



property *market* report

APRIL 2025

NORTH COAST, KWAZULU-NATAL (KZN)



rainmaker
MARKETING

in this report

1

Our services

page 3

2

Semigration In
South Africa (SA)

page 4

3

South Africa's
holiday movements

page 5

4

Building plans
activity

page 6

5

Introduction to
the North Coast,
KZN

page 7

6

Unpacking
these key
areas

page 10

7

Market stock
growth

page 15

8

Sales
performance

page 17

9

Investment
drivers

page 23

10

Key highlights

page 25



STEFAN BOTHA
DIRECTOR

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Since our first Property Marketing Report launched in 2023, featuring the North Coast of KwaZulu-Natal, we've been overwhelmed by the positive feedback and its widespread reach. Due to popular demand, we've published our second edition on the North Coast, focusing on the key towns of Ballito, KwaDukuza Non-Urban (NU), and Salt Rock. The report offers up-to-date data and valuable insights into one of South Africa's most dynamic regions, which has experienced tremendous growth in development and semigration over the past year. We are fortunate to have played a role in the placemaking and planning of new estates, precincts, and mixed-use developments across the region. The North Coast continues to offer the quintessential South African family lifestyle—driven by great weather, beautiful beaches, a strong sense of community, and access to quality amenities.

our *services*

Rainmaker Marketing is a turnkey property and lifestyle marketing agency. We ensure every project we take on is perfectly positioned to succeed in both local and global markets. Our expertise covers in-depth market research to 360 degree property marketing campaigns, with tailored solutions that work.



semigration in South Africa (SA)

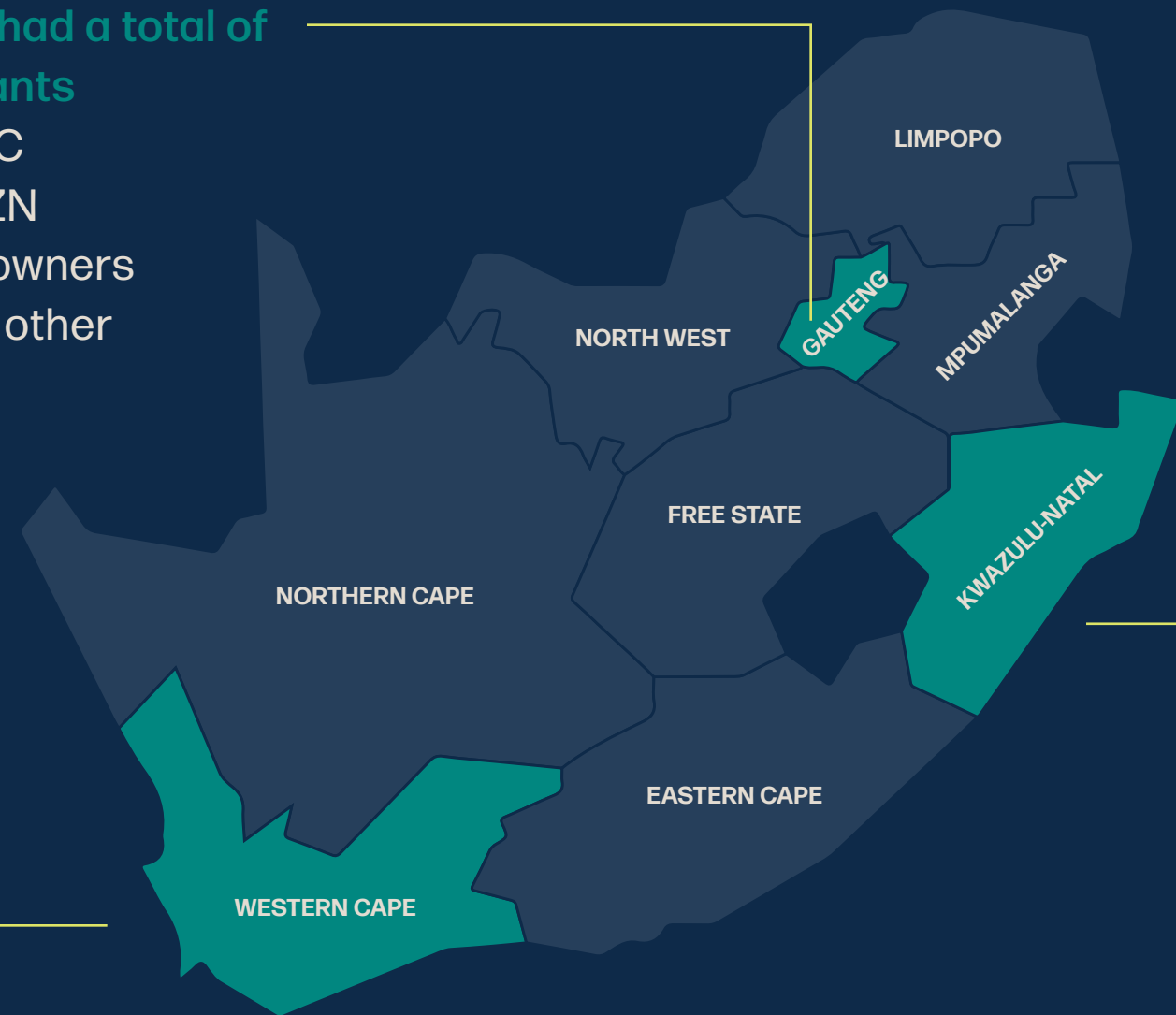


1 IN 4 SELLERS MOVED TO A NEW PROVINCE

In **2024**, **27%** of those who **sold and then bought a new home** chose to do so in a **different province**, increasing from 16% in 2019

Gauteng (GP) had a total of **3,360 semigrants**

- 900 from WC
- 860 from KZN
- 1,600 homeowners from the six other provinces



KwaZulu-Natal (KZN) had a total of **1,300 semigrants**

- 800 from GP
- 200 from WC
- 300 from the other provinces

Western Cape (WC) is the preferred destination with **5,970 semigrants**

- 3,500 movers from GP
- 870 from KZN
- 1,600 from the other provinces



REMAINING IN SAME PROVINCE: 2018/2019 VS. 2023/2024

Most sell-to-buy homeowners stay in the same province, but this trend has weakened in **8 of 9 provinces** since **2018/19**

WC:
87%

(dropping by 2%)

GP:
73%

(dropping by 10%)

KZN:
68%

(dropping by 13%)

Eastern Cape:
71%

(dropping by 9%)

KZN



Those sell-to-buy homeowners, **below 55 Years**, tend to stay in KZN (**67%**) compared to those **older than 55 years** (**64%**)

Of the elder buyers who leave KZN, the **WC (20%)** is the preferred destination

South Africa's *holiday movements*

PROVINCIAL DOMESTIC TOURISM

OCTOBER 2024 - DECEMBER 2024

- **KZN, GP** and **WC** were the **top-performing domestic tourism provinces**
- **KZN** led with the **highest number of overnight trips at 2.6M**, while both GP and the WC followed with 1.5M trips each
- **KZN** recorded the **highest total overnight spend at R12.3Bn** (increased by **92%** from **Q4 2023**), followed by the WC at **R8.5Bn**, while GP reached **R6.6Bn**

KING SHAKA INTERNATIONAL AIRPORT (KSIA)

PASSENGER STATISTICS

FINANCIAL YEAR PERIOD (APRIL - MARCH)	21/22	22/23	23/24	24/25
INTERNATIONAL ARRIVALS	27,233	110,176 (+304%)	132,320 (+20%)	154,939 (+17%)

International arrivals surged by 304% in 2022/23 and continued to grow by 20% in 2023/24 and 17% in 2024/25, showing a sustained rebound in global travel to KZN.

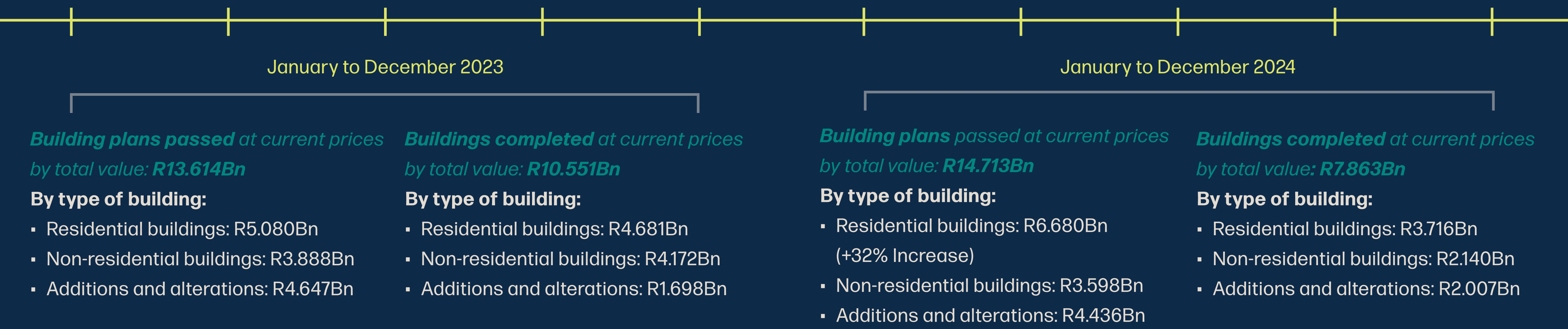
Source: <https://live.southafrica.net/media/307565/sat-dts-q4-2024-performance-report.pdf>



building plans activity

Statistics SA shares insights into the selected building activities of the private sector in KZN, as reported by local government institutions. The total value of building plans passed increased by 8% from January 2024 to December 2024 compared to the same period in 2023. KZN was the largest positive contributor to this growth, positioning it among the top 3 provinces in the country for building plans passed.

