



Market Report

A P R I L 2 0 2 6 R E P O R T



BONNYCASTLE
REALTY

BONNYCASTLE

Bonnycastle Realty provides an unparalleled standard of luxury services to buyers and sellers in Collier and Lee counties, Florida. Putting a fresh spin on a dated industry, our highly personalized, concierge-style assistance is infused with revolutionary real estate advancements.

Here at Bonnycastle, we're tech savvy and solutions oriented, filling whatever gaps we see in the industry with innovative excellence. As business-minded agents, we make data-driven decisions to maximize our marketing efforts and ultimately produce top-dollar deals, all in a trendsetting style.

Still, our entrepreneurial attitude doesn't sacrifice our human-to-human interaction — we're committed to building deep-rooted relationships that last long after the closing papers are signed. We understand that buying or selling a home is one of life's biggest financial decisions, which is why we'll guide you through every step to help you navigate the process with ease.

As Naples locals ourselves, we're motivated to share the high-quality life we live. Our team will go above and beyond to find the property that will elevate your lifestyle in the scenic Sunshine State.

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WELCOME TO THE BONNYCASTLE APRIL 2026 REPORT THIS TEXT IS COURTESY OF THE NAPLES AREA BOARD OF REALTORS MARKET REPORT

As high season begins to settle and traffic around town eases, the Naples real estate market is showing no signs of cooling off. Overall pending sales (homes under contract) in April increased 38.2 percent to 1,388 pending sales from 1,004 pending sales in April 2025. Steady demand for the Naples lifestyle during April resulted in a 7.7 percent increase in the overall median closed price to \$630,000 from \$585,000 in April 2025.

Broker analysts reviewing the April 2026 Market Report by the Naples Area Board of REALTORS® (NABOR®), which tracks home listings and sales within Collier County (excluding Marco Island), predict a solid summer market ahead, especially before the August elimination of the Fannie Mae and Freddie Mac limited review process for condominium buyers, which will require lenders to review more data, including a condominium association's reserve fund status.

The percent of list price received in April increased .3 percent, which means more sellers are pricing homes right for today's market. In fact, less than 30 percent of homes for sale in April initiated a price decrease.

In April, the report showed a 51.4 percent increase in condominium pending sales. Likewise, there were 575 closed sales of condominiums compared to 493 closed sales of single-family homes for the month.

Because a remarkable increase in sales is occurring, new listings can't keep up with demand so the overall inventory in Naples decreased 21 percent to 5,919 properties from 7,492 properties.

QUICK FACTS

OVERALL MARKET FACTS

INVENTORY



5,919

↓ 21%

PENDINGS



1,388

↑ 38%

NEW LISTINGS



1,169

↓ 15%

MEDIAN CLOSED PRICE



\$630,000

↑ 8%

CLOSED SALES



1,068

↑ 18%

DAYS ON MARKET



97

↑ 16%



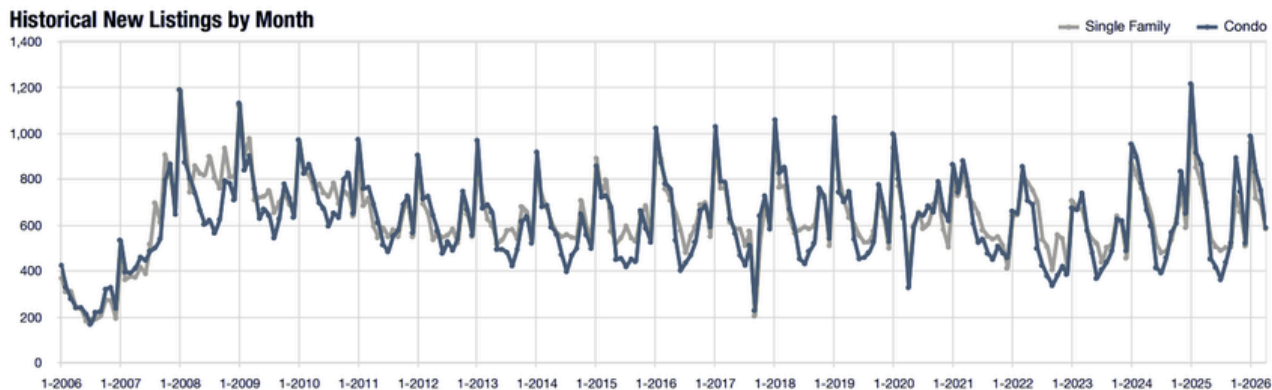
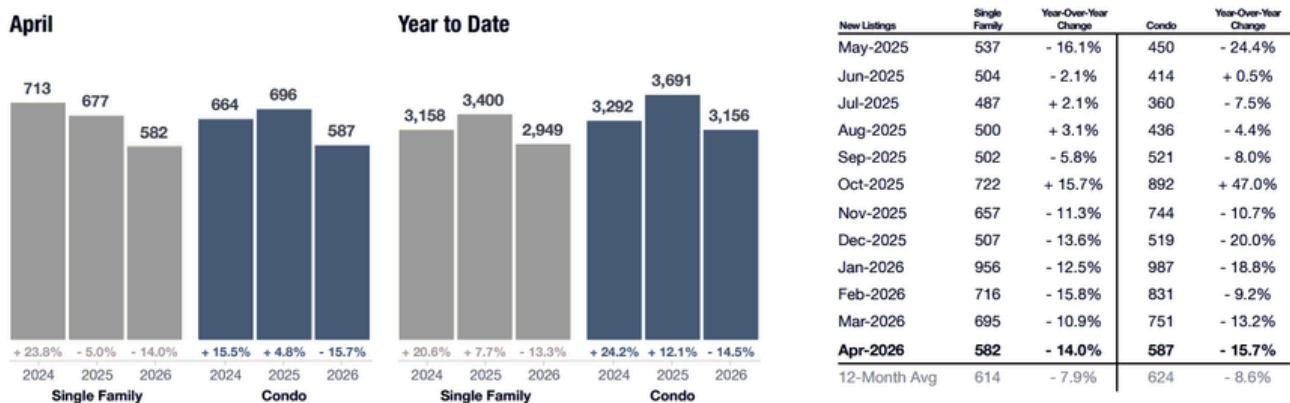
OVERALL MARKET OVERVIEW

Key metrics by report month and for year-to-date (YTD) starting from the first of the year.

