



Market Report

J U L Y 2 0 2 5 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 JULY 2025 REPORT THIS TEXT IS COURTESY OF THE NAPLES AREA BOARD OF REALTORS MARKET REPORT

Broker analysts reviewing the July 2025 Market Report by the Naples Area Board of REALTORS® (NABOR®), which tracks home listings and sales within Collier County (excluding Marco Island), agreed that the desire to own property in paradise is a major factor in the Naples housing market's continued stability. Pending sales (homes under contract) in July increased 19.9 percent to 807 pending sales from 673 pending sales in July 2024. And even with evidence that sellers are negotiating on price (94% of list price received) and adjusting list prices to stay competitive (1,296 price decreases recorded in July), home values remain stable.

If we were in the midst of a market correction, prices would be near \$325,000, or where they were before the pandemic in 2019. The fact that the Naples market was able to sustain prices over the last four years (after record-breaking demand during the pandemic drove prices up), indicates it is consistently doing well.

More evidence that Naples' desirability and consumer confidence are positively influencing the Naples housing market can be witnessed in the number of homes sold resulting in the gradual decrease in inventory over the past few months. While up 11.4 percent to 5,224 properties from 4,691 properties in July 2024, overall inventory has been slowly decreasing since it peaked in March with 7,483 properties.

New listings in July decreased 7.2 percent to 804 new listings from 866 in July 2024. But closed sales, which are connected to pending sales, increased 2 percent in July to 624 closed sales from 612 closed sales in July 2024.

QUICK FACTS

OVERALL MARKET FACTS

INVENTORY



5,224

↑ 11.4%

PENDINGS



807

↑ 19.9%

NEW LISTINGS



804

↓ 7.2%

MEDIAN CLOSED PRICE



\$575,000

↓ 2.5%

CLOSED SALES



624

↑ 2.0%

DAYS ON MARKET



102

↑ 25.9%

OVERALL MARKET OVERVIEW

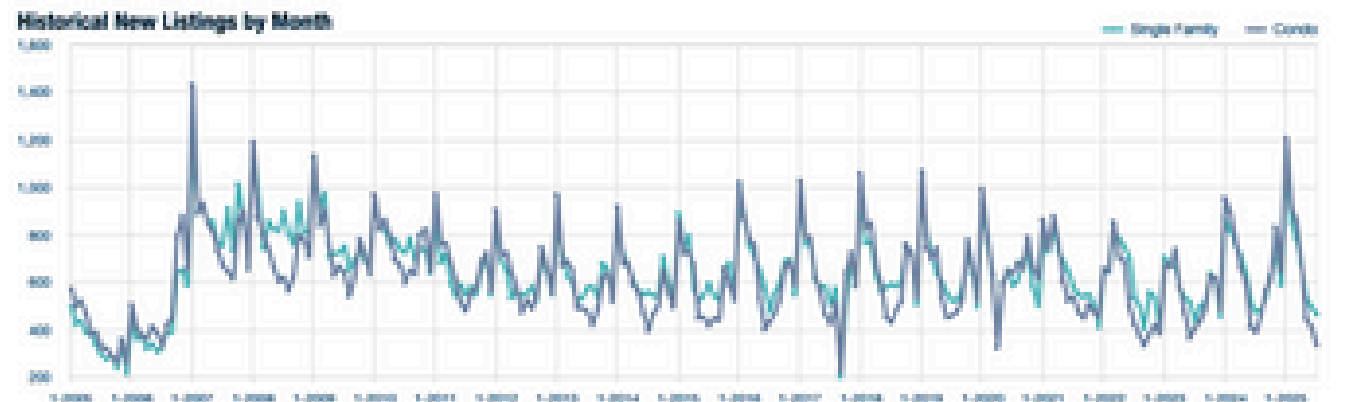
Key metrics by report month and for year-to-date (YTD) starting from the first of the year.

Key Metrics	Historical Sparkbars	7-2024	7-2025	% Change	YTD 2024	YTD 2025	% Change
New Listings		800	804	+ 0.5%	9,476	9,757	+ 3.0%
Total Sales		612	624	+ 2.0%	5,339	5,091	- 4.6%
Days on Market Until Sale		81	102	+ 25.9%	70	90	+ 28.6%
Median Closed Price		\$590,000	\$575,000	- 2.5%	\$625,000	\$608,000	- 2.7%
Average Closed Price		\$539,375	\$506,833	- 6.0%	\$1,112,741	\$1,208,379	+ 8.6%
Percent of List Price Received		94.8%	94.5%	- 0.3%	95.5%	94.4%	- 1.2%
Pending Listings		673	697	+ 3.6%	6,895	6,326	- 8.1%
Inventory of Homes for Sale		4,691	5,224	+ 11.4%	---	---	---
Months Supply of Inventory		6.7	8.1	+ 20.9%	---	---	---

OVERALL NEW LISTINGS

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

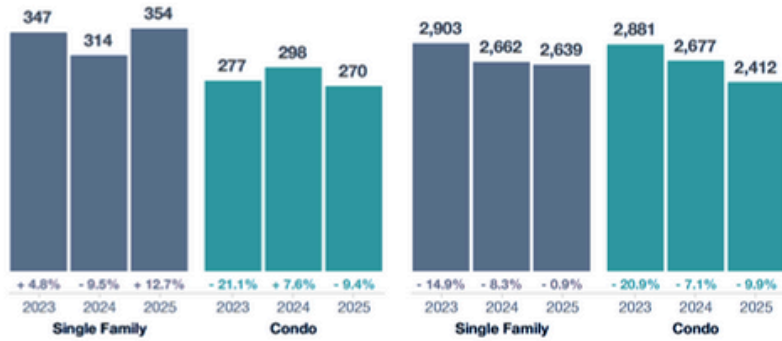
Month	Single Family	Condo	Total	YoY Change
Jul-2025	407	307	714	+ 13.4%
Jun-2025	497	411	908	+ 5.2%
May-2025	536	445	981	+ 16.2%
Apr-2025	675	692	1,367	+ 5.2%
Mar-2025	781	660	1,441	+ 3.0%
Feb-2025	848	610	1,458	+ 3.8%
Jan-2025	1,001	1,207	2,208	+ 25.4%
Dec-2024	586	647	1,233	+ 28.1%
Nov-2024	728	833	1,561	+ 22.8%
Oct-2024	625	636	1,261	+ 2.8%
Sep-2024	533	545	1,078	+ 3.9%
Aug-2024	485	406	891	+ 3.2%
12-Month Avg	655	654	1,309	+ 4.9%



