



Market Report

DECEMBER 2025 REPORT



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.

Google



Zillow



realtor.com®



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

Overall closed sales in Naples during December increased 28.8 percent to 773 closed sales from 600 closed sales in December 2024. Broker analysts reviewing the December 2025 Market Report by the Naples Area Board of REALTORS® (NABOR®), which tracks home listings and sales within Collier County (excluding Marco Island), have been watching closed sales improve for seven months consistently. They believe the increase in sales is largely due to sellers being more willing to negotiate. Adjustments in prices – as a result of seller flexibility – effected a 2.5 percent decrease in the overall median closed price in 2025; and a 5 percent decrease in December to \$570,000 from \$600,000 in December 2024. With 8.3 months of inventory available to buyers heading into 2026, broker analysts are cautiously optimistic that closed sales will continue to increase as our transition to a more balanced market is ideal for homes sales in Naples.

A higher volume of high-end, luxury property sales has driven up the average price and conversely, a higher volume of sales in lowerpriced, more affordable properties has exerted downward pressure on the median price.

Overall pending sales increased 12.5 percent in December to 704 pending sales from 626 pending sales in December 2024. Overall inventory during December decreased 3.8 percent to 5,714 properties from 5,938 properties in December 2024.

QUICK FACTS

OVERALL MARKET FACTS

INVENTORY



5,714

↓ 4%

PENDINGS



704

↑ 13%

NEW LISTINGS



999

↓ 19%

MEDIAN CLOSED PRICE



\$570,000

↓ 5%

CLOSED SALES



773

↑ 29%

DAYS ON MARKET



94

↑ 12%

OVERALL MARKET OVERVIEW

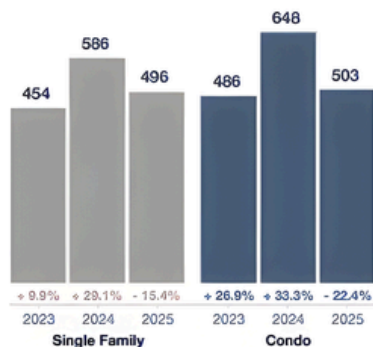
Key metrics by report month and for year-to-date (YTD) starting from the first of the year.

Key Metrics	Historical Sparkbars	12-2024	12-2025	% Change	YTD 2024	YTD 2025	% Change
New Listings		1,234	999	- 19.0%	15,558	15,773	+ 1.4%
Total Sales		600	773	+ 28.8%	7,981	8,249	+ 3.4%
Days on Market Until Sale		84	94	+ 11.9%	75	95	+ 26.7%
Median Closed Price		\$600,000	\$570,000	- 5.0%	\$610,000	\$594,500	- 2.5%
Average Closed Price		\$1,028,254	\$1,073,189	+ 4.4%	\$1,081,902	\$1,130,837	+ 4.5%
Percent of List Price Received		95.0%	94.4%	- 0.6%	95.4%	94.2%	- 1.3%
Pending Listings		626	704	+ 12.5%	10,090	10,178	+ 0.9%
Inventory of Homes for Sale		5,938	5,714	- 3.8%	—	—	—
Months Supply of Inventory		8.9	8.3	- 6.7%	—	—	—

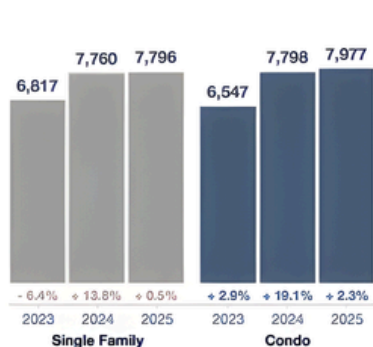
OVERALL NEW LISTINGS

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

December

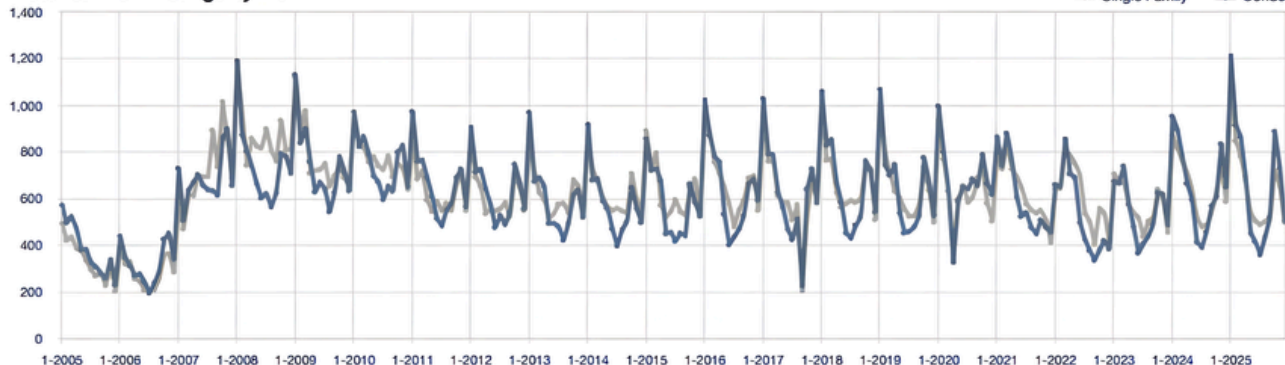


Year to Date



New Listings	Single Family	Year Over-Year Change	Condo	Year Over-Year Change
Jan-2025	1,092	+ 25.5%	1,211	+ 27.2%
Feb-2025	847	+ 3.7%	914	+ 2.1%
Mar-2025	760	+ 2.9%	864	+ 10.6%
Apr-2025	676	- 5.2%	693	+ 4.4%
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%	435	- 4.6%
Sep-2025	504	- 5.4%	517	- 8.7%
Oct-2025	721	+ 15.5%	887	+ 46.1%
Nov-2025	653	- 11.9%	731	- 12.2%
Dec-2025	496	- 15.4%	503	- 22.4%
12-Month Avg	650	+ 0.5%	665	+ 2.3%