In KZN, plans passed for residential building increased by 32% from R5.080Bn (2023) to R6.680Bn (2024), showing an increased level of positive sentiment within the residential sector. However, the ratio of approved to completed has dropped from 77% in 2023 to 53% in 2024, indicating a decreased infrastructure spend influenced by multiple economic, environmental, and political factors historically.



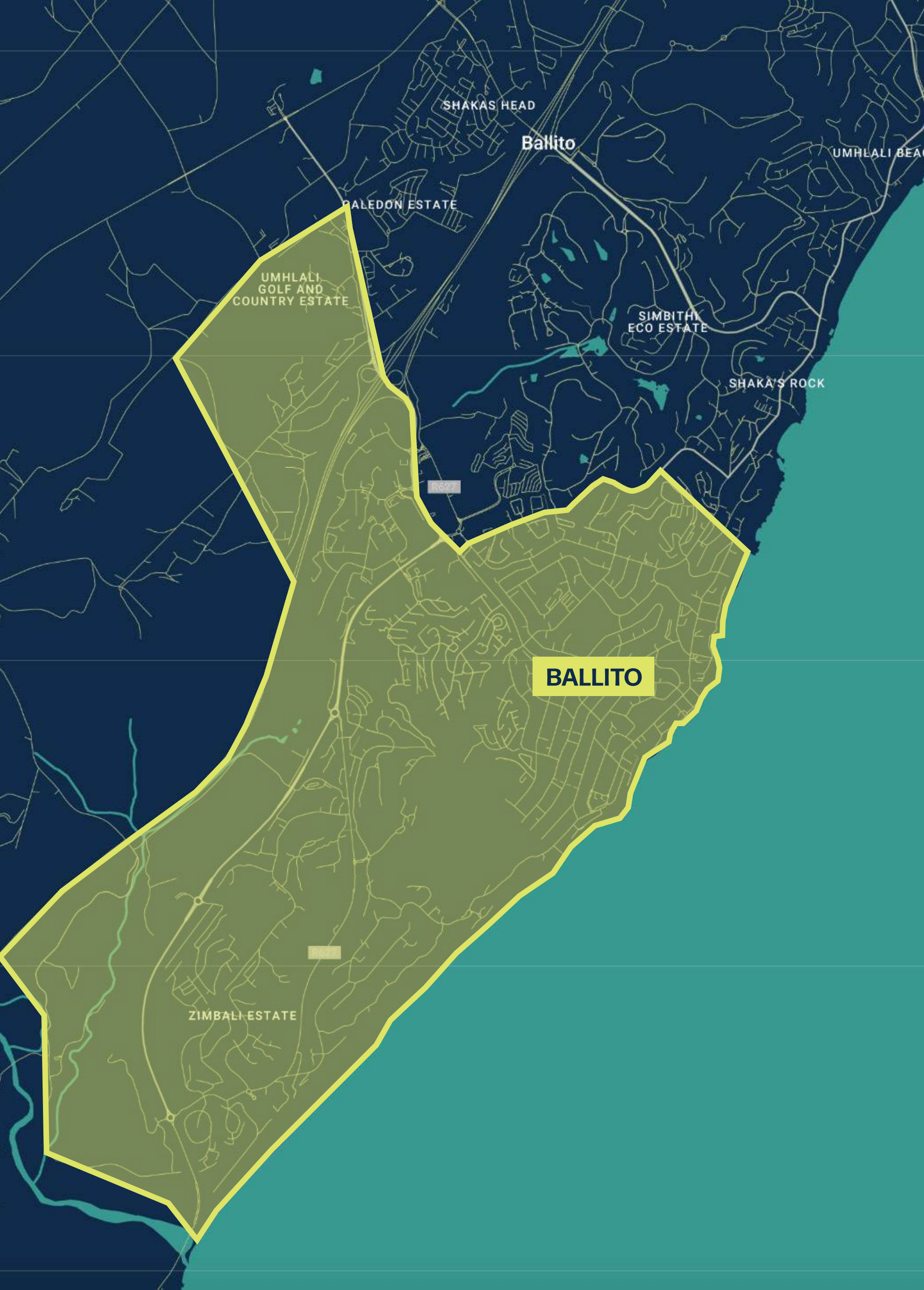
introduction to the *North Coast, KZN*

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Our research gives a holistic picture of the current market in Ballito, KwaDukuza NU and Salt Rock, exploring the burgeoning North Coast. We look at the population growth, property market performance and significant factors driving dynamic change in the market.

Our data tracks recent buyer activity across a range of demographics, highlighting prospective investment areas for growth. In addition to its prime coastal climate driving semigration, key new infrastructure such as the newly commenced Seaton N2 interchange, access to top schools and shopping centres have made it an effortless move for many families and professionals from Durban and across the country.





overview

The North Coast, spanning from Zimbali in the south to the Tugela River in the north, has seen remarkable growth over the past two decades, becoming a thriving hub of residential estates, commercial developments, and retail spaces. This region includes popular towns such as Ballito, KwaDukuza Non-Urban (NU) and Salt Rock, each offering a unique blend of modern amenities and access to natural beauty, including the pristine Blue Flag beaches of the Indian Ocean.

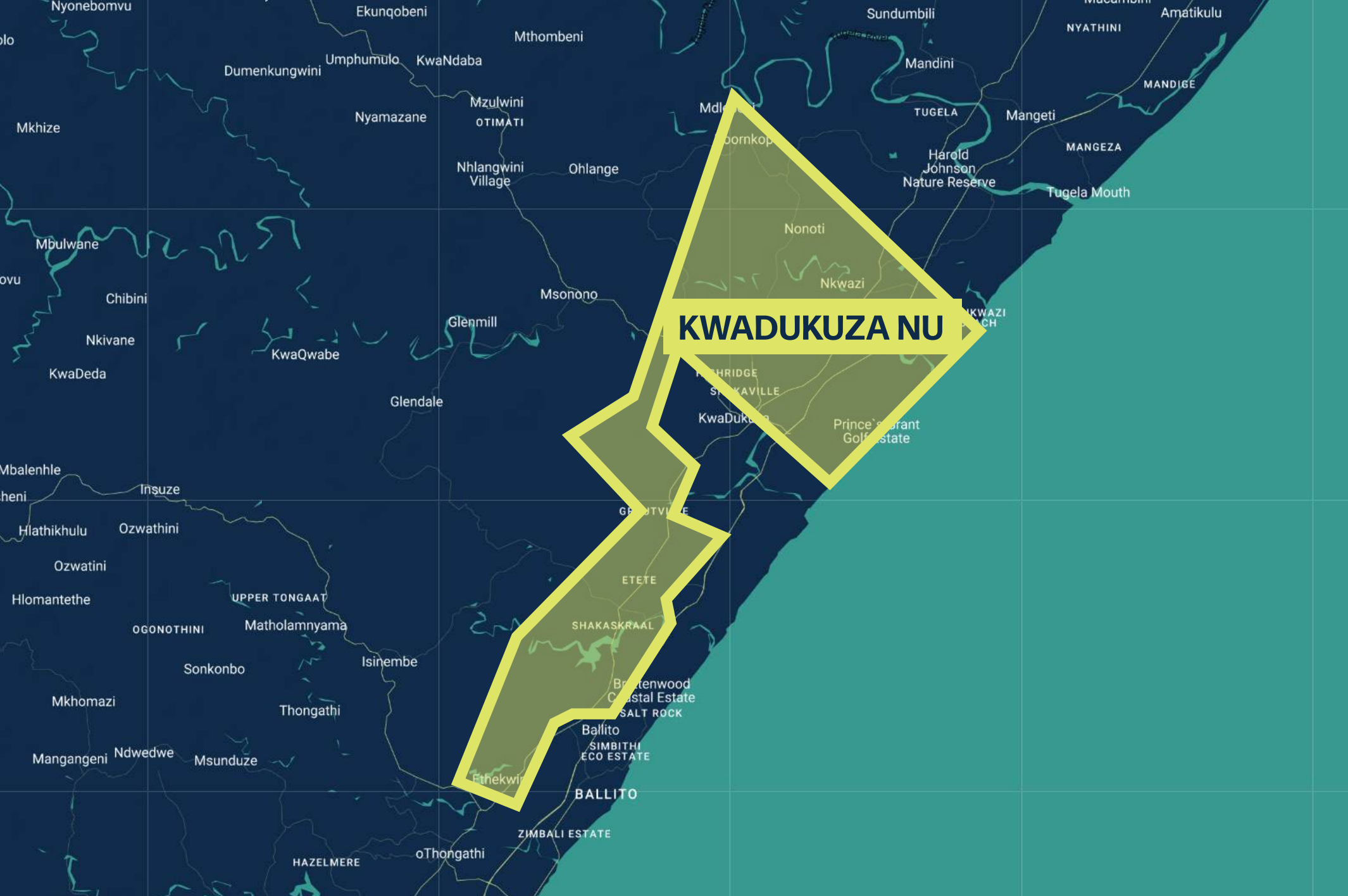
BALLITO

Ballito, with its expansive range of amenities including schools, healthcare facilities, and managed urban spaces, has become a highly desirable place to live, work, and visit.

It comprises a variety of suburbs, including: *Ballito, Ballito Commercial Area, Ballito Hills, Beverley Hills Estate, Compensation, Compensation Beach, Deepdale, Deepdene, Seaward Estates, Umhlali Country Club and Golf Estate, Wakenshaw Estate, Willard Beach, Zimbali, Zimbali Lakes Resort, and Zimbali Office Park.*

Ballito's growth is further supported by the Ballito Urban Improvement Precinct (BUIP), a non-profit company established by local property owners in 2015 as a Special Ratings Area (SRA). The BUIP works in collaboration with the KwaDukuza Municipality (KDM) to enhance public spaces, providing supplementary services to ensure the area remains clean, safe, and well-maintained. Key areas serviced by the BUIP include major public spaces such as the entrances to Ballito, Ballito Business Park, and the boardwalk, contributing to the overall appeal of the region.