OVERALL CLOSED SALES

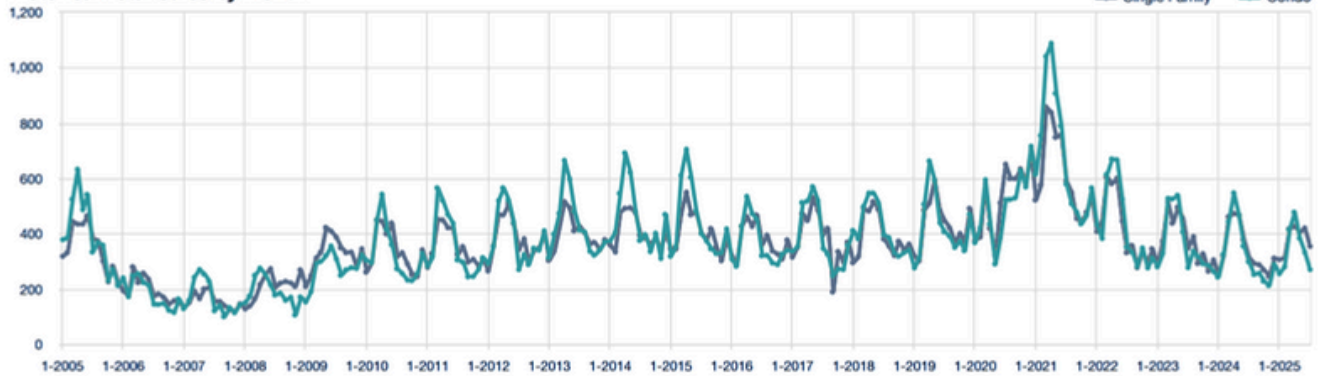
A count of the actual sales that closed in a given month.

July



Total Sales	Single Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Aug-2024	292	- 24.9%	252	- 25.2%
Sep-2024	287	- 1.7%	257	- 18.7%
Oct-2024	269	- 17.7%	228	- 21.6%
Nov-2024	245	- 7.2%	212	- 25.6%
Dec-2024	311	+ 2.0%	289	+ 9.9%
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	404	- 13.7%	383	- 17.8%
Jun-2025	420	+ 11.1%	332	- 6.5%
Jul-2025	354	+ 12.7%	270	- 9.4%
12-Month Avg	337	- 4.5%	304	- 12.4%

