



Market Report

J U N E 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 JUNE 2025 REPORT THIS TEXT IS COURTESY OF THE NAPLES AREA BOARD OF REALTORS MARKET REPORT

According to the June 2025 Market Report by the Naples Area Board of REALTORS® (NABOR®), which tracks home listings and sales within Collier County (excluding Marco Island), inventory increased 18.2 percent to 5,885 homes from 4,978 homes in June 2024. Along with a healthy pool of options, a moderate softening of home prices sparked a 1.5 percent increase in both pending and closed sales during June. Broker analysts reviewing the report said the 1,282 sellers who removed their homes from the market during June will miss out on what may become a very good summer for sales in Naples.

Brokers reviewing the report consider the Naples real estate market is stable. The median closed price in June decreased 3.2 percent to \$576,000 from \$595,000 in June 2024. Price declines have been modest, so most sellers will still enjoy plenty of equity when they sell.

According to the report, the average sales price in Naples increased 12.4 percent to \$1,200,472 from \$1,085,605 in June 2024. Those who understand our unique market will not be surprised to learn the report showed closed sales of properties over \$5 million increased 13.6 percent over the last 12 months.

Inventory decreased 21 percent in the second quarter of 2025. The decline in inventory was due to successful closings as well as some sellers removing their listing from the MLS during the summer with the hope they will get their target price later in the year when they relist their property. Sellers that pull their homes off the market during the summer are doing serious sellers a favor.

QUICK FACTS

OVERALL MARKET FACTS

INVENTORY



5,885

↑ 18%

PENDINGS



722

↑ 2%

NEW LISTINGS



877

↓ 5%

MEDIAN CLOSED PRICE



↓ 3%

CLOSED SALES



744

↑ 2%

DAYS ON MARKET



98

↑ 27%

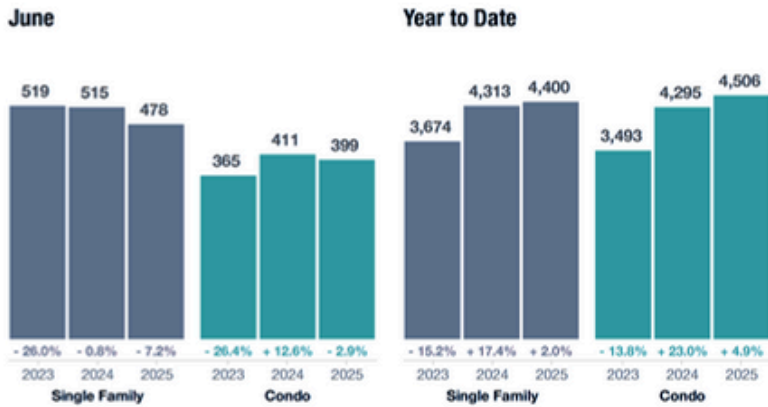
OVERALL MARKET OVERVIEW

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

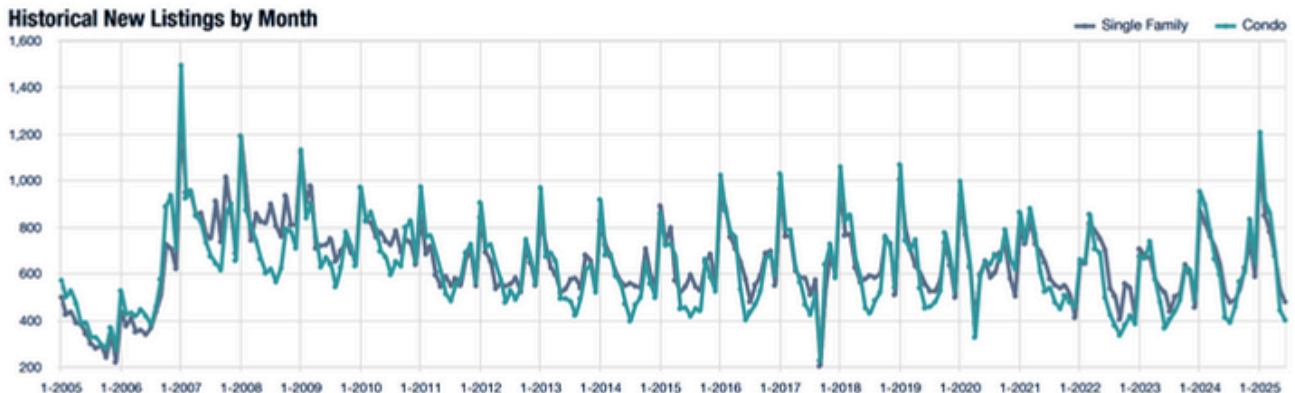
Key Metrics	Historical Sparkbars	6-2024	6-2025	% Change	YTD 2024	YTD 2025	% Change
New Listings		926	877	- 5.3%	8,608	8,906	+ 3.5%
Total Sales		733	744	+ 1.5%	4,726	4,416	- 6.6%
Days on Market Until Sale		77	98	+ 27.3%	68	88	+ 29.4%
Median Closed Price		\$595,000	\$576,000	- 3.2%	\$630,000	\$617,164	- 2.0%
Average Closed Price		\$1,073,389	\$1,220,472	+ 13.7%	\$1,134,793	\$1,249,646	+ 10.1%
Percent of List Price Received		95.0%	94.1%	- 0.9%	95.6%	94.4%	- 1.3%
Pending Listings		711	722	+ 1.5%	1,037	953	-8.1%
Inventory of Homes for Sale		4,978	5,885	+ 18.2%	—	—	—
Months Supply of Inventory		7.1	9.2	+ 29.6%	—	—	—