Note: Some estates are listed as suburbs due to the fact that the estate has grown to such an extent that it is recognised by the municipality as a suburb in its own right. This usually occurs when the estate covers a large area, with many homes, amenities, its own management system and roadways.



KWADUKUZA NON-URBAN (NU)

To the north, KwaDukuza NU offers a community-focused lifestyle, with easy access to urban conveniences while maintaining the charm of rural living. Its central location ensures residents are close to retail, healthcare, education, and recreational facilities.

The town includes suburbs like *Dendethu, Fairview Estates, Hangush, KwaDukuza Non-Urban, Mdlebeni, Mzwangetwa, Palm Lakes, Tinley Manor Beach and Zinkwazi Beach.*

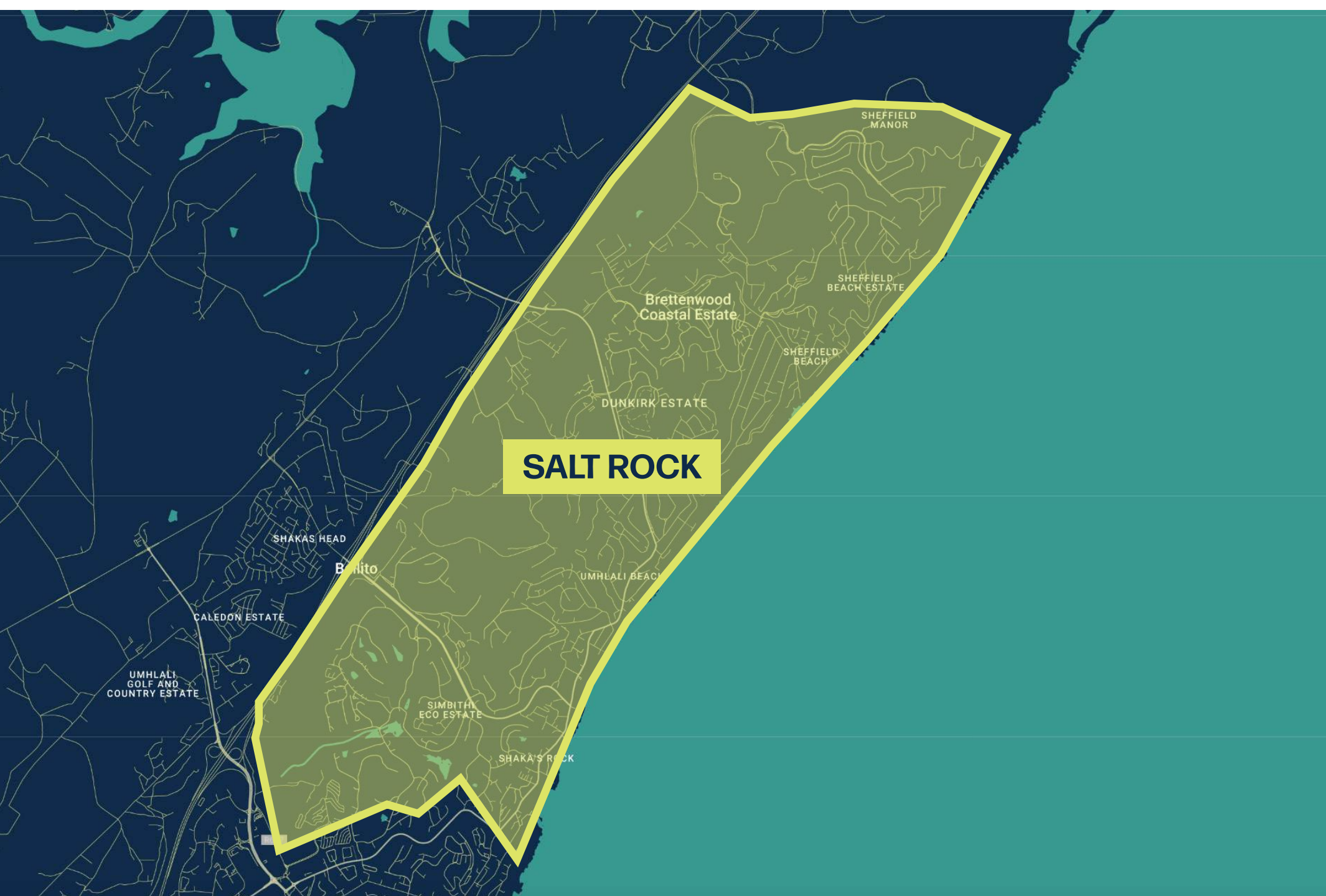
SALT ROCK

Salt Rock is an established coastal town with growing residential opportunities. This thriving community is popular with families, retirees and holidaymakers and has seen growth in property markets and services, with initiatives supporting its continued development.

Suburbs include *Brettenwood, Dunkirk Estate, Mount Richmore Village, Salt Rock, Seaton Delaval, Shakas Rock, Sheffield Beach, Sheffield Manor, Simbithi, Thompsons Bay, Umhlali and Umhlali Beach.*

Together, these regions make up a highly sought-after destination, combining the best of coastal living, vibrant communities, and modern amenities.

Note: KwaDukuza Non-Urban (NU) falls within the KwaDukuza Municipality and is recognised as a town in addition to Salt Rock and Ballito. Non-urban means that the area has large areas of land still to be developed.



unpacking these *key areas*

In the following pages, we provide an analysis on the key towns of Ballito, KwaDukuza NU, and Salt Rock, exploring the trends in population growth, household income, recent buyer activity and the location of buyers who are moving to the North Coast.

VAST DEVELOPMENT SEEN ON THE NORTH COAST

adult *population growth*

Since 2011, the greater North Coast has seen **exponential growth**, with **290* adults** moving into the area each month. This translates to approximately **193** families per month**.

Breakdown:

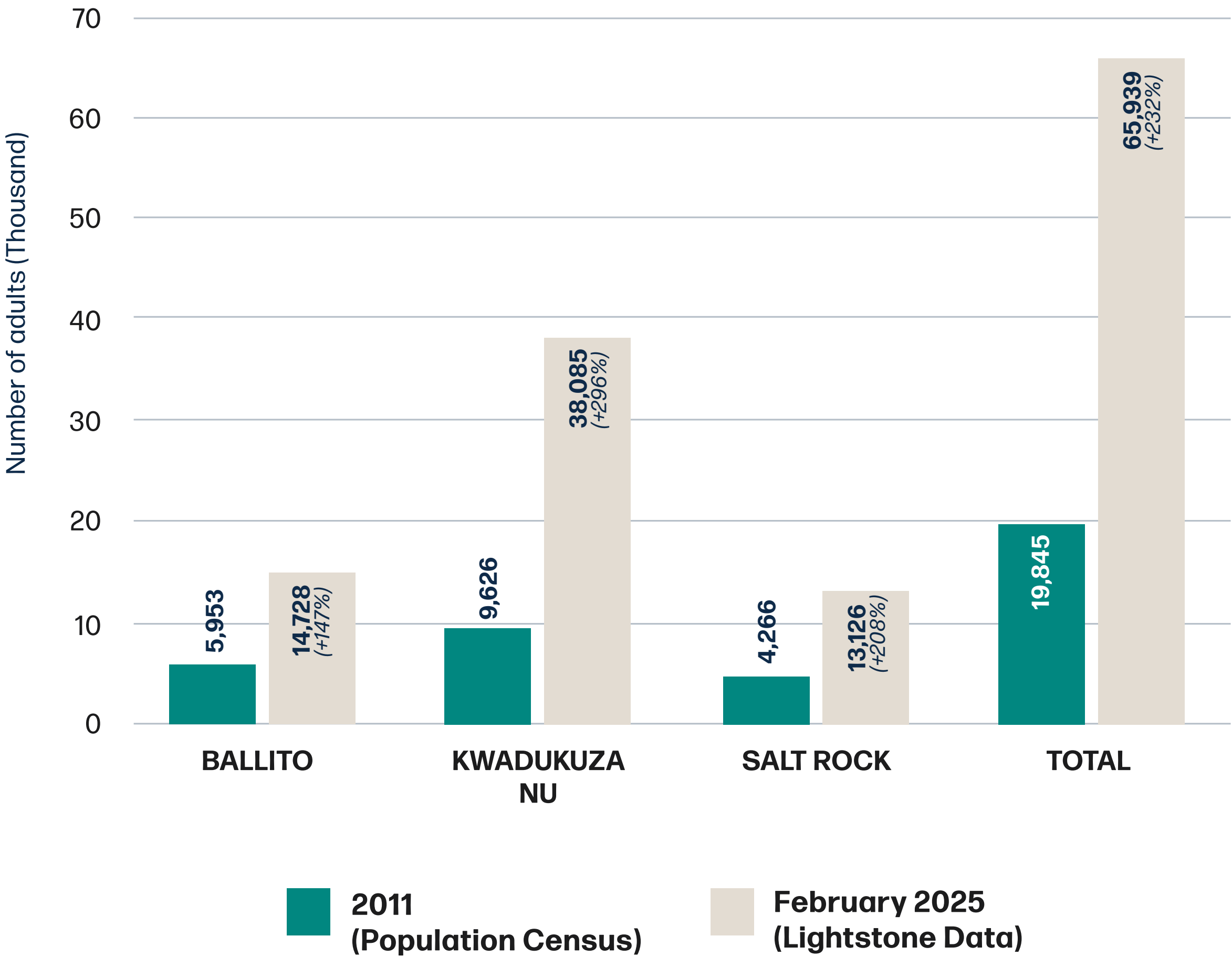
- **Ballito: 55 adults p/m***, which equates to **37 families****
- **KwaDukuza NU: 190 adults p/m***, which equates to **127 families****
- **Salt Rock: 56 adults p/m***, which equates to **37 families****

Note:

