



Market Report

M A R C H 2 0 2 6 R E P O R T



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REALTY

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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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MARCH 2026 REPORT

THIS TEXT IS COURTESY OF THE NAPLES AREA BOARD OF REALTORS MARKET REPORT

Brisk pending and closed sales activity in the Naples housing market during March (+15 percent and +26.7 percent, respectively) signal improved market conditions and confidence. Sellers who priced properties competitively for today's market or were open to negotiation – especially in the condominium market – enjoyed swift sales in March. Broker analysts reviewing the March 2026 Market Report by the Naples Area Board of REALTORS® (NABOR®), which tracks home listings and sales within Collier County (excluding Marco Island), are confident price corrections that began last summer helped to accelerate the market's momentum during Q1 2026 and, excluding any hurricane activity, anticipate strong home sales into Q2.

Overall pending sales increased 15 percent to 1,394 pending sales from 1,212 pending sales in March 2025. Overall closed sales increased 26.7 percent to 1,054 closed sales from 832 closed sales in March 2025. Both pending and closed sales activity during March outperformed activity in any March since 2016, with the exception of 2021 and 2022.

Overall median closed price decreased 11.5 percent to \$575,000 from \$649,950 in March 2025. The median closed price in the single-family home market increased 2.4 percent to \$771,950 from \$754,000 in March 2025. Conversely, the median closed price in the condominium market decreased 11.5 percent to \$430,000 from \$486,000 in March 2025.

Overall inventory decreased 17.5 percent to 6,367 properties from 7,722 properties in March 2025. However, sellers appear more competitive in the condominium market, which had an 18.5 percent increase in inventory for properties in the \$300,000 and below price category during March.

QUICK FACTS

OVERALL MARKET FACTS

INVENTORY



6,367

↓ 18%

PENDINGS



1,394

↑ 15%

NEW LISTINGS



1,427

↓ 13%

MEDIAN CLOSED PRICE



\$575,000

↓ 12%

CLOSED SALES



1,054

↑ 27%

DAYS ON MARKET



95

↑ 11%



OVERALL MARKET OVERVIEW

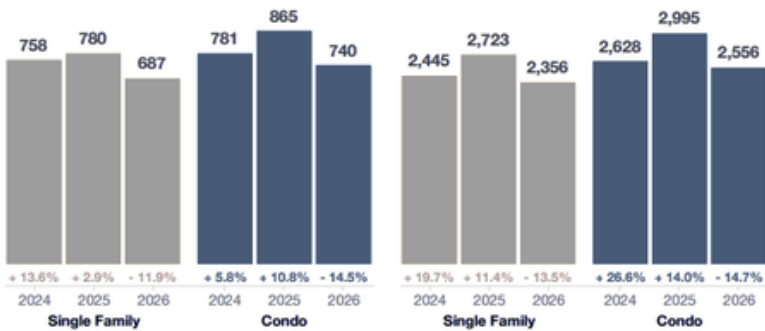
Key metrics by report month and for year-to-date (YTD) starting from the first of the year.

Key Metrics	Historical Sparkbars	3-2025	3-2026	% Change	YTD 2025	YTD 2026	% Change
New Listings		1,645	1,427	- 13.3%	5,718	4,912	- 14.1%
Total Sales		832	1,054	+ 26.7%	1,985	2,356	+ 18.7%
Days on Market Until Sale		86	95	+ 10.5%	87	95	+ 9.2%
Median Closed Price		\$649,950	\$575,000	- 11.5%	\$650,000	\$610,000	- 6.2%
Average Closed Price		\$1,210,118	\$1,119,600	- 7.5%	\$1,265,449	\$1,187,249	- 6.2%
Percent of List Price Received		94.7%	94.5%	- 0.2%	94.8%	94.6%	- 0.2%
Pending Listings		1,212	1,394	+ 15.0%	2,814	3,773	+ 34.1%
Inventory of Homes for Sale		7,722	6,367	- 17.5%	—	—	—
Months Supply of Inventory		11.7	8.9	- 23.9%	—	—	—