Key Metrics	Historical Sparkbars	4-2025	4-2026	% Change	YTD 2025	YTD 2026	% Change
New Listings		1,373	1,169	- 14.9%	7,091	6,105	- 13.9%
Total Sales		904	1,068	+ 18.1%	2,889	3,428	+ 18.7%
Days on Market Until Sale		84	97	+ 15.5%	86	95	+ 10.5%
Median Closed Price		\$585,000	\$630,000	+ 7.7%	\$630,000	\$615,000	- 2.4%
Average Closed Price		\$1,388,382	\$1,220,136	- 12.1%	\$1,303,916	\$1,196,526	- 8.2%
Percent of List Price Received		94.3%	94.6%	+ 0.3%	94.6%	94.6%	0.0%
Pending Listings		1,004	1,388	+38.2%	3,818	5,161	+35.2%
Inventory of Homes for Sale		7,492	5,919	- 21.0%	—	—	—
Months Supply of Inventory		11.5	8.1	- 29.6%	—	—	—

OVERALL NEW LISTINGS

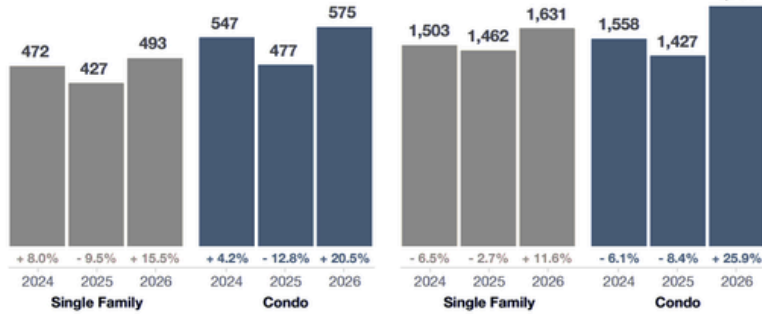
A count of the properties that have been newly listed on the market in a given month.



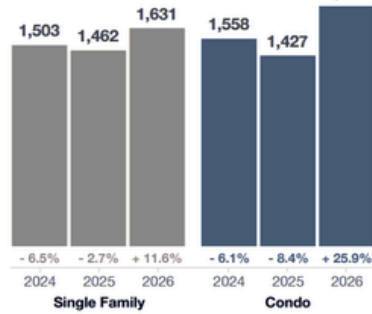
OVERALL CLOSED SALES

A count of the actual sales that closed in a given month.

April

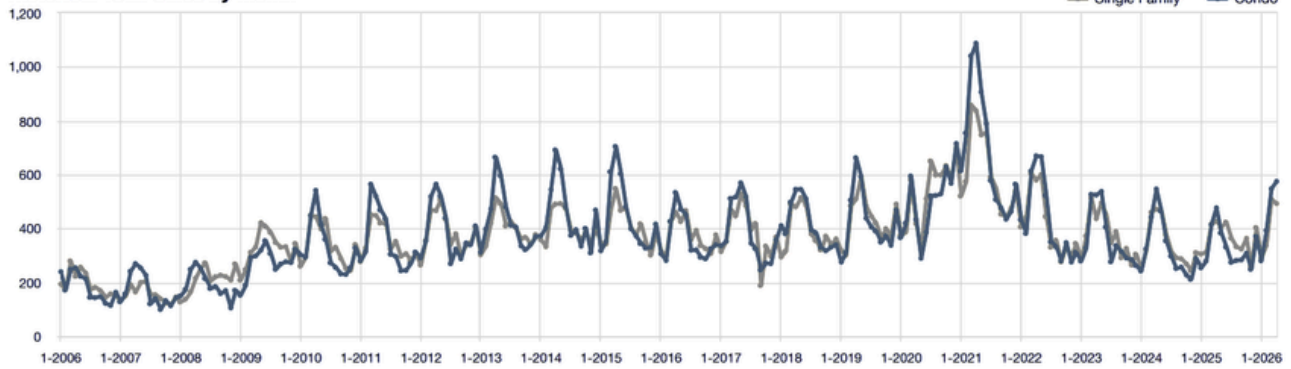


Year to Date



Total Sales	Single Family	Year-Over-Year Change	Condo	Year-Over-Year Change
May-2025	406	-13.2%	384	-17.6%
Jun-2025	424	+12.2%	332	-6.5%
Jul-2025	365	+15.9%	275	-7.7%
Aug-2025	333	+14.0%	282	+11.9%
Sep-2025	324	+12.5%	284	+10.5%
Oct-2025	364	+35.3%	309	+35.5%
Nov-2025	261	+6.5%	249	+17.5%
Dec-2025	404	+29.9%	372	+28.7%
Jan-2026	291	-4.9%	281	+10.2%
Feb-2026	338	+8.3%	393	+40.4%
Mar-2026	509	+22.1%	548	+32.0%
Apr-2026	493	+15.5%	575	+20.5%
12-Month Avg	376	+11.9%	357	+13.3%

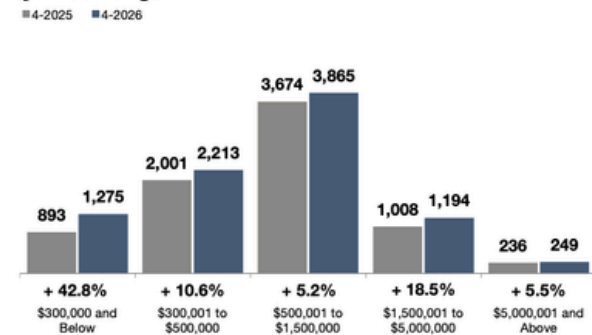
Historical Total Sales by Month



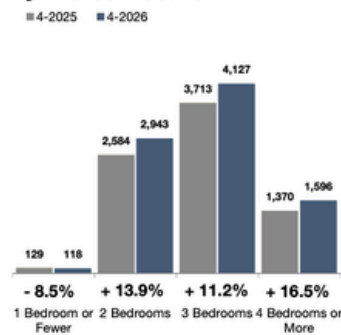
OVERALL CLOSED SALES BY PRICE RANGE

A count of the actual sales that closed in a given month. Based on a rolling 12-month total.