**Total increase divided by 159 months (December 2011 - February 2025)*

***Based on a ratio of 1.5*

TOTAL NUMBER OF ADULTS



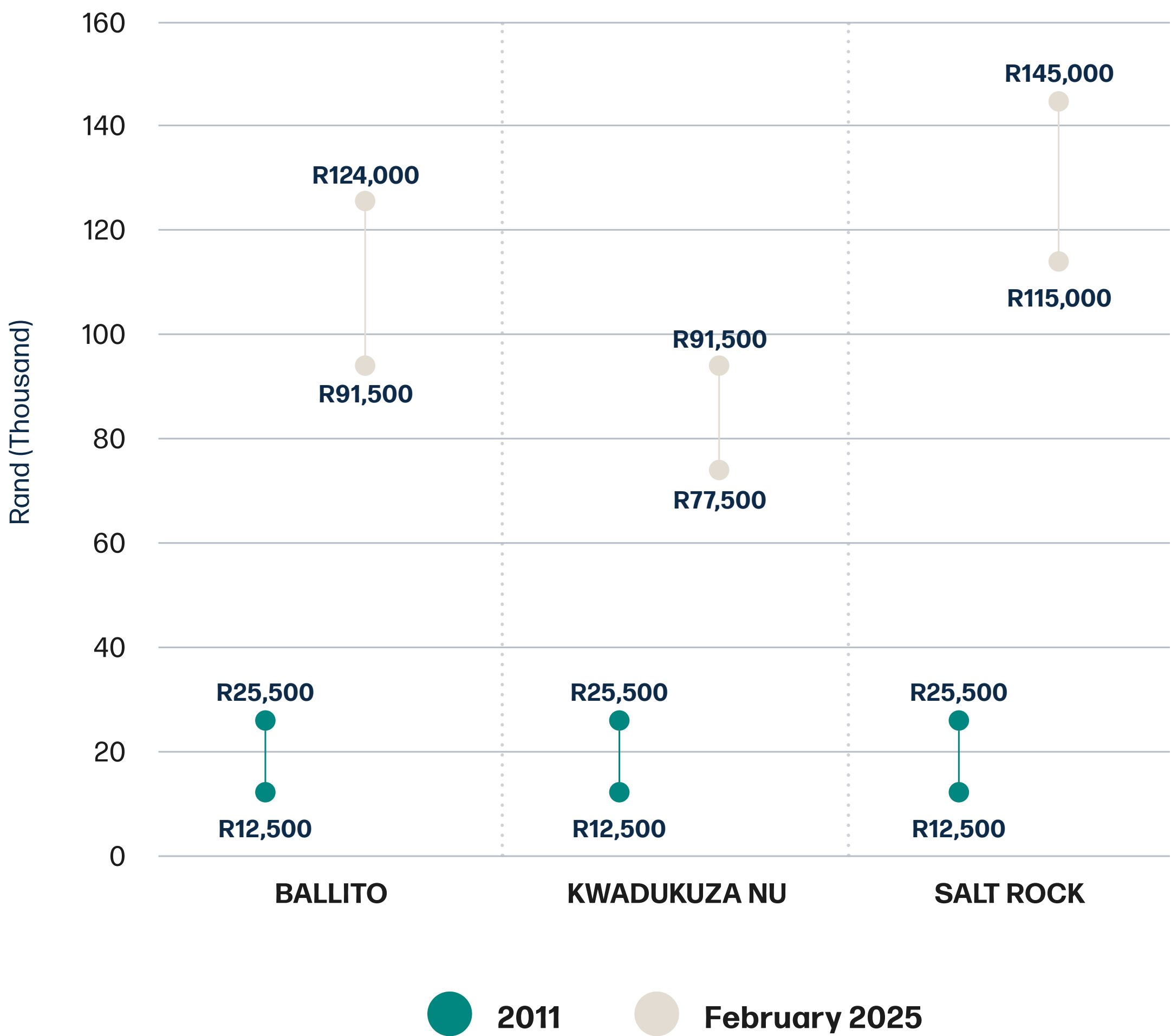
average monthly household income

The increase in average household income indicates consistent improvement in living standards and wealthy individuals moving into these areas.

Since 2011, monthly household income within Salt Rock, Ballito, and KwaDukuza NU has increased by an average of 645%, 504%, and 390% respectively, highlighting **Salt Rock as the top performing town in terms of income growth.**

Salt Rock and Ballito both show strong concentrations of high-income households, with **70% of Salt Rock’s** households falling into the **wealthy and super wealthy** brackets. **Ballito** reflects a broader income mix, with **50%** in the **wealthy and super wealthy** categories, and the remainder spread across high and middle-income segments.

AVERAGE MONTHLY HOUSEHOLD INCOME RANGE



recent *buyer activity*

Ballito

Predominance of 36 - 49 (37%) and 50 - 64 years (32%), comprising mature families, empty nesters and active retirees who are seeking secure estate living and a desirable lifestyle in a convenient coastal location.

KwaDukuza NU

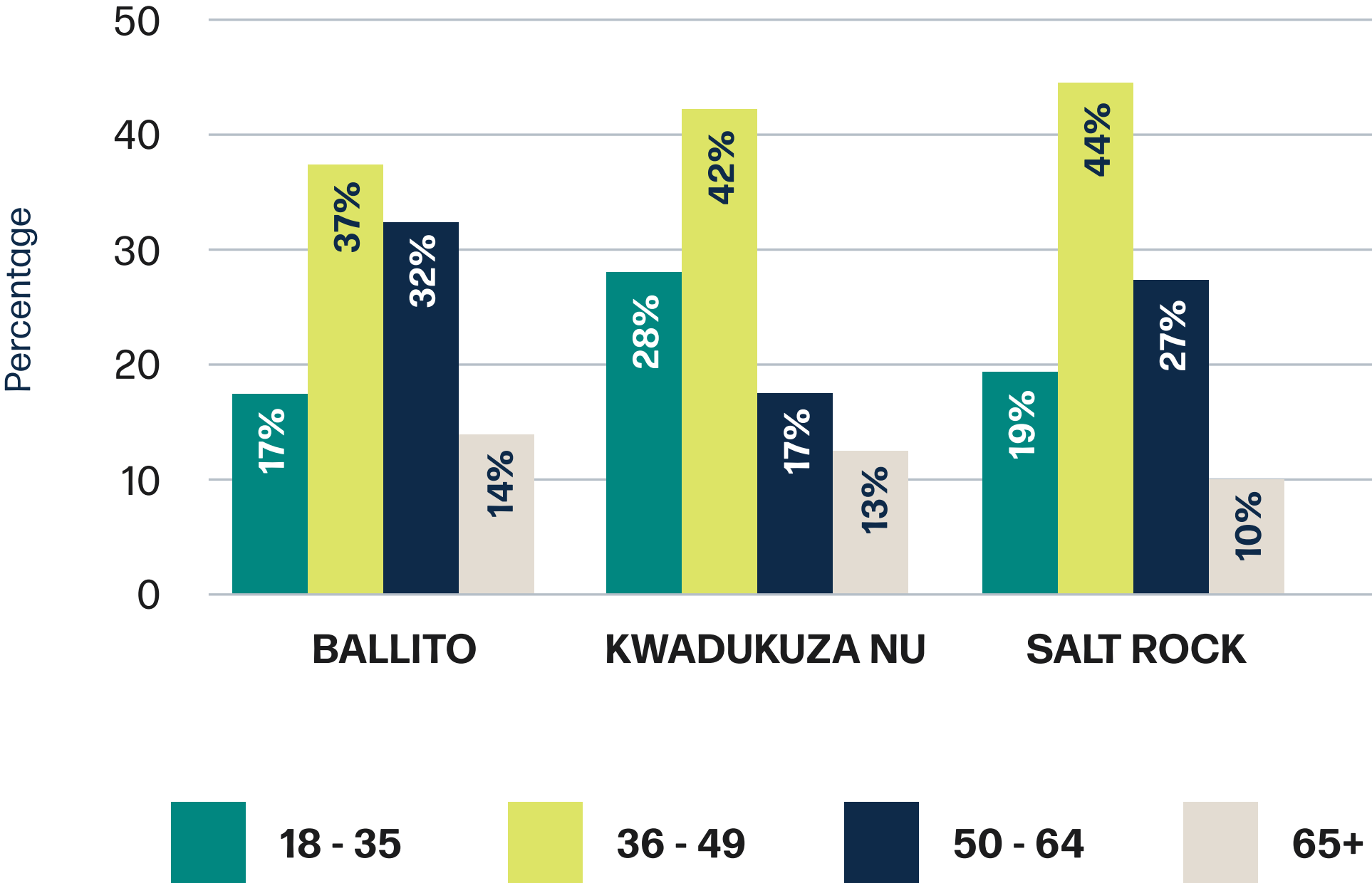
Predominance of 36 - 49 years (42%) and those below 35 years (28%), comprising young professionals, growing families, and first-time homebuyers seeking career opportunities, family amenities, and a balanced lifestyle.

Salt Rock

Predominance of 36 - 49 years (44%) and 50 - 65 years (27%), comprising mature families, empty nesters and active retirees who are driven by the need for a desirable lifestyle, seaside living and a tranquil location.

Across Ballito, KwaDukuza NU, Salt Rock, there is consistent demand among 36-49-year-olds. This trend aligns with the national average age of first-time buyers, which is 37 years old.

AGE OF RECENT BUYERS
FOR THE PERIOD MARCH 2024 - FEBRUARY 2025



comparing interested *vs. actual buyer locations*

Through our comprehensive market research approach – which includes online surveys, stakeholder engagement, analysis of recent buyer transactions, and resident surveys – we are able to map buyer locations, clearly distinguishing between those expressing interest and those who ultimately relocate to the Greater North Coast, which aligns with the broader semigration trends experienced in the region.