OVERALL NEW LISTINGS

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



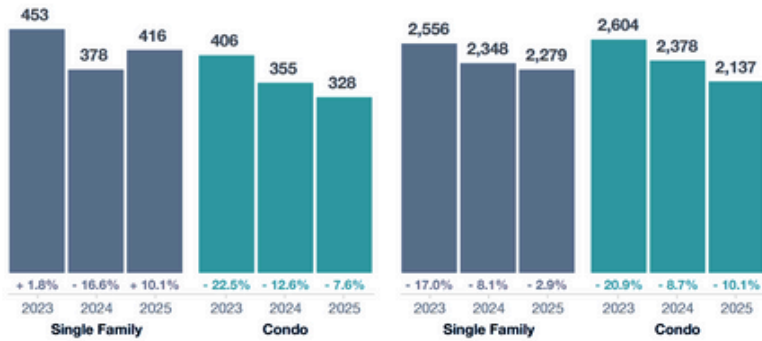
New Listings	Single Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Jul-2024	476	+ 9.2%	389	- 3.7%
Aug-2024	485	- 3.2%	456	+ 4.3%
Sep-2024	533	+ 3.9%	565	+ 16.3%
Oct-2024	625	- 2.0%	606	- 2.9%
Nov-2024	738	+ 22.8%	833	+ 35.0%
Dec-2024	586	+ 29.1%	647	+ 33.1%
Jan-2025	1,090	+ 25.3%	1,206	+ 26.7%
Feb-2025	848	+ 3.8%	909	+ 1.6%
Mar-2025	779	+ 2.8%	860	+ 10.3%
Apr-2025	676	- 5.2%	691	+ 4.4%
May-2025	529	- 17.3%	441	- 25.9%
Jun-2025	478	- 7.2%	399	- 2.9%
12-Month Avg	654	+ 5.3%	667	+ 9.0%



OVERALL CLOSED SALES

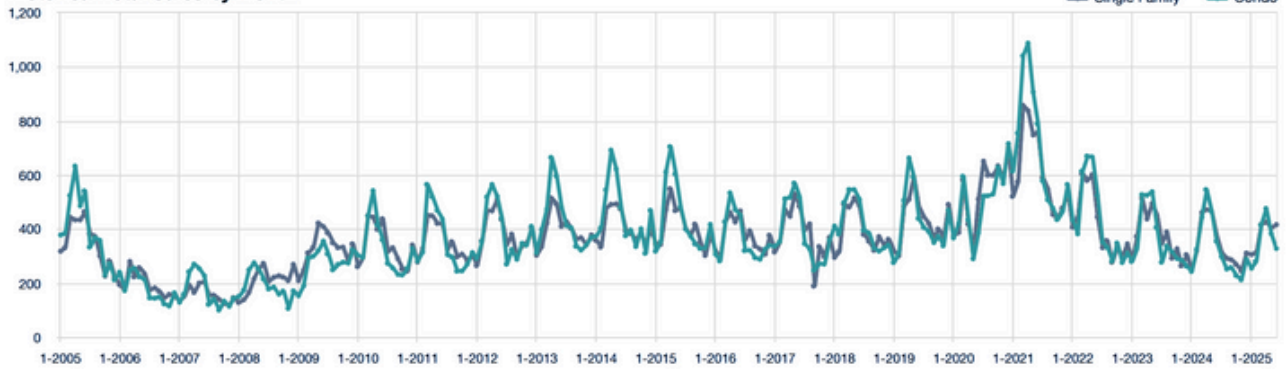
A count of the actual sales that closed in a given month.

June



Total Sales	Single Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Jul-2024	314	- 9.5%	298	+ 7.6%
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	311	- 2.8%	280	- 13.8%
Mar-2025	416	- 9.8%	415	- 6.3%
Apr-2025	426	- 9.7%	476	- 12.8%
May-2025	404	- 13.7%	383	- 17.8%
Jun-2025	416	+ 10.1%	328	- 7.6%
12-Month Avg	333	- 6.5%	306	- 11.6%