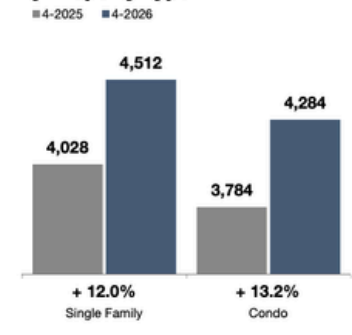
By Price Range



By Bedroom Count



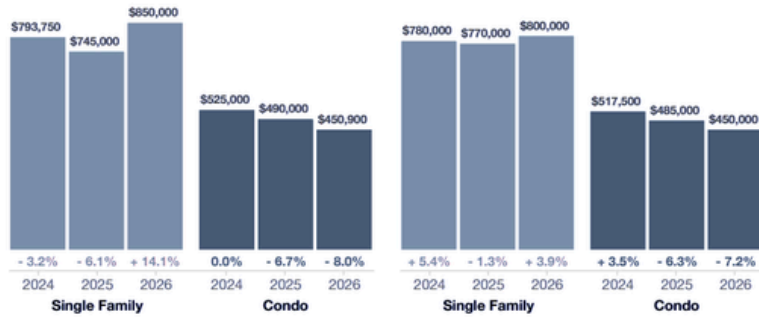
By Property Type



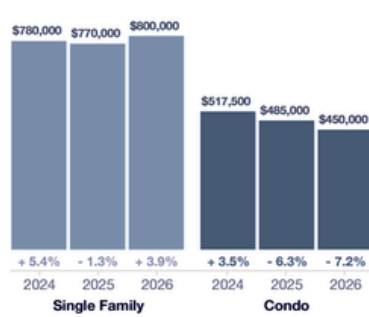
OVERALL MEDIAN CLOSED PRICE

Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.

April



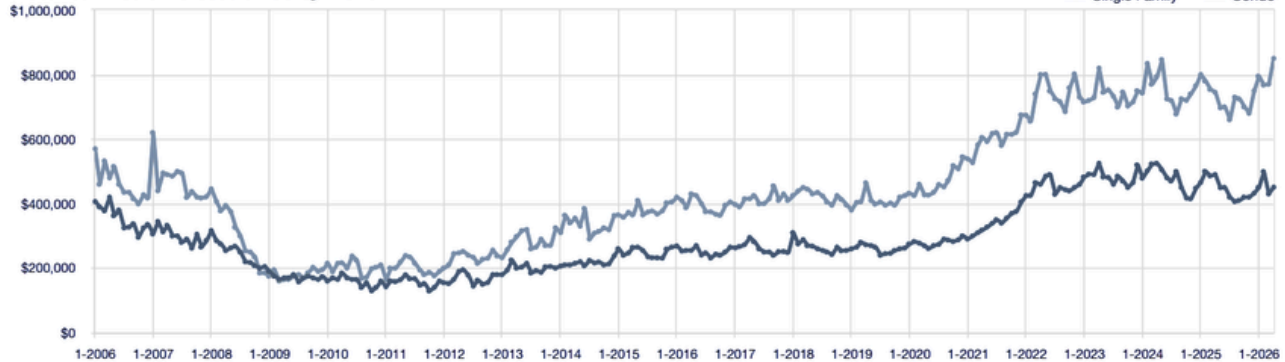
Year to Date



Median Closed Price	Single Family	Year-Over-Year Change	Condo	Year-Over-Year Change
May-2025	\$697,000	-17.7%	\$449,500	-11.0%
Jun-2025	\$700,000	-3.4%	\$450,225	-6.2%
Jul-2025	\$660,000	-8.3%	\$420,000	-10.6%
Aug-2025	\$730,000	+7.7%	\$406,500	-18.6%
Sep-2025	\$725,000	0.0%	\$410,000	-8.9%
Oct-2025	\$700,000	-2.8%	\$420,000	+0.6%
Nov-2025	\$680,000	-8.1%	\$420,000	+1.2%
Dec-2025	\$750,000	-2.0%	\$432,500	-3.4%
Jan-2026	\$795,000	-0.6%	\$450,000	-3.4%
Feb-2026	\$767,500	-1.6%	\$499,000	-0.2%
Mar-2026	\$770,000	+2.1%	\$430,000	-11.5%
Apr-2026	\$850,000	+14.1%	\$450,900	-8.0%
12-Month Avg*	\$735,000	-2.0%	\$439,000	-6.6%

* Median Closed Price for all properties from May 2025 through April 2026. This is not the average of the individual figures above.

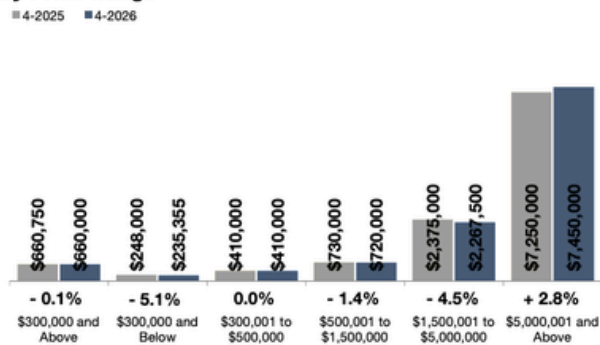
Historical Median Closed Price by Month



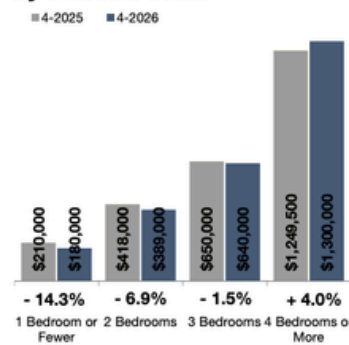
OVERALL MEDIAN CLOSED PRICE BY PRICE RANGE

Median price point for all closed sales, not accounting for seller concessions. Based on a rolling 12-month median.

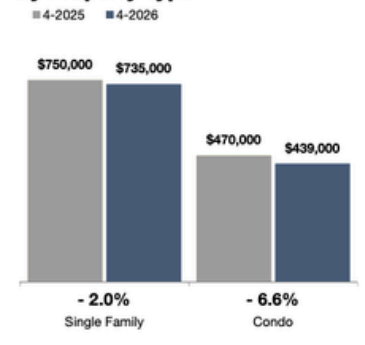
By Price Range



By Bedroom Count



By Property Type

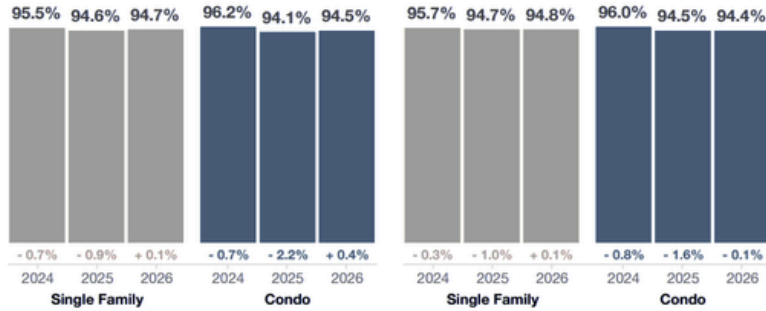


OVERALL PERCENT OF CURRENT LIST PRICE RECEIVED

Percentage found when dividing a property's sales price by its most recent list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.