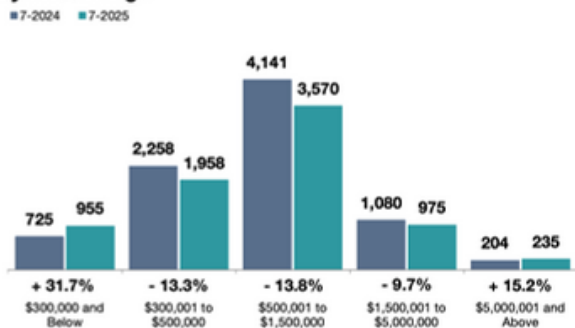
Historical Total Sales by Month



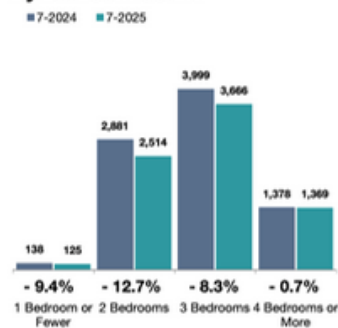
OVERALL CLOSED SALES BY PRICE RANGE

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

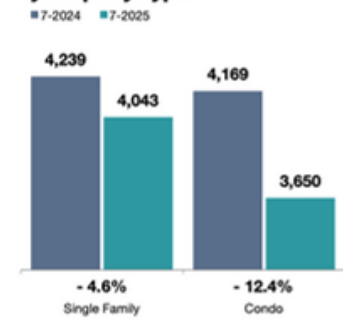
By Price Range



By Bedroom Count



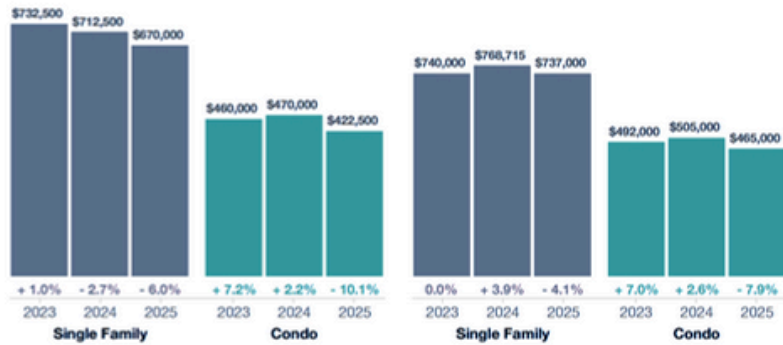
By Property Type



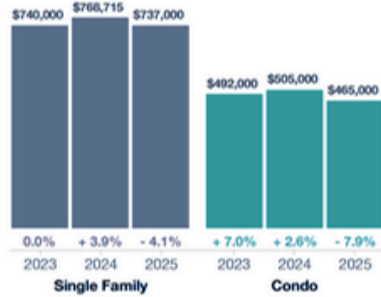
OVERALL MEDIAN CLOSED PRICE

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

July



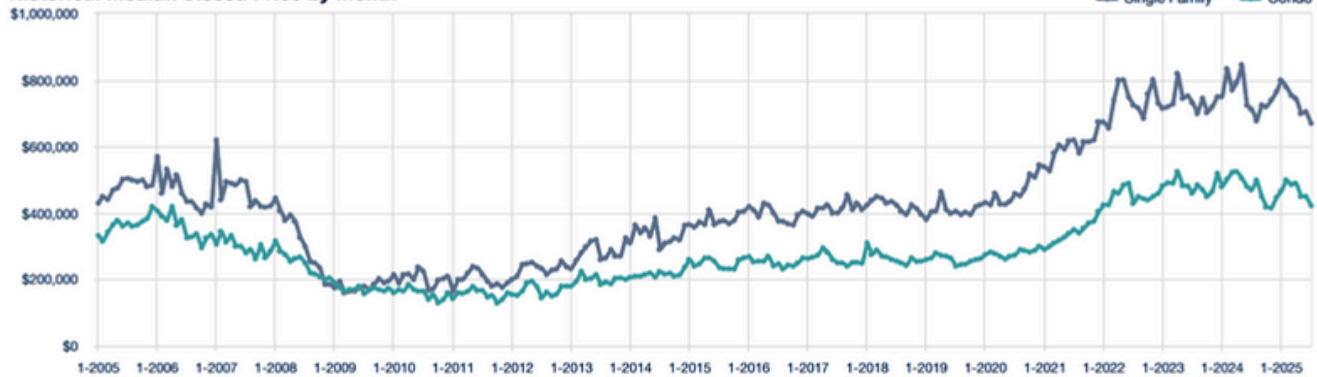
Year to Date



Median Closed Price	Single Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Aug-2024	\$677,500	- 3.1%	\$499,500	+ 3.0%
Sep-2024	\$725,000	- 2.8%	\$450,000	- 4.3%
Oct-2024	\$720,000	+ 2.5%	\$417,500	- 7.2%
Nov-2024	\$740,000	+ 2.8%	\$415,000	- 10.8%
Dec-2024	\$765,000	+ 2.0%	\$447,500	- 13.9%
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	\$699,500	- 17.4%	\$450,000	- 10.9%
Jun-2025	\$705,000	- 2.7%	\$450,225	- 6.2%
Jul-2025	\$670,000	- 6.0%	\$422,500	- 10.1%
12-Month Avg*	\$735,000	- 2.0%	\$457,000	- 7.7%

* Median Closed Price for all properties from August 2024 through July 2025. This is not the average of the individual figures above.

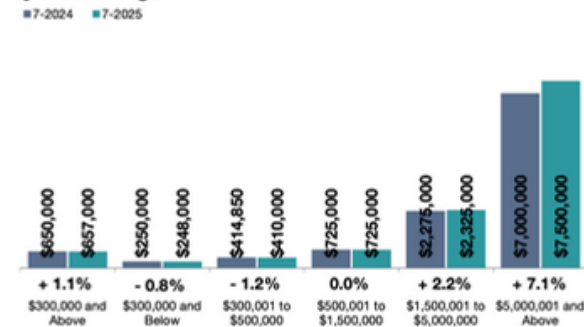
Historical Median Closed Price by Month



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.

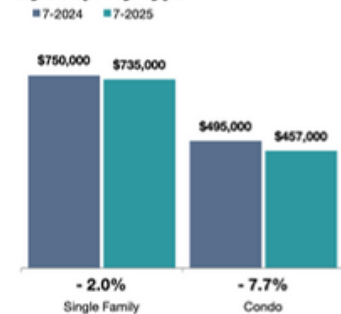
By Price Range



By Bedroom Count



By Property Type

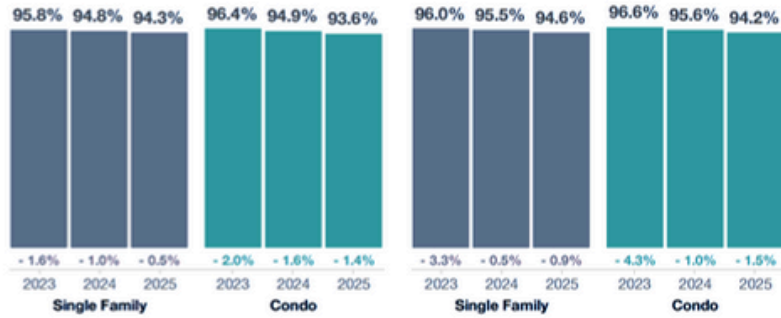


OVERALL PERCENT OF CURRENT LIST PRICE RECEIVED

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.

July

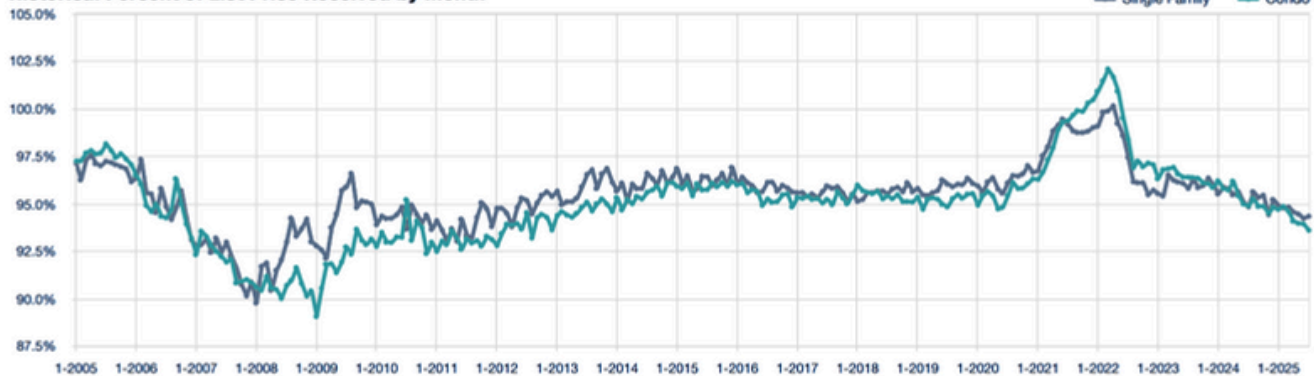
Year to Date



Pct. of List Price Received	Single Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Aug-2024	95.6%	- 0.7%	95.3%	- 1.1%
Sep-2024	95.3%	- 0.5%	94.8%	- 1.6%
Oct-2024	95.4%	- 0.5%	94.9%	- 1.2%
Nov-2024	94.4%	- 2.0%	94.5%	- 1.6%
Dec-2024	95.2%	- 0.8%	94.8%	- 1.0%
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%	94.0%	- 1.5%
Jun-2025	94.2%	- 0.9%	93.9%	- 1.2%
Jul-2025	94.3%	- 0.5%	93.6%	- 1.4%
12-Month Avg*	94.8%	- 1.0%	94.4%	- 1.4%

* Pct. of List Price Received for all properties from August 2024 through July 2025. This is not the average of the individual figures above.