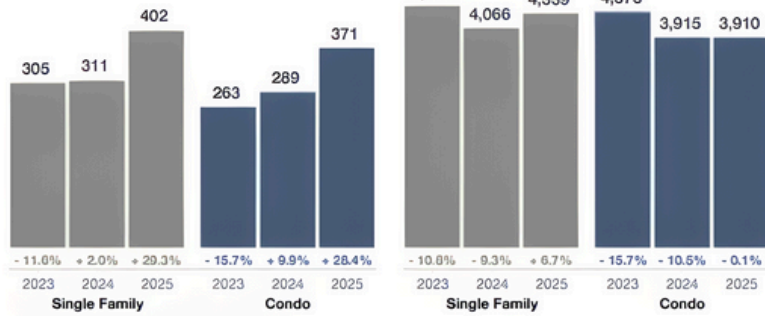
Historical New Listings by Month



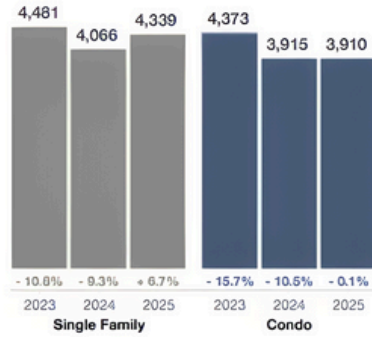
OVERALL CLOSED SALES

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

December

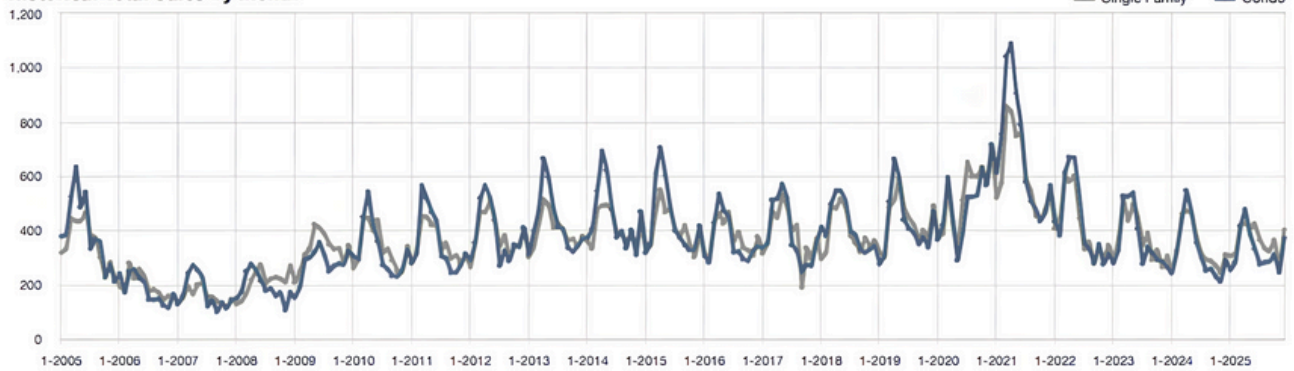


Year to Date



Total Sales	Single Family	Year Over-Year Change	Condo	Year Over-Year Change
Jan-2025	306	+ 22.9%	255	+ 4.9%
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	405	- 13.5%	384	- 17.6%
Jun-2025	424	+ 12.2%	332	- 6.5%
Jul-2025	365	+ 16.2%	275	- 7.7%
Aug-2025	333	+ 14.0%	282	+ 11.9%
Sep-2025	324	+ 12.9%	284	+ 10.5%
Oct-2025	364	+ 35.3%	309	+ 35.5%
Nov-2025	261	+ 6.5%	246	+ 16.0%
Dec-2025	402	+ 29.3%	371	+ 28.4%
12-Month Avg	362	+ 6.8%	326	0.0%

