

SYDNEY
EASTERN SUBURBS
LUXURY PROPERTY
MARKET REPORT
AUTUMN, 2026





Summer 2025/2026 | A Season of Selectivity

Each quarter I review what's happened across the Eastern Suburbs and where I see opportunity. This report is my perspective on where we are and what it means for owners and buyers operating at the top of the market.

Summer reinforced what we have seen for some time now. The best property continues to attract serious competition, while everything else requires patience and precision. The Eastern Suburbs prestige market is not slowing. It is becoming more selective.

Trophy waterfront holdings, significant land parcels and architecturally compelling residences attracted sustained enquiry. Non-mainstream stock remained more sensitive to pricing alignment. The broader Sydney market stabilised

following a period of adjustment, but the luxury tier continued to operate within its own cycle.

Inside, we examine ultra prime activity, suburb level performance and the evolving prestige apartment market, together with a focused spotlight on Woollahra and the factors shaping its next chapter.

In tightly held markets, timing, presentation and strategic negotiation remain critical. For owners and buyers alike, understanding the nuance of this segment has never been more important.

Brad Pillinger
Director | Pillinger

Record Sale Achievements

Highest Priced Sale NSW 2025
Highest Priced Sale Australia 2022, 2023, 2024
Greatest Australian Home Sale Price of all time

Current Suburb Price Records

Rose Bay
Bondi
Tamarama
Bronte
Woollahra (unrenovated)

Contact us for a confidential discussion.

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Sydney Housing Values

(as of April 1 2026)¹

Month Growth

-0.1%

Quarter Growth

-0.2%

Annual Growth

4.8%

Sydney continues to outperform broader national conditions, supported by constrained supply and sustained buyer confidence.

Where the Market Stands

Broader housing conditions have moved into a more balanced phase following a period of sustained growth.

Sydney's median dwelling value now sits at approximately \$1,295,387¹, with values easing marginally over the quarter. While price growth has moderated, this reflects improved supply levels and more measured buyer behaviour rather than any structural decline.

Buyers are increasingly deliberate, with greater choice reducing urgency at the negotiation stage. At the

same time, many established owners continue to hold, maintaining overall supply constraints across tightly held locations.

Within this environment, the Eastern Suburbs prestige market continues to operate on its own trajectory. Demand remains concentrated around quality, scale and position, with competition strongest when these elements align.

At the upper end, the market is not driven by momentum alone. It is also driven by confidence in the asset

At the highest level, buyers are not driven by timing alone. They are driven by confidence in the asset itself. When quality, positioning and presentation align, competition remains exceptionally strong regardless of broader conditions. Success in this market comes down to preparation, discretion and strategic negotiation.

Brad Pillinger

The Prestige Tier

At the upper end, the market does not identically move in line with with broader conditions.

While overall activity has become more measured, performance across the Eastern Suburbs remains highly selective. Suburb-level results reinforce this. Clovelly recorded house price growth of over 30% across the past 12 months, while Bellevue Hill and Edgecliff delivered strong gains. In the apartment market, Bronte and Dover Heights saw notable uplift, driven by demand for position, outlook and quality of product.

This is not uniform growth. It is concentrated performance.

In this segment, buyers are fewer, but more decisive. When the right property is presented correctly, competition remains strong. When it is not, patience is required.

At this level, price is not driven by volume. It is shaped by scarcity, positioning and access.

Many transactions continue to occur outside the public domain, introduced through established relationships. Others require a carefully managed public campaign to create the right level of exposure without overexposure.

The difference is not the method itself, but knowing which approach to take and when.

In a more balanced market, this becomes even more important.





Suburb Spotlight Woollahra

Long regarded as one of Sydney's most tightly held addresses, Woollahra continues to balance heritage character with careful evolution. Defined by Victorian terraces, established streetscapes and proximity to both harbour and coastline, the suburb has traditionally resisted large scale change.