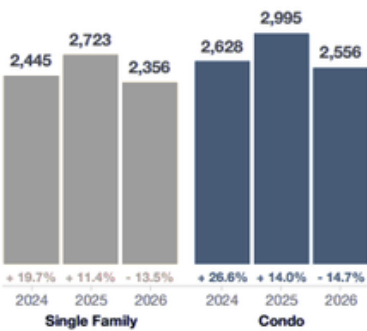
OVERALL NEW LISTINGS

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

March

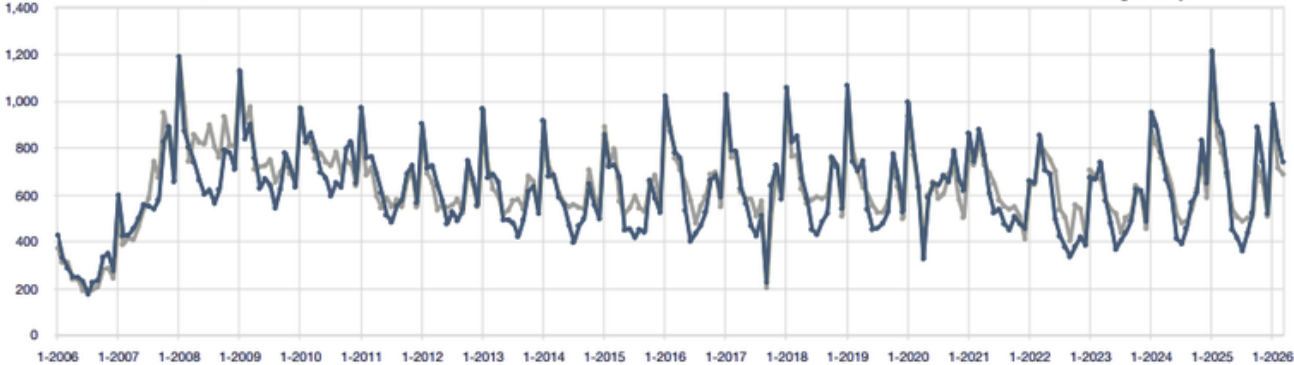


Year to Date



New Listings	Single Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Apr-2025	677	- 5.0%	694	+ 4.5%
May-2025	537	- 16.1%	450	- 24.4%
Jun-2025	504	- 2.1%	414	+ 0.5%
Jul-2025	486	+ 1.7%	359	- 7.7%
Aug-2025	500	+ 3.1%	436	- 4.4%
Sep-2025	502	- 5.8%	521	- 8.0%
Oct-2025	721	+ 15.5%	889	+ 46.5%
Nov-2025	656	- 11.5%	742	- 10.9%
Dec-2025	507	- 13.6%	519	- 20.0%
Jan-2026	955	- 12.6%	986	- 18.8%
Feb-2026	714	- 16.0%	830	- 9.3%
Mar-2026	687	- 11.9%	740	- 14.5%
12-Month Avg	621	- 7.3%	632	- 7.2%

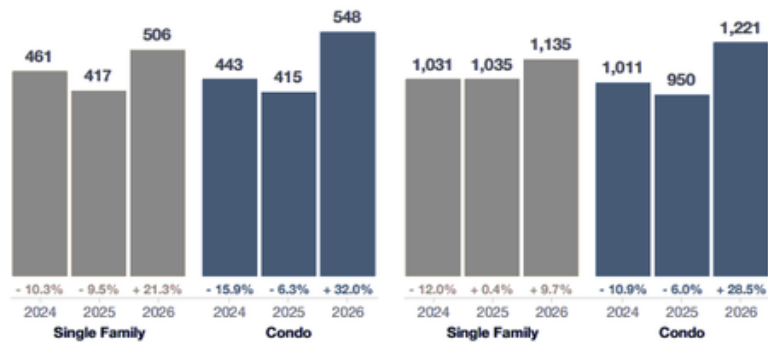
Historical New Listings by Month



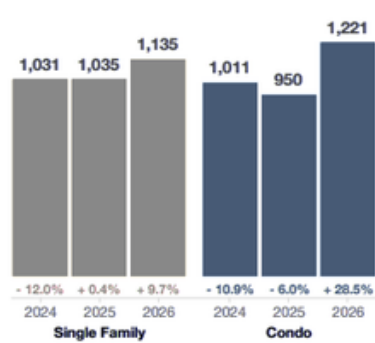
OVERALL CLOSED SALES

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

March

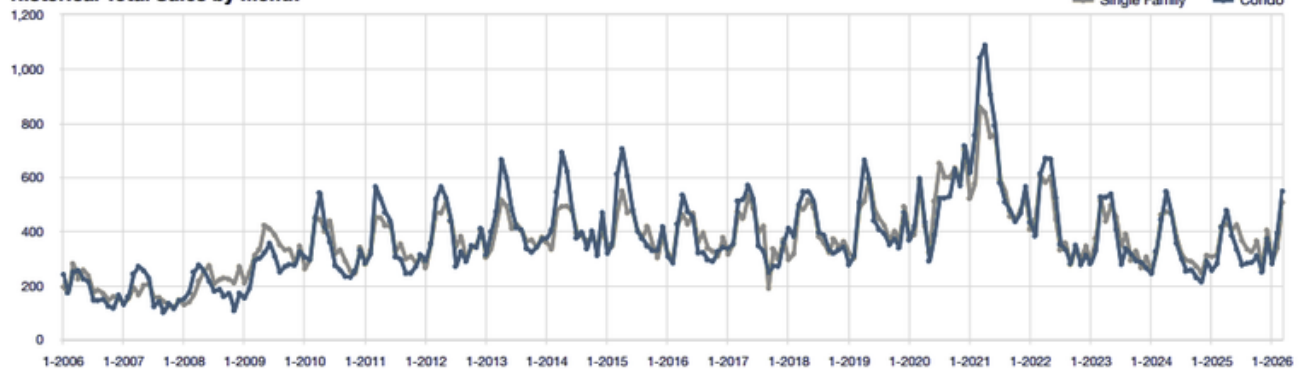


Year to Date



Total Sales	Single Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Apr-2025	427	- 9.5%	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%	249	+ 17.5%
Dec-2025	404	+ 29.9%	372	+ 28.7%
Jan-2026	291	- 4.9%	280	+ 9.8%
Feb-2026	338	+ 8.3%	393	+ 40.4%
Mar-2026	506	+ 21.3%	548	+ 32.0%
12-Month Avg	370	+ 9.1%	349	+ 8.7%