April

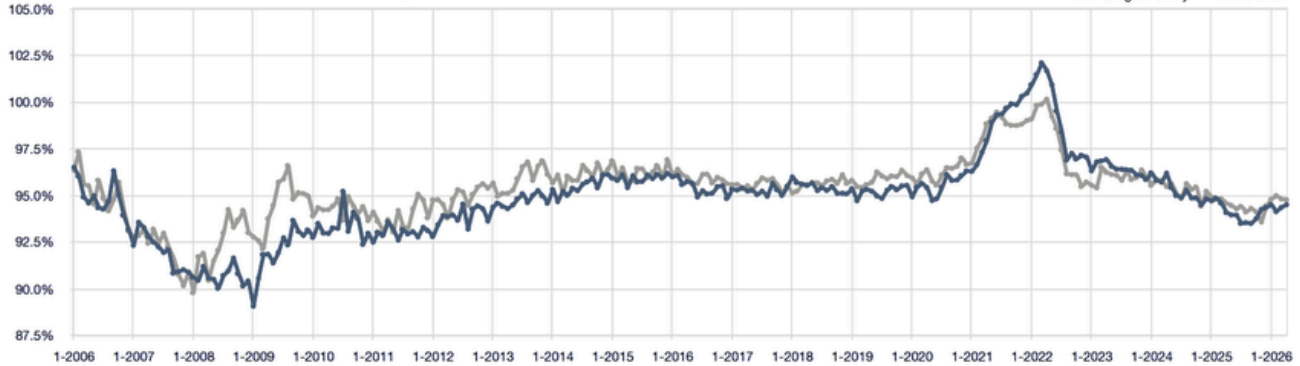
Year to Date



Pct. of List Price Received	Single Family	Year-Over-Year Change	Condo	Year-Over-Year Change
May-2025	94.4%	-1.3%	93.9%	-1.6%
Jun-2025	94.3%	-0.8%	93.9%	-1.2%
Jul-2025	94.4%	-0.4%	93.5%	-1.5%
Aug-2025	94.1%	-1.6%	93.5%	-1.9%
Sep-2025	94.3%	-1.0%	93.5%	-1.4%
Oct-2025	94.1%	-1.4%	93.7%	-1.3%
Nov-2025	93.6%	-0.8%	94.2%	-0.3%
Dec-2025	94.4%	-0.8%	94.3%	-0.5%
Jan-2026	94.8%	-0.1%	94.5%	-0.2%
Feb-2026	95.0%	+0.2%	94.1%	-0.7%
Mar-2026	94.8%	0.0%	94.3%	-0.3%
Apr-2026	94.7%	+0.1%	94.5%	+0.4%
12-Month Avg*	94.4%	-0.6%	94.1%	-0.8%

* Pct. of List Price Received for all properties from May 2025 through April 2026. This is not the average of the individual figures above.

Historical Percent of List Price Received by Month

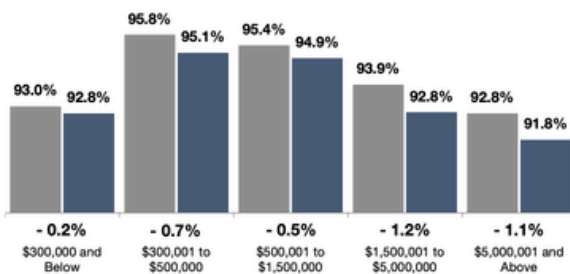


OVERALL PERCENT OF CURRENT LIST PRICE RECEIVED BY PRICE RANGE

Percentage found when dividing a property's sales price by its last list price, then taking the average for all properties sold, not accounting for seller concessions. Based on a rolling 12-month average.

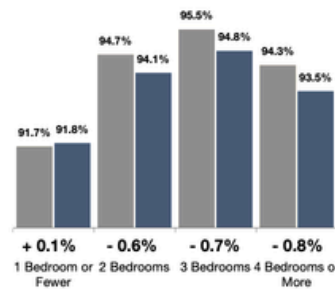
By Price Range

■ 4-2025 ■ 4-2026



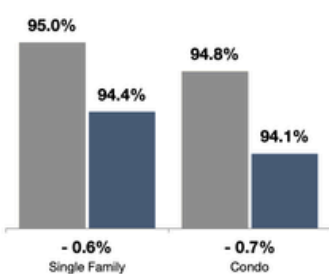
By Bedroom Count

■ 4-2025 ■ 4-2026



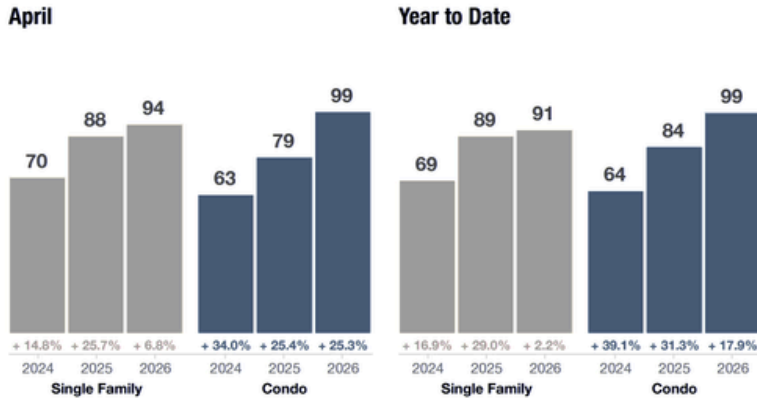
By Property Type

■ 4-2025 ■ 4-2026



OVERALL DAYS ON MARKET UNTIL SALE

Average number of days between when a property is listed and when an offer is accepted in a given month.