That position is now shifting as state infrastructure planning begins to reshape long term connectivity. The New South Wales Government has confirmed plans to complete the long proposed Woollahra train station between Edgecliff and Bondi Junction on the Eastern Suburbs rail line. Once operational, the station is expected to materially improve CBD access and reinforce demand for village based living within close reach of the city.^{2,3}













Performance over the past twelve months reflects this position. House values increased by 6.5% to March 2026, supported by limited turnover and sustained demand for well-located period homes. The highest disclosed residential sale reached \$13,800,000, reinforcing the suburb's standing within the prestige market. Apartment values eased by 2.2% over the same period, however premium units continued to transact at the upper end of the market, with prices reaching up to \$4.5m⁴.















While planning discussions around transport oriented development remain ongoing, any future change is expected to be guided by established heritage protections and strong community oversight. For existing owners, scarcity continues to underpin value. For buyers, Woollahra offers a rare alignment of character, connectivity and long term positioning within the Eastern Suburbs.















Sources: ² NSW Department of Planning and Environment
Transport Oriented Development Program and Edgecliff Woollahra Precinct
<https://www.planning.nsw.gov.au/policy-and-legislation/housing/transport-oriented-development-program>
³ Transport for NSW Woollahra Station Activation Project
<https://www.transport.nsw.gov.au/projects/current-projects/woollahra-station>
⁴ REA Group Market Trends and Suburb Performance Data Woollahra NSW
<https://www.realestate.com.au/neighbourhoods/woollahra-2025-nsw>

Suburb by Suburb Sales Statistics

Quarter 1 2026

Bellevue Hill		Median Price ¹	Top Price ²	12 Month Growth ¹	Prestige Home Sales ²
	Houses	\$11,825,000	\$25,000,000	+21.9%	4 Over \$10M
	Apartments	\$1,572,388	\$8,200,000	-12.0%	2 Over \$5M
Bondi		Median Price ¹	Top Price ²	12 Month Growth ¹	Prestige Home Sales ²
	Houses	\$4,410,000	\$8,725,000	+9.8%	0 Over \$10M
	Apartments	\$1,452,000	\$3,510,000	+5.5%	0 Over \$5M
Bondi Beach		Median Price ¹	Top Price ²	12 Month Growth ¹	Prestige Home Sales ²
	Houses	\$4,825,000	\$8,850,000	+12.2%	0 Over \$10M
	Apartments	\$1,555,000	\$10,800,000	+6.1%	1 Over \$5M
Bronte		Median Price ¹	Top Price ²	12 Month Growth ¹	Prestige Home Sales ²
	Houses	\$7,687,500	\$7,900,000	-6.0%	0 Over \$10M
	Apartments	\$1,865,000	\$8,250,000	+26.4%	1 Over \$5M
Centennial Park		Median Price ¹	Top Price ²	12 Month Growth ¹	Prestige Home Sales ²
	Houses	\$11,000,000	Not Available	+125%	n/a Over \$10M
	Apartments	\$857,500	\$2,250,000	-9.7%	0 Over \$5M
Clovelly		Median Price ¹	Top Price ²	12 Month Growth ¹	Prestige Home Sales ²
	Houses	\$6,250,000	\$10,425,000	+34.3%	2 Over \$10M
	Apartments	\$1,800,000	\$2,990,000	+4.4%	0 Over \$5M

Coogee		Median Price ¹	Top Price ²	12 Month Growth ¹	Prestige Home Sales ²
	Houses	\$4,705,000	\$15,000,000	+7.4%	2 Over \$10M
	Apartments	\$1,590,000	\$3,561,000	+4.6%	0 Over \$5M
Darling Point		Median Price ¹	Top Price ²	12 Month Growth ¹	Prestige Home Sales ²
	Houses	\$7,500,000	\$9,300,000	+50.0%	0 Over \$10M
	Apartments	\$2,425,000	\$12,700,000	+3.2%	2 Over \$5M
Dover Heights		Median Price ¹	Top Price ²	12 Month Growth ¹	Prestige Home Sales ²
	Houses	\$7,500,000	\$17,000,000	+17.2%	2 Over \$10M
	Apartments	\$1,820,000	\$6,050,000	+27.7%	2 Over \$5M
Double Bay		Median Price ¹	Top Price ²	12 Month Growth ¹	Prestige Home Sales ²
	Houses	\$8,075,000	\$11,350,000	+13.3%	1 Over \$10M
	Apartments	\$2,040,000	\$20,000,000	+11.2%	5 Over \$5M
Edgecliff		Median Price ¹	Top Price ²	12 Month Growth ¹	Prestige Home Sales ²
	Houses	\$3,900,000	\$3,900,000	+26.5%	0 Over \$10M
	Apartments	\$1,440,000	\$3,650,000	+1.1%	0 Over \$5M
Paddington		Median Price ¹	Top Price ²	12 Month Growth ¹	Prestige Home Sales ²
	Houses	\$2,150,000	\$8,750,000	+7.5%	0 Over \$10M
	Apartments	\$915,000	\$5,030,000	+13.6%	1 Over \$5M
Point Piper		Median Price ¹	Top Price ²	12 Month Growth ¹	Prestige Home Sales ²
	Houses	\$25,000,000	Not Available	+47.1%	0 Over \$10M
	Apartments	\$3,500,000	\$22,000,000	-13.0%	3 Over \$5M