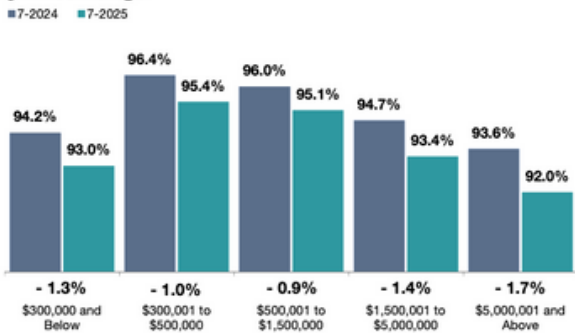
Historical Percent of List Price Received by Month



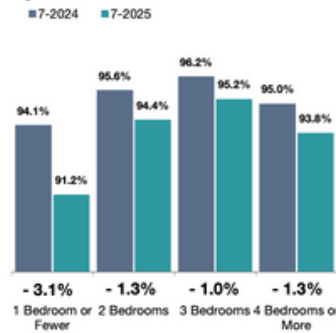
OVERALL PERCENT OF CURRENT LIST PRICE RECEIVED BY PRICE RANGE

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.

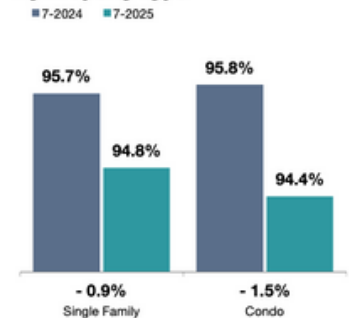
By Price Range



By Bedroom Count

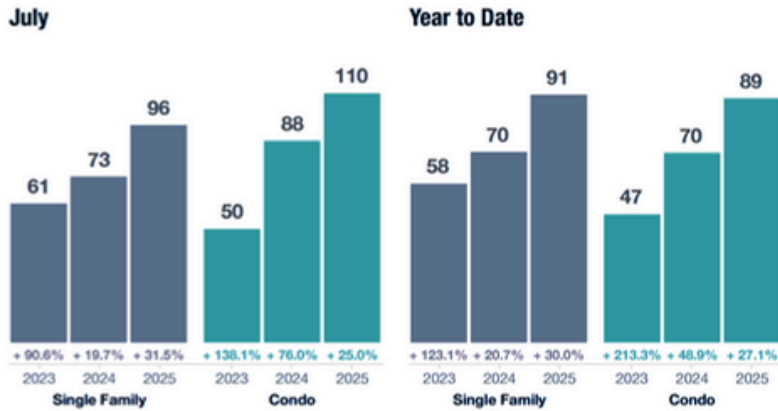


By Property Type



OVERALL DAYS ON MARKET UNTIL SALE

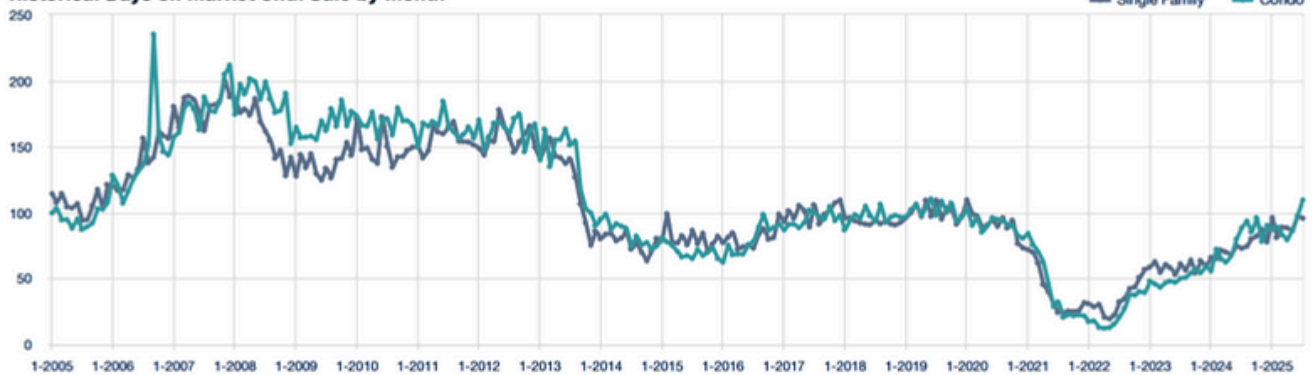
Average number of days between when a property is listed and when an offer is accepted in a given month.



Days on Market	Single Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Aug-2024	74	+32.1%	94	+84.3%
Sep-2024	80	+25.0%	85	+57.4%
Oct-2024	82	+51.9%	96	+68.4%
Nov-2024	87	+35.9%	78	+44.4%
Dec-2024	78	+32.2%	90	+52.5%
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	97	+29.3%	98	+22.5%
Jul-2025	96	+31.5%	110	+25.0%
12-Month Avg*	87	+31.8%	89	+38.5%

* Days on Market for all properties from August 2024 through July 2025. This is not the average of the individual figures above.