Days on Market	Single Family	Year-Over-Year Change	Condo	Year-Over-Year Change
May-2025	86	+26.5%	87	+29.9%
Jun-2025	98	+30.7%	98	+22.5%
Jul-2025	95	+30.1%	108	+22.7%
Aug-2025	95	+28.4%	123	+30.9%
Sep-2025	101	+26.3%	115	+35.3%
Oct-2025	106	+29.3%	112	+16.7%
Nov-2025	102	+17.2%	105	+34.6%
Dec-2025	87	+11.5%	100	+11.1%
Jan-2026	92	-4.2%	101	+16.1%
Feb-2026	86	+6.2%	98	+10.1%
Mar-2026	92	+3.4%	98	+18.1%
Apr-2026	94	+6.8%	99	+25.3%
12-Month Avg*	94	+16.6%	102	+22.6%

* Days on Market for all properties from May 2025 through April 2026. This is not the average of the individual figures above.

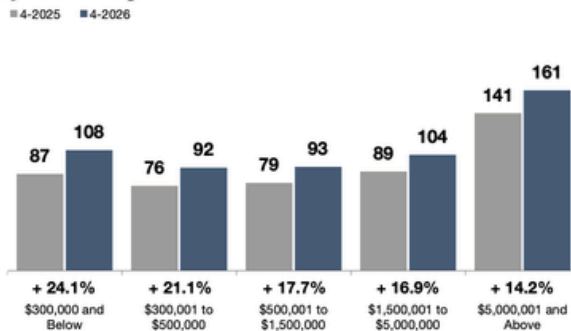
Historical Days on Market Until Sale by Month



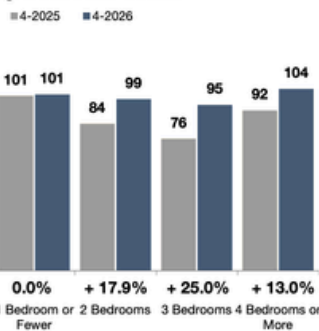
OVERALL DAYS ON MARKET UNTIL SALE BY PRICE RANGE

Average number of days between when a property is listed and when an offer is accepted. Based on a rolling 12-month average.

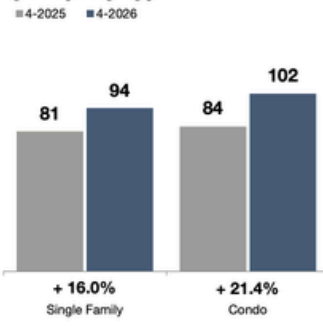
By Price Range



By Bedroom Count



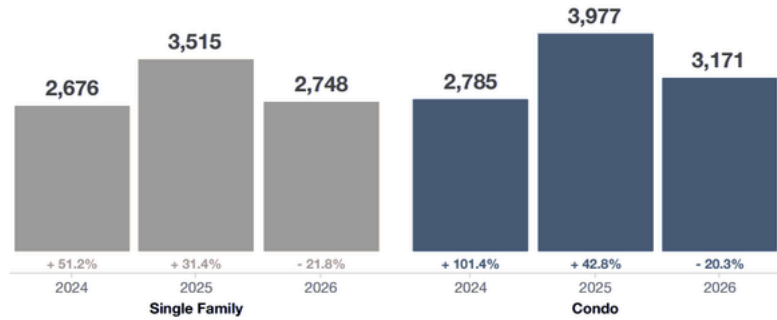
By Property Type



OVERALL INVENTORY OF HOMES FOR SALE

The number of properties available for sale in active status at the end of a given month.

April



Homes for Sale	Single Family	Year-Over-Year Change	Condo	Year-Over-Year Change
May-2025	3,232	+ 24.1%	3,556	+ 32.3%
Jun-2025	2,971	+ 18.6%	3,216	+ 28.8%
Jul-2025	2,723	+ 13.1%	2,860	+ 23.8%
Aug-2025	2,570	+ 11.1%	2,677	+ 21.9%
Sep-2025	2,480	+ 5.0%	2,639	+ 13.6%
Oct-2025	2,595	+ 2.5%	3,023	+ 19.4%
Nov-2025	2,729	- 2.9%	3,227	+ 12.2%
Dec-2025	2,693	- 6.9%	3,195	+ 4.3%
Jan-2026	3,003	- 10.9%	3,499	- 6.2%
Feb-2026	3,044	- 15.9%	3,566	- 10.4%
Mar-2026	2,978	- 17.8%	3,483	- 15.0%
Apr-2026	2,748	- 21.8%	3,171	- 20.3%
12-Month Avg	2,814	- 2.3%	3,176	+ 5.1%

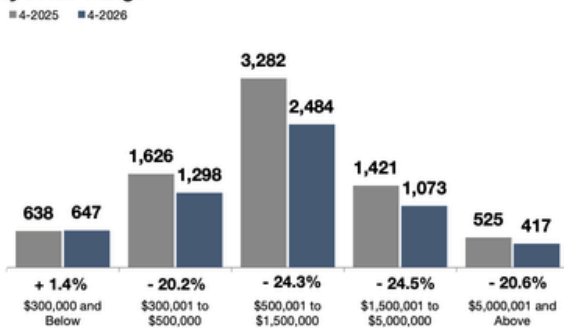
Historical Inventory of Homes for Sale by Month



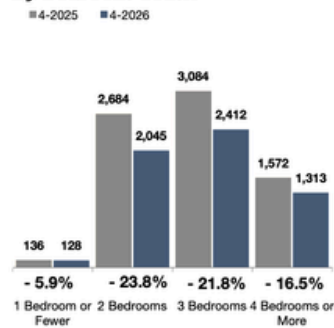
OVERALL INVENTORY OF HOMES FOR SALE BY PRICE RANGE

The number of properties available for sale in active status at the end of the most recent month. Based on one month of activity.