Queens Park		Median Price ¹	Top Price ²	12 Month Growth ¹	Prestige Home Sales ²
	Houses	\$3,950,000	\$14,500,000	-15.6%	1 Over \$10M
	Apartments	\$1,410,000	\$1,600,000	+5.4%	0 Over \$5M
Randwick		Median Price ¹	Top Price ²	12 Month Growth ¹	Prestige Home Sales ²
	Houses	\$3,635,000	\$8,500,000	+6.9%	0 Over \$10M
	Apartments	\$1,290,000	\$3,510,000	+5.5%	0 Over \$5M
Rose Bay		Median Price ¹	Top Price ²	12 Month Growth ¹	Prestige Home Sales ²
	Houses	\$5,200,000	\$10,800,000	-16.1%	2 Over \$10M
	Apartments	\$1,850,000	\$9,200,000	-1.1%	2 Over \$5M
Tamarama		Median Price ¹	Top Price ²	12 Month Growth ¹	Prestige Home Sales ²
	Houses	\$7,625,000	\$10,000,000	-14.1%	1 Over \$10M
	Apartments	\$2,200,000	\$3,150,000	-4.6%	0 Over \$5M
Vaucluse		Median Price ¹	Top Price ²	12 Month Growth ¹	Prestige Home Sales ²
	Houses	\$9,605,000	\$23,000,000	+18.2%	4 Over \$10M
	Apartments	\$1,565,000	\$6,000,000	+5.2%	2 Over \$5M
Watsons Bay		Median Price ¹	Top Price ²	12 Month Growth ¹	Prestige Home Sales ²
	Houses	\$14,100,000	\$8,350,000	+122.1%	n/a Over \$10M
	Apartments	Not Available	\$2,020,000	Not Available	n/a Over \$5M
Woollahra		Median Price ¹	Top Price ²	12 Month Growth ¹	Prestige Home Sales ²
	Houses	\$4,900,000	\$13,800,000	+6.5%	1 Over \$10M
	Apartments	\$1,570,000	\$4,500,000	-2.2%	0 Over \$5M



Suburb Statistics

The suburb by suburb statistics shown on previous pages reflects all recorded sales across the Eastern Suburbs and is sourced from REA and Cotality. It is important to note that median price data for Watsons Bay houses and units, and Centennial Park houses, has only recently been published by REA due to previously insufficient transaction volume. As these figures are being reported for the first time, percentage growth indicators in these suburbs may appear elevated and should be interpreted with caution. In tightly held markets with limited annual transactions, a small number of high value sales can materially influence median growth figures.

What Comes Next

Prestige property continues to move to its own rhythm. While broader markets respond to economic cycles, activity at the upper end remains driven by confidence in asset quality rather than timing alone.

Buyers are increasingly deliberate, prioritising lifestyle certainty, walkability and architectural integrity. Rightsizing and intergenerational planning are shaping movement across both houses and apartments, often within the same communities.

Sydney's Eastern Suburbs remain firmly positioned within a global landscape where stability and scarcity carry growing importance. Internationally connected buyers continue to recognise the enduring value of tightly held coastal markets. Preparation and discretion are increasingly defining successful outcomes. In markets built on rarity, exceptional property rarely waits for perfect conditions.

In this market, informed perspective matters. For a considered conversation about your next move, connect with Brad Pillinger.