INTERESTED IN MOVING

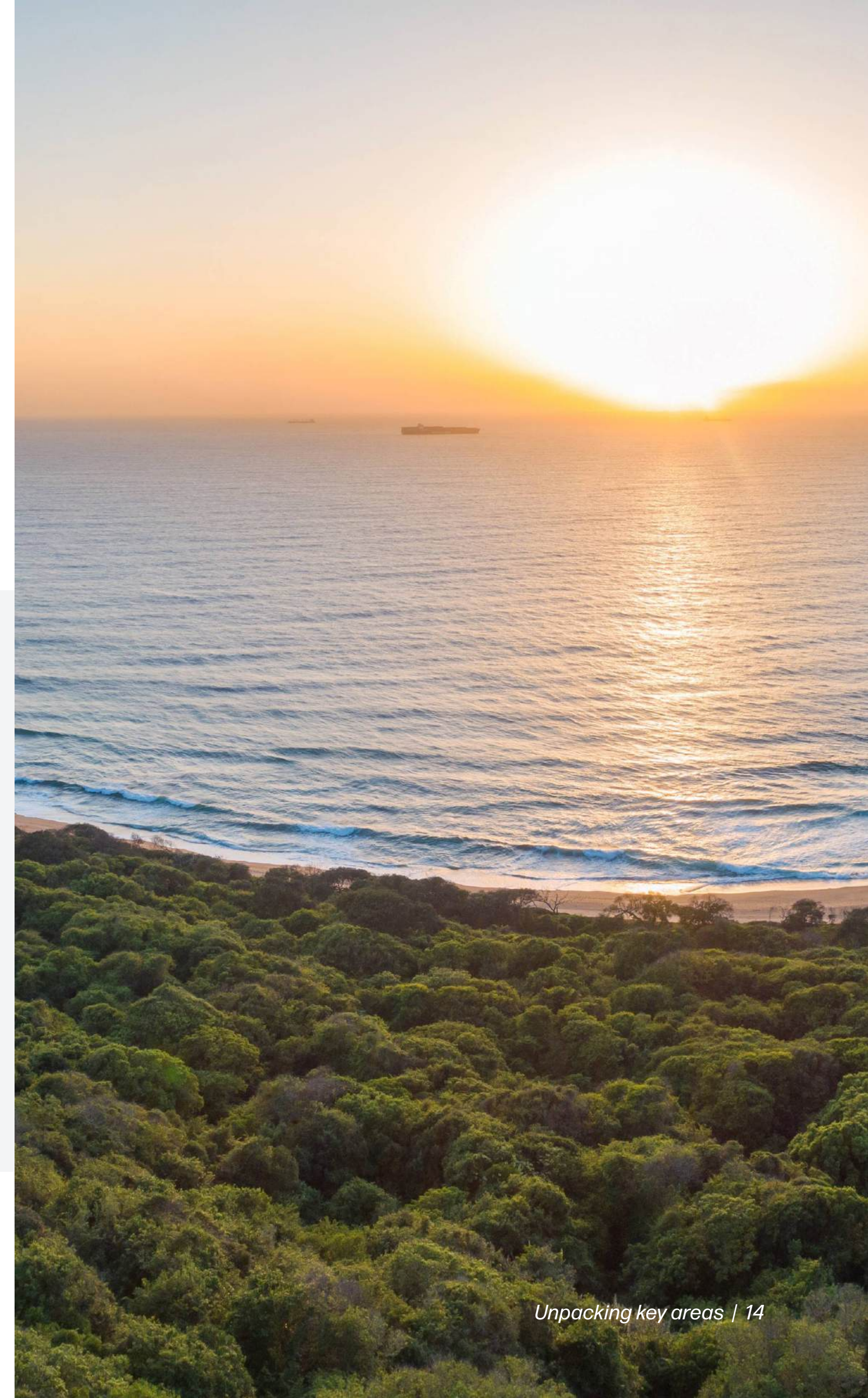
The majority (**59%**) of people showing interest* in moving to the greater North Coast are from Ballito, KwaDukuza NU, Salt Rock, Stanger & Tongaat towns. This is followed by Richards Bay and Greytown as well as the Inner West, each contributing **9%**. The Outer West accounts for **8%**, while Phoenix, Mount Edgecombe, and Verulam contribute **4%**. Gauteng (largely Sandton, Centurion, Pretoria, Roodepoort, Randburg, Germiston, Edenvale, Boksburg, and Kempton Park) also contribute **4%** of those who are interested in moving to the area.

ACTUAL RELOCATIONS

Among those actually moving** to the area, **58%** are from Ballito, KwaDukuza NU, Salt Rock, with greater Umhlanga accounting for **11%**. Gauteng (largely Centurion, Sandton, Fourways, Craighall Park, West Rand, and Lonehill) also account for **11%**, followed by the Inner West at **6%**. Additionally, **1%** come from greater Africa (Botswana & Zimbabwe) & **4%** from International locations, including Australia, USA, China, Germany, Canada, Denmark, Jamaica, Italy, Russia, India, Brazil, and the UK.

* These statistics are based on analysing recent online resident surveys and stakeholder engagement conducted by Rainmaker Marketing


** These statistics are based on recent buyer sales transactions, residents' surveys.





regional growth *in the North Coast*


SINCE 2019


KEY 1:


 Hospitality


 Retail

 Residential

 Medical

 Offices

 Mixed-use

 Education

KEY 2:

