



Market Report

JANUARY 2026 REPORT



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.

Google



Zillow



realtor.com[®]



WELCOME TO THE BONNYCASTLE DECEMBER 2025 REPORT THIS TEXT IS COURTESY OF THE NAPLES AREA BOARD OF REALTORS MARKET REPORT

Sellers in the Naples area housing market enjoyed increased buyer activity in January as pending sales increased 40.3 percent to 1,065 pending sales from 759 pending sales in January 2025. According to the January 2026 Market Report by the Naples Area Board of REALTORS® (NABOR®), which tracks home listings and sales within Collier County (excluding Marco Island), there were 2,053 price decreases during January and 1,906 new listings, which opened the door to buyers seeking more choices in all price points and home types. Broker analysts reviewing the report anticipated January would enjoy continued sales momentum, as seen during the second half of 2025, and point to the 9.2 months of inventory as a signal that Naples has returned to a balanced market.

The overall median closed price in January decreased 4.1 percent to \$627,500 from \$654,000 in January 2025. However, this was driven by the condominium market, which had a 3.4 percent decrease in median closed price, to \$450,000 from \$466,000 in January 2025. The single-family home market, which had about 500 fewer properties for sale than the condominium market, reported a 1.6 percent increase in median closed price, to \$812,500 from \$800,000 in January 2025.

Despite a surge of 907 more new listings in January compared to December, overall inventory during January decreased 10.6 percent to 6,328 properties from 7,082 properties in January 2025, which highlights a rapid pace of sales outpacing new supply.

Overall closed sales increased 0.5 percent to 564 closed sales from 561 closed sales in January 2025. Closed sales of condominiums increased 8.2 percent to 276 closed sales from 255 closed sales in January 2025. However, closed sales of single-family homes decreased 5.9 percent to 288 closed sales from 306 closed sales.

QUICK FACTS

OVERALL MARKET FACTS

INVENTORY



6,328

↓ 11%

PENDINGS



1,065

↑ 40%

NEW LISTINGS



1,906

↓ 17%

MEDIAN CLOSED PRICE



\$627,500

↓ 4%

CLOSED SALES



564

↑ .5%

DAYS ON MARKET



97

↑ 5%

OVERALL MARKET OVERVIEW

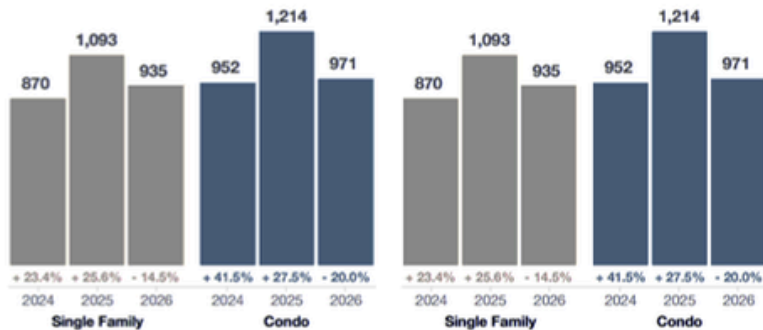
Key metrics by report month and for year-to-date (YTD) starting from the first of the year.

Key Metrics	Historical Sparkbars	1-2025	1-2026	% Change	YTD 2025	YTD 2026	% Change
New Listings		2,307	1,906	- 17.4%	2,307	1,906	- 17.4%
Total Sales		561	564	+0.5%	561	564	+0.5%
Days on Market Until Sale		92	97	+ 5.4%	92	97	+ 5.4%
Median Closed Price		\$654,000	\$627,500	- 4.1%	\$654,000	\$627,500	- 4.1%
Average Closed Price		\$1,306,136	\$1,269,763	- 2.8%	\$1,306,136	\$1,269,763	- 2.8%
Percent of List Price Received		94.8%	94.6%	- 0.2%	94.8%	94.6%	- 0.2%
Pending Listings		759	1,065	+ 40.3%	759	1,065	+ 40.3%
Inventory of Homes for Sale		7,082	6,328	- 10.6%	—	—	—
Months Supply of Inventory		10.6	9.2	- 13.2%	—	—	—