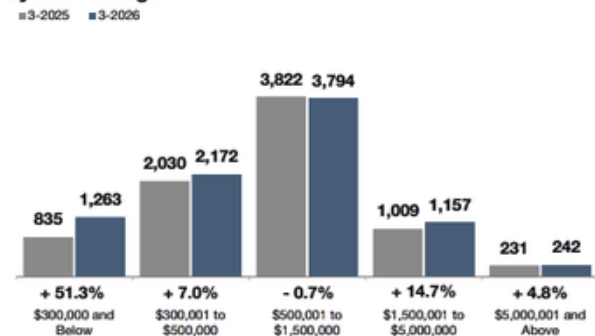
Historical Total Sales by Month



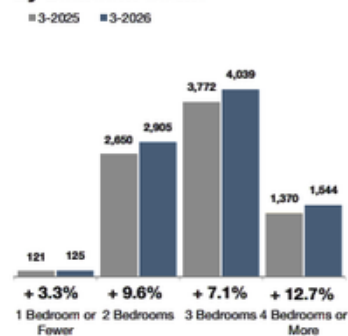
OVERALL CLOSED SALES BY PRICE RANGE

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

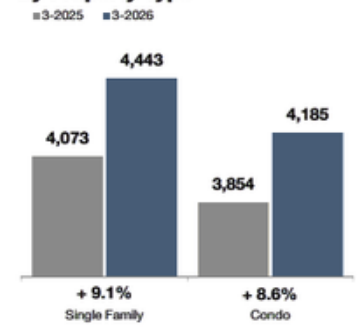
By Price Range



By Bedroom Count

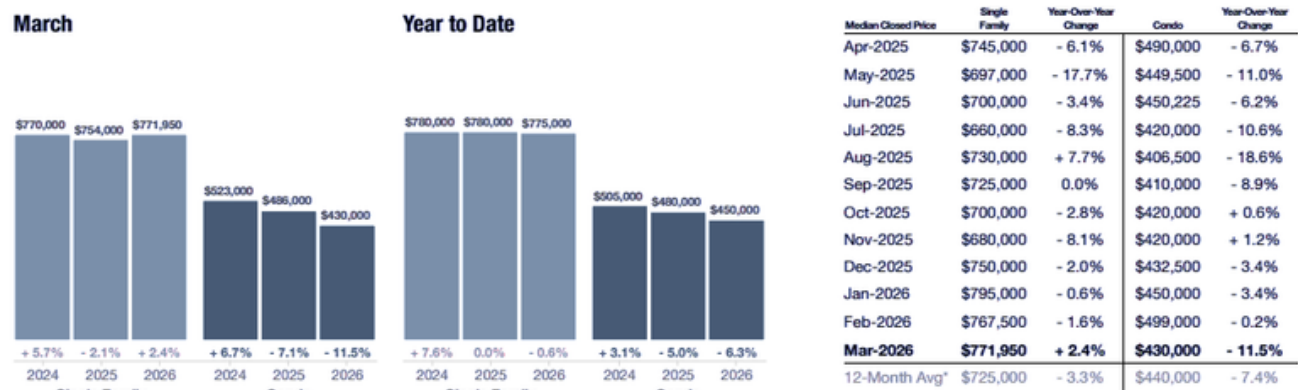


By Property Type

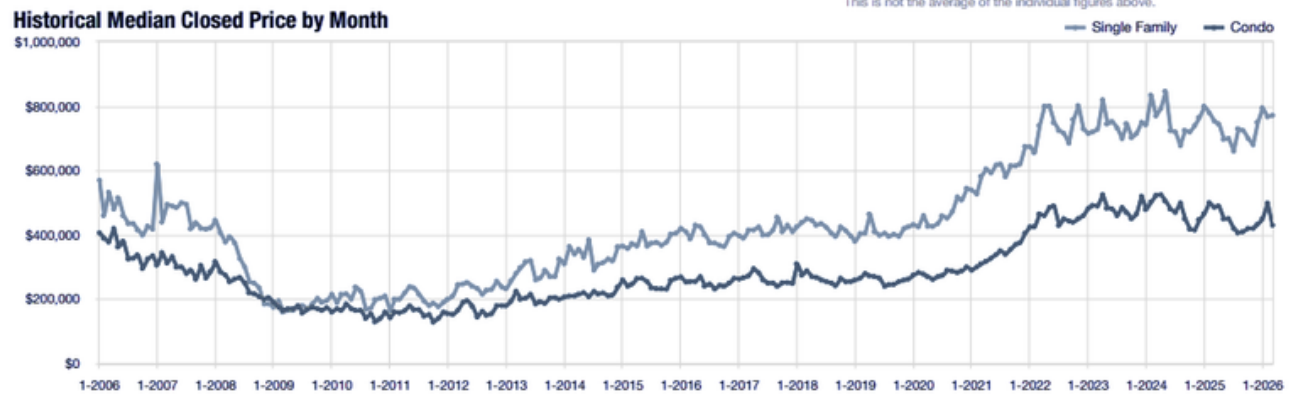


OVERALL MEDIAN CLOSED PRICE

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

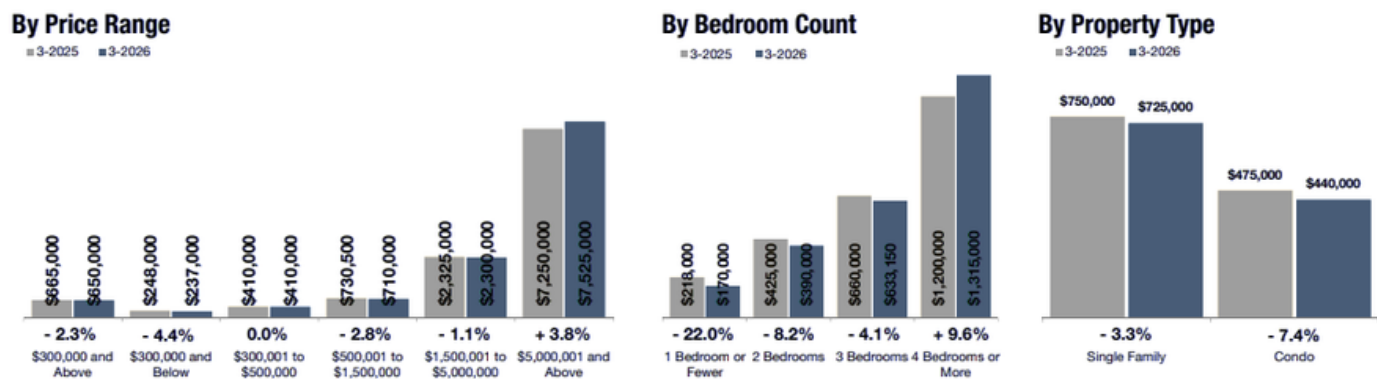


* Median Closed Price for all properties from April 2025 through March 2026. This is not the average of the individual figures above.