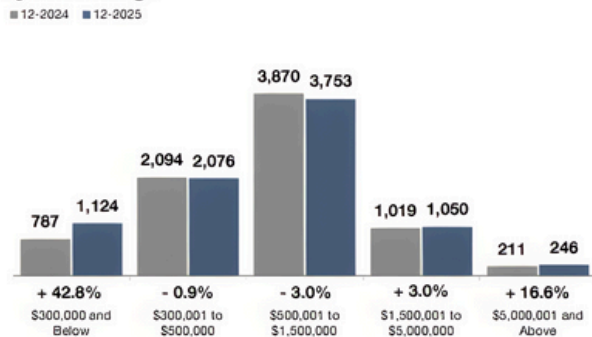
Historical Total Sales by Month



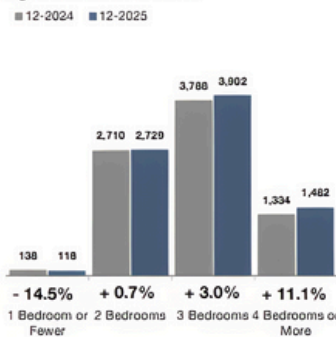
OVERALL CLOSED SALES BY PRICE RANGE

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

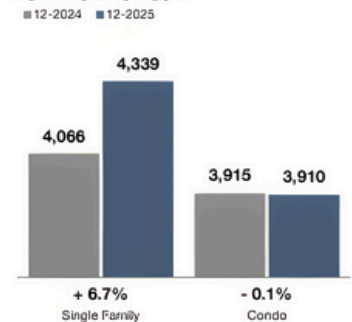
By Price Range



By Bedroom Count



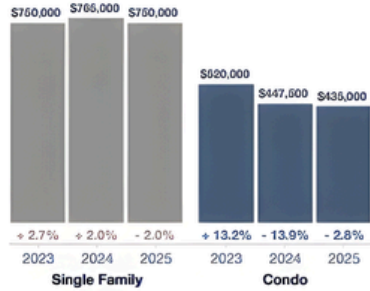
By Property Type



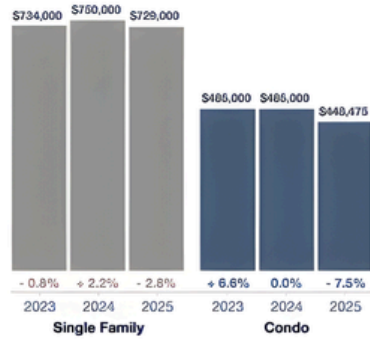
OVERALL MEDIAN CLOSED PRICE

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

December



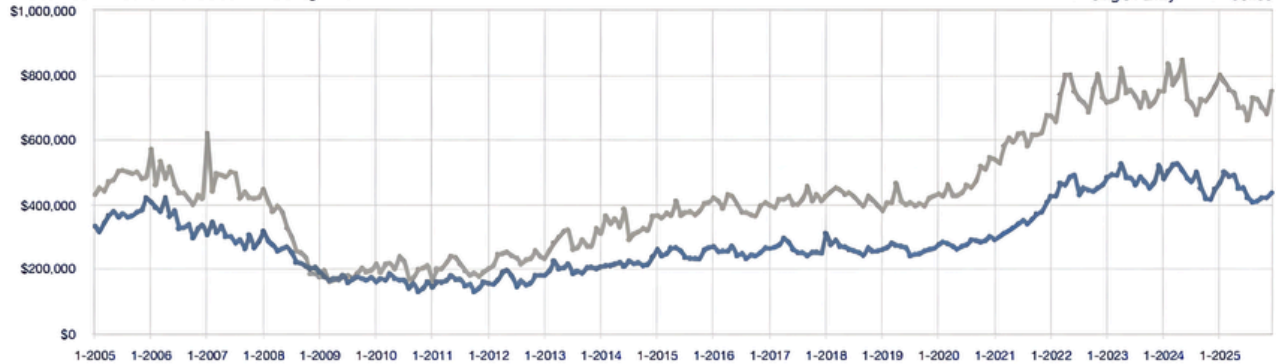
Year to Date



Median Closed Price	Single Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Jan-2025	\$800,000	+ 6.7%	\$466,000	- 2.7%
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	\$699,000	- 17.4%	\$449,500	- 11.0%
Jun-2025	\$700,000	- 3.4%	\$450,225	- 6.2%
Jul-2025	\$660,000	- 7.4%	\$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%	\$435,000	- 2.8%
12-Month Avg*	\$729,000	- 2.8%	\$448,475	- 7.5%

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

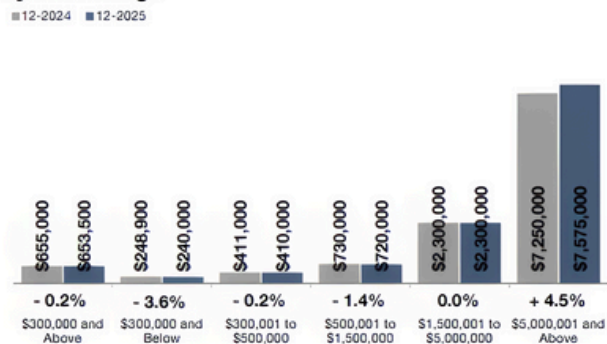
Historical Median Closed Price by Month



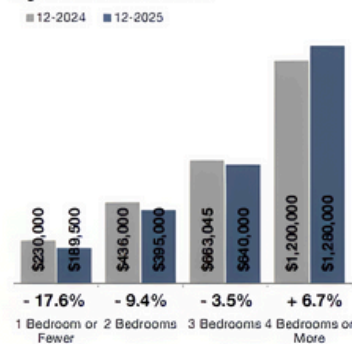
OVERALL MEDIAN CLOSED PRICE BY PRICE RANGE