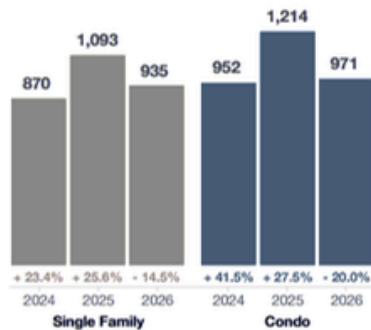
OVERALL NEW LISTINGS

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

January

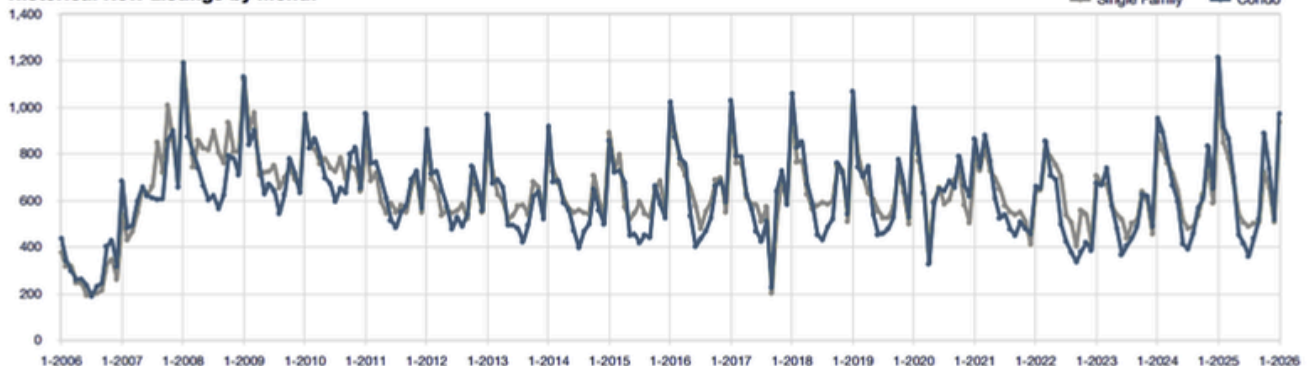


Year to Date



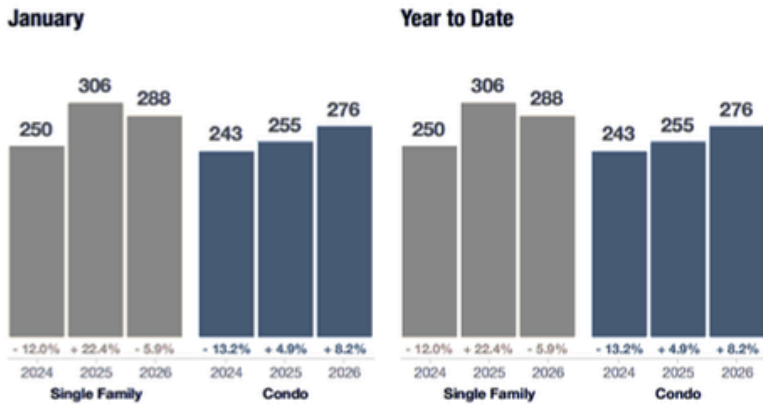
New Listings	Single Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Feb-2025	847	+ 3.7%	914	+ 2.1%
Mar-2025	780	+ 2.9%	865	+ 10.8%
Apr-2025	676	- 5.2%	694	+ 4.5%
May-2025	537	- 16.1%	450	- 24.4%
Jun-2025	503	- 2.3%	414	+ 0.5%
Jul-2025	487	+ 1.9%	358	- 8.0%
Aug-2025	500	+ 3.1%	436	- 4.4%
Sep-2025	503	- 5.6%	518	- 8.5%
Oct-2025	721	+ 15.5%	888	+ 46.3%
Nov-2025	655	- 11.6%	737	- 11.5%
Dec-2025	506	- 13.8%	516	- 20.5%
Jan-2026	935	- 14.5%	971	- 20.0%
12-Month Avg	638	- 4.1%	647	- 3.7%