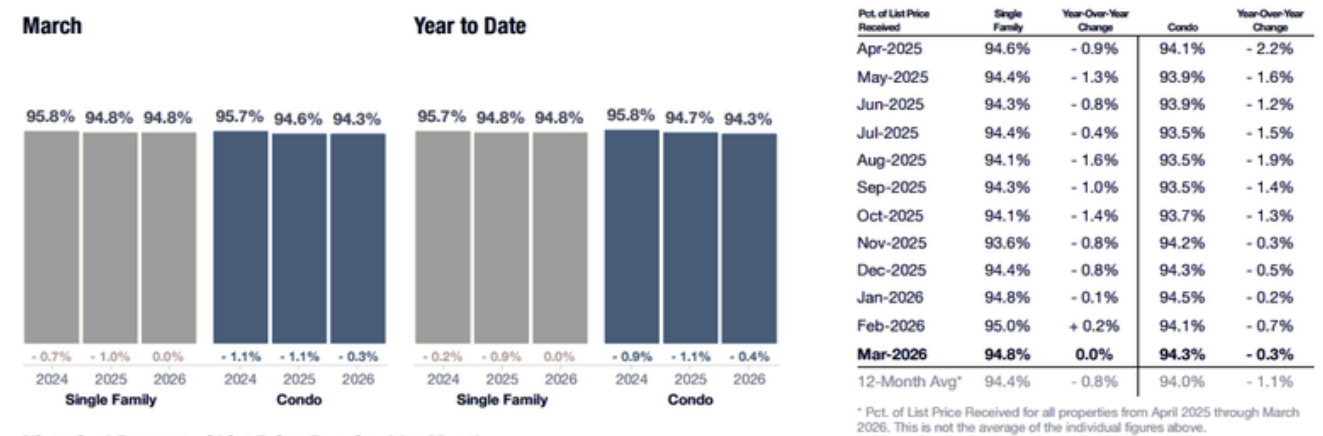
OVERALL MEDIAN CLOSED PRICE BY PRICE RANGE

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



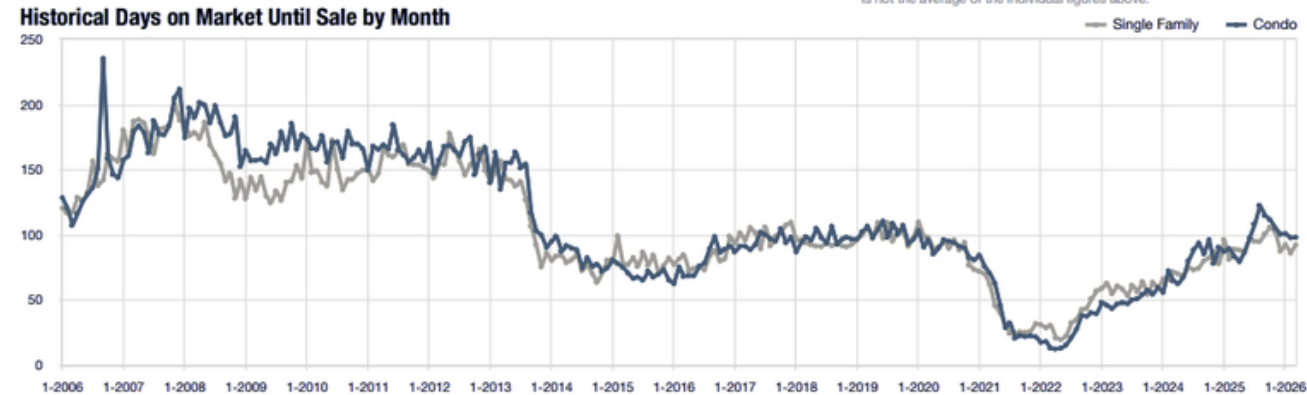
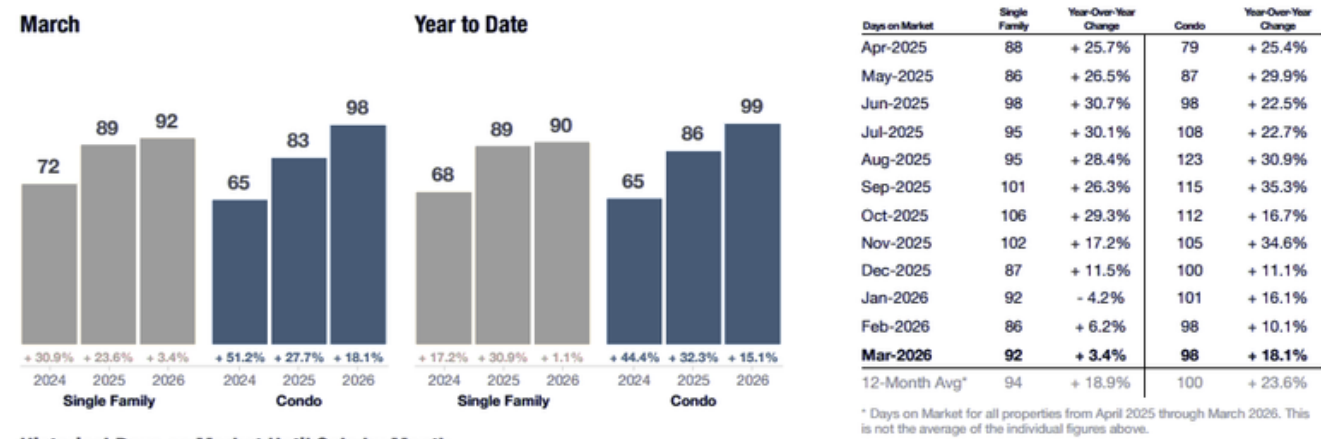
OVERALL PERCENT OF CURRENT LIST PRICE RECEIVED

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.