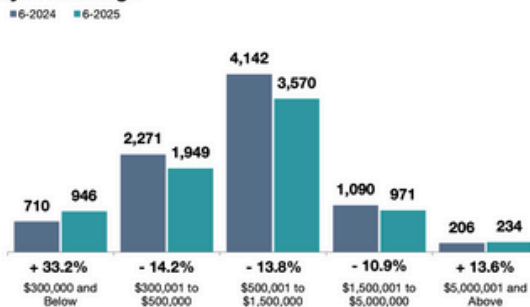
Historical Total Sales by Month



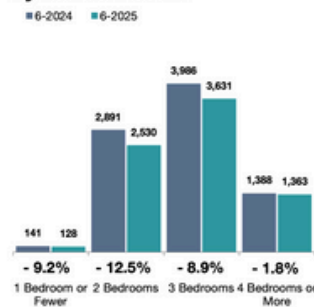
OVERALL CLOSED SALES BY PRICE RANGE

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

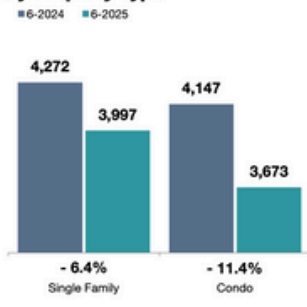
By Price Range



By Bedroom Count

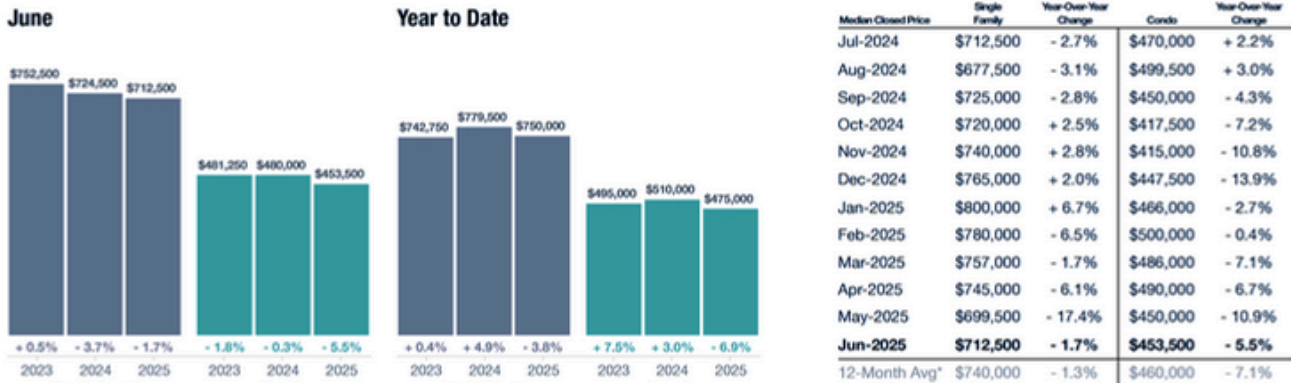


By Property Type

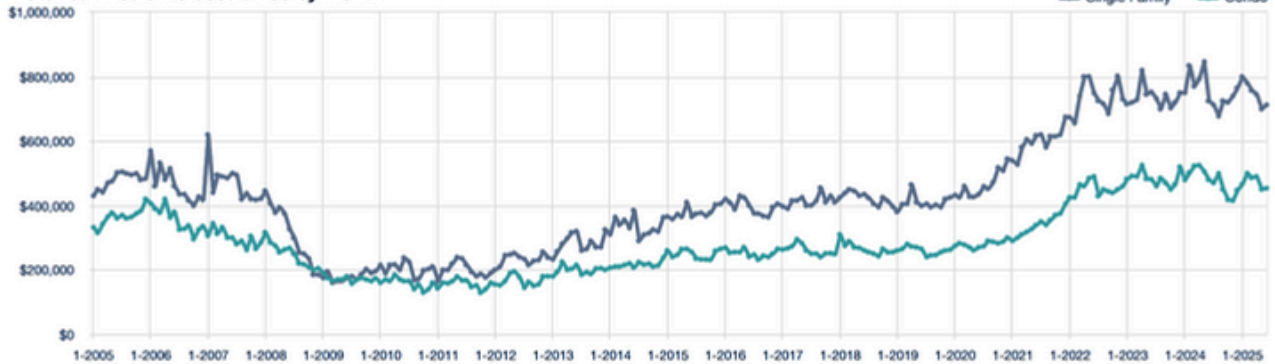


OVERALL MEDIAN CLOSED PRICE

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

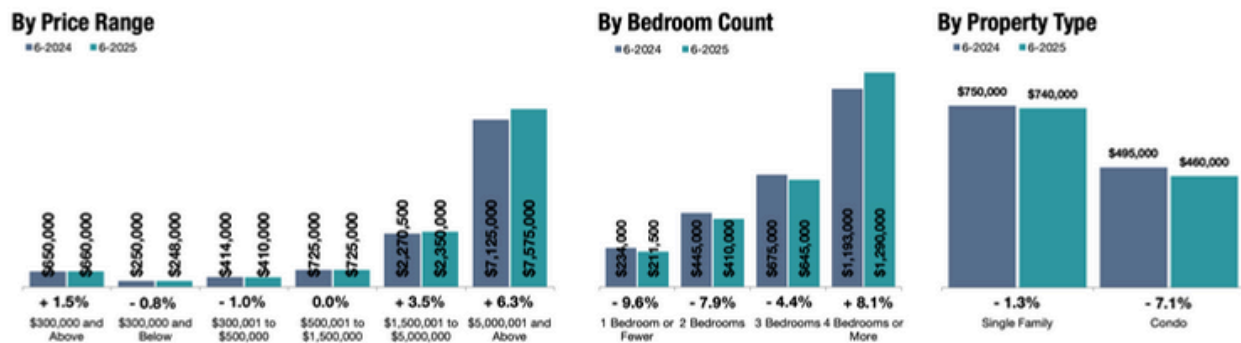


Historical Median Closed Price by Month



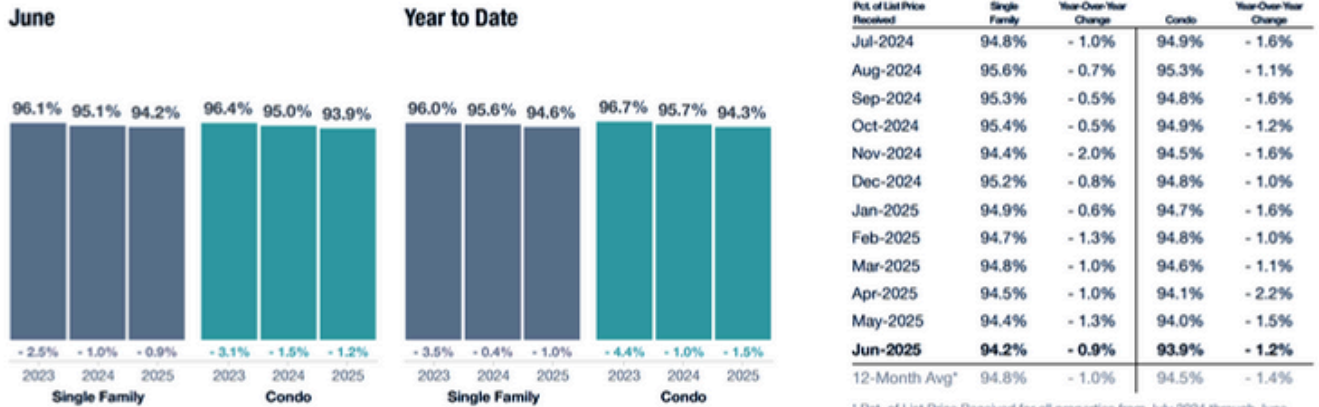
OVERALL MEDIAN CLOSED PRICE BY PRICE RANGE