Historical New Listings by Month

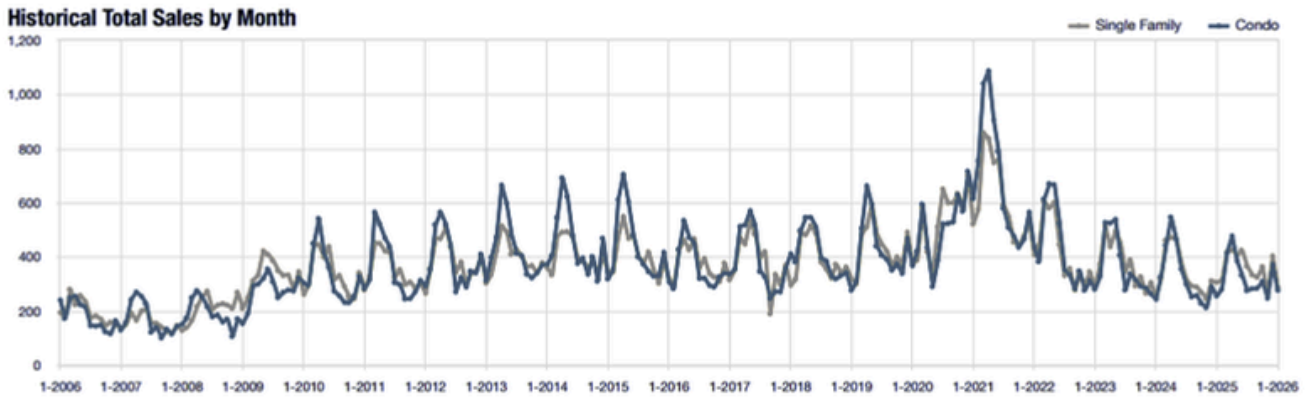


OVERALL CLOSED SALES

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

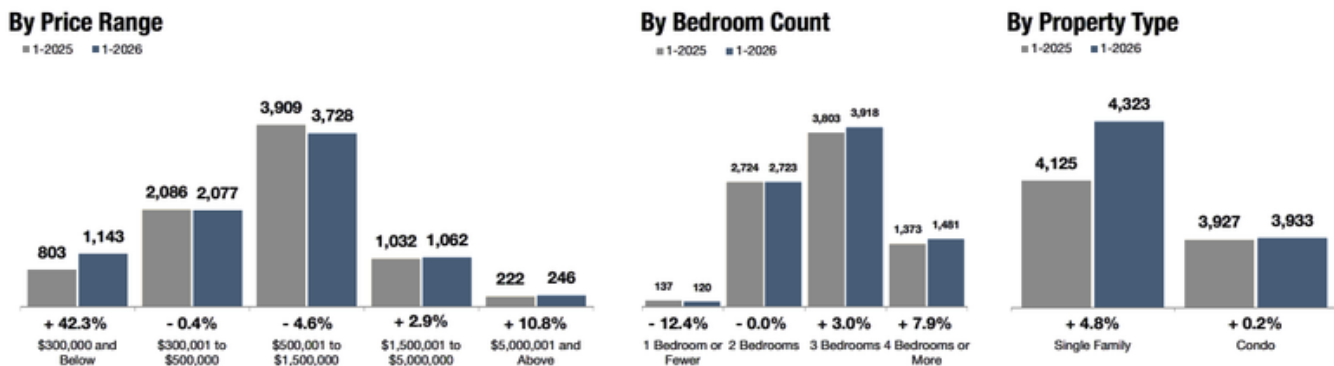


Total Sales	Single Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Feb-2025	312	- 2.5%	280	- 13.8%
Mar-2025	417	- 9.5%	415	- 6.3%
Apr-2025	426	- 9.7%	477	- 12.8%
May-2025	406	- 13.2%	384	- 17.6%
Jun-2025	424	+ 12.2%	332	- 6.5%
Jul-2025	365	+ 15.9%	275	- 7.7%
Aug-2025	333	+ 14.0%	282	+ 11.9%
Sep-2025	324	+ 12.5%	284	+ 10.5%
Oct-2025	364	+ 35.3%	309	+ 35.5%
Nov-2025	261	+ 6.5%	247	+ 16.5%
Dec-2025	403	+ 29.6%	372	+ 28.7%
Jan-2026	288	- 5.9%	276	+ 8.2%
12-Month Avg	360	+ 4.7%	328	+ 0.3%



OVERALL CLOSED SALES BY PRICE RANGE

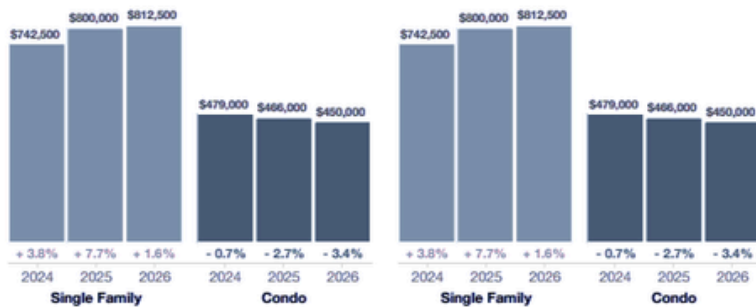
A count of the actual sales that closed in a given month. Based on a rolling 12-month total.



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.

January

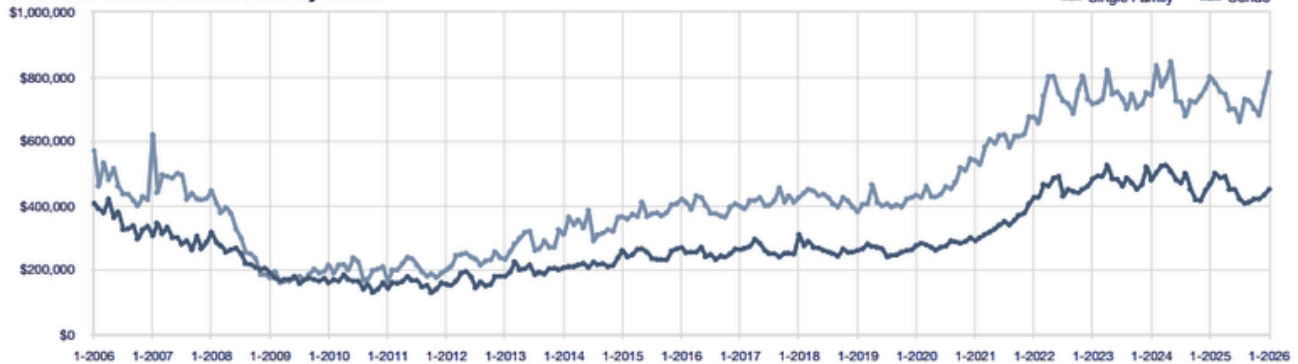


Year to Date

Median Closed Price	Single Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Feb-2025	\$780,000	- 6.5%	\$500,000	- 0.4%
Mar-2025	\$754,000	- 2.1%	\$486,000	- 7.1%
Apr-2025	\$745,000	- 6.1%	\$490,000	- 6.7%
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	\$812,500	+ 1.6%	\$450,000	- 3.4%
12-Month Avg*	\$725,000	- 4.0%	\$445,000	- 7.4%