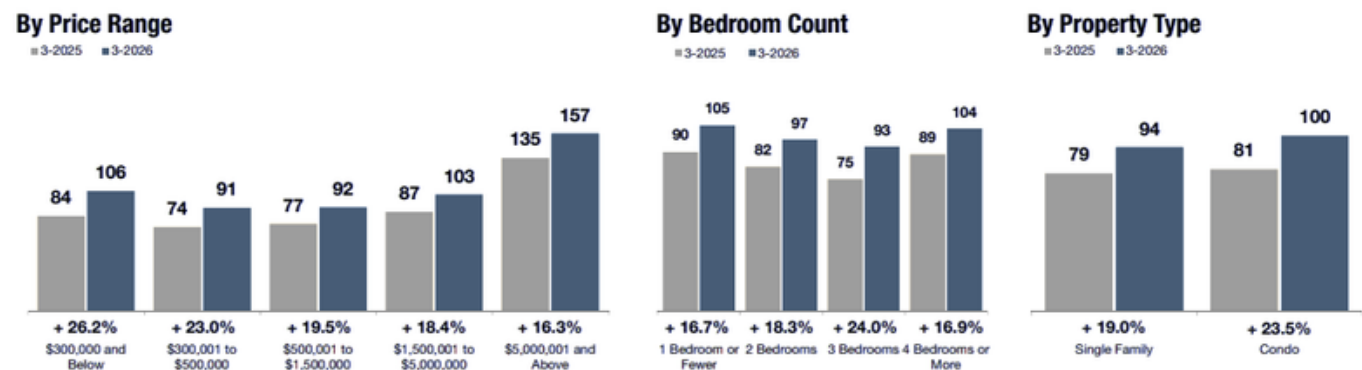
OVERALL DAYS ON MARKET UNTIL SALE

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



OVERALL DAYS ON MARKET UNTIL SALE BY PRICE RANGE

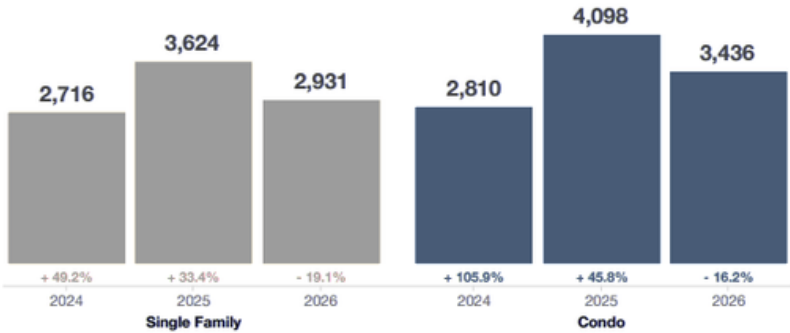
Average number of days between when a property is listed and when an offer is accepted. Based on a rolling 12-month average.



OVERALL INVENTORY OF HOMES FOR SALE

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

March



Homes for Sale	Single Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Apr-2025	3,516	+ 31.4%	3,974	+ 42.7%
May-2025	3,233	+ 24.1%	3,553	+ 32.2%
Jun-2025	2,972	+ 18.6%	3,213	+ 28.8%
Jul-2025	2,723	+ 13.0%	2,856	+ 23.7%
Aug-2025	2,570	+ 11.0%	2,673	+ 21.8%
Sep-2025	2,480	+ 4.9%	2,635	+ 13.5%
Oct-2025	2,593	+ 2.4%	3,015	+ 19.1%
Nov-2025	2,726	- 3.0%	3,217	+ 11.9%
Dec-2025	2,689	- 7.1%	3,184	+ 4.0%
Jan-2026	2,994	- 11.2%	3,485	- 6.5%
Feb-2026	3,022	- 16.5%	3,540	- 11.0%
Mar-2026	2,931	- 19.1%	3,436	- 16.2%
12-Month Avg	2,871	+ 2.1%	3,232	+ 10.6%

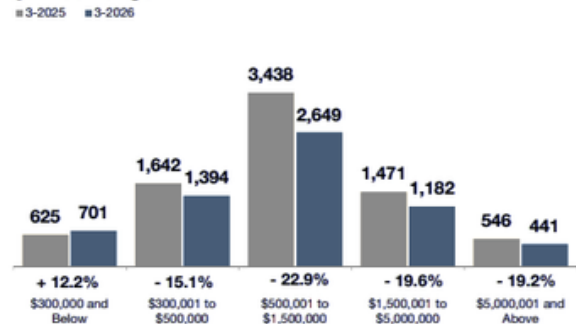
Historical Inventory of Homes for Sale by Month



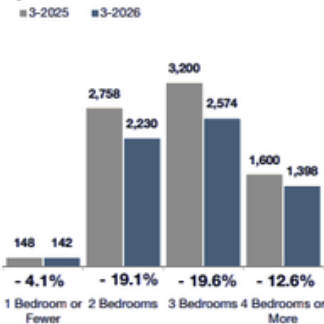
OVERALL INVENTORY OF HOMES FOR SALE BY PRICE RANGE