BCE – Brettenwood Coastal Estate

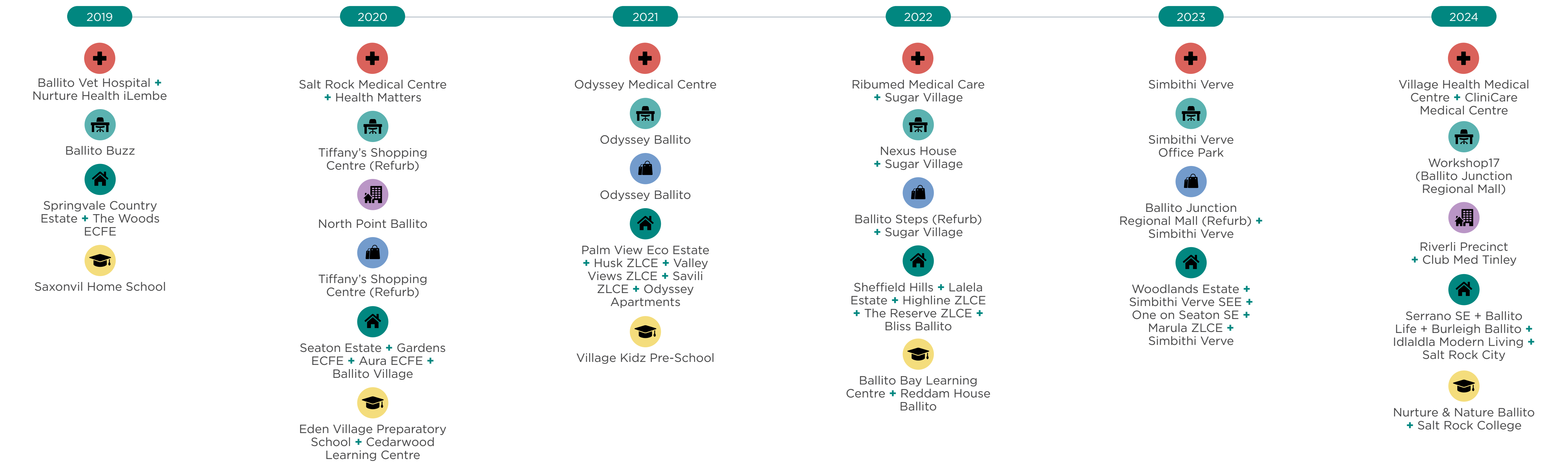
SEE – Simbithi Eco Estate

ECFE – Elaleni Coastal Forest Estate

ZLCE – Zululami Luxury Coastal Estate

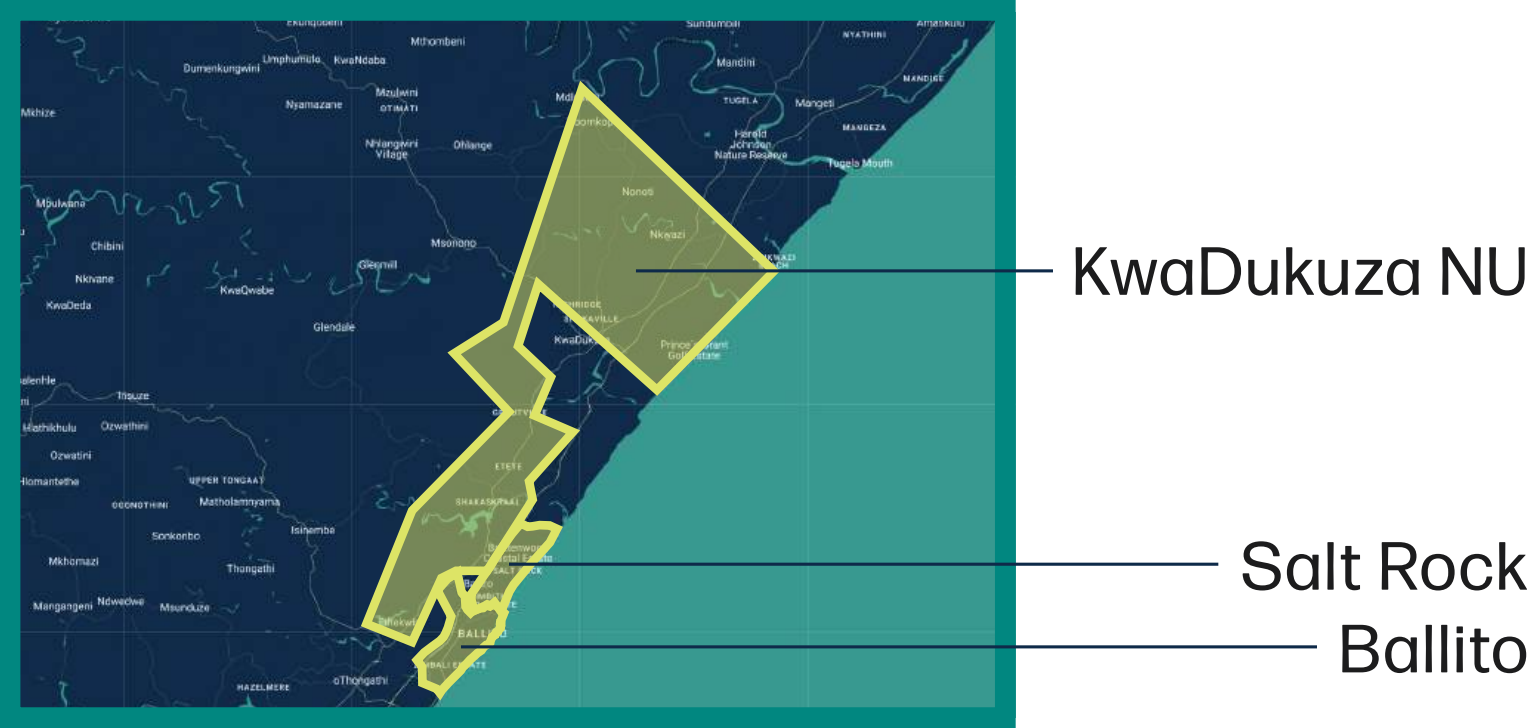
SE – Seaton Estate

NSRC – New Salt Rock City



Note:
This information is provided as part of an independent report compiled by Rainmaker Marketing on behalf of Collins Residential.

market stock *growth*



BALLITO

Situated east of the N2, stretching from Zimbali Coastal Resort to Umhlali Country Club & Golf Estate.

59% are sectional title (ST) stock **41%** are freehold (FH) stock

46% of these are within estates

The overall stock within Ballito **increased by 5%** from 8,268 (2021) to **8,718 (2025)**

Since 2021, **ST stock increased by 11%** (from 3,080 to 3,421)

Largely driven by sales in the following development:
Ballito Hills

Since 2021, **FH in estates increased by 4%** (From 2,242 to 2,334)

Largely driven by sales in the following development:
Zimbali Lakes Resort

KWADUKUZA NU

Situated on the western side of the N2 extending from Tinley Manor Beach to Zinkwazi Beach in the north.

25% are sectional title (ST) stock **75%** are freehold (FH) stock

55% of these are within estates

The overall stock within KwaDukuza NU **increased by 47%** from 2,573 (2021) to **3,774 (2025)**

Since 2021, **ST stock increased by 252%** (from 161 – 566)

Largely driven by sales in the following developments:
Ballito Village and Bliss Ballito

Since 2021, **FH in estates increased by 30%** (from 1,309 to 1,705)

Largely driven by sales in the following developments:
Palm Lakes Estate, Fairview Estate, Lalela Estate and Springvale Country Estate

SALT ROCK

Situated along the eastern side of the N2, stretching from Simbithi Eco-Estate to Seaton.

48% are sectional title (ST) stock **52%** are freehold (FH) stock

57% of these are within estates

The overall stock within Salt Rock **increased by 18%** from 6,452 (2021) to **7,601 (2025)**

Since 2021, **ST stock increased by 27%** (from 1,319 to 1,669)

Largely driven by sales in the following developments:
Elaleni Coastal Estate and Zululami Luxury Coastal Estate

Since 2021, **FH in estates increased by 32%** (from 2,024 to 2,679)

Largely driven by sales in the following developments:
Elaleni Coastal Estate, Seaton, and Zululami Luxury Coastal Estate

sales performance

IN ESTATES VS OUT OF ESTATES

BALLITO

Sectional Title (ST)

Over Mar 2024 – Feb 2025, the average **ST unit price in an estate** was

R3,612M

exceeding those out of an estate (R2,207M) **by 64%**

Predominant prices for ST sales in estates are between

R2M – R5M
(58% of Sales)

Freehold Homes (FH)

Over Mar 2024 – Feb 2025, the average price of a **FH in an estate** was

R5,642M

exceeding those out of an estate (R4,223M) **by 34%**

Predominant prices for FH sales in estate are between

R3M – R7M
(53% of Sales)

KWADUKUZA NU

Sectional Title (ST)

Over Mar 2024 – Feb 2025, the average **ST unit price in an estate** was

R2,243M

exceeding those out of an estate (R1,630M) **by 38%**

Predominant prices for ST sales in estate are between

R1,5M – R3M
(62% of Sales)

Freehold Homes (FH)

Over Mar 2024 – Feb 2025, the average price of a **FH in an estate** was

R4,262M

Predominant prices for FH sales in estate

R3M – R5M
(80% of Sales)

SALT ROCK

Sectional Title (ST)

Over Mar 2024 – Feb 2025, the average price of a **ST in an estate** was

R3,469M

exceeding those out of an estate (R2,141M) **by 62%**

Predominant prices for ST sales in estate are between

R3M – R7,550M
(55% of Sales)

Freehold Homes (FH)

Over Mar 2024 – Feb 2025, the average price of a **FH in an estate** was

R6,708M

exceeding those out of an estate (R5,429M) **by 24%**

Predominant prices for FH sales in estate are between

R5M – R9M
(74% of Sales)

year-on-year *sales performance*

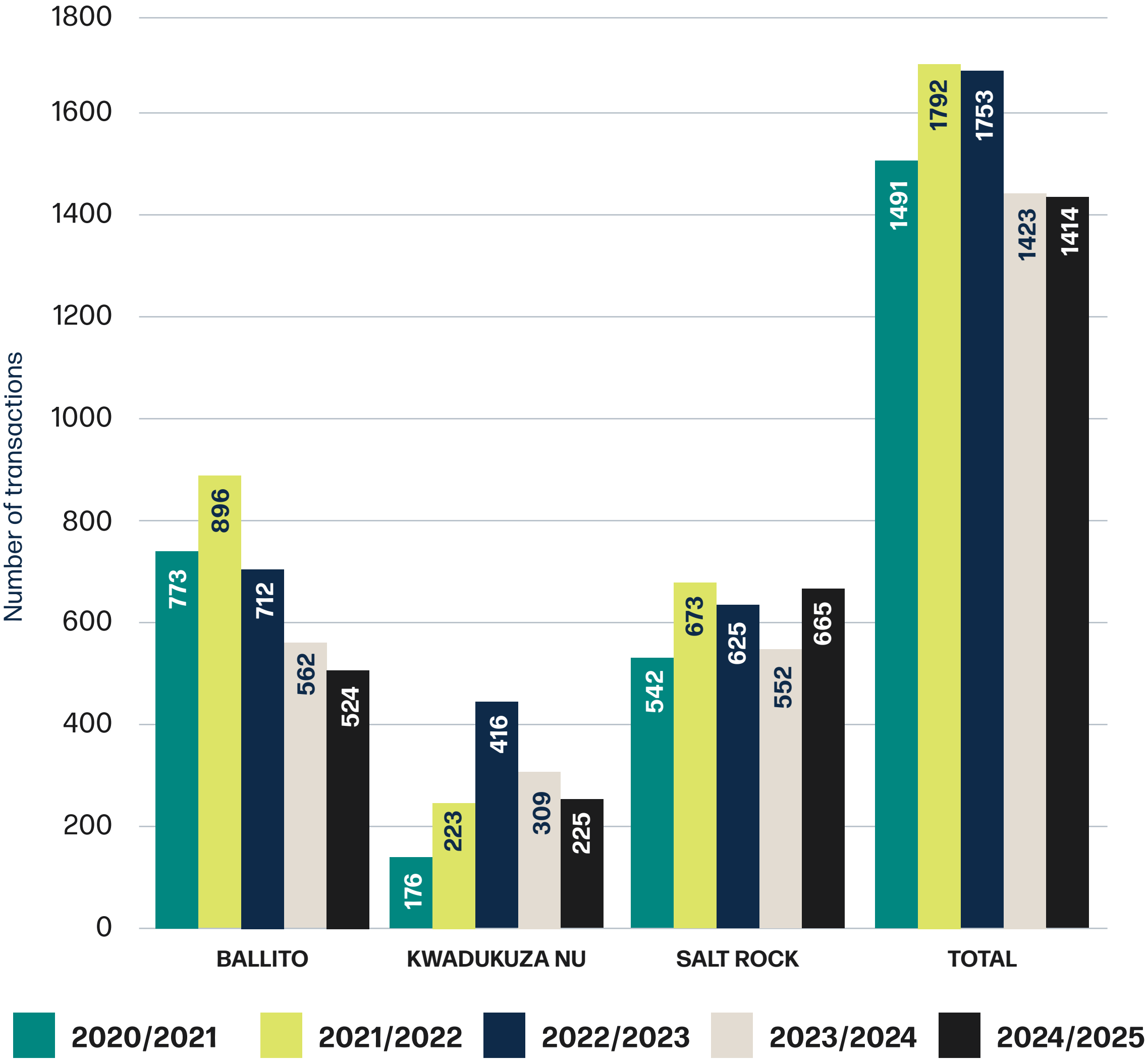
Ballito and Salt Rock have consistently recorded the highest total property sales across all periods when compared to KwaDukuza NU. In the most recent period (March 2024 to February 2025), Salt Rock accounted for the largest share of total sales at 47%.

Notably, Salt Rock’s total sales increased from 552 in 2023/2024 to 665 in 2024/2025, driven largely by sales within newer estate developments.

Overall, the strongest sales years were 2021/2022 and 2022/2023, with total transactions amounting to 1,792 and 1,753, respectively.