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

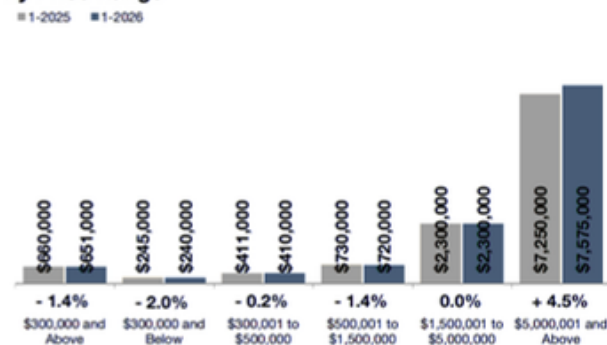
Historical Median Closed Price by Month



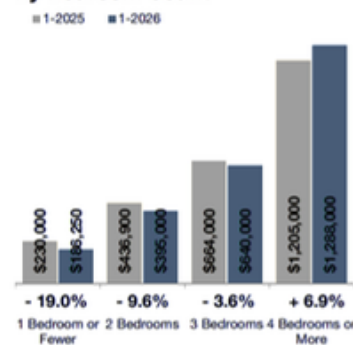
OVERALL MEDIAN CLOSED PRICE BY PRICE RANGE

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



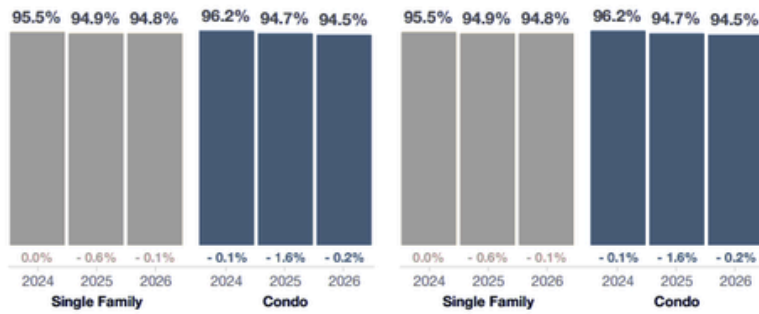
By Property Type



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.

January

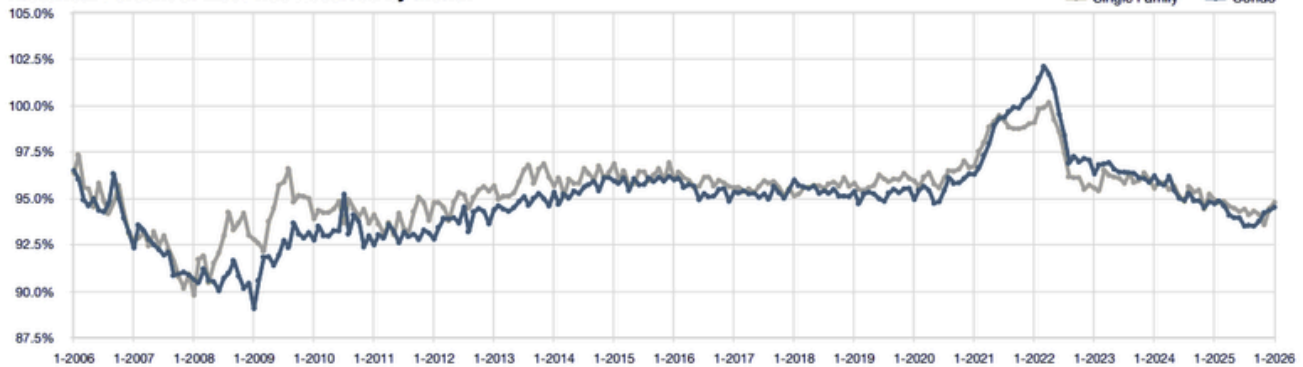


Year to Date

Pct. of List Price Received	Single Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Feb-2025	94.8%	-1.1%	94.8%	-1.0%
Mar-2025	94.8%	-1.0%	94.6%	-1.1%
Apr-2025	94.5%	-1.0%	94.1%	-2.2%
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%
12-Month Avg*	94.4%	-1.0%	94.1%	-1.3%

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

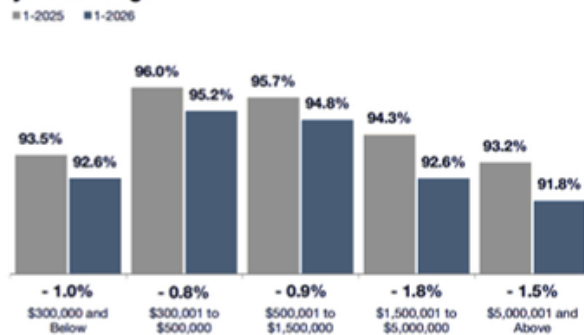
Historical Percent of List Price Received by Month