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



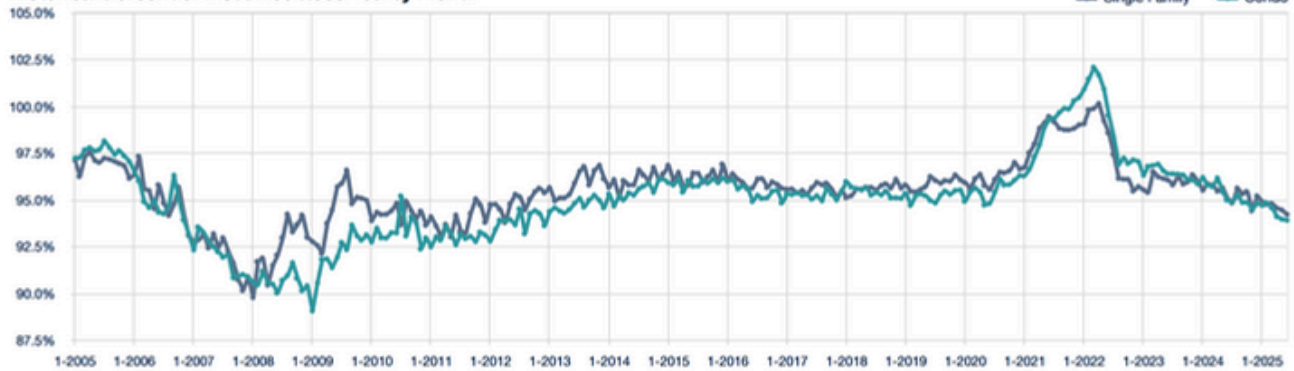
OVERALL PERCENT OF CURRENT LIST PRICE RECEIVED

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.



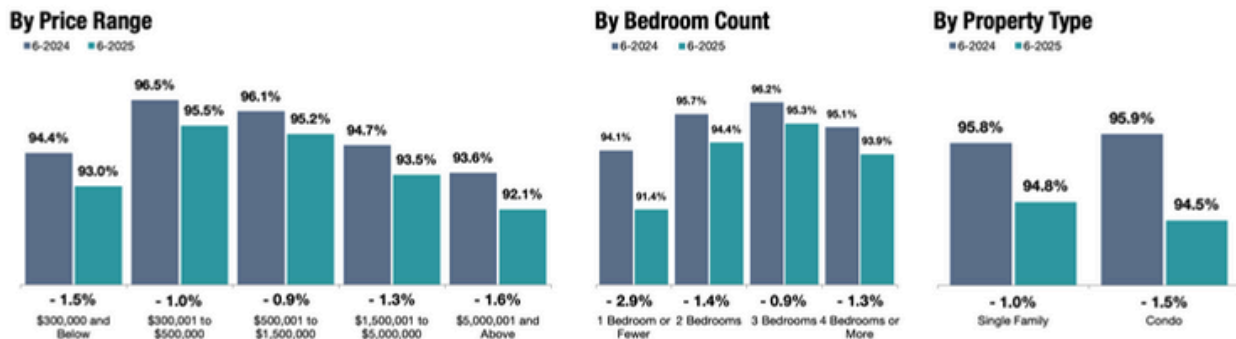
* Pct. of List Price Received for all properties from July 2024 through June 2025. This is not the average of the individual figures above.

Historical Percent of List Price Received by Month



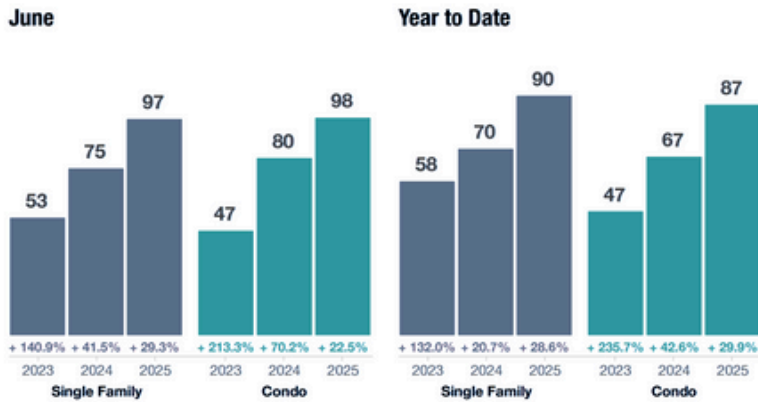
OVERALL PERCENT OF CURRENT LIST PRICE RECEIVED BY PRICE RANGE

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.



OVERALL DAYS ON MARKET UNTIL SALE

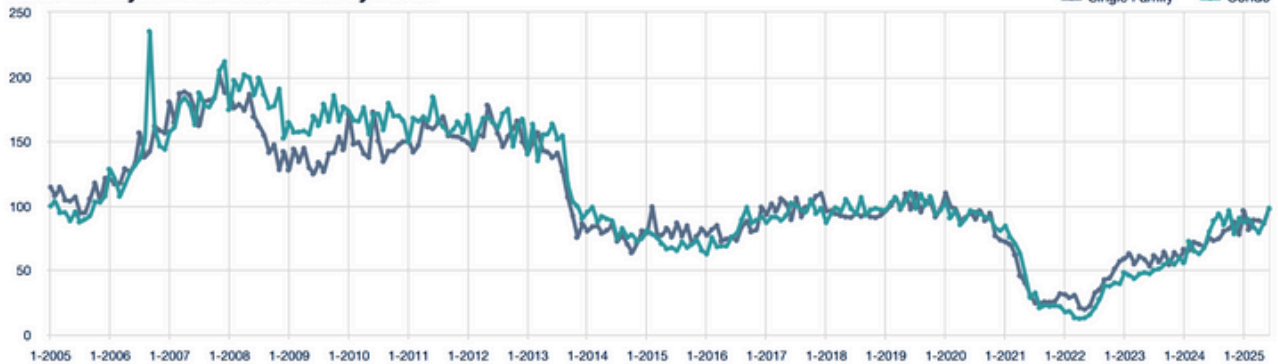
Average number of days between when a property is listed and when an offer is accepted in a given month.