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

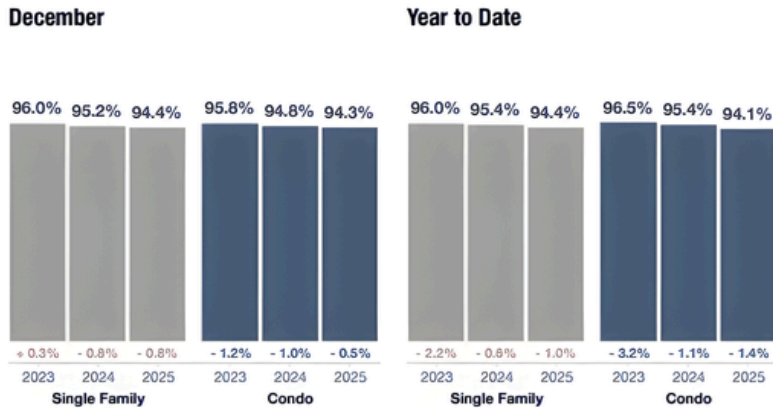


By Property Type



OVERALL PERCENT OF CURRENT LIST PRICE RECEIVED

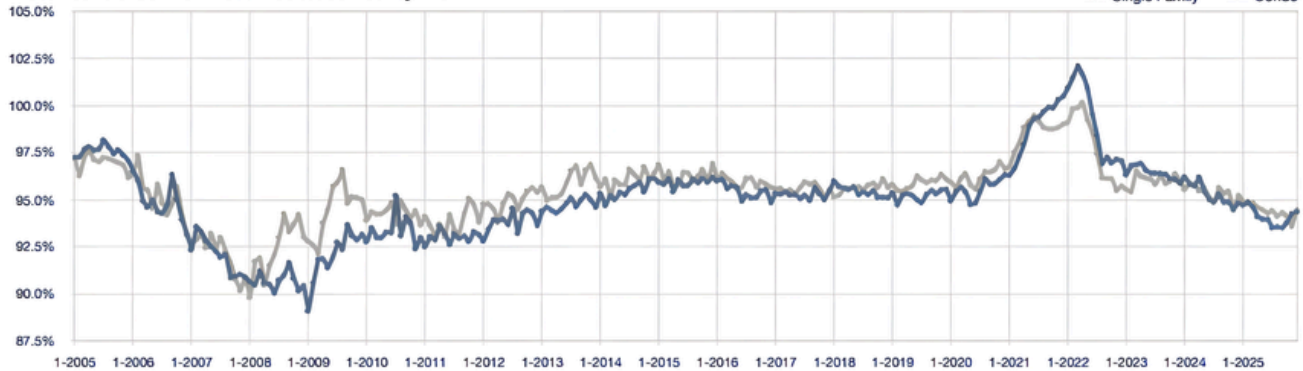
Percentage found when dividing a property's sales price by its most recent list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.



Pct. of List Price Received	Single Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Jan-2025	94.9%	-0.6%	94.7%	-1.6%
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%
12-Month Avg*	94.4%	-1.0%	94.1%	-1.4%

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

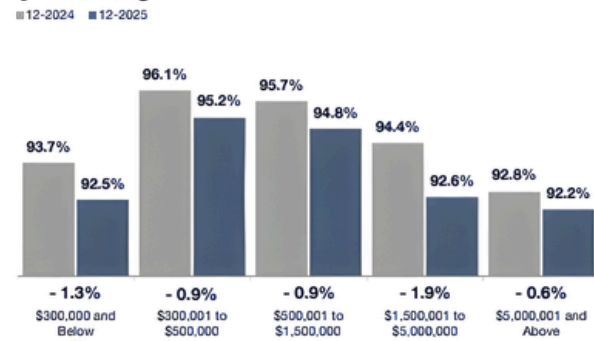
Historical Percent of List Price Received by Month



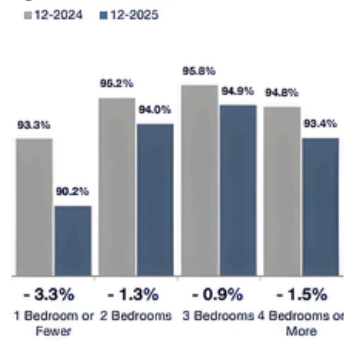
OVERALL PERCENT OF CURRENT LIST PRICE RECEIVED BY PRICE RANGE

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.

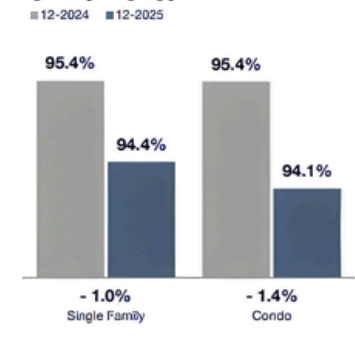
By Price Range



By Bedroom Count



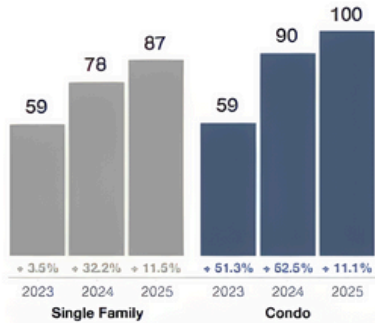
By Property Type



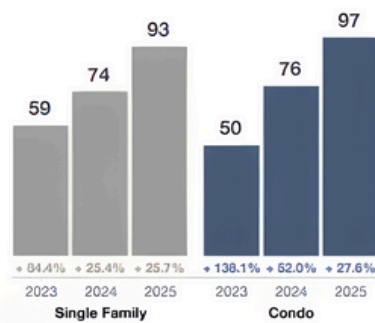
OVERALL DAYS ON MARKET UNTIL SALE

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

December



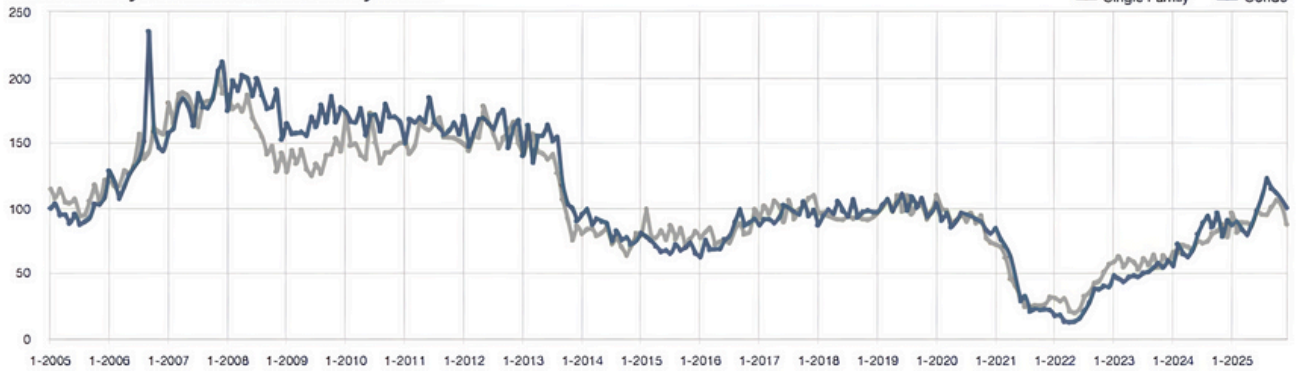
Year to Date



Days on Market	Single Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Jan-2025	96	+ 45.5%	87	+ 55.4%
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%
12-Month Avg*	93	+ 26.9%	97	+ 28.6%