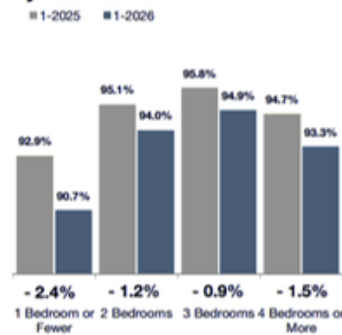
OVERALL PERCENT OF CURRENT LIST PRICE RECEIVED BY PRICE RANGE

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



By Bedroom Count

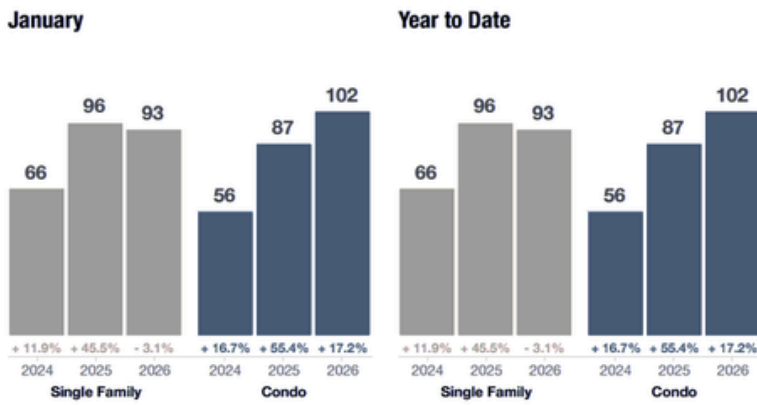


By Property Type



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
Feb-2025	81	+ 24.6%	89	+ 23.6%
Mar-2025	89	+ 23.6%	83	+ 27.7%
Apr-2025	88	+ 25.7%	79	+ 25.4%
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%	106	+ 35.9%
Dec-2025	87	+ 11.5%	100	+ 11.1%
Jan-2026	93	- 3.1%	102	+ 17.2%
12-Month Avg*	93	+ 23.1%	98	+ 26.5%

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

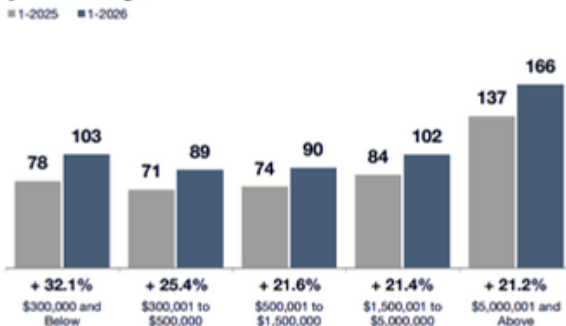
Historical Days on Market Until Sale by Month



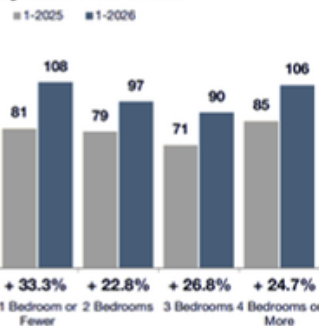
OVERALL DAYS ON MARKET UNTIL SALE BY PRICE RANGE

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

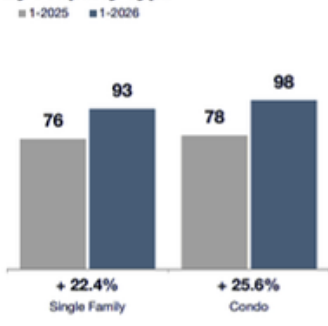
By Price Range



By Bedroom Count



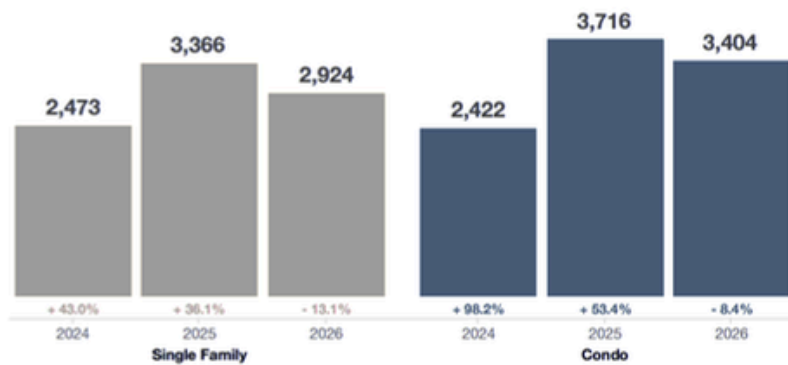
By Property Type



OVERALL INVENTORY OF HOMES FOR SALE

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

January



Homes for Sale	Single Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Feb-2025	3,611	+35.0%	3,965	+45.2%
Mar-2025	3,615	+33.1%	4,084	+46.0%
Apr-2025	3,505	+31.0%	3,961	+42.9%
May-2025	3,221	+23.6%	3,539	+32.3%
Jun-2025	2,959	+18.1%	3,197	+28.8%
Jul-2025	2,711	+12.8%	2,839	+23.6%
Aug-2025	2,558	+10.7%	2,656	+21.7%
Sep-2025	2,468	+4.6%	2,614	+13.2%
Oct-2025	2,577	+1.9%	2,992	+18.8%
Nov-2025	2,707	-3.5%	3,187	+11.4%
Dec-2025	2,664	-7.8%	3,143	+3.0%
Jan-2026	2,924	-13.1%	3,404	-8.4%
12-Month Avg	2,960	+11.6%	3,298	+22.2%

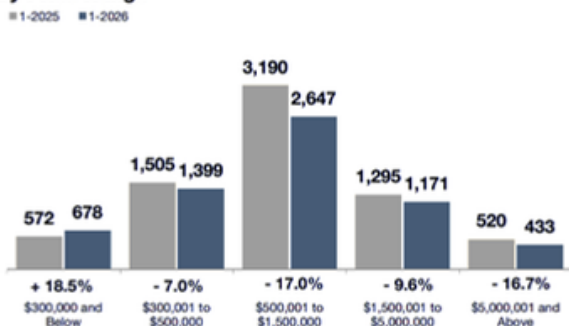
Historical Inventory of Homes for Sale by Month



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.