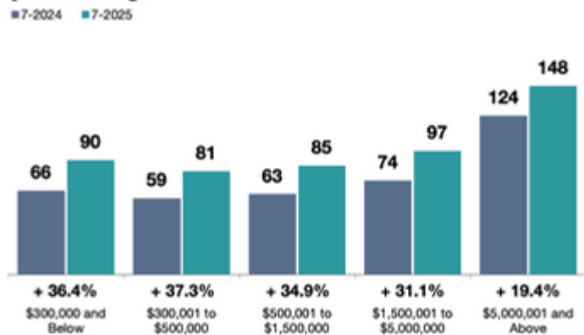
Historical Days on Market Until Sale by Month



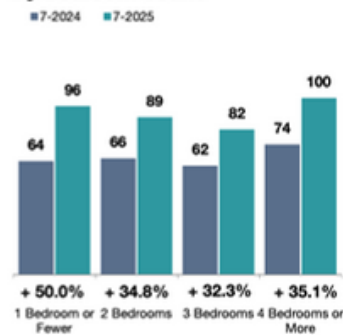
OVERALL DAYS ON MARKET UNTIL SALE BY PRICE RANGE

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

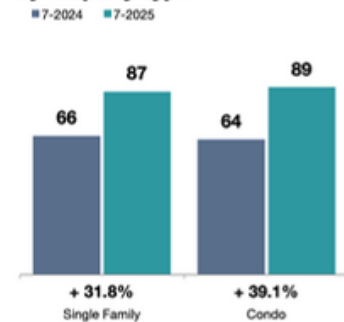
By Price Range



By Bedroom Count



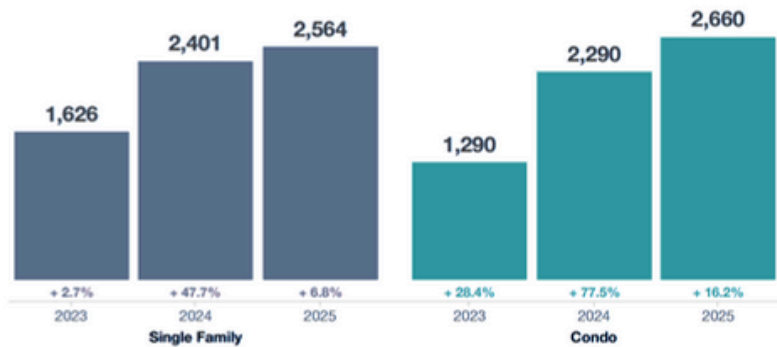
By Property Type



OVERALL INVENTORY OF HOMES FOR SALE

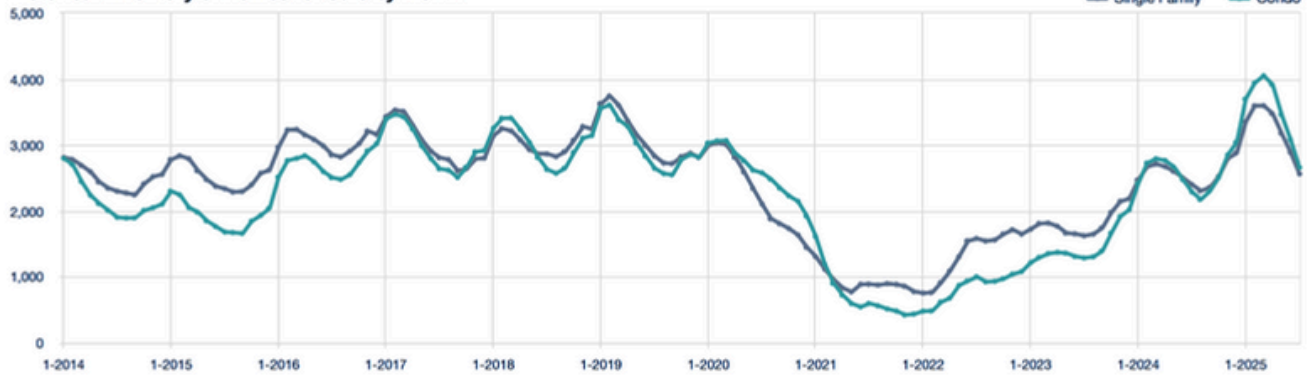
The number of properties available for sale in active status at the end of a given month.

July



Homes for Sale	Single Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Aug-2024	2,307	+39.7%	2,176	+66.4%
Sep-2024	2,356	+35.0%	2,302	+65.1%
Oct-2024	2,524	+27.6%	2,511	+50.7%
Nov-2024	2,799	+30.4%	2,853	+48.7%
Dec-2024	2,880	+31.7%	3,040	+50.4%
Jan-2025	3,351	+35.6%	3,697	+52.8%
Feb-2025	3,595	+34.5%	3,940	+44.5%
Mar-2025	3,597	+32.5%	4,050	+45.0%
Apr-2025	3,479	+30.1%	3,918	+41.6%
May-2025	3,180	+22.2%	3,464	+29.8%
Jun-2025	2,891	+15.5%	3,084	+24.5%
Jul-2025	2,564	+6.8%	2,660	+16.2%
12-Month Avg	2,960	+28.0%	3,141	+42.5%

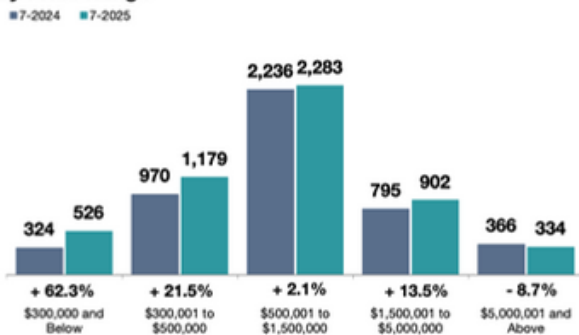
Historical Inventory of Homes for Sale by Month



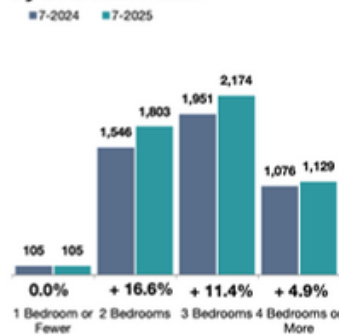
OVERALL INVENTORY OF HOMES FOR SALE BY PRICE RANGE