- Note:**
12-month periods are defined as follows:
- 2020/21: May 2020 – April 2021
 - 2021/22: July 2021 – June 2022
 - 2022/23: July 2022 – June 2023
 - 2023/24: May 2023 – April 2024
 - 2024/25: March 2024 – February 2025

TOTAL VOLUME OF ALL PROPERTY TRANSACTIONS
(INCLUDES SECTIONAL TITLE, FREEHOLD HOMES AND VACANT LAND)



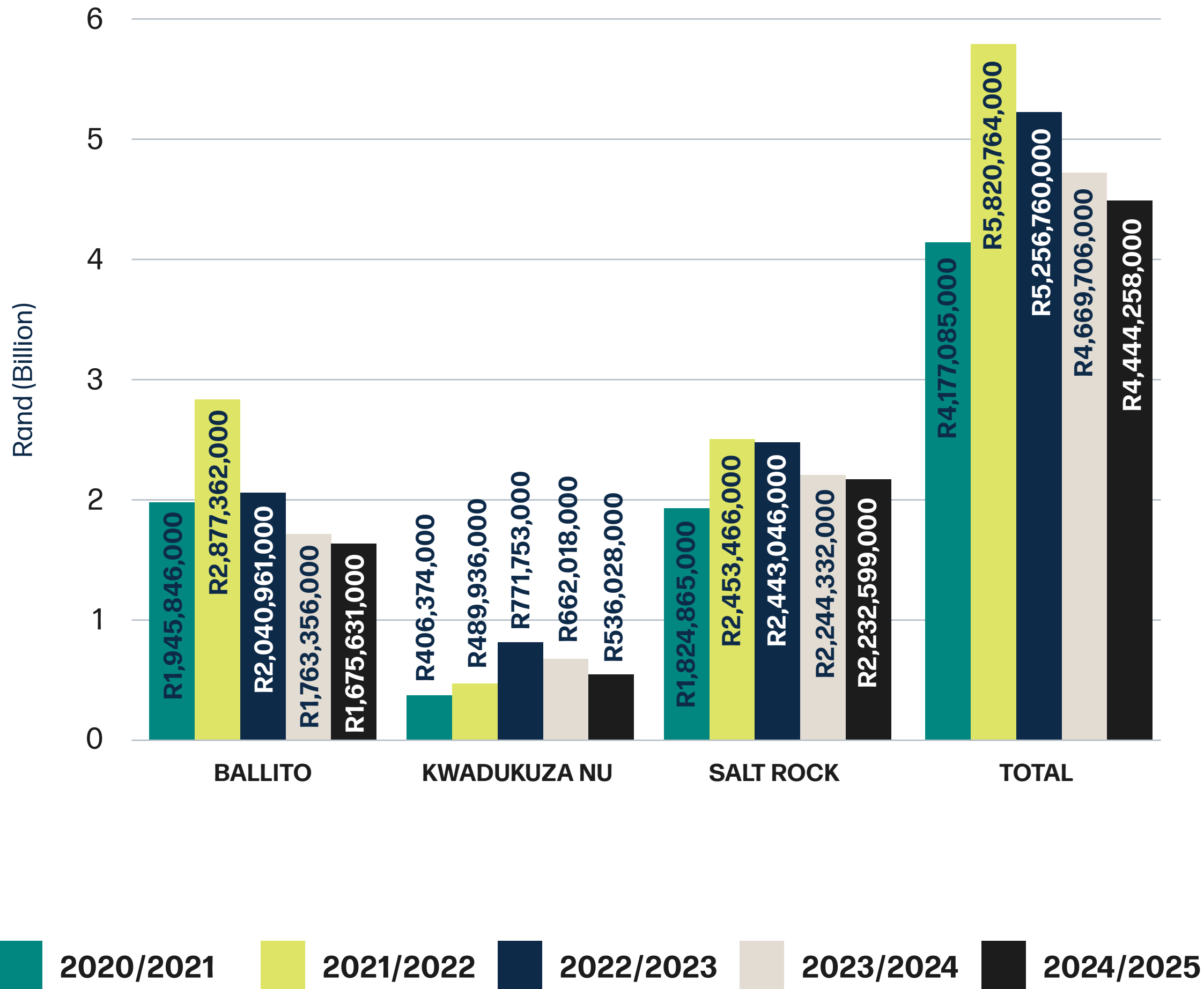
property transactions

The best-performing period was 2021/2022, with a total sales value of R5.821Bn.

While all areas have seen a decline in total sales volumes over the various periods, Salt Rock has demonstrated greater stability, with more moderate decreases compared to other areas.

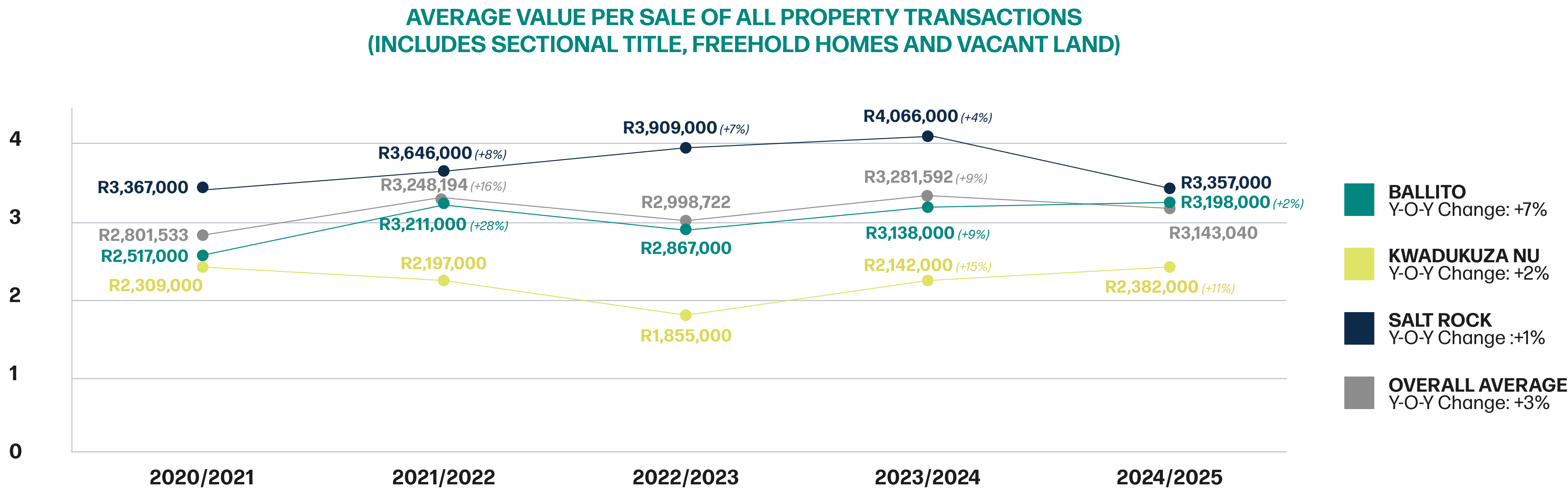
In the **2024/2025** period, **Salt Rock** accounted for **50%** of total sales.

TOTAL VALUE OF ALL PROPERTY TRANSACTIONS
(INCLUDES SECTIONAL TITLE, FREEHOLD HOMES AND VACANT LAND)



average *value per sale*

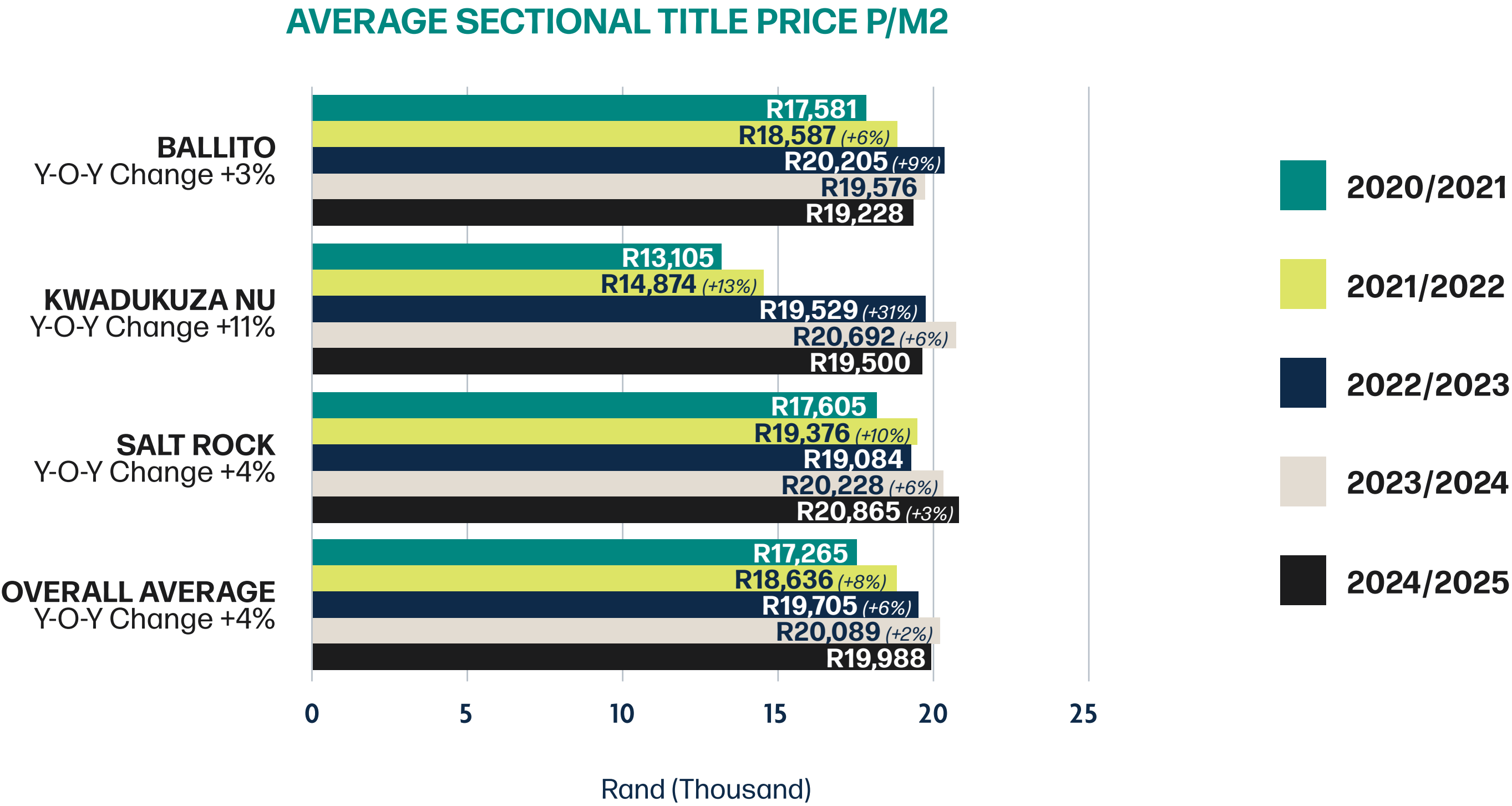
All areas have experienced positive year-on-year growth over the past five years. Ballito recorded the highest overall year-on-year percentage increase of +7% over this period. However, in 2023/24, Salt Rock outperformed Ballito by 30%, achieving an average price of R4,066M, compared to Ballito's R3,138M.