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

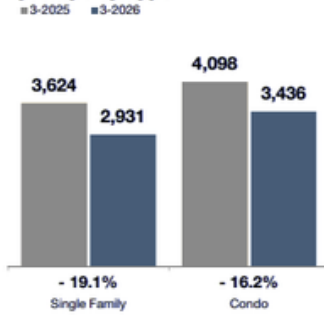
By Price Range



By Bedroom Count



By Property Type



LOCAL MARKET UPDATE - NAPLES BEACH

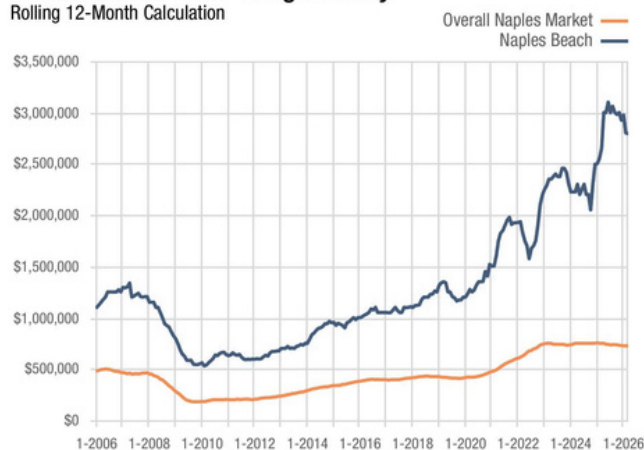
34102, 34103, 34108

Single Family	March			Year to Date		
Key Metrics	2025	2026	% Change	Thru 3-2025	Thru 3-2026	% Change
New Listings	90	102	+ 13.3%	461	360	- 21.9%
Total Sales	51	68	+ 33.3%	143	156	+ 9.1%
Days on Market Until Sale	132	114	- 13.6%	125	119	- 4.8%
Median Closed Price*	\$3,425,000	\$3,034,500	- 11.4%	\$3,250,000	\$2,820,000	- 13.2%
Average Closed Price*	\$5,405,514	\$4,481,677	- 17.1%	\$5,321,822	\$4,929,197	- 7.4%
Percent of List Price Received*	91.6%	92.7%	+ 1.2%	92.7%	92.4%	- 0.3%
Inventory of Homes for Sale	795	602	- 24.3%	—	—	—
Months Supply of Inventory	21.3	12.9	- 39.4%	—	—	—

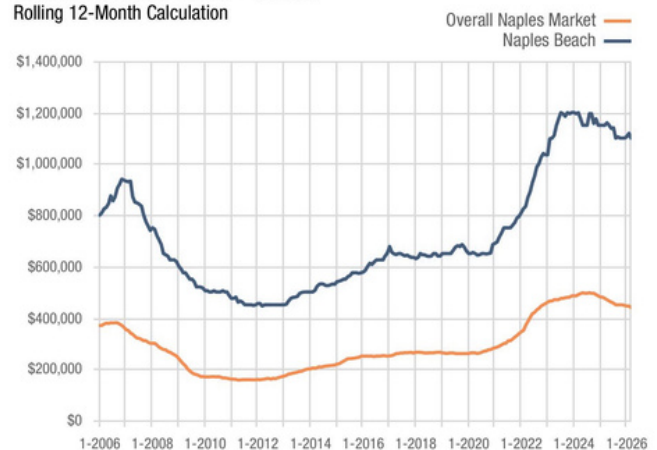
Condo	March			Year to Date		
Key Metrics	2025	2026	% Change	Thru 3-2025	Thru 3-2026	% Change
New Listings	218	172	- 21.1%	821	661	- 19.5%
Total Sales	93	126	+ 35.5%	220	304	+ 38.2%
Days on Market Until Sale	84	92	+ 9.5%	91	99	+ 8.8%
Median Closed Price*	\$1,200,000	\$1,131,272	- 5.7%	\$1,187,500	\$1,220,000	+ 2.7%
Average Closed Price*	\$1,735,212	\$1,657,629	- 4.5%	\$1,829,213	\$1,681,990	- 8.0%
Percent of List Price Received*	93.7%	93.6%	- 0.1%	93.6%	93.7%	+ 0.1%
Inventory of Homes for Sale	1,249	1,040	- 16.7%	—	—	—
Months Supply of Inventory	17.7	13.1	- 26.0%	—	—	—

* 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 - NORTH NAPLES

34109, 34110, 34119

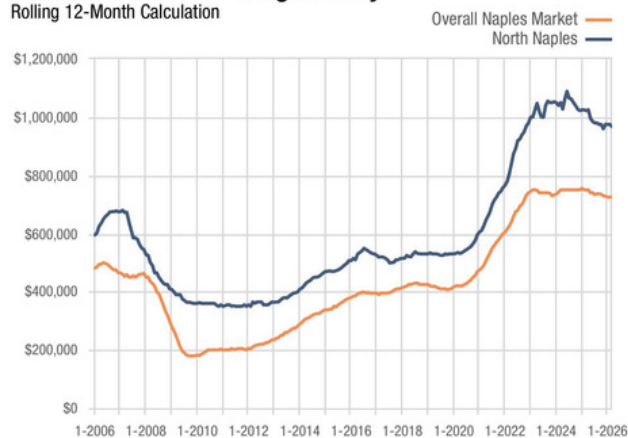
Single Family	March			Year to Date		
Key Metrics	2025	2026	% Change	Thru 3-2025	Thru 3-2026	% Change
New Listings	176	147	- 16.5%	565	527	- 6.7%
Total Sales	86	111	+ 29.1%	230	256	+ 11.3%
Days on Market Until Sale	89	63	- 29.2%	83	74	- 10.8%
Median Closed Price*	\$982,500	\$880,000	- 10.4%	\$1,000,000	\$977,500	- 2.3%
Average Closed Price*	\$1,593,472	\$1,419,837	- 10.9%	\$1,537,994	\$1,525,125	- 0.8%
Percent of List Price Received*	94.0%	94.5%	+ 0.5%	94.3%	94.6%	+ 0.3%
Inventory of Homes for Sale	669	551	- 17.6%	—	—	—
Months Supply of Inventory	9.0	6.9	- 23.3%	—	—	—

Condo	March			Year to Date		
Key Metrics	2025	2026	% Change	Thru 3-2025	Thru 3-2026	% Change
New Listings	200	191	- 4.5%	713	631	- 11.5%
Total Sales	124	134	+ 8.1%	268	302	+ 12.7%
Days on Market Until Sale	78	103	+ 32.1%	81	104	+ 28.4%
Median Closed Price*	\$476,250	\$425,000	- 10.8%	\$475,000	\$443,750	- 6.6%
Average Closed Price*	\$663,224	\$636,572	- 4.0%	\$662,997	\$666,021	+ 0.5%
Percent of List Price Received*	95.0%	94.3%	- 0.7%	95.5%	94.6%	- 0.9%
Inventory of Homes for Sale	884	819	- 7.4%	—	—	—
Months Supply of Inventory	9.9	9.4	- 5.1%	—	—	—