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

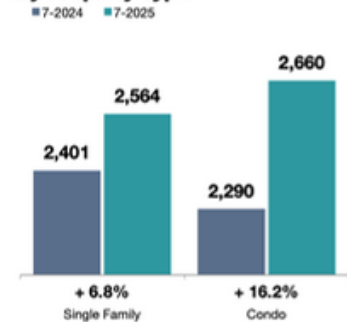
By Price Range



By Bedroom Count



By Property Type



LOCAL MARKET UPDATE - NAPLES BEACH

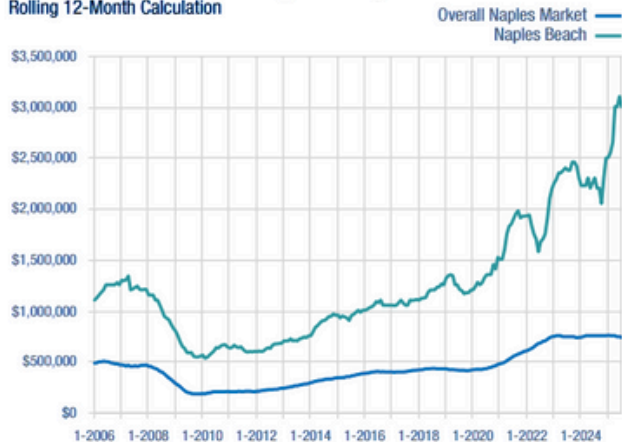
34102, 34103, 34108

Single Family	July			Year to Date		
	2024	2025	% Change	Thru 7-2024	Thru 7-2025	% Change
Key Metrics						
New Listings	66	54	- 18.2%	666	730	+ 9.6%
Total Sales	22	40	+ 81.8%	272	343	+ 26.1%
Days on Market Until Sale	112	135	+ 20.5%	113	139	+ 23.0%
Median Closed Price*	\$2,350,000	\$1,900,000	- 19.1%	\$2,500,000	\$3,250,000	+ 30.0%
Average Closed Price*	\$4,426,432	\$2,672,731	- 39.6%	\$4,506,984	\$5,621,822	+ 24.7%
Percent of List Price Received*	92.4%	91.4%	- 1.1%	92.6%	91.6%	- 1.1%
Inventory of Homes for Sale	499	498	- 0.2%	—	—	—
Months Supply of Inventory	14.9	12.3	- 17.4%	—	—	—

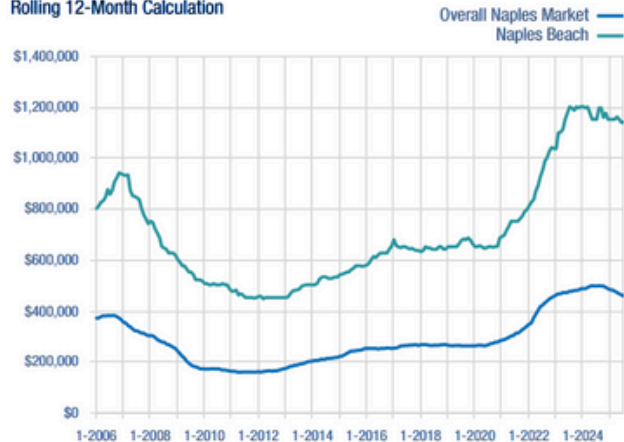
Condo	July			Year to Date		
	2024	2025	% Change	Thru 7-2024	Thru 7-2025	% Change
Key Metrics						
New Listings	79	71	- 10.1%	1,119	1,212	+ 8.3%
Total Sales	61	54	- 11.5%	618	566	- 8.4%
Days on Market Until Sale	112	126	+ 12.5%	90	99	+ 10.0%
Median Closed Price*	\$1,015,000	\$986,875	- 2.8%	\$1,150,000	\$1,150,000	0.0%
Average Closed Price*	\$1,328,621	\$1,463,273	+ 10.1%	\$1,663,937	\$1,677,572	+ 0.8%
Percent of List Price Received*	92.7%	91.1%	- 1.7%	94.0%	92.6%	- 1.5%
Inventory of Homes for Sale	639	713	+ 11.6%	—	—	—
Months Supply of Inventory	8.5	10.6	+ 24.7%	—	—	—

* 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

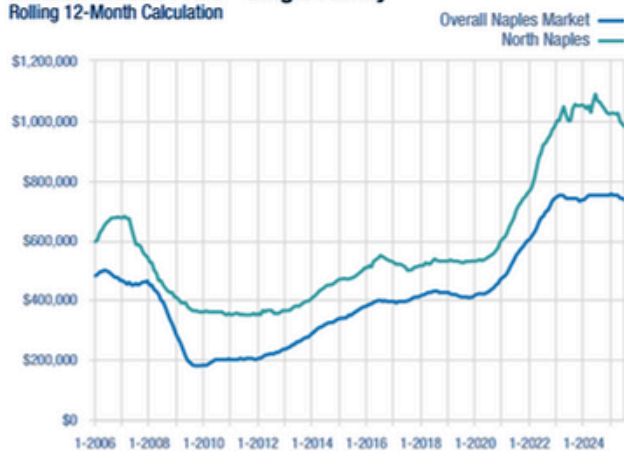
34109, 34110, 34119

Single Family	July			Year to Date		
	2024	2025	% Change	Thru 7-2024	Thru 7-2025	% Change
Key Metrics						
New Listings	104	87	- 16.3%	1,038	983	- 5.3%
Total Sales	69	71	+ 2.9%	567	544	- 4.1%
Days on Market Until Sale	76	87	+ 14.5%	56	84	+ 50.0%
Median Closed Price*	\$950,000	\$795,000	- 16.3%	\$1,060,000	\$982,500	- 7.3%
Average Closed Price*	\$1,482,271	\$1,180,196	- 20.4%	\$1,556,639	\$1,486,135	- 4.5%
Percent of List Price Received*	94.0%	94.3%	+ 0.3%	95.1%	94.2%	- 0.9%
Inventory of Homes for Sale	452	467	+ 3.3%	—	—	—
Months Supply of Inventory	5.8	6.4	+ 10.3%	—	—	—