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off-market
opportunities**

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ARTIST IMPRESSION

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VAUCLUSE 13 Queens Avenue
Exclusive Harbourside Sanctuary with 30m Frontage & Iconic Sydney Views



ARTIST IMPRESSION



ARTIST IMPRESSION

The pinnacle of exclusivity, this sleek, contemporary home captures uninterrupted, panoramic views of Sydney. Positioned at the end of an exclusive harbourside cul-de-sac, it boasts approx. 30 metres of elevated frontage, elegantly bordered by sandstone, water, and air, evoking a striking connection between industrial-style design and natural elements.

With DA approved plans designed by Brian Meyerson MHNDU for imbecably designed expanded living, dining, and master suite, this is a rare opportunity in one of Sydney's most sought-after addresses.

5 BED | 4 BATH | 4 CAR | POOL

FOR SALE

Expressions of Interest

INSPECT

As advertised or by appointment

CONTACT

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BELLEVUE HILL 60 Victoria Road
Designer Masterpiece in Sydney's Premier Locale



Nestled within one of Sydney's most coveted addresses, this architectural residence delivers grand-scale living and entertaining across three inspired levels. Set on 920sqm of prime land, the home seamlessly blends timeless design, cutting-edge technology, and luxurious amenity to create an unparalleled lifestyle experience.

8 BED | 7 BATH | 4 CAR | POOL

FOR SALE
Expressions of Interest

INSPECT
By appointment

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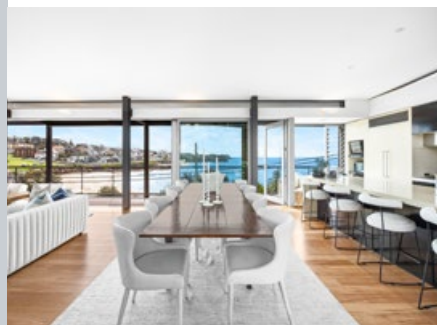
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BRONTE 499 Bronte Road
Unique 47m Bronte Beach Frontage



Snug in the landscape, this sun-filled beach house by Corben Architects has been designed to integrate with the natural environment and sculpted to afford unobstructed north-easterly views from almost every room. One of the closest freestanding homes to the sand, yet remarkably private, the streamlined home's linear footprint and wraparound terrace maximise the connection with the vista, with walls of glass and a cantilevered balcony on the northern wing.

A robust palette of sandstone, steel, and timber is informed by its coastal setting, while interiors capture the essence of barefoot beachside luxury with multiple living spaces, a heated saltwater pool, and dual street frontage with rare triple parking and a double garage accessed via Pacific Street. The five-bedroom home features a master retreat with a private native garden, a lower-level children's wing, and an alfresco entertainer's pavilion with an outdoor bar overlooking the sparkling infinity-edge pool.

5 BED | 4 BATH | 3 CAR | POOL

FOR SALE

Expressions of Interest

INSPECT

As advertised or by appointment

CONTACT

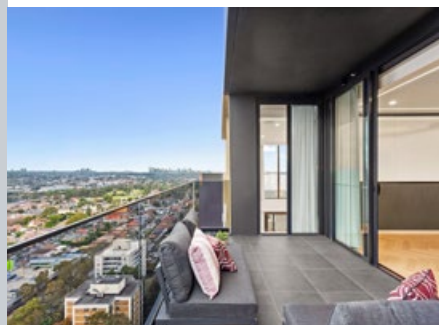
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BURWOOD The Penthouse, 2201/23 George Street
Exquisite Penthouse Oasis with Breathtaking Views



Setting a new benchmark for designer luxury, this world-class 'La Luna' penthouse features multiple balconies, terraces and sweeping city skyline views.

Crafted to the highest specifications with floor-to-ceiling glass and soaring ceilings, the dual level layout presents a gourmet marble kitchen, four bedrooms plus three secure car spaces. It's one of the most impressive penthouses in the Inner West, steps from Burwood's vibrant dining, shops and transport.