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

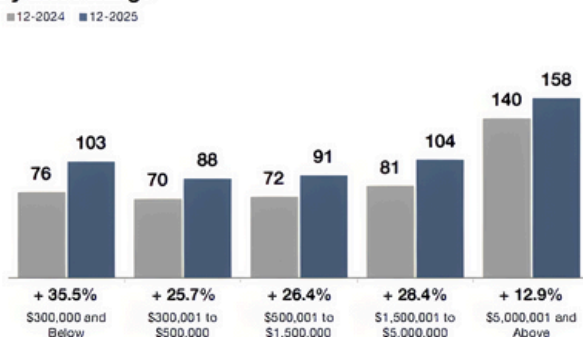
Historical Days on Market Until Sale by Month



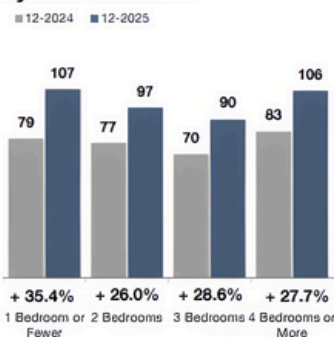
OVERALL DAYS ON MARKET UNTIL SALE BY PRICE RANGE

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

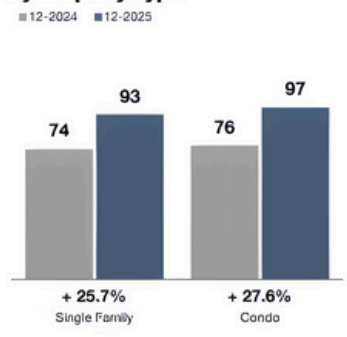
By Price Range



By Bedroom Count



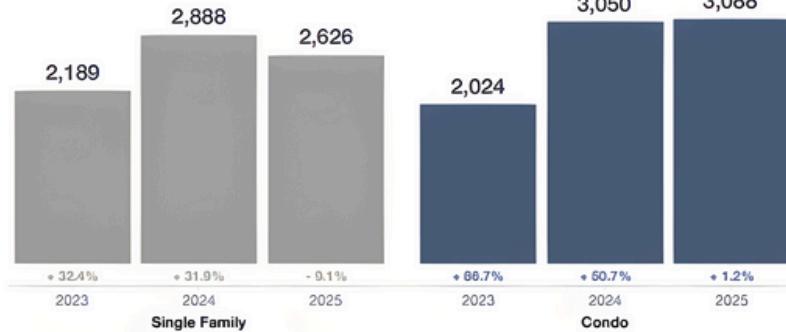
By Property Type



OVERALL INVENTORY OF HOMES FOR SALE

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

December



Homes for Sale	Single Family	Year-over-Year Change	Condo	Year-over-Year Change
Jan-2025	3,363	+36.0%	3,712	+53.3%
Feb-2025	3,608	+34.9%	3,961	+45.1%
Mar-2025	3,612	+33.0%	4,079	+45.8%
Apr-2025	3,502	+30.9%	3,955	+42.7%
May-2025	3,216	+23.5%	3,531	+32.0%
Jun-2025	2,954	+17.9%	3,189	+28.5%
Jul-2025	2,705	+12.5%	2,829	+23.2%
Aug-2025	2,551	+10.4%	2,645	+21.2%
Sep-2025	2,461	+4.3%	2,602	+12.7%
Oct-2025	2,568	+1.6%	2,976	+18.1%
Nov-2025	2,692	-4.0%	3,156	+10.3%
Dec-2025	2,626	-9.1%	3,088	+1.2%
12-Month Avg	2,988	+15.9%	3,310	+27.7%

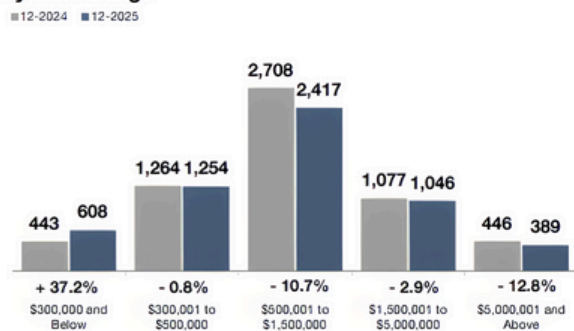
Historical Inventory of Homes for Sale by Month



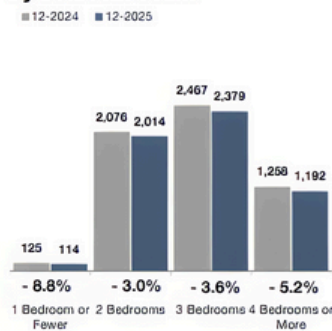
OVERALL INVENTORY OF HOMES FOR SALE BY PRICE RANGE