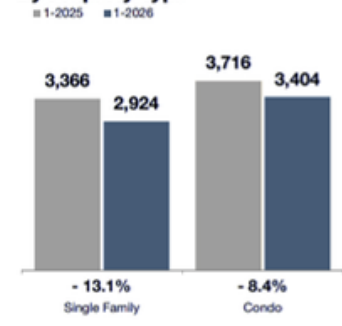
By Price Range



By Bedroom Count



By Property Type



LOCAL MARKET UPDATE - NAPLES BEACH

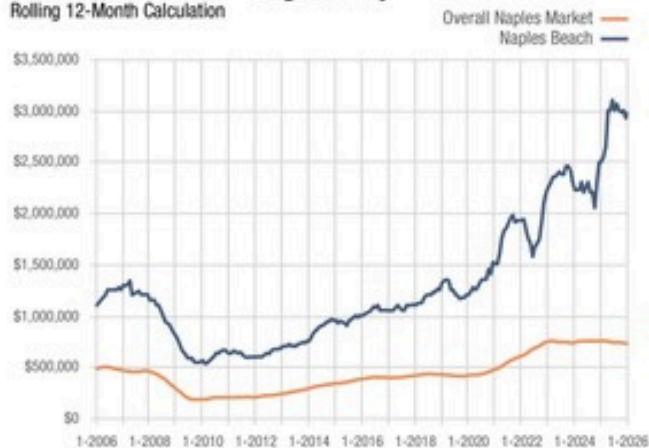
34102, 34103, 34108

Single Family	January			Year to Date		
	2025	2026	% Change	Thru 1-2025	Thru 1-2026	% Change
Key Metrics						
New Listings	216	144	- 33.3%	216	144	- 33.3%
Total Sales	51	50	- 2.0%	51	50	- 2.0%
Days on Market Until Sale	120	137	+ 14.2%	120	137	+ 14.2%
Median Closed Price*	\$2,500,000	\$2,645,000	+ 5.8%	\$2,500,000	\$2,645,000	+ 5.8%
Average Closed Price*	\$4,927,835	\$5,107,578	+ 3.6%	\$4,927,835	\$5,107,578	+ 3.6%
Percent of List Price Received*	93.3%	92.5%	- 0.9%	93.3%	92.5%	- 0.9%
Inventory of Homes for Sale	742	583	- 21.4%	—	—	—
Months Supply of Inventory	20.2	12.8	- 36.6%	—	—	—

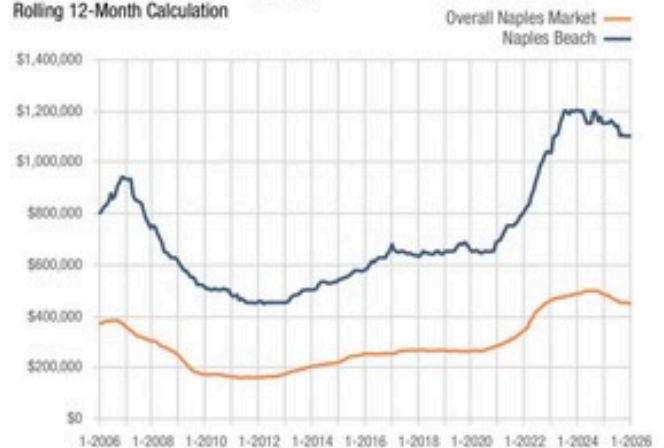
Condo	January			Year to Date		
	2025	2026	% Change	Thru 1-2025	Thru 1-2026	% Change
Key Metrics						
New Listings	359	255	- 29.0%	359	255	- 29.0%
Total Sales	57	62	+ 8.8%	57	62	+ 8.8%
Days on Market Until Sale	90	109	+ 21.1%	90	109	+ 21.1%
Median Closed Price*	\$1,100,000	\$1,181,250	+ 7.4%	\$1,100,000	\$1,181,250	+ 7.4%
Average Closed Price*	\$1,700,777	\$1,490,727	- 12.4%	\$1,700,777	\$1,490,727	- 12.4%
Percent of List Price Received*	93.8%	93.8%	0.0%	93.8%	93.8%	0.0%
Inventory of Homes for Sale	1,107	1,018	- 8.0%	—	—	—
Months Supply of Inventory	15.4	14.0	- 9.1%	—	—	—

* 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



A rolling 12-month calculation represents the current month and the 11 months prior in a single data point. If no activity occurred during a month, the line extends to the next available data point.