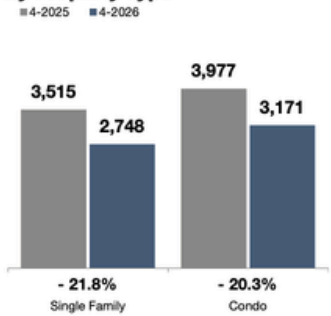
By Price Range



By Bedroom Count



By Property Type



LOCAL MARKET UPDATE - NAPLES BEACH

34102, 34103, 34108

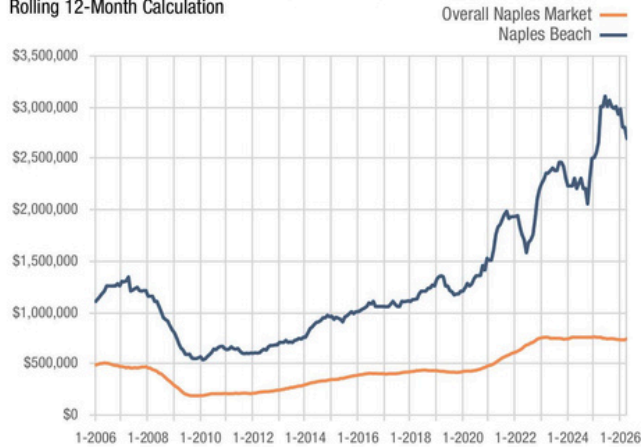
Single Family	April			Year to Date		
	2025	2026	% Change	Thru 4-2025	Thru 4-2026	% Change
Key Metrics						
New Listings	87	75	- 13.8%	548	436	- 20.4%
Total Sales	60	76	+ 26.7%	203	232	+ 14.3%
Days on Market Until Sale	161	139	- 13.7%	135	125	- 7.4%
Median Closed Price*	\$3,700,000	\$3,150,000	- 14.9%	\$3,275,000	\$2,937,500	- 10.3%
Average Closed Price*	\$8,357,873	\$4,991,914	- 40.3%	\$6,219,177	\$4,949,743	- 20.4%
Percent of List Price Received*	90.8%	92.8%	+ 2.2%	92.2%	92.5%	+ 0.3%
Inventory of Homes for Sale	749	564	- 24.7%	—	—	—
Months Supply of Inventory	20.1	11.7	- 41.8%	—	—	—

Condo	April			Year to Date		
	2025	2026	% Change	Thru 4-2025	Thru 4-2026	% Change
Key Metrics						
New Listings	167	132	- 21.0%	988	796	- 19.4%
Total Sales	118	148	+ 25.4%	338	452	+ 33.7%
Days on Market Until Sale	92	101	+ 9.8%	91	100	+ 9.9%
Median Closed Price*	\$1,252,500	\$1,012,500	- 19.2%	\$1,200,000	\$1,155,000	- 3.8%
Average Closed Price*	\$1,770,831	\$1,545,628	- 12.7%	\$1,808,831	\$1,637,341	- 9.5%
Percent of List Price Received*	92.3%	93.3%	+ 1.1%	93.2%	93.6%	+ 0.4%
Inventory of Homes for Sale	1,192	940	- 21.1%	—	—	—
Months Supply of Inventory	17.3	11.5	- 33.5%	—	—	—

* Does not account for sale concessions and/or downpayment assistance. | Percent changes are calculated using rounded figures and can sometimes look extreme due to small sample size.

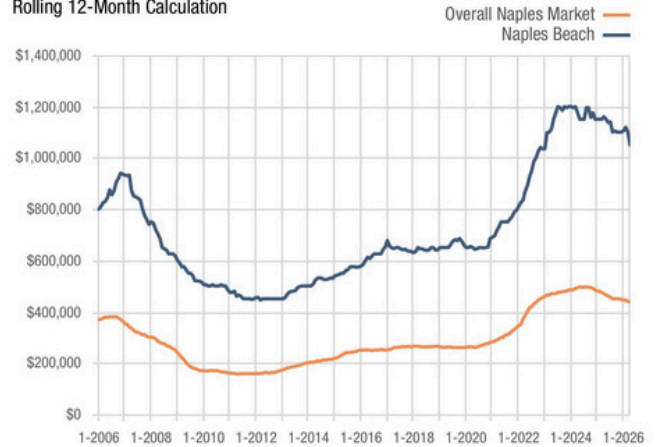
Median Closed Price - Single Family

Rolling 12-Month Calculation



Median Closed Price - Condo

Rolling 12-Month Calculation



LOCAL MARKET UPDATE - NORTH NAPLES

34109, 34110, 34119

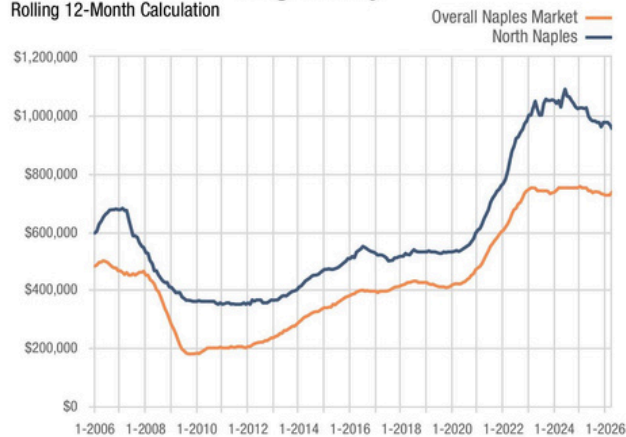
Single Family	April			Year to Date		
	2025	2026	% Change	Thru 4-2025	Thru 4-2026	% Change
Key Metrics						
New Listings	127	103	- 18.9%	692	631	- 8.8%
Total Sales	73	121	+ 65.8%	303	377	+ 24.4%
Days on Market Until Sale	66	90	+ 36.4%	79	79	0.0%
Median Closed Price*	\$1,285,000	\$1,050,000	- 18.3%	\$1,050,000	\$1,000,000	- 4.8%
Average Closed Price*	\$1,734,650	\$1,619,672	- 6.6%	\$1,585,373	\$1,555,233	- 1.9%
Percent of List Price Received*	94.3%	94.3%	0.0%	94.3%	94.5%	+ 0.2%
Inventory of Homes for Sale	653	498	- 23.7%	—	—	—
Months Supply of Inventory	9.0	6.0	- 33.3%	—	—	—

Condo	April			Year to Date		
	2025	2026	% Change	Thru 4-2025	Thru 4-2026	% Change
Key Metrics						
New Listings	195	159	- 18.5%	908	792	- 12.8%
Total Sales	117	149	+ 27.4%	385	451	+ 17.1%
Days on Market Until Sale	69	97	+ 40.6%	78	102	+ 30.8%
Median Closed Price*	\$480,000	\$450,000	- 6.3%	\$475,000	\$445,000	- 6.3%
Average Closed Price*	\$626,357	\$675,572	+ 7.9%	\$651,862	\$669,176	+ 2.7%
Percent of List Price Received*	95.2%	94.7%	- 0.5%	95.4%	94.6%	- 0.8%
Inventory of Homes for Sale	887	774	- 12.7%	—	—	—
Months Supply of Inventory	10.3	8.6	- 16.5%	—	—	—

* Does not account for sale concessions and/or downpayment assistance. | Percent changes are calculated using rounded figures and can sometimes look extreme due to small sample size.