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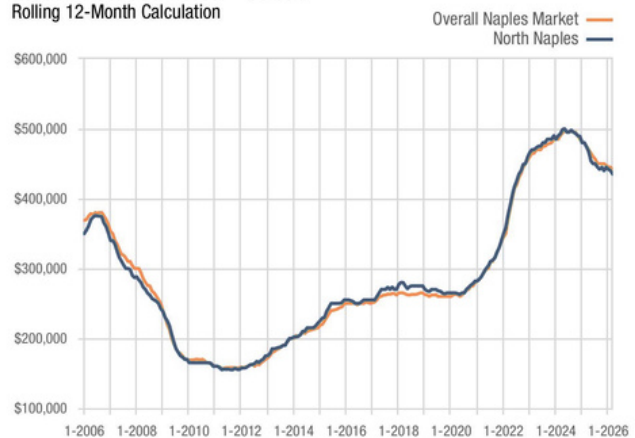
Median Closed Price - Single Family

Rolling 12-Month Calculation



Median Closed Price - Condo

Rolling 12-Month Calculation



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LOCAL MARKET UPDATE - CENTRAL NAPLES

34104, 34105, 34116

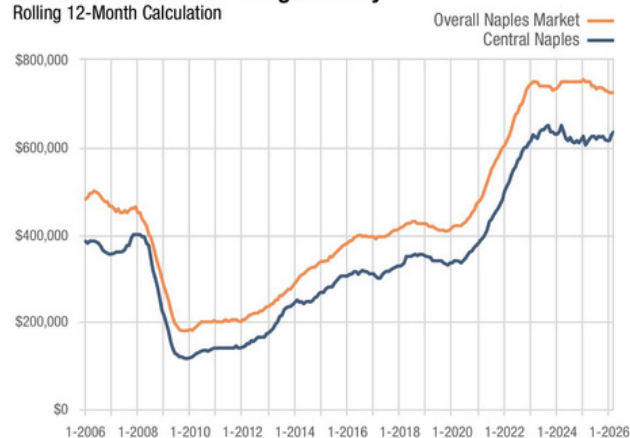
Single Family	March			Year to Date		
Key Metrics	2025	2026	% Change	Thru 3-2025	Thru 3-2026	% Change
New Listings	86	62	- 27.9%	299	244	- 18.4%
Total Sales	62	60	- 3.2%	141	135	- 4.3%
Days on Market Until Sale	75	84	+ 12.0%	81	84	+ 3.7%
Median Closed Price*	\$672,500	\$692,500	+ 3.0%	\$639,000	\$700,000	+ 9.5%
Average Closed Price*	\$1,157,850	\$1,364,673	+ 17.9%	\$1,104,650	\$1,321,085	+ 19.6%
Percent of List Price Received*	95.6%	96.0%	+ 0.4%	95.7%	95.7%	0.0%
Inventory of Homes for Sale	353	260	- 26.3%	—	—	—
Months Supply of Inventory	8.1	5.8	- 28.4%	—	—	—

Condo	March			Year to Date		
Key Metrics	2025	2026	% Change	Thru 3-2025	Thru 3-2026	% Change
New Listings	123	96	- 22.0%	391	310	- 20.7%
Total Sales	48	70	+ 45.8%	119	164	+ 37.8%
Days on Market Until Sale	67	77	+ 14.9%	74	91	+ 23.0%
Median Closed Price*	\$324,900	\$302,500	- 6.9%	\$312,500	\$308,750	- 1.2%
Average Closed Price*	\$427,877	\$381,381	- 10.9%	\$402,938	\$384,462	- 4.6%
Percent of List Price Received*	95.1%	95.7%	+ 0.6%	94.7%	94.6%	- 0.1%
Inventory of Homes for Sale	537	367	- 31.7%	—	—	—
Months Supply of Inventory	12.0	6.9	- 42.5%	—	—	—

* 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.

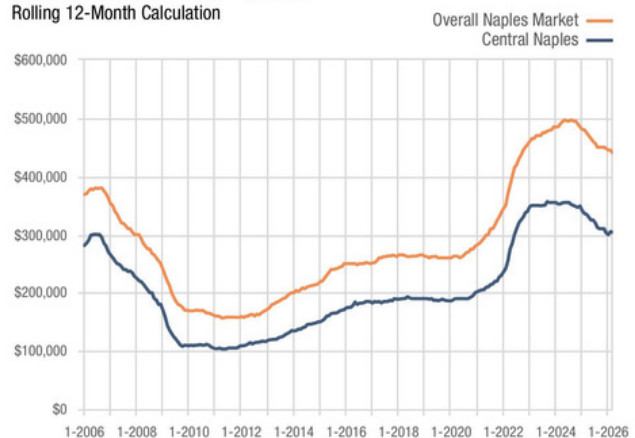
Median Closed Price - Single Family

Rolling 12-Month Calculation



Median Closed Price - Condo

Rolling 12-Month Calculation



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LOCAL MARKET UPDATE - SOUTH NAPLES

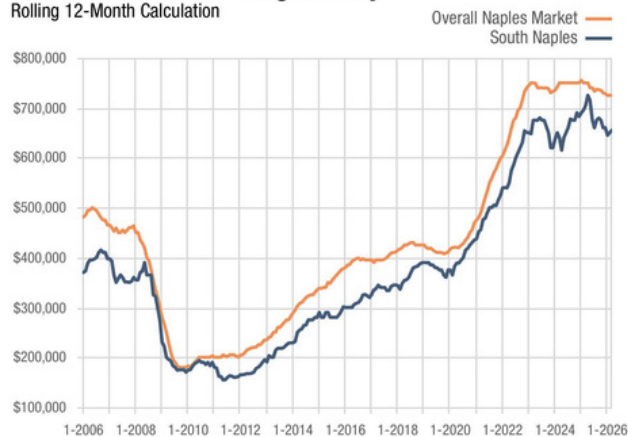
34112, 34113

Single Family	March			Year to Date		
Key Metrics	2025	2026	% Change	Thru 3-2025	Thru 3-2026	% Change
New Listings	102	81	- 20.6%	383	299	- 21.9%
Total Sales	52	67	+ 28.8%	115	135	+ 17.4%
Days on Market Until Sale	69	110	+ 59.4%	78	99	+ 26.9%
Median Closed Price*	\$702,500	\$700,000	- 0.4%	\$765,000	\$775,000	+ 1.3%
Average Closed Price*	\$1,147,123	\$934,052	- 18.6%	\$1,111,603	\$1,046,385	- 5.9%
Percent of List Price Received*	94.4%	93.8%	- 0.6%	94.0%	94.4%	+ 0.4%
Inventory of Homes for Sale	488	365	- 25.2%	—	—	—
Months Supply of Inventory	12.3	8.2	- 33.3%	—	—	—