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

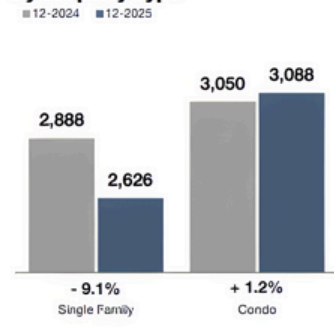
By Price Range



By Bedroom Count



By Property Type



LOCAL MARKET UPDATE - NAPLES BEACH

34102, 34103, 34108

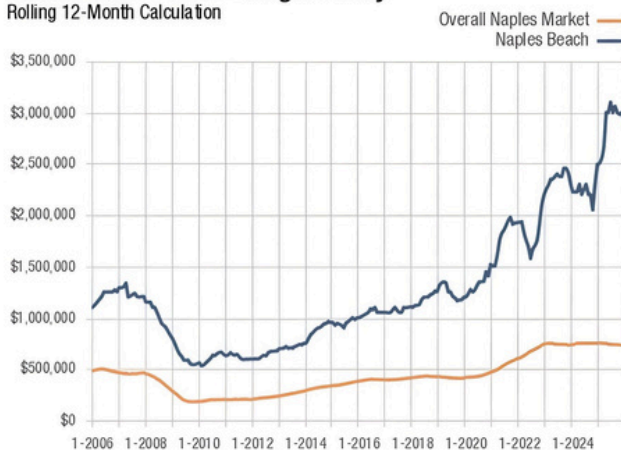
Single Family	December			Year to Date		
	2024	2025	% Change	Thru 12-2024	Thru 12-2025	% Change
Key Metrics						
New Listings	118	75	- 36.4%	1,141	1,163	+ 1.9%
Total Sales	35	56	+ 60.0%	414	549	+ 32.6%
Days on Market Until Sale	87	139	+ 59.8%	113	140	+ 23.9%
Median Closed Price*	\$3,200,000	\$1,870,000	- 41.6%	\$2,495,000	\$2,925,000	+ 17.2%
Average Closed Price*	\$3,719,988	\$3,673,482	- 1.3%	\$4,356,669	\$5,036,203	+ 15.6%
Percent of List Price Received*	92.2%	91.0%	- 1.3%	92.5%	91.5%	- 1.1%
Inventory of Homes for Sale	617	514	- 16.7%	—	—	—
Months Supply of Inventory	17.9	11.2	- 37.4%	—	—	—

Condo	December			Year to Date		
	2024	2025	% Change	Thru 12-2024	Thru 12-2025	% Change
Key Metrics						
New Listings	192	158	- 17.7%	1,906	2,051	+ 7.6%
Total Sales	51	75	+ 47.1%	859	866	+ 0.8%
Days on Market Until Sale	105	128	+ 21.9%	96	112	+ 16.7%
Median Closed Price*	\$950,000	\$1,100,000	+ 15.8%	\$1,150,000	\$1,100,000	- 4.3%
Average Closed Price*	\$1,405,225	\$1,538,498	+ 9.5%	\$1,677,307	\$1,587,903	- 5.3%
Percent of List Price Received*	94.4%	93.4%	- 1.1%	93.9%	92.5%	- 1.5%
Inventory of Homes for Sale	881	937	+ 6.4%	—	—	—
Months Supply of Inventory	12.3	13.0	+ 5.7%	—	—	—

* 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.

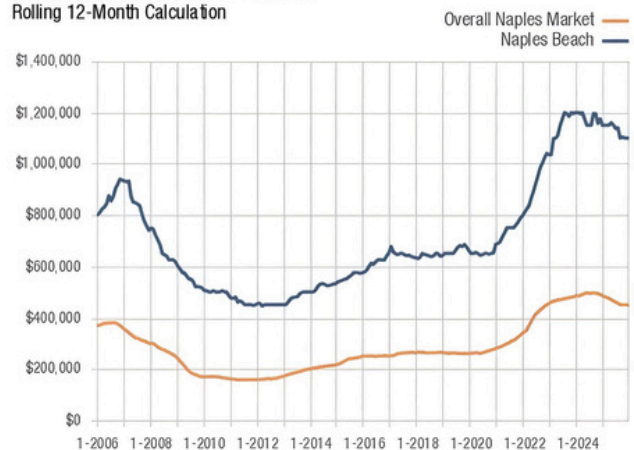
Median Closed Price - Single Family

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 - NORTH NAPLES

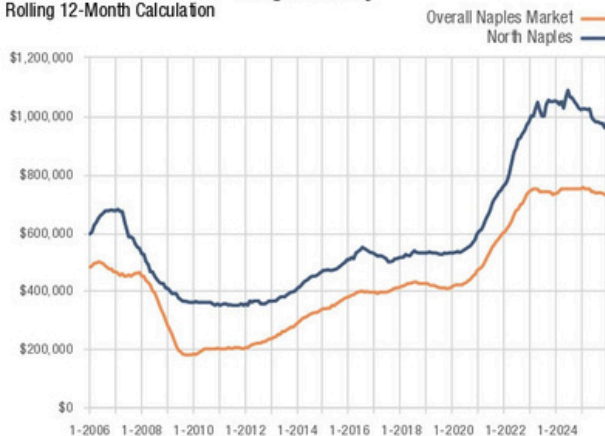
34109, 34110, 34119

Single Family	December			Year to Date		
	2024	2025	% Change	Thru 12-2024	Thru 12-2025	% Change
Key Metrics						
New Listings	101	79	- 21.8%	1,616	1,557	- 3.7%
Total Sales	81	79	- 2.5%	893	925	+ 3.6%
Days on Market Until Sale	67	71	+ 6.0%	62	86	+ 38.7%
Median Closed Price*	\$980,000	\$1,050,000	+ 7.1%	\$1,022,000	\$975,000	- 4.6%
Average Closed Price*	\$1,447,364	\$1,683,114	+ 16.3%	\$1,493,904	\$1,445,730	- 3.2%
Percent of List Price Received*	94.3%	94.3%	0.0%	94.8%	94.2%	- 0.6%
Inventory of Homes for Sale	510	458	- 10.2%	—	—	—
Months Supply of Inventory	6.9	5.9	- 14.5%	—	—	—