LOCAL MARKET UPDATE - NORTH NAPLES

34109, 34110, 34119

ShowingTime.com

Single Family	January			Year to Date		
	2025	2026	% Change	Thru 1-2025	Thru 1-2026	% Change
Key Metrics						
New Listings	213	222	+ 4.2%	213	222	+ 4.2%
Total Sales	69	69	0.0%	69	69	0.0%
Days on Market Until Sale	88	92	+ 4.5%	88	92	+ 4.5%
Median Closed Price*	\$1,037,000	\$1,000,000	- 3.6%	\$1,037,000	\$1,000,000	- 3.6%
Average Closed Price*	\$1,510,849	\$1,574,104	+ 4.2%	\$1,510,849	\$1,574,104	+ 4.2%
Percent of List Price Received*	95.0%	94.9%	- 0.1%	95.0%	94.9%	- 0.1%
Inventory of Homes for Sale	580	550	- 5.2%	—	—	—
Months Supply of Inventory	7.7	7.1	- 7.8%	—	—	—

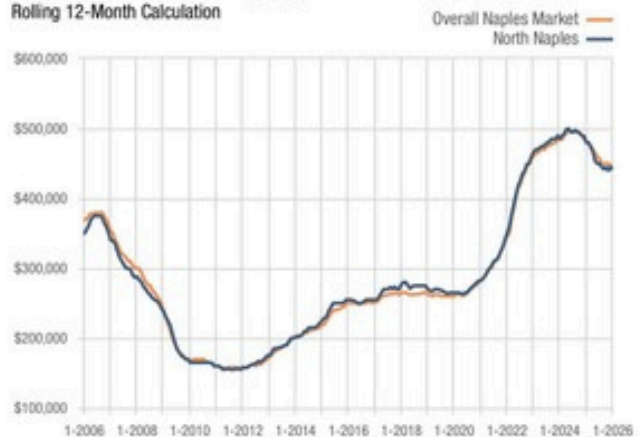
Condo	January			Year to Date		
	2025	2026	% Change	Thru 1-2025	Thru 1-2026	% Change
Key Metrics						
New Listings	283	235	- 17.0%	283	235	- 17.0%
Total Sales	63	72	+ 14.3%	63	72	+ 14.3%
Days on Market Until Sale	82	95	+ 15.9%	82	95	+ 15.9%
Median Closed Price*	\$465,000	\$460,000	- 1.1%	\$465,000	\$460,000	- 1.1%
Average Closed Price*	\$680,241	\$637,778	- 6.2%	\$680,241	\$637,778	- 6.2%
Percent of List Price Received*	95.9%	95.0%	- 0.9%	95.9%	95.0%	- 0.9%
Inventory of Homes for Sale	826	793	- 4.0%	—	—	—
Months Supply of Inventory	9.2	9.3	+ 1.1%	—	—	—

* 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



A rolling 12-month calculation represents the current month and the 11 months prior in a single data point. If no activity occurred during a month, the line extends to the next available data point.

LOCAL MARKET UPDATE - CENTRAL NAPLES

34104, 34105, 34116

Single Family	January			Year to Date		
	2025	2026	% Change	Thru 1-2025	Thru 1-2026	% Change
Key Metrics						
New Listings	120	98	- 18.3%	120	98	- 18.3%
Total Sales	42	37	- 11.9%	42	37	- 11.9%
Days on Market Until Sale	96	92	- 4.2%	96	92	- 4.2%
Median Closed Price*	\$642,000	\$715,000	+ 11.4%	\$642,000	\$715,000	+ 11.4%
Average Closed Price*	\$1,115,260	\$1,383,578	+ 24.1%	\$1,115,260	\$1,383,578	+ 24.1%
Percent of List Price Received*	95.6%	95.9%	+ 0.3%	95.6%	95.9%	+ 0.3%
Inventory of Homes for Sale	332	263	- 20.8%	—	—	—
Months Supply of Inventory	7.6	5.9	- 22.4%	—	—	—

Condo	January			Year to Date		
	2025	2026	% Change	Thru 1-2025	Thru 1-2026	% Change
Key Metrics						
New Listings	162	112	- 30.9%	162	112	- 30.9%
Total Sales	36	40	+ 11.1%	36	40	+ 11.1%
Days on Market Until Sale	60	117	+ 95.0%	60	117	+ 95.0%
Median Closed Price*	\$312,500	\$285,000	- 8.8%	\$312,500	\$285,000	- 8.8%
Average Closed Price*	\$349,460	\$372,983	+ 6.7%	\$349,460	\$372,983	+ 6.7%
Percent of List Price Received*	94.4%	94.1%	- 0.3%	94.4%	94.1%	- 0.3%
Inventory of Homes for Sale	499	382	- 23.4%	—	—	—
Months Supply of Inventory	10.5	7.7	- 26.7%	—	—	—

* 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.

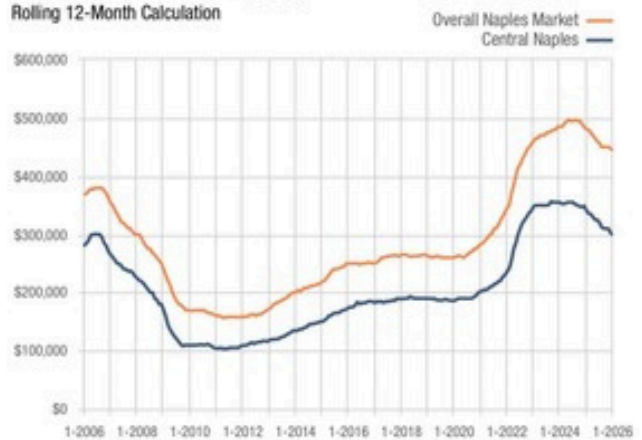
Median Closed Price - Single Family

Rolling 12-Month Calculation



Median Closed Price - Condo

Rolling 12-Month Calculation



A rolling 12-month calculation represents the current month and the 11 months prior in a single data point. If no activity occurred during a month, the line extends to the next available data point.