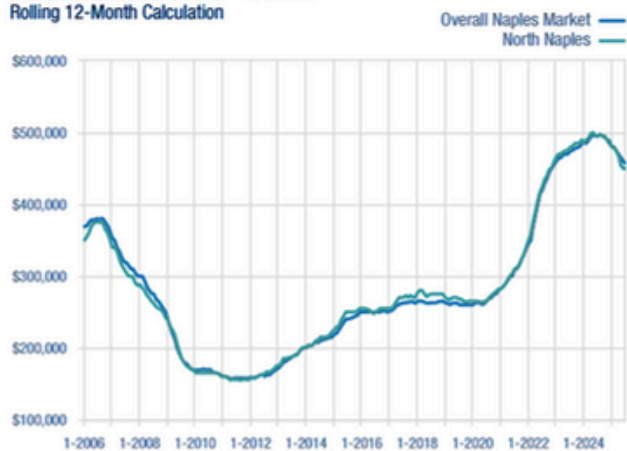
Condo	July			Year to Date		
	2024	2025	% Change	Thru 7-2024	Thru 7-2025	% Change
Key Metrics						
New Listings	104	86	- 17.3%	1,191	1,213	+ 1.8%
Total Sales	79	70	- 11.4%	740	637	- 13.9%
Days on Market Until Sale	79	104	+ 31.6%	62	87	+ 40.3%
Median Closed Price*	\$475,000	\$436,250	- 8.2%	\$505,000	\$450,450	- 10.8%
Average Closed Price*	\$573,577	\$710,641	+ 23.9%	\$697,178	\$630,361	- 9.6%
Percent of List Price Received*	95.4%	94.2%	- 1.3%	96.0%	94.9%	- 1.1%
Inventory of Homes for Sale	514	619	+ 20.4%	—	—	—
Months Supply of Inventory	5.4	7.6	+ 40.7%	—	—	—

* 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



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LOCAL MARKET UPDATE - CENTRAL NAPLES

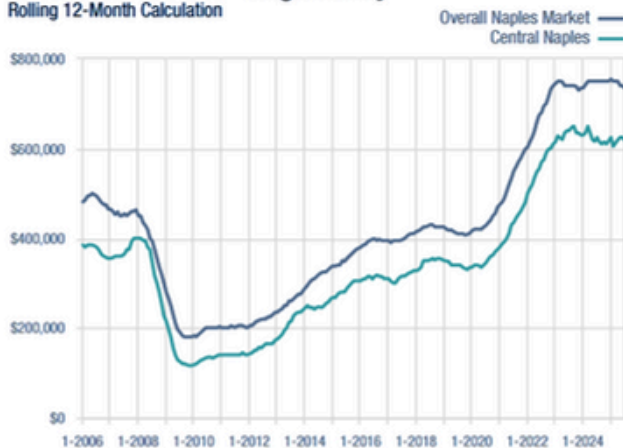
34104, 34105, 34116

Single Family	July			Year to Date		
	2024	2025	% Change	Thru 7-2024	Thru 7-2025	% Change
Key Metrics						
New Listings	49	51	+ 4.1%	524	547	+ 4.4%
Total Sales	39	33	- 15.4%	339	330	- 2.7%
Days on Market Until Sale	50	74	+ 48.0%	63	74	+ 17.5%
Median Closed Price*	\$640,000	\$580,000	- 9.4%	\$639,000	\$630,000	- 1.4%
Average Closed Price*	\$1,048,143	\$781,121	- 25.5%	\$1,172,986	\$1,023,986	- 12.7%
Percent of List Price Received*	95.5%	94.6%	- 0.9%	95.6%	95.4%	- 0.2%
Inventory of Homes for Sale	224	249	+ 11.2%	—	—	—
Months Supply of Inventory	5.0	6.0	+ 20.0%	—	—	—

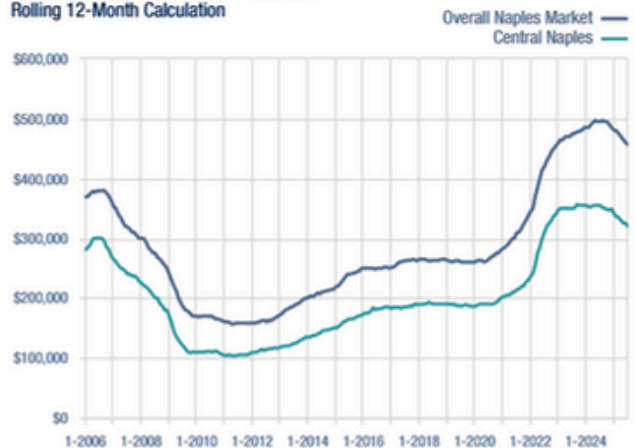
Condo	July			Year to Date		
	2024	2025	% Change	Thru 7-2024	Thru 7-2025	% Change
Key Metrics						
New Listings	57	57	0.0%	679	660	- 2.8%
Total Sales	46	47	+ 2.2%	375	348	- 7.2%
Days on Market Until Sale	79	90	+ 13.9%	52	74	+ 42.3%
Median Closed Price*	\$363,500	\$310,000	- 14.7%	\$355,000	\$310,000	- 12.7%
Average Closed Price*	\$438,452	\$344,459	- 21.4%	\$446,508	\$385,652	- 13.6%
Percent of List Price Received*	96.2%	94.2%	- 2.1%	95.7%	94.6%	- 1.1%
Inventory of Homes for Sale	292	368	+ 26.0%	—	—	—
Months Supply of Inventory	6.0	8.2	+ 36.7%	—	—	—

* 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

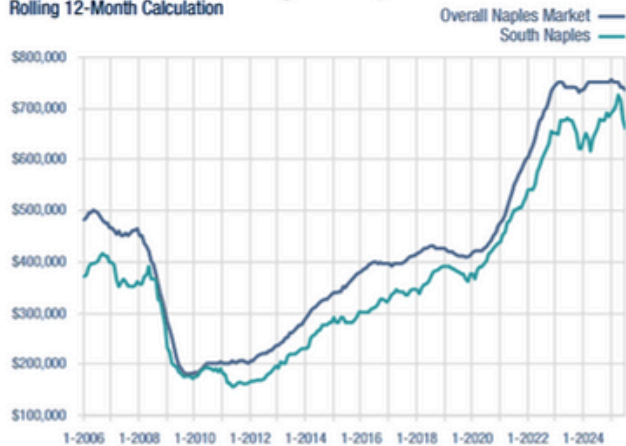
34112, 34113

Single Family	July			Year to Date		
	2024	2025	% Change	Thru 7-2024	Thru 7-2025	% Change
Key Metrics						
New Listings	60	50	- 16.7%	601	633	+ 5.3%
Total Sales	26	49	+ 88.5%	329	320	- 2.7%
Days on Market Until Sale	62	98	+ 58.1%	65	81	+ 24.6%
Median Closed Price*	\$705,000	\$620,000	- 12.1%	\$725,000	\$675,000	- 6.9%
Average Closed Price*	\$969,942	\$909,064	- 6.3%	\$1,056,732	\$995,495	- 5.8%
Percent of List Price Received*	92.9%	92.8%	- 0.1%	94.8%	93.3%	- 1.6%
Inventory of Homes for Sale	280	313	+ 11.8%	—	—	—
Months Supply of Inventory	6.3	8.1	+ 28.6%	—	—	—