Days on Market	Single Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Jul-2024	73	+ 19.7%	88	+ 76.0%
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%
12-Month Avg*	85	+ 30.8%	88	+ 41.9%

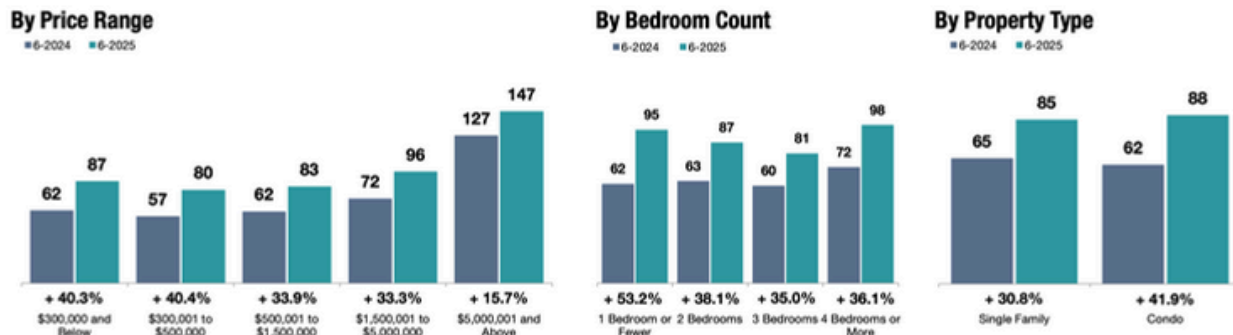
* Days on Market for all properties from July 2024 through June 2025. This is not the average of the individual figures above.

Historical Days on Market Until Sale by Month



OVERALL DAYS ON MARKET UNTIL SALE BY PRICE RANGE

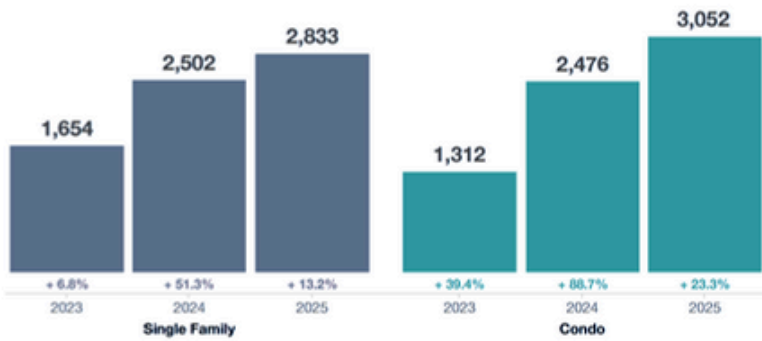
Average number of days between when a property is listed and when an offer is accepted. Based on a rolling 12-month average.



OVERALL INVENTORY OF HOMES FOR SALE

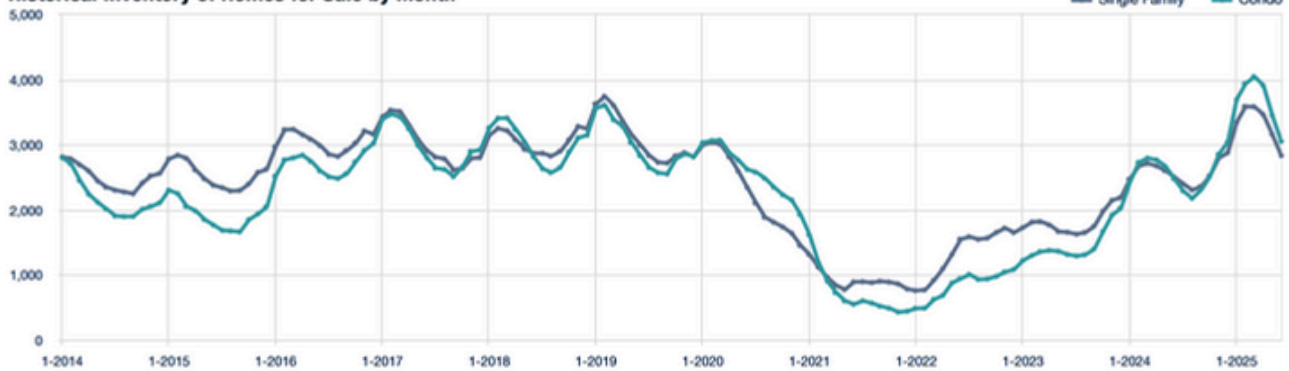
The number of properties available for sale in active status at the end of a given month.

June



Homes for Sale	Single Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Jul-2024	2,398	+47.6%	2,289	+77.4%
Aug-2024	2,304	+39.6%	2,175	+66.3%
Sep-2024	2,353	+34.9%	2,301	+65.1%
Oct-2024	2,521	+27.5%	2,510	+50.7%
Nov-2024	2,796	+30.3%	2,852	+48.7%
Dec-2024	2,875	+31.5%	3,039	+50.4%
Jan-2025	3,344	+35.4%	3,694	+52.7%
Feb-2025	3,586	+34.3%	3,936	+44.3%
Mar-2025	3,583	+32.1%	4,046	+44.9%
Apr-2025	3,465	+29.6%	3,913	+41.5%
May-2025	3,159	+21.4%	3,452	+29.3%
Jun-2025	2,833	+13.2%	3,052	+23.3%
12-Month Avg	2,935	+30.6%	3,105	+46.4%

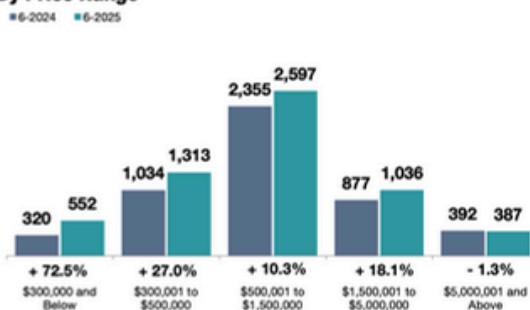
Historical Inventory of Homes for Sale by Month



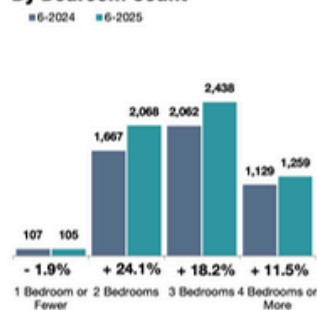
OVERALL INVENTORY OF HOMES FOR SALE BY PRICE RANGE