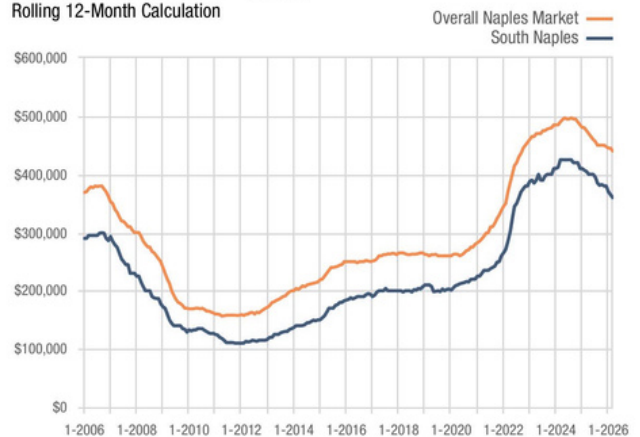
Condo	March			Year to Date		
Key Metrics	2025	2026	% Change	Thru 3-2025	Thru 3-2026	% Change
New Listings	210	172	- 18.1%	675	570	- 15.6%
Total Sales	96	112	+ 16.7%	213	252	+ 18.3%
Days on Market Until Sale	77	94	+ 22.1%	85	87	+ 2.4%
Median Closed Price*	\$427,000	\$355,000	- 16.9%	\$425,000	\$340,000	- 20.0%
Average Closed Price*	\$495,229	\$401,870	- 18.9%	\$477,715	\$408,134	- 14.6%
Percent of List Price Received*	94.5%	93.6%	- 1.0%	94.4%	93.9%	- 0.5%
Inventory of Homes for Sale	870	725	- 16.7%	—	—	—
Months Supply of Inventory	12.4	9.6	- 22.6%	—	—	—

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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

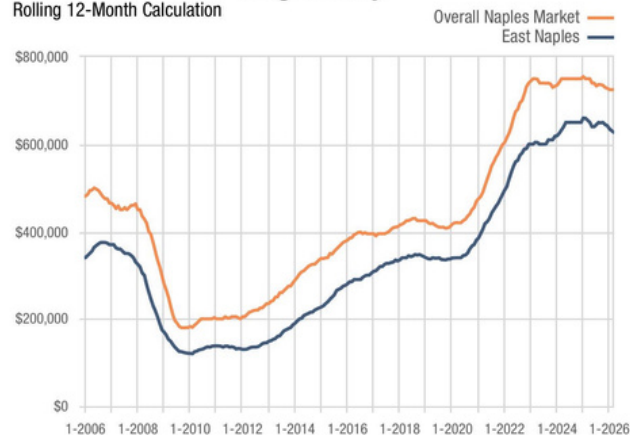
34114, 34117, 34120, 34137

Single Family	March			Year to Date		
Key Metrics	2025	2026	% Change	Thru 3-2025	Thru 3-2026	% Change
New Listings	283	249	- 12.0%	878	802	- 8.7%
Total Sales	139	186	+ 33.8%	350	413	+ 18.0%
Days on Market Until Sale	95	96	+ 1.1%	89	90	+ 1.1%
Median Closed Price*	\$669,900	\$600,000	- 10.4%	\$682,000	\$610,000	- 10.6%
Average Closed Price*	\$807,784	\$833,630	+ 3.2%	\$847,400	\$800,515	- 5.5%
Percent of List Price Received*	96.3%	95.5%	- 0.8%	95.9%	95.6%	- 0.3%
Inventory of Homes for Sale	1,154	975	- 15.5%	—	—	—
Months Supply of Inventory	9.2	7.3	- 20.7%	—	—	—

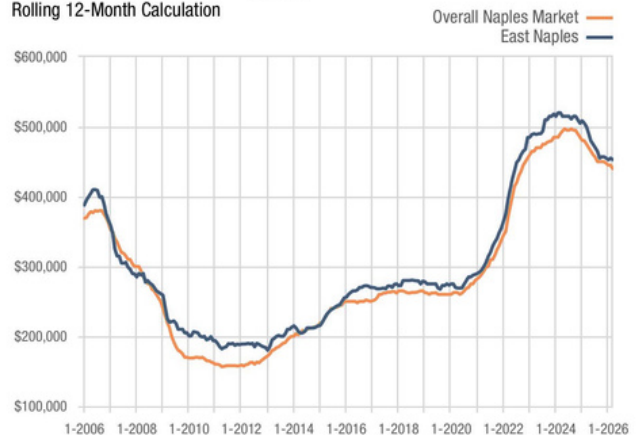
Condo	March			Year to Date		
Key Metrics	2025	2026	% Change	Thru 3-2025	Thru 3-2026	% Change
New Listings	98	86	- 12.2%	347	316	- 8.9%
Total Sales	41	89	+ 117.1%	106	168	+ 58.5%
Days on Market Until Sale	118	121	+ 2.5%	98	113	+ 15.3%
Median Closed Price*	\$440,000	\$440,000	0.0%	\$462,500	\$460,000	- 0.5%
Average Closed Price*	\$475,105	\$461,461	- 2.9%	\$473,551	\$481,132	+ 1.6%
Percent of List Price Received*	94.3%	95.0%	+ 0.7%	95.2%	95.0%	- 0.2%
Inventory of Homes for Sale	503	401	- 20.3%	—	—	—
Months Supply of Inventory	12.3	8.8	- 28.5%	—	—	—

* 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.



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