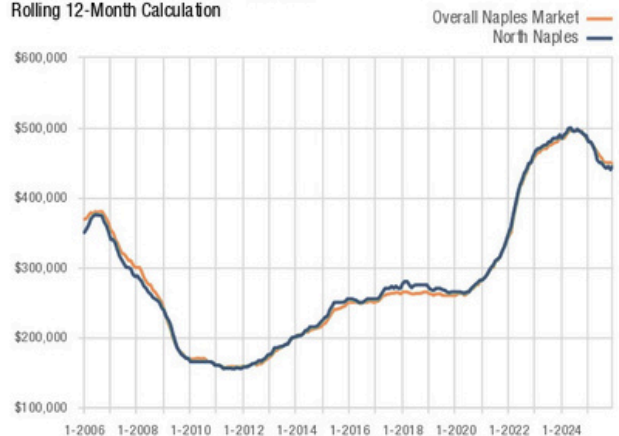
Condo	December			Year to Date		
	2024	2025	% Change	Thru 12-2024	Thru 12-2025	% Change
Key Metrics						
New Listings	152	108	- 28.9%	1,958	1,932	- 1.3%
Total Sales	84	87	+ 3.6%	1,077	1,013	- 5.9%
Days on Market Until Sale	77	104	+ 35.1%	67	94	+ 40.3%
Median Closed Price*	\$416,500	\$440,000	+ 5.6%	\$489,000	\$445,000	- 9.0%
Average Closed Price*	\$617,152	\$703,401	+ 14.0%	\$672,727	\$616,606	- 8.3%
Percent of List Price Received*	95.0%	94.4%	- 0.6%	95.8%	94.6%	- 1.3%
Inventory of Homes for Sale	698	715	+ 2.4%	—	—	—
Months Supply of Inventory	7.8	8.5	+ 9.0%	—	—	—

* 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

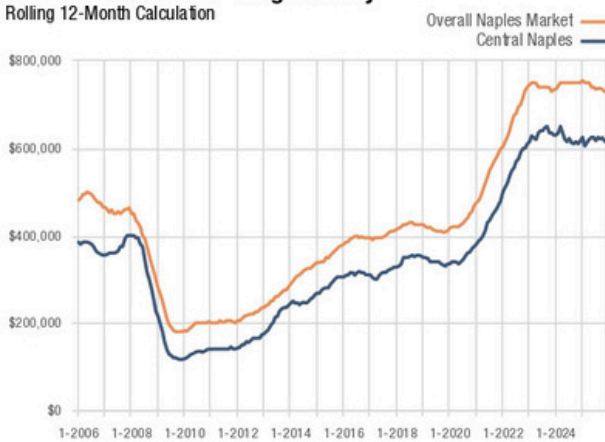
34104, 34105, 34116

Single Family	December			Year to Date		
	2024	2025	% Change	Thru 12-2024	Thru 12-2025	% Change
Key Metrics						
New Listings	62	52	- 16.1%	858	859	+ 0.1%
Total Sales	32	58	+ 81.3%	509	542	+ 6.5%
Days on Market Until Sale	55	94	+ 70.9%	63	80	+ 27.0%
Median Closed Price*	\$703,500	\$625,500	- 11.1%	\$617,000	\$615,000	- 0.3%
Average Closed Price*	\$1,197,816	\$1,189,757	- 0.7%	\$1,097,568	\$1,006,153	- 8.3%
Percent of List Price Received*	96.0%	94.6%	- 1.5%	95.7%	95.1%	- 0.6%
Inventory of Homes for Sale	282	238	- 15.6%	—	—	—
Months Supply of Inventory	6.6	5.3	- 19.7%	—	—	—

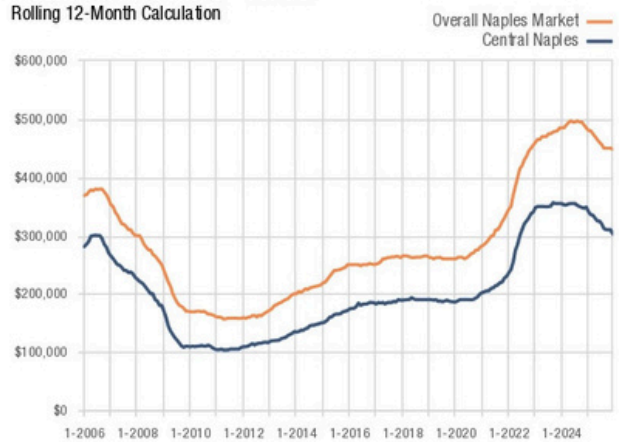
Condo	December			Year to Date		
	2024	2025	% Change	Thru 12-2024	Thru 12-2025	% Change
Key Metrics						
New Listings	92	75	- 18.5%	1,137	1,077	- 5.3%
Total Sales	46	58	+ 26.1%	565	591	+ 4.6%
Days on Market Until Sale	76	104	+ 36.8%	60	87	+ 45.0%
Median Closed Price*	\$387,500	\$309,500	- 20.1%	\$349,000	\$302,500	- 13.3%
Average Closed Price*	\$512,180	\$365,210	- 28.7%	\$429,373	\$375,501	- 12.5%
Percent of List Price Received*	94.9%	94.3%	- 0.6%	95.5%	94.2%	- 1.4%
Inventory of Homes for Sale	406	361	- 11.1%	—	—	—
Months Supply of Inventory	8.6	7.3	- 15.1%	—	—	—

* 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 - SOUTH NAPLES

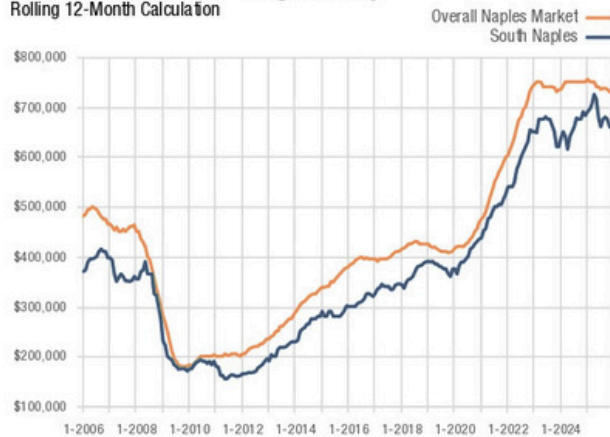
34112, 34113

Single Family	December			Year to Date		
	2024	2025	% Change	Thru 12-2024	Thru 12-2025	% Change
Key Metrics						
New Listings	86	69	- 19.8%	965	963	- 0.2%
Total Sales	36	54	+ 50.0%	474	514	+ 8.4%
Days on Market Until Sale	94	80	- 14.9%	69	90	+ 30.4%
Median Closed Price*	\$665,000	\$523,500	- 21.3%	\$682,500	\$657,500	- 3.7%
Average Closed Price*	\$909,929	\$774,290	- 14.9%	\$1,021,643	\$938,170	- 8.2%
Percent of List Price Received*	94.7%	94.6%	- 0.1%	94.8%	93.4%	- 1.5%
Inventory of Homes for Sale	359	322	- 10.3%	—	—	—
Months Supply of Inventory	9.1	7.5	- 17.6%	—	—	—