4 BED | 3 BATH | 3 CAR

AUCTION

Tuesday 21st April 2026

INSPECT

As advertised or by appointment

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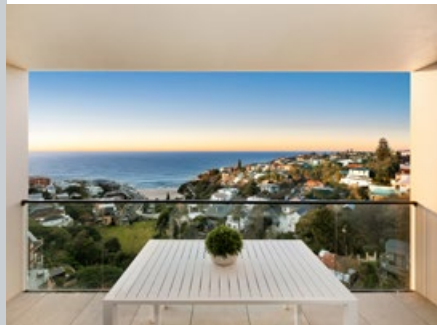
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TAMARAMA 64/20 Illawong Avenue
High-end 70sqm sixth floor apartment overlooking Tamarama Beach



A sophisticated oasis of calm and tranquility in 'Skye Tamarama', one of Sydney's most celebrated beachside communities. Offering an exclusively rare, beach lifestyle, this upper level luxury designer apartment is exuding a warm, calm palate in this architecturally re-designed building.

Freshly renovated with unobstructed views across the horizon and Tamarama Beach. Hear the lull of the ocean, minutes to Bondi to Bronte coastal walk, surrounded by the best of Sydney's Eastern Suburbs cafes and restaurants.

1 BED | 1 BATH | 1 CAR

FOR SALE

Expressions of Interest

INSPECT

As advertised or by appointment

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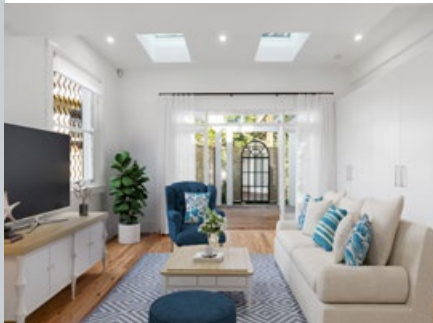
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BELLEVUE HILL 97 Beresford Road
Grand old dame lovingly revived, set amid established private gardens



Privately secluded from the street behind landscaped gardens, this expansive two-storey character home has been tastefully restored and revived for contemporary living. Set on a 7sqm corner parcel of land with two street frontage, its vast, versatile floorplan encompasses an abundance of accommodation, making it the perfect address for large families.

Capturing sweeping northerly district views from its elevated vantage point, this light-filled home retains immense classic appeal, with polished floorboards, soaring ceilings and sandstone accents. It enjoys a serene blue-ribbon address just footsteps to Thornton Park and a brief stroll to charming Plumer Road village shops and the Rose Bay waterfront.

5 BED | 4 BATH | 5 CAR

FOR SALE

Off-market opportunity

INSPECT

By appointment

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ROSE BAY 'BAYVIEW' 19 Bayview Hill Road
Grand residence on a landmark harbour estate with breathtaking views



SOLD

PRICE UNDISCLOSED

SOLD BY
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brad@pillinger.com



P
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POINT PIPER 3A Buckhurst Avenue
World-class Seven Shillings beachfront entertainer



SOLD

PRICE UNDISCLOSED

SOLD BY
Brad Pillinger 0411 545 577
brad@pillinger.com



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SEAFORTH 23 Battle Boulevard
Iconic Middle Harbour waterfront sanctuary with unique potential



SOLD

PRICE UNDISCLOSED

SOLD BY
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brad@pillinger.com



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BRONTE 'Figtree House' 27 Chesterfield Parade
Magnificent award-winning Victorian manor with pool and ocean vistas



SOLD OFF MARKET

PRICE UNDISCLOSED

SOLD BY
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TAMARAMA 9/63 Fletcher Street
'Kalypto' Sub-Penthouse. Elevated Coastal Living



SOLD

PRICE UNDISCLOSED

SOLD BY

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simonexleton@pillinger.com



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DARLING POINT 8 Eltham Avenue
Exceptional Residential Block with Further Value Add Opportunity



SOLD

PRICE UNDISCLOSED

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RANDWICK 84 St Marks Road
Architecturally re-imagined classic home on prized, leafy street



SOLD

PRICE UNDISCLOSED

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CREMORNE 'Ingleneuk' 19 Bennett Street
Grand (c1903) harbour-view estate on 3,214sqm



SOLD

PRICE UNDISCLOSED

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TAMARAMA 11/360 Birrell Street
Overlooking Tamarama beachfront reserve with breathtaking views



SOLD

PRIOR TO AUCTION

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