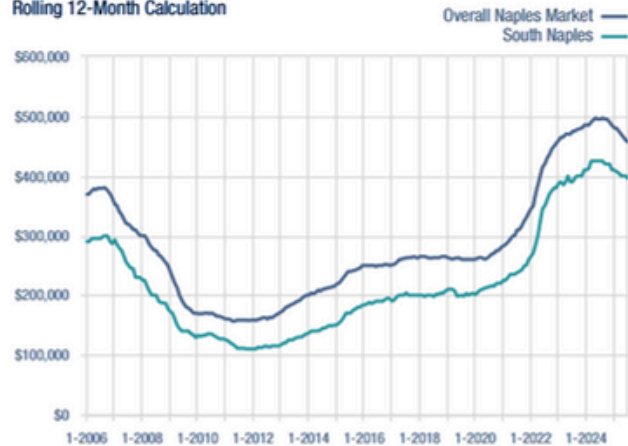
Condo	July			Year to Date		
	2024	2025	% Change	Thru 7-2024	Thru 7-2025	% Change
Key Metrics						
New Listings	89	74	- 16.9%	1,040	1,085	+ 4.3%
Total Sales	63	59	- 6.3%	566	533	- 5.8%
Days on Market Until Sale	84	118	+ 40.5%	66	89	+ 34.8%
Median Closed Price*	\$375,000	\$340,000	- 9.3%	\$425,000	\$405,000	- 4.7%
Average Closed Price*	\$422,703	\$415,603	- 1.7%	\$486,895	\$452,073	- 7.2%
Percent of List Price Received*	95.2%	93.5%	- 1.8%	96.2%	94.4%	- 1.9%
Inventory of Homes for Sale	509	558	+ 9.6%	—	—	—
Months Supply of Inventory	6.8	8.3	+ 22.1%	—	—	—

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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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LOCAL MARKET UPDATE - EAST NAPLES

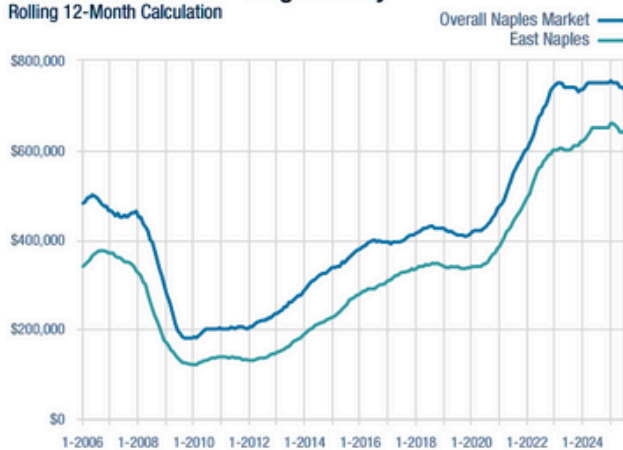
34114, 34117, 34120, 34137

Single Family	July			Year to Date		
	2024	2025	% Change	Thru 7-2024	Thru 7-2025	% Change
Key Metrics						
New Listings	169	188	+ 11.2%	1,708	1,694	- 0.8%
Total Sales	136	137	+ 0.7%	1,015	935	- 7.9%
Days on Market Until Sale	70	95	+ 35.7%	68	87	+ 27.9%
Median Closed Price*	\$610,000	\$650,000	+ 6.6%	\$659,000	\$645,000	- 2.1%
Average Closed Price*	\$734,237	\$778,318	+ 6.0%	\$820,185	\$792,424	- 3.4%
Percent of List Price Received*	95.6%	95.3%	- 0.3%	96.4%	95.8%	- 0.6%
Inventory of Homes for Sale	802	881	+ 9.9%	—	—	—
Months Supply of Inventory	6.1	7.2	+ 18.0%	—	—	—

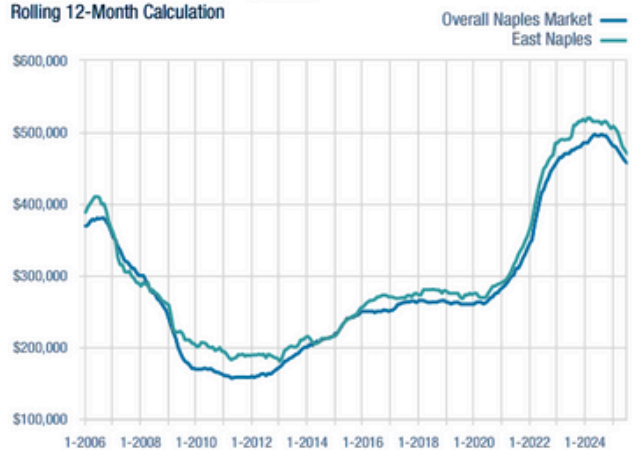
Condo	July			Year to Date		
	2024	2025	% Change	Thru 7-2024	Thru 7-2025	% Change
Key Metrics						
New Listings	43	45	+ 4.7%	573	588	+ 2.6%
Total Sales	46	34	- 26.1%	334	268	- 19.8%
Days on Market Until Sale	87	118	+ 35.6%	74	95	+ 28.4%
Median Closed Price*	\$505,000	\$460,000	- 8.9%	\$513,500	\$462,500	- 9.9%
Average Closed Price*	\$535,195	\$468,953	- 12.4%	\$548,248	\$479,730	- 12.5%
Percent of List Price Received*	95.4%	95.5%	+ 0.1%	96.5%	95.2%	- 1.3%
Inventory of Homes for Sale	289	351	+ 21.5%	—	—	—
Months Supply of Inventory	6.2	9.6	+ 54.8%	—	—	—

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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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