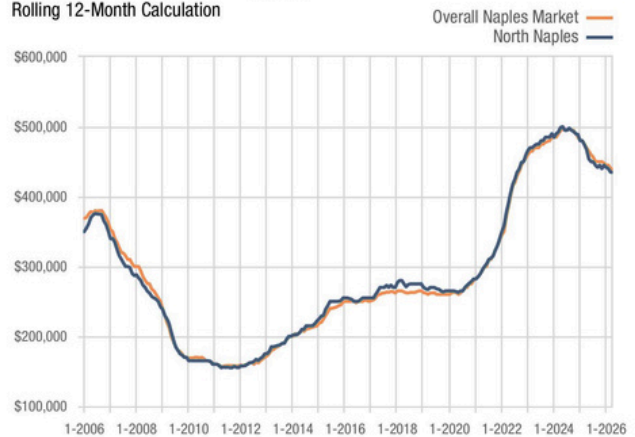
Median Closed Price - Single Family

Rolling 12-Month Calculation



Median Closed Price - Condo

Rolling 12-Month Calculation



LOCAL MARKET UPDATE - CENTRAL NAPLES

34104, 34105, 34116

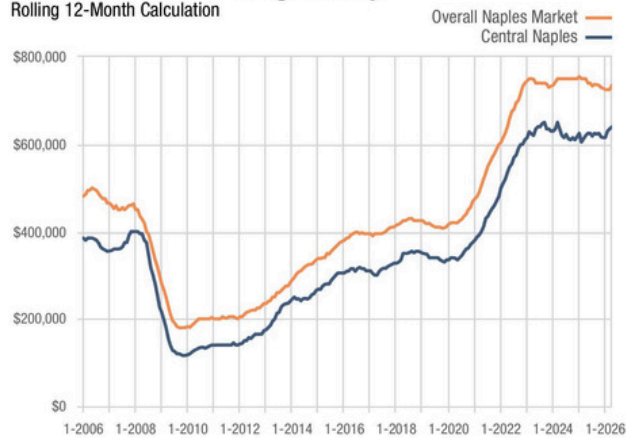
Single Family	April			Year to Date		
	2025	2026	% Change	Thru 4-2025	Thru 4-2026	% Change
Key Metrics						
New Listings	72	68	- 5.6%	371	316	- 14.8%
Total Sales	48	46	- 4.2%	189	181	- 4.2%
Days on Market Until Sale	53	69	+ 30.2%	74	80	+ 8.1%
Median Closed Price*	\$715,000	\$682,500	- 4.5%	\$650,000	\$700,000	+ 7.7%
Average Closed Price*	\$1,126,223	\$1,281,187	+ 13.8%	\$1,110,129	\$1,310,945	+ 18.1%
Percent of List Price Received*	96.2%	95.6%	- 0.6%	95.8%	95.6%	- 0.2%
Inventory of Homes for Sale	327	250	- 23.5%	—	—	—
Months Supply of Inventory	7.9	5.6	- 29.1%	—	—	—

Condo	April			Year to Date		
	2025	2026	% Change	Thru 4-2025	Thru 4-2026	% Change
Key Metrics						
New Listings	87	60	- 31.0%	478	371	- 22.4%
Total Sales	74	70	- 5.4%	193	235	+ 21.8%
Days on Market Until Sale	84	85	+ 1.2%	78	90	+ 15.4%
Median Closed Price*	\$305,000	\$334,500	+ 9.7%	\$310,000	\$310,000	0.0%
Average Closed Price*	\$384,122	\$393,270	+ 2.4%	\$395,724	\$386,173	- 2.4%
Percent of List Price Received*	94.6%	94.1%	- 0.5%	94.6%	94.5%	- 0.1%
Inventory of Homes for Sale	528	326	- 38.3%	—	—	—
Months Supply of Inventory	11.5	6.2	- 46.1%	—	—	—

* Does not account for sale concessions and/or downpayment assistance. | Percent changes are calculated using rounded figures and can sometimes look extreme due to small sample size.

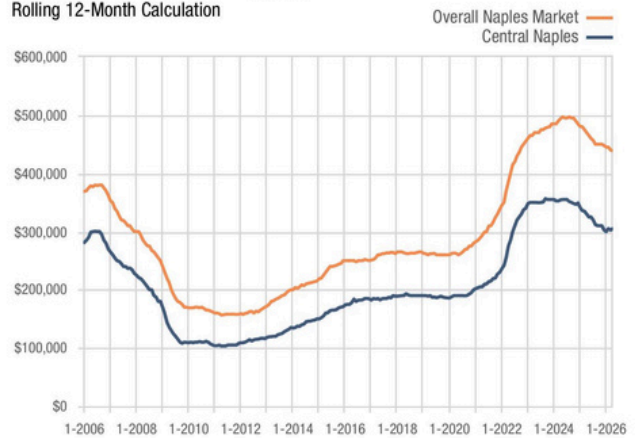
Median Closed Price - Single Family

Rolling 12-Month Calculation



Median Closed Price - Condo

Rolling 12-Month Calculation



LOCAL MARKET UPDATE - SOUTH NAPLES

34112, 34113

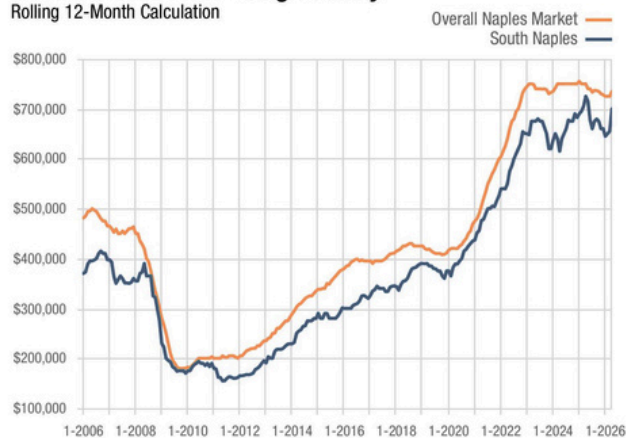
Single Family	April			Year to Date		
	2025	2026	% Change	Thru 4-2025	Thru 4-2026	% Change
Key Metrics						
New Listings	93	64	- 31.2%	476	364	- 23.5%
Total Sales	55	59	+ 7.3%	170	194	+ 14.1%
Days on Market Until Sale	62	100	+ 61.3%	73	99	+ 35.6%
Median Closed Price*	\$725,000	\$830,000	+ 14.5%	\$754,950	\$800,000	+ 6.0%
Average Closed Price*	\$1,064,782	\$1,085,638	+ 2.0%	\$1,096,455	\$1,058,323	- 3.5%
Percent of List Price Received*	92.8%	94.7%	+ 2.0%	93.6%	94.5%	+ 1.0%
Inventory of Homes for Sale	490	324	- 33.9%	—	—	—
Months Supply of Inventory	12.5	7.2	- 42.4%	—	—	—