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

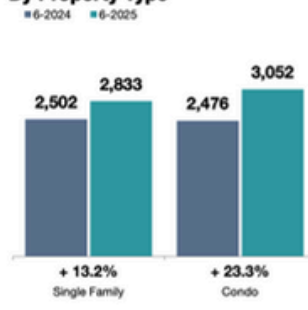
By Price Range



By Bedroom Count



By Property Type



LOCAL MARKET UPDATE - NAPLES BEACH

34102, 34103, 34108

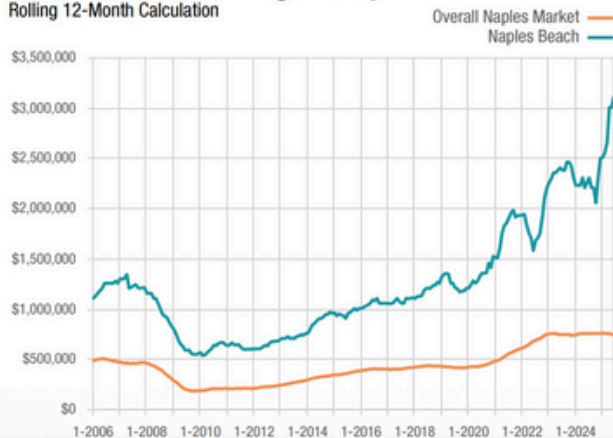
Single Family	June			Year to Date		
	2024	2025	% Change	Thru 6-2024	Thru 6-2025	% Change
Key Metrics						
New Listings	58	57	- 1.7%	600	673	+ 12.2%
Total Sales	28	50	+ 78.6%	250	303	+ 21.2%
Days on Market Until Sale	139	155	+ 11.5%	113	140	+ 23.9%
Median Closed Price*	\$3,460,000	\$5,750,000	+ 66.2%	\$2,500,000	\$3,500,000	+ 40.0%
Average Closed Price*	\$5,142,696	\$6,924,505	+ 34.6%	\$4,514,073	\$6,011,141	+ 33.2%
Percent of List Price Received*	91.2%	89.9%	- 1.4%	92.7%	91.6%	- 1.2%
Inventory of Homes for Sale	532	576	+ 8.3%	—	—	—
Months Supply of Inventory	15.0	14.8	- 1.3%	—	—	—

Condo	June			Year to Date		
	2024	2025	% Change	Thru 6-2024	Thru 6-2025	% Change
Key Metrics						
New Listings	76	74	- 2.6%	1,040	1,138	+ 9.4%
Total Sales	80	74	- 7.5%	557	512	- 8.1%
Days on Market Until Sale	98	123	+ 25.5%	88	96	+ 9.1%
Median Closed Price*	\$1,197,500	\$1,117,500	- 6.7%	\$1,175,000	\$1,150,000	- 2.1%
Average Closed Price*	\$1,762,459	\$1,373,995	- 22.0%	\$1,700,660	\$1,700,174	- 0.0%
Percent of List Price Received*	93.7%	91.3%	- 2.6%	94.1%	92.7%	- 1.5%
Inventory of Homes for Sale	681	837	+ 22.9%	—	—	—
Months Supply of Inventory	9.2	12.3	+ 33.7%	—	—	—

* 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.

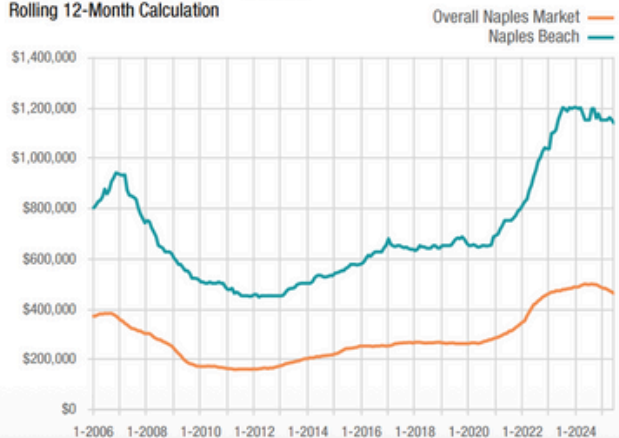
Median Closed Price - Single Family

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

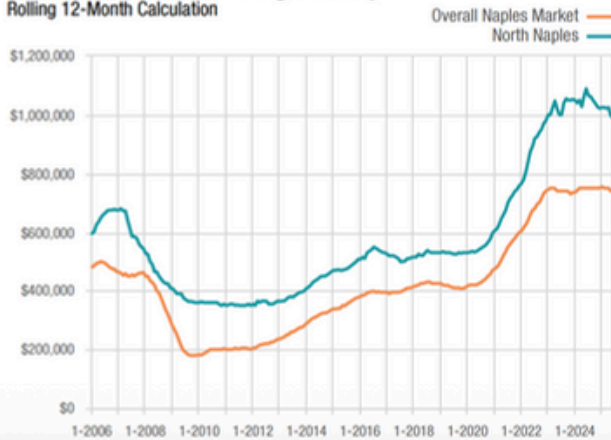
34109, 34110, 34119

Single Family	June			Year to Date		
	2024	2025	% Change	Thru 6-2024	Thru 6-2025	% Change
Key Metrics						
New Listings	107	99	- 7.5%	934	891	- 4.6%
Total Sales	75	91	+ 21.3%	498	472	- 5.2%
Days on Market Until Sale	44	100	+ 127.3%	54	83	+ 53.7%
Median Closed Price*	\$1,050,000	\$930,000	- 11.4%	\$1,097,500	\$1,000,000	- 8.9%
Average Closed Price*	\$1,504,144	\$1,363,120	- 9.4%	\$1,566,943	\$1,533,990	- 2.1%
Percent of List Price Received*	94.5%	93.8%	- 0.7%	95.3%	94.2%	- 1.2%
Inventory of Homes for Sale	476	537	+ 12.8%	—	—	—
Months Supply of Inventory	6.0	7.4	+ 23.3%	—	—	—