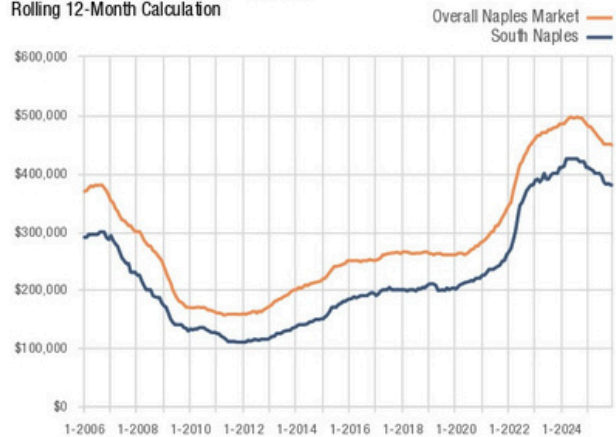
Condo	December			Year to Date		
	2024	2025	% Change	Thru 12-2024	Thru 12-2025	% Change
Key Metrics						
New Listings	132	111	- 15.9%	1,691	1,740	+ 2.9%
Total Sales	58	92	+ 58.6%	843	863	+ 2.4%
Days on Market Until Sale	102	93	- 8.8%	73	94	+ 28.8%
Median Closed Price*	\$385,000	\$362,500	- 5.8%	\$410,000	\$380,000	- 7.3%
Average Closed Price*	\$496,151	\$418,031	- 15.7%	\$476,584	\$441,694	- 7.3%
Percent of List Price Received*	94.3%	94.3%	0.0%	95.8%	94.4%	- 1.5%
Inventory of Homes for Sale	638	620	- 2.8%	—	—	—
Months Supply of Inventory	9.1	8.6	- 5.5%	—	—	—

* 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



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

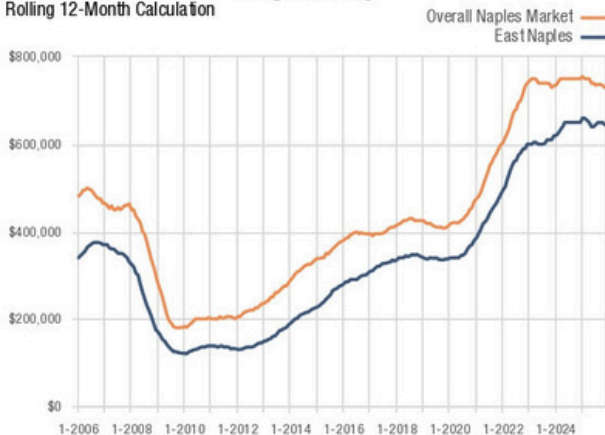
34114, 34117, 34120, 34137

Single Family	December			Year to Date		
	2024	2025	% Change	Thru 12-2024	Thru 12-2025	% Change
Key Metrics						
New Listings	188	196	+ 4.3%	2,759	2,775	+ 0.6%
Total Sales	106	138	+ 30.2%	1,546	1,547	+ 0.1%
Days on Market Until Sale	76	77	+ 1.3%	72	88	+ 22.2%
Median Closed Price*	\$674,950	\$644,000	- 4.6%	\$650,000	\$643,000	- 1.1%
Average Closed Price*	\$832,716	\$793,444	- 4.7%	\$802,904	\$785,523	- 2.2%
Percent of List Price Received*	96.3%	95.7%	- 0.6%	96.4%	95.5%	- 0.9%
Inventory of Homes for Sale	970	952	- 1.9%	—	—	—
Months Supply of Inventory	7.5	7.4	- 1.3%	—	—	—

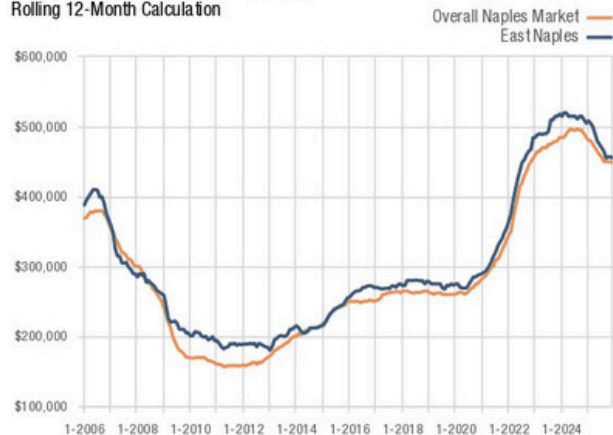
Condo	December			Year to Date		
	2024	2025	% Change	Thru 12-2024	Thru 12-2025	% Change
Key Metrics						
New Listings	76	44	- 42.1%	974	1,000	+ 2.7%
Total Sales	45	54	+ 20.0%	505	485	- 4.0%
Days on Market Until Sale	102	69	- 32.4%	83	96	+ 15.7%
Median Closed Price*	\$492,500	\$456,250	- 7.4%	\$505,000	\$455,000	- 9.9%
Average Closed Price*	\$506,181	\$460,939	- 8.9%	\$533,117	\$469,989	- 11.8%
Percent of List Price Received*	95.6%	95.3%	- 0.3%	96.2%	95.1%	- 1.1%
Inventory of Homes for Sale	379	392	+ 3.4%	—	—	—
Months Supply of Inventory	9.0	9.7	+ 7.8%	—	—	—

* 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