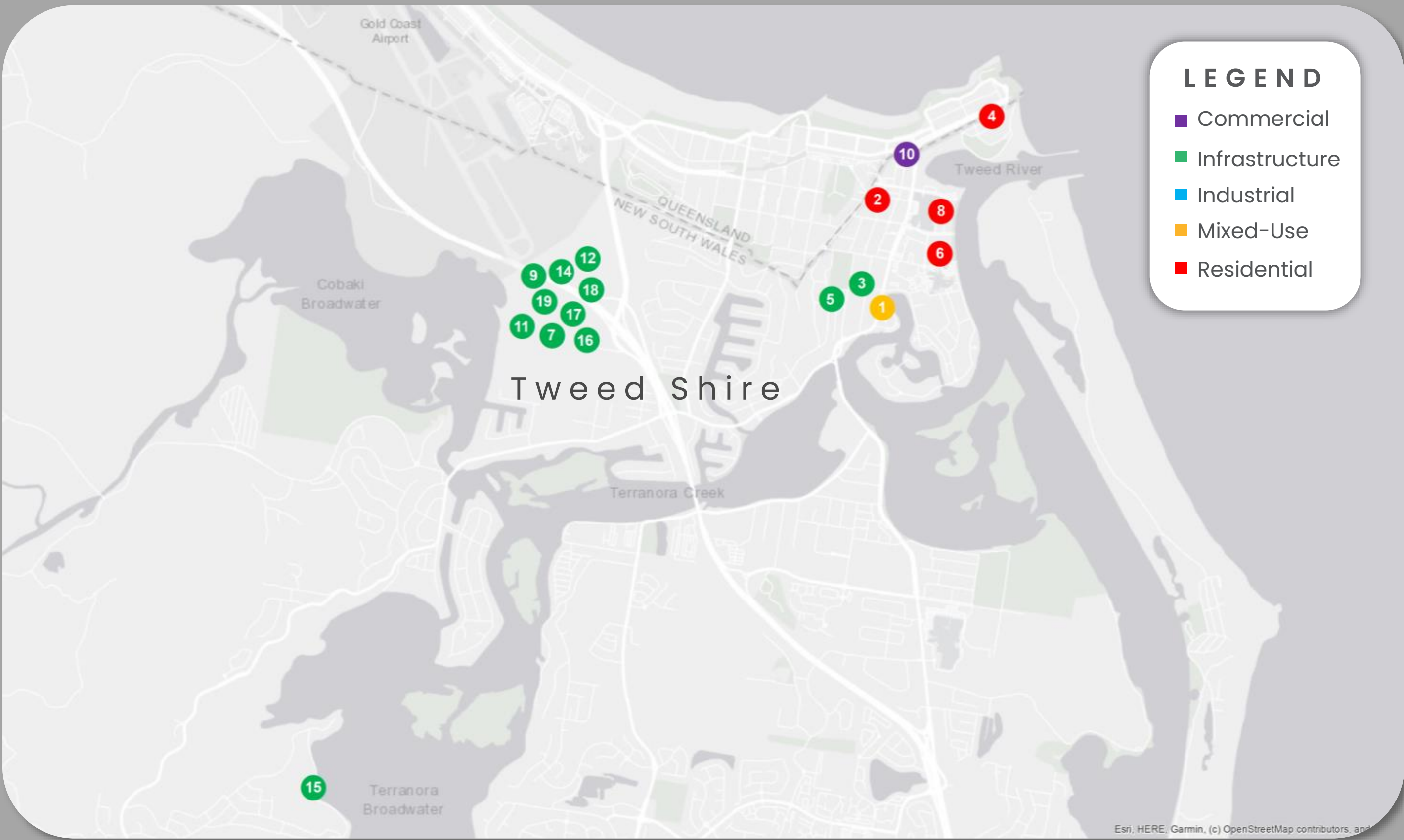
PROJECT DEVELOPMENT MAP 2026-2027₳



#	Project£	Type	Estimated Valueµ	Commence Dateψ
1	3-7 River Terrace Apartments & Retail Premises (72 Apartments + 2 Retail Premises)	Mixed-Use	$95,599,635	1/12/2026
2	Quay Grand Apartments Tweed Heads Stages 1 & 2 (122 Apartments)	Residential	$60,450,121	4/12/2026
3	25-27 Boyd Street Affordable Housing Apartments (80 Apartments) (State Government)	Infrastructure	$51,059,242	5/11/2027
4	5 Boundary Lane Apartments (11 Apartments)	Residential	$25,516,200	13/02/2027
5	Tweed Heads Mid Rise General Housing (80 Units) (State Government)	Infrastructure	$20,000,000	15/12/2026
6	4 Ivory Crescent Units (16 Units)	Residential	$9,917,492	30/12/2026
7	Tweed Shire Council Roadworks Slips Package (State Government)	Infrastructure	$7,000,000	10/11/2026
8	5 Endeavour Parade Units (15 Units)	Residential	$6,851,919	12/03/2027
9	Transport Nsw Tunnel Control Building St Helena Air Conditioning Upgrade (State Government)	Infrastructure	$3,000,000	17/08/2026
10	Twin Towns Resort Tweed Heads Restaurant Alterations & Additions	Commercial	$2,827,358	24/09/2027
11	Land and Housing Corporation Tweed Heads General Housing (Local Government)	Infrastructure	$2,000,000	11/12/2026
12	Tweed Holiday Parks New Cabin Block (Local Government)	Infrastructure	$2,000,000	16/11/2026
13	Kennedy Drive Rock Wall Stabilisation (Local Government) (Not Mapped)	Infrastructure	$1,500,000	14/09/2026
14	Tweed Shire Council Flood Damaged (Local Government)	Infrastructure	$1,000,000	15/06/2026
15	Broadwater Parkway (Local Government)	Infrastructure	$1,000,000	13/07/2026
16	Tweed Shire Council Roadworks Flood Damaged Reconstruction (Local Government)	Infrastructure	$1,000,000	12/10/2026
17	Tweed Shire Council Culvert & Bridge Betterment Program Package 2 (Local Government)	Infrastructure	$1,000,000	12/10/2026
18	Tweed Shire Council Culvert & Bridge Betterment Program Package 1 (Local Government)	Infrastructure	$1,000,000	12/10/2026
19	Tweed Resource Recovery Centre Car Park Shade Structure (Local Government)	Infrastructure	$1,000,000	8/06/2026
20	Tweed Shire Council Handrails & Guide Post Installation - Nrrt Safety Audit (Local Government) (Not Mapped)	Infrastructure	$900,000	5/10/2026

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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.

2026 encapsulates sales transactions for 1st half of 2026 (01/01/2026 – 30/06/2026) 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 2025 (01/04/2025 – 30/06/2025) and Q2 2026 (01/04/2026 – 30/06/2026) 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 2026.

₳ 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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