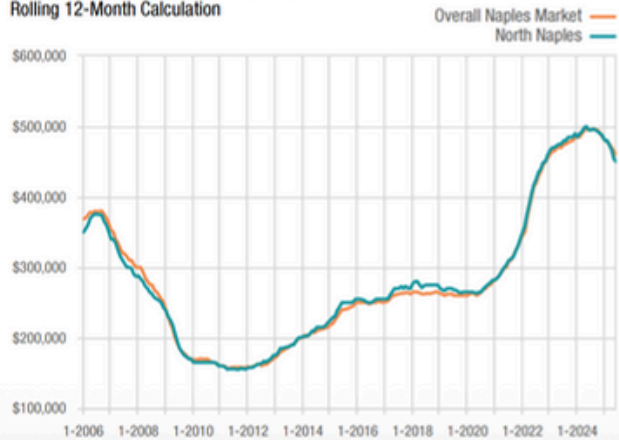
Condo	June			Year to Date		
	2024	2025	% Change	Thru 6-2024	Thru 6-2025	% Change
Key Metrics						
New Listings	116	109	- 6.0%	1,086	1,123	+ 3.4%
Total Sales	105	83	- 21.0%	660	566	- 14.2%
Days on Market Until Sale	77	97	+ 26.0%	60	85	+ 41.7%
Median Closed Price*	\$465,000	\$450,000	- 3.2%	\$506,000	\$455,000	- 10.1%
Average Closed Price*	\$606,705	\$577,542	- 4.8%	\$708,400	\$621,078	- 12.3%
Percent of List Price Received*	95.6%	95.0%	- 0.6%	96.1%	95.0%	- 1.1%
Inventory of Homes for Sale	574	694	+ 20.9%	—	—	—
Months Supply of Inventory	6.0	8.5	+ 41.7%	—	—	—

* 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

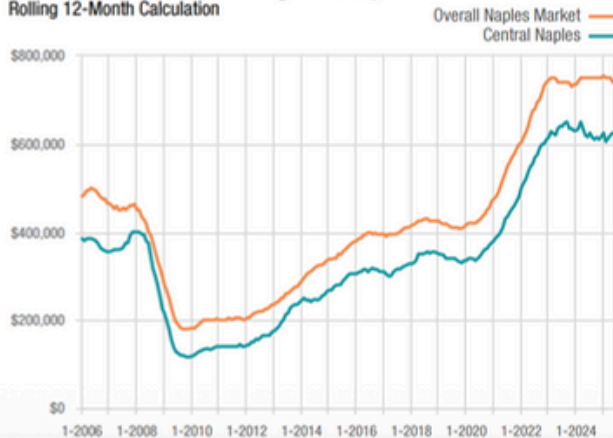
34104, 34105, 34116

Single Family	June			Year to Date		
	2024	2025	% Change	Thru 6-2024	Thru 6-2025	% Change
Key Metrics						
New Listings	59	57	- 3.4%	475	491	+ 3.4%
Total Sales	49	54	+ 10.2%	300	297	- 1.0%
Days on Market Until Sale	87	74	- 14.9%	64	74	+ 15.6%
Median Closed Price*	\$595,000	\$612,500	+ 2.9%	\$636,950	\$635,000	- 0.3%
Average Closed Price*	\$1,216,429	\$992,183	- 18.4%	\$1,189,216	\$1,050,971	- 11.6%
Percent of List Price Received*	95.6%	95.1%	- 0.5%	95.6%	95.5%	- 0.1%
Inventory of Homes for Sale	237	275	+ 16.0%	—	—	—
Months Supply of Inventory	5.2	6.5	+ 25.0%	—	—	—

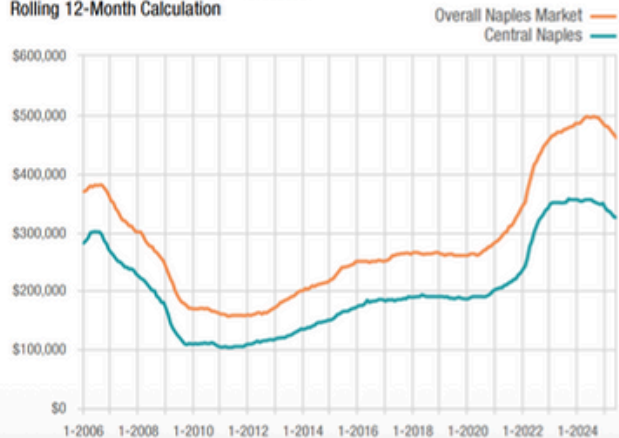
Condo	June			Year to Date		
	2024	2025	% Change	Thru 6-2024	Thru 6-2025	% Change
Key Metrics						
New Listings	64	69	+ 7.8%	621	600	- 3.4%
Total Sales	56	46	- 17.9%	329	299	- 9.1%
Days on Market Until Sale	62	64	+ 3.2%	49	71	+ 44.9%
Median Closed Price*	\$336,200	\$310,000	- 7.8%	\$351,500	\$310,000	- 11.8%
Average Closed Price*	\$429,147	\$390,717	- 9.0%	\$447,635	\$393,489	- 12.1%
Percent of List Price Received*	94.7%	94.7%	0.0%	95.7%	94.6%	- 1.1%
Inventory of Homes for Sale	323	425	+ 31.6%	—	—	—
Months Supply of Inventory	6.6	9.5	+ 43.9%	—	—	—

* 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

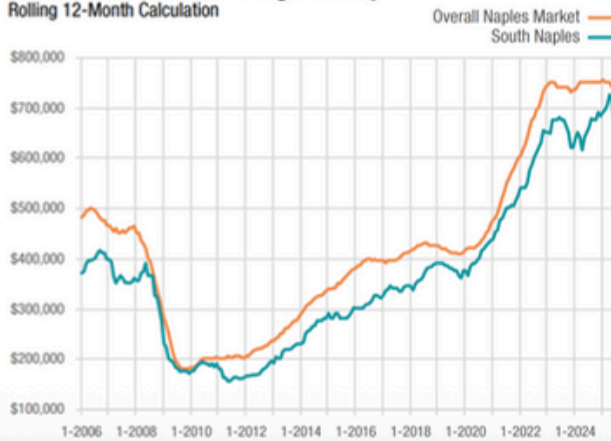
34112, 34113

Single Family	June			Year to Date		
	2024	2025	% Change	Thru 6-2024	Thru 6-2025	% Change
Key Metrics						
New Listings	58	52	- 10.3%	541	583	+ 7.8%
Total Sales	60	45	- 25.0%	303	271	- 10.6%
Days on Market Until Sale	80	89	+ 11.3%	65	77	+ 18.5%
Median Closed Price*	\$780,000	\$520,000	- 33.3%	\$725,000	\$720,000	- 0.7%
Average Closed Price*	\$1,055,717	\$783,245	- 25.8%	\$1,064,180	\$1,011,123	- 5.0%
Percent of List Price Received*	94.0%	93.0%	- 1.1%	94.9%	93.3%	- 1.7%
Inventory of Homes for Sale	287	345	+ 20.2%	—	—	—
Months Supply of Inventory	6.3	9.4	+ 49.2%	—	—	—