LOCAL MARKET UPDATE - SOUTH NAPLES

34112, 34113

Single Family	January			Year to Date		
	2025	2026	% Change	Thru 1-2025	Thru 1-2026	% Change
Key Metrics						
New Listings	170	117	- 31.2%	170	117	- 31.2%
Total Sales	29	29	0.0%	29	29	0.0%
Days on Market Until Sale	80	68	- 15.0%	80	68	- 15.0%
Median Closed Price*	\$850,000	\$605,000	- 28.8%	\$850,000	\$605,000	- 28.8%
Average Closed Price*	\$1,095,506	\$812,178	- 25.9%	\$1,095,506	\$812,178	- 25.9%
Percent of List Price Received*	94.5%	94.5%	0.0%	94.5%	94.5%	0.0%
Inventory of Homes for Sale	456	354	- 22.4%	—	—	—
Months Supply of Inventory	11.5	8.3	- 27.8%	—	—	—

Condo	January			Year to Date		
	2025	2026	% Change	Thru 1-2025	Thru 1-2026	% Change
Key Metrics						
New Listings	266	223	- 16.2%	266	223	- 16.2%
Total Sales	55	61	+ 10.9%	55	61	+ 10.9%
Days on Market Until Sale	108	97	- 10.2%	108	97	- 10.2%
Median Closed Price*	\$439,489	\$309,000	- 29.7%	\$439,489	\$309,000	- 29.7%
Average Closed Price*	\$449,020	\$412,010	- 8.2%	\$449,020	\$412,010	- 8.2%
Percent of List Price Received*	93.9%	94.3%	+ 0.4%	93.9%	94.3%	+ 0.4%
Inventory of Homes for Sale	783	707	- 9.7%	—	—	—
Months Supply of Inventory	11.1	9.7	- 12.6%	—	—	—

* 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.

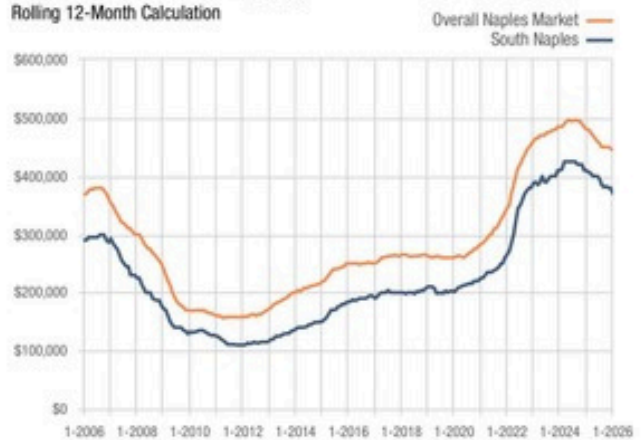
Median Closed Price - Single Family

Rolling 12-Month Calculation



Median Closed Price - Condo

Rolling 12-Month Calculation



A rolling 12-month calculation represents the current month and the 11 months prior in a single data point. If no activity occurred during a month, the line extends to the next available data point.

LOCAL MARKET UPDATE - EAST NAPLES

34114, 34117, 34120, 34137

Single Family	January			Year to Date		
	2025	2026	% Change	Thru 1-2025	Thru 1-2026	% Change
Key Metrics						
New Listings	319	303	- 5.0%	319	303	- 5.0%
Total Sales	101	88	- 12.9%	101	88	- 12.9%
Days on Market Until Sale	98	82	- 16.3%	98	82	- 16.3%
Median Closed Price*	\$730,000	\$610,000	- 16.4%	\$730,000	\$610,000	- 16.4%
Average Closed Price*	\$942,263	\$819,826	- 13.0%	\$942,263	\$819,826	- 13.0%
Percent of List Price Received*	95.2%	95.5%	+ 0.3%	95.2%	95.5%	+ 0.3%
Inventory of Homes for Sale	1,074	1,004	- 6.5%	—	—	—
Months Supply of Inventory	8.3	7.9	- 4.8%	—	—	—

Condo	January			Year to Date		
	2025	2026	% Change	Thru 1-2025	Thru 1-2026	% Change
Key Metrics						
New Listings	123	119	- 3.3%	123	119	- 3.3%
Total Sales	38	34	- 10.5%	38	34	- 10.5%
Days on Market Until Sale	83	92	+ 10.8%	83	92	+ 10.8%
Median Closed Price*	\$470,000	\$467,950	- 0.4%	\$470,000	\$467,950	- 0.4%
Average Closed Price*	\$465,560	\$531,171	+ 14.1%	\$465,560	\$531,171	+ 14.1%
Percent of List Price Received*	95.6%	95.3%	- 0.3%	95.6%	95.3%	- 0.3%
Inventory of Homes for Sale	443	432	- 2.5%	—	—	—
Months Supply of Inventory	10.4	10.8	+ 3.8%	—	—	—

* 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



A rolling 12-month calculation represents the current month and the 11 months prior in a single data point. If no activity occurred during a month, the line extends to the next available data point.



BONNYCASTLE
REALTY

239 572 1443

www.BonnycastleRealty.com