Condo	April			Year to Date		
	2025	2026	% Change	Thru 4-2025	Thru 4-2026	% Change
Key Metrics						
New Listings	167	129	- 22.8%	842	704	- 16.4%
Total Sales	103	123	+ 19.4%	316	375	+ 18.7%
Days on Market Until Sale	77	94	+ 22.1%	83	89	+ 7.2%
Median Closed Price*	\$405,000	\$375,000	- 7.4%	\$420,000	\$350,000	- 16.7%
Average Closed Price*	\$451,299	\$461,971	+ 2.4%	\$469,105	\$425,793	- 9.2%
Percent of List Price Received*	93.9%	95.2%	+ 1.4%	94.2%	94.3%	+ 0.1%
Inventory of Homes for Sale	854	673	- 21.2%	—	—	—
Months Supply of Inventory	12.4	8.7	- 29.8%	—	—	—

* Does not account for sale concessions and/or downpayment assistance. | Percent changes are calculated using rounded figures and can sometimes look extreme due to small sample size.

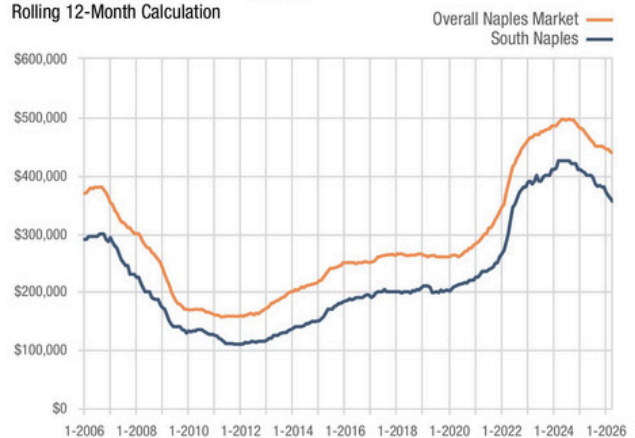
Median Closed Price - Single Family

Rolling 12-Month Calculation



Median Closed Price - Condo

Rolling 12-Month Calculation



LOCAL MARKET UPDATE - EAST NAPLES

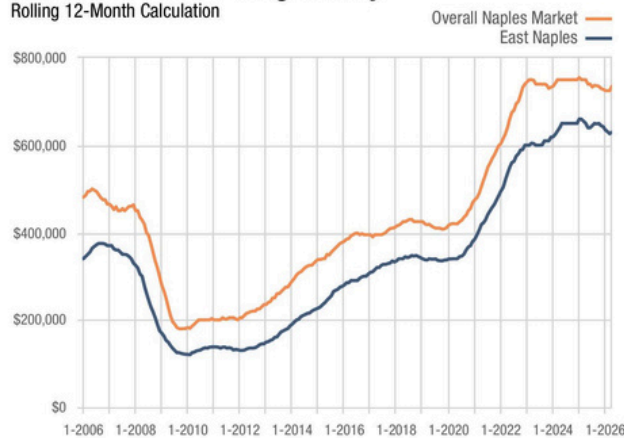
34114, 34117, 34120, 34137

Single Family	April			Year to Date		
	2025	2026	% Change	Thru 4-2025	Thru 4-2026	% Change
Key Metrics						
New Listings	241	242	+ 0.4%	1,119	1,047	- 6.4%
Total Sales	162	167	+ 3.1%	512	583	+ 13.9%
Days on Market Until Sale	85	78	- 8.2%	87	86	- 1.1%
Median Closed Price*	\$599,500	\$675,000	+ 12.6%	\$650,000	\$625,000	- 3.8%
Average Closed Price*	\$707,191	\$844,559	+ 19.4%	\$803,037	\$811,250	+ 1.0%
Percent of List Price Received*	96.0%	95.7%	- 0.3%	95.9%	95.7%	- 0.2%
Inventory of Homes for Sale	1,127	937	- 16.9%	—	—	—
Months Supply of Inventory	9.0	6.9	- 23.3%	—	—	—

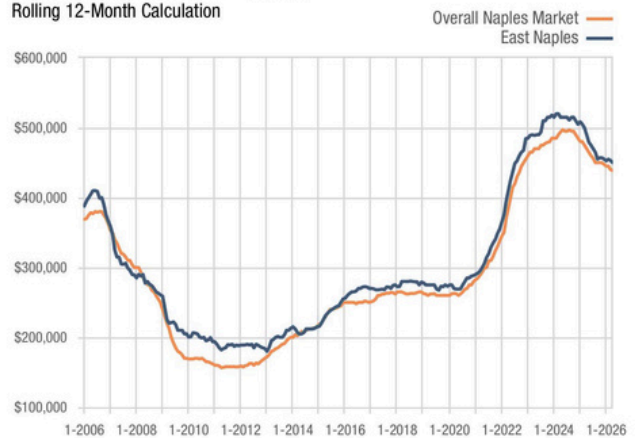
Condo	April			Year to Date		
	2025	2026	% Change	Thru 4-2025	Thru 4-2026	% Change
Key Metrics						
New Listings	61	82	+ 34.4%	408	400	- 2.0%
Total Sales	54	75	+ 38.9%	160	243	+ 51.9%
Days on Market Until Sale	77	110	+ 42.9%	91	112	+ 23.1%
Median Closed Price*	\$479,500	\$436,500	- 9.0%	\$465,000	\$450,000	- 3.2%
Average Closed Price*	\$478,534	\$460,327	- 3.8%	\$475,233	\$474,711	- 0.1%
Percent of List Price Received*	94.9%	95.7%	+ 0.8%	95.1%	95.2%	+ 0.1%
Inventory of Homes for Sale	459	370	- 19.4%	—	—	—
Months Supply of Inventory	11.7	7.8	- 33.3%	—	—	—

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Median Closed Price - Single Family
Rolling 12-Month Calculation



Median Closed Price - Condo
Rolling 12-Month Calculation





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