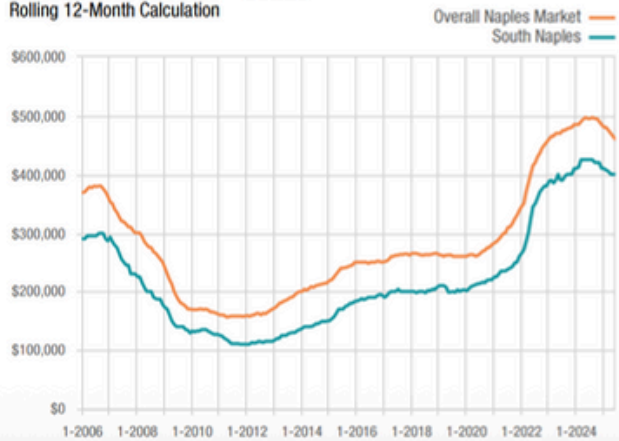
Condo	June			Year to Date		
	2024	2025	% Change	Thru 6-2024	Thru 6-2025	% Change
Key Metrics						
New Listings	89	75	- 15.7%	951	1,006	+ 5.8%
Total Sales	71	72	+ 1.4%	503	472	- 6.2%
Days on Market Until Sale	81	91	+ 12.3%	64	85	+ 32.8%
Median Closed Price*	\$420,000	\$420,000	0.0%	\$435,000	\$420,000	- 3.4%
Average Closed Price*	\$467,316	\$424,856	- 9.1%	\$494,935	\$457,795	- 7.5%
Percent of List Price Received*	95.2%	94.0%	- 1.3%	96.4%	94.5%	- 2.0%
Inventory of Homes for Sale	540	632	+ 17.0%	—	—	—
Months Supply of Inventory	7.3	9.3	+ 27.4%	—	—	—

* 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

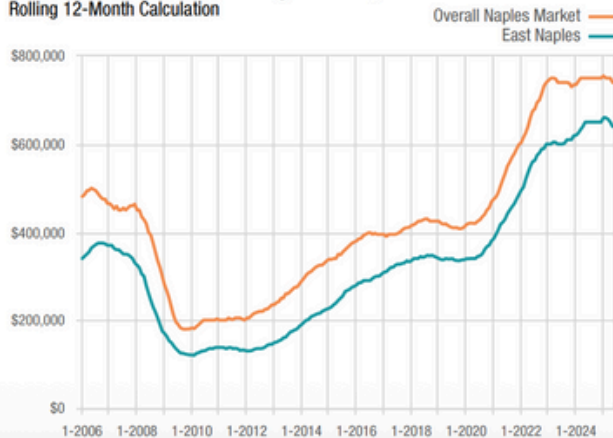
34114, 34117, 34120, 34137

Single Family	June			Year to Date		
	2024	2025	% Change	Thru 6-2024	Thru 6-2025	% Change
Key Metrics						
New Listings	196	181	- 7.7%	1,539	1,492	- 3.1%
Total Sales	140	150	+ 7.1%	879	794	- 9.7%
Days on Market Until Sale	68	86	+ 26.5%	68	85	+ 25.0%
Median Closed Price*	\$600,000	\$592,500	- 1.3%	\$665,000	\$644,950	- 3.0%
Average Closed Price*	\$785,393	\$761,546	- 3.0%	\$833,483	\$796,502	- 4.4%
Percent of List Price Received*	95.9%	95.7%	- 0.2%	96.6%	95.9%	- 0.7%
Inventory of Homes for Sale	826	939	+ 13.7%	—	—	—
Months Supply of Inventory	6.4	7.7	+ 20.3%	—	—	—

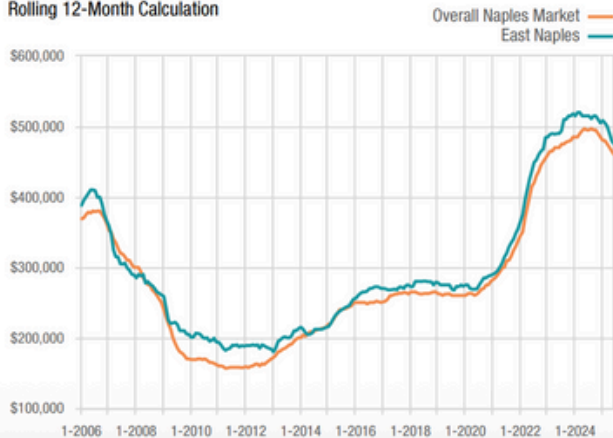
Condo	June			Year to Date		
	2024	2025	% Change	Thru 6-2024	Thru 6-2025	% Change
Key Metrics						
New Listings	57	59	+ 3.5%	530	539	+ 1.7%
Total Sales	41	42	+ 2.4%	288	234	- 18.8%
Days on Market Until Sale	77	111	+ 44.2%	72	91	+ 26.4%
Median Closed Price*	\$500,000	\$451,500	- 9.7%	\$515,000	\$465,000	- 9.7%
Average Closed Price*	\$523,153	\$498,821	- 4.7%	\$550,332	\$481,296	- 12.5%
Percent of List Price Received*	95.6%	95.0%	- 0.6%	96.7%	95.1%	- 1.7%
Inventory of Homes for Sale	319	403	+ 26.3%	—	—	—
Months Supply of Inventory	6.9	10.7	+ 55.1%	—	—	—

* 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



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