sectional title

price per square metre

All towns have experienced year-on-year growth, with KwaDukuza NU seeing the highest increase of +11%, driven by a lower price base. Overall, these price per square metre trends highlight the area’s strong value for money.



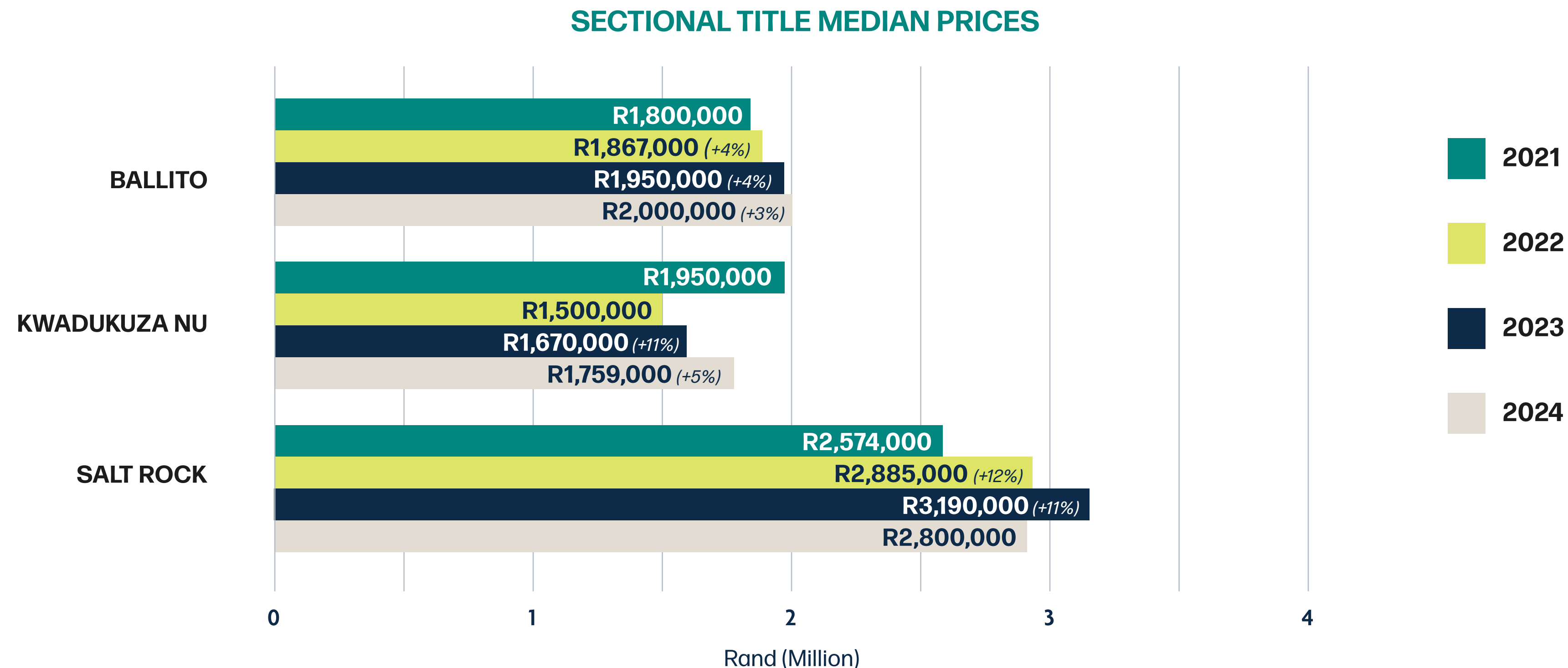
sectional title *capital appreciation*

OF MEDIAN PRICES

SINCE 2021:

- **Ballito** achieved a **capital appreciation of +11% (4% p/a)**
- **Salt Rock** experienced a capital appreciation of **+9% (3% p/a)**

Although Ballito achieved slightly higher overall capital appreciation compared to Salt Rock, **Salt Rock outperformed Ballito by 40%** in terms of median prices in 2024.



investment drivers *for the North Coast, KZN*

FACTORS THAT WE BELIEVE WILL DETERMINE SUSTAINED INVESTMENT WITHIN THE REGION

1. Club Med South Africa Beach and Safari Resort

The R2 billion Club Med Resort, developed by Club Med and Collins Residential Consortium, is expected to open by July 2026 and significantly boost tourism, international connectivity, infrastructure, and property values—all reinforcing long-term investment confidence.

Once operational, the resort is expected to create 2,300 direct and indirect permanent jobs. Upon launch, it will attract over 400 new international visitors weekly, primarily from the French and Belgian markets. International guests are expected to make up about 70% of total visitors, with the remaining 30% being domestic travellers.



2. Education infrastructure growth

Many families along the North Coast face limited schooling options, particularly at high school level, with primary schools like Umhlali Preparatory already experiencing lengthy waiting lists. As a result, parents are often required to send their children to schools outside the region, including Durban North, Berea, Westville, and even as far as Pietermaritzburg and the Midlands.

The steady growth of families—averaging 193 new families p/m since 2011 across Ballito, KwaDukuza NU and Salt Rock—continues to drive demand for quality education. The upcoming Seaton House Independent School (Grades 000-12) is set to open in 2027, along with other planned private schools, will help address this growing need.

3. Ongoing infrastructure improvements

Collins Residential recently completed a full upgrade of the Salt Rock and Sheffield Beach roads (P330/P474). The addition of traffic lights, widened roadways, and slip lanes has significantly improved traffic flow. In addition, the upcoming Seaton Interchange—a R110 million project—will feature new south-facing on- and off-ramps, easing congestion at the Salt Rock interchange and enhancing access to Sheffield and nearby estates.

Scheduled for completion by March 2026, the interchange is expected to stimulate economic activity, unlock a new commercial zone, and boost demand for both residential and business development, with local SMMEs (Small, Medium, and Micro Enterprises) playing a key role in its delivery. Further road upgrades are also planned as more estates are established in the area.

4. Sustained impact of privately managed elements

The North Coast offers a secure and well-maintained lifestyle, with over 50% of the property market stock located within gated estates. This prevalence of estate living supports higher levels of service delivery, including private security, dedicated infrastructure maintenance, and overall quality of life.

Beyond estates, a range of privately driven initiatives further reinforce this standard across the greater region. These include the Ballito Urban Improvement Precinct (BUIP), which has promoted a culture of care and accountability; Siza Water, a privately run water utility ensuring reliable service; business-led organisations such as iLembe Chamber of Commerce and area promotion campaigns such as Love North Coast and Legend iLembe. Together, these public-private partnerships have played a vital role in shaping a collaborative, investment-friendly environment.

5. Return on lifestyle

The region offers a compelling value proposition: warm all-year-round weather, lifestyle-focused estates, natural beauty, blue flag beaches and high-quality developments at comparatively accessible price points, attracting both primary and semigration buyers.

6. Strong demand for land

There is continued strong demand for land across all segments of the market, particularly among those looking to establish long-term roots on the North Coast. Recent development successes highlight this momentum:

- **Seaton Estate:** Achieved R1,137 billion in total land sales since launching in 2020, with the highest-priced single residential land transaction reaching R15.5 million.
- **Salt Rock City:** Reached 100 land sales at launch in March 2025

key highlights *from the report*



SEMIGRATION:

In 2023/24, KZN had a total of **1,300 semigrants**



800 from GP
200 from WC
300 from Rest SA

BUILDING PLANS ACTIVITY:

Plans passed for residential building increased by



32 % % %
from **R5.080Bn** (2023)
to **R6.680Bn** (2024)

POPULATION GROWTH:

Since 2011, there are **290 adults p/m** moving into these combined areas



This equates to approximately **193 families p/m**

RECENT BUYER ACTIVITY:

Further exemplifies the multigenerational trends

Ballito:

Predominance of **36 - 49 years (37%)** and **50 - 64 years (32%)**



Salt Rock:

Predominance of **36 - 49 years (44%)** and **50 - 65 years (27%)**

MARKET STOCK:

Salt Rock:

57% of stock is in estates

Since 2021, ST stock in estates increased by **27%**



Since 2021, FH in estates increased by **32%**

PROPERTY TRANSACTIONS FOR THE PERIOD MARCH 2024 - FEBRUARY 2025

Total Volume:

1,414 Sales

Total Value:

R4,444Bn





thank you

The statistics used were largely sourced from Lightstone data, with the interpretation and analysis carried out by the market research division of Rainmaker Marketing.

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