

Annual Report on the Naples Area Housing Market

A Research Tool Provided by Naples Area Board of REALTORS®



2025

The U.S. housing market navigated a challenging landscape throughout 2025. Mortgage rates remained elevated compared with recent years, and home prices continued to rise nationwide. Demand for affordable housing far outpaced supply, and with fewer buyers able to keep up with rising costs, sales of previously owned homes were subdued. Younger buyers faced steep hurdles as high rents, inflation, and student loan debt limited their ability to save for a down payment. By mid-2025, first-time buyers accounted for just 21% of all home purchases, while the typical age of a first-time buyer reached a record high of 40, according to the National Association of REALTORS® (NAR). This aging trend extended across the broader market, as the median age of all homebuyers reached 59. NAR data show that homeowners also set a record, staying in their homes a median of 11 years before selling.

With sales activity down, inventory continued to edge higher, and homes spent more time on the market compared with the previous year, signaling a shift toward more balanced market conditions. The rise in supply has given buyers more options and reduced the sense of urgency that characterized the post-pandemic market, while sellers have rediscovered the importance of strategic pricing, especially in areas where inventory growth is strongest. Although price appreciation has slowed, home values remain roughly 50% higher than pre-pandemic levels, stretching budgets and prompting many would-be buyers to delay their home search until affordability increases.

Sales: Total sales were up 3.4 percent to end the year at 8,249.

Prices: The overall median sales price decreased 2.5 percent to \$594,500 for the year. Single Family home prices decreased 2.8 percent in 2025 compared to the year before. Townhouse-Condo home prices fell 7.5 percent in year-over-year comparisons.

List Price Received: Sellers received, on average, 94.2 percent of their list price at sale, down 1.3 percent from last year. Single Family homes received 94.4 percent of the list price, while Condo homes received 94.1 percent of their list price at sale.

Listings: Comparing 2025 to the prior year, the number of homes available for sale was down 3.8 percent. There were 5,714 active listings at the end of the year. New listings increased 1.4 percent to finish the year at 15,773.

Sales by Price Range: The number of homes sold in the \$500,001 to \$1,500,000 price range fell 3.0 percent to 3,753 homes. Homes sold in the \$300,000 and Below price range rose 42.8 percent to 1,124 homes.

Bedroom Count: The number of closed sales in homes with 3 or more bedrooms increased over the year before. In 2025, properties with 2 Bedrooms or Less saw the a decline of just one home sale. Homes with 3 Bedrooms saw a 3.0 percent increase in home sales, while homes with 4 or More bedrooms saw an increase of 11.1 percent over last year.

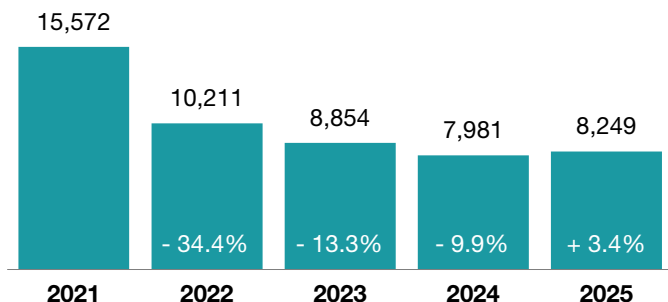
Looking ahead to 2026, experts are forecasting an improvement in market activity. Mortgage rates declined through the second half of 2025 and are expected to stay in the 6% range in the year ahead, supporting incremental gains in affordability. As inventory builds, sales volume is projected to increase. Economists anticipate modest increases in home prices, well below the rapid appreciation of recent years. While conditions should become somewhat more favorable for buyers, affordability constraints and the effects of a decade-long supply shortfall will continue to shape the market. Taken together, these trends suggest 2026 will be a year of stabilization and recovery, rather than dramatic change.

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Quick Facts

Total Sales



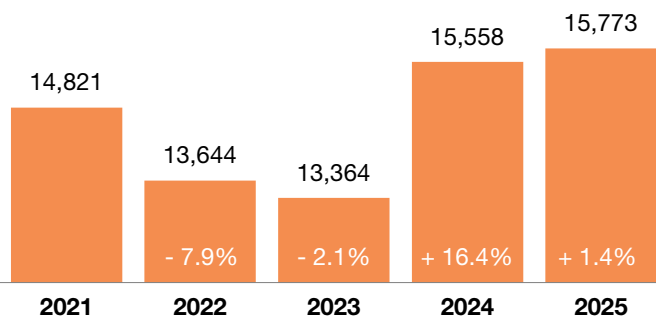
Top 5 Areas: Change in Total Sales from 2024

Ave Maria	+ 31.5%
34117	+ 20.8%
Immokalee / Ave Maria	+ 19.6%
34142	+ 19.6%
34108	+ 17.5%

Bottom 5 Areas: Change in Total Sales from 2024

North Naples	- 1.6%
34120	- 5.5%
34110	- 11.1%
Immokalee	- 16.2%
Everglades City	- 57.1%

New Listings



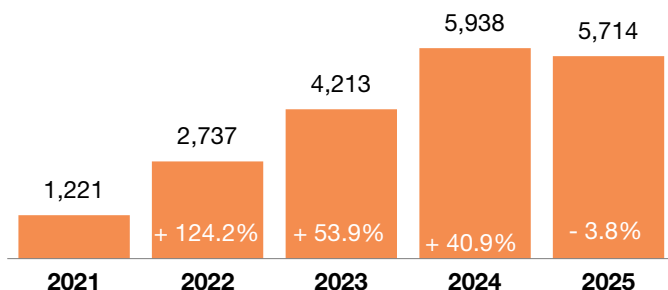
Top 5 Areas: Change in New Listings from 2024

Ave Maria	+ 30.8%
Immokalee / Ave Maria	+ 18.6%
34142	+ 18.6%
34102	+ 10.7%
34112	+ 5.6%

Bottom 5 Areas: Change in New Listings from 2024

Central Naples	- 3.0%
34116	- 7.1%
34110	- 9.1%
Everglades City	- 36.8%
Immokalee	- 44.4%

Inventory of Homes for Sale



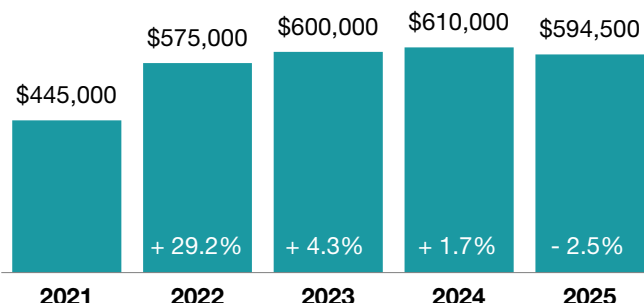
Top 5 Areas: Change in Homes for Sale from 2024

Ave Maria	+ 15.5%
34109	+ 8.2%
34120	+ 4.8%
Immokalee / Ave Maria	+ 3.5%
34142	+ 3.5%

Bottom 5 Areas: Change in Homes for Sale from 2024

Central Naples	- 12.9%
34105	- 12.9%
34113	- 13.8%
34116	- 30.1%
Immokalee	- 87.5%

Median Closed Price



Top 5 Areas: Change in Median Sales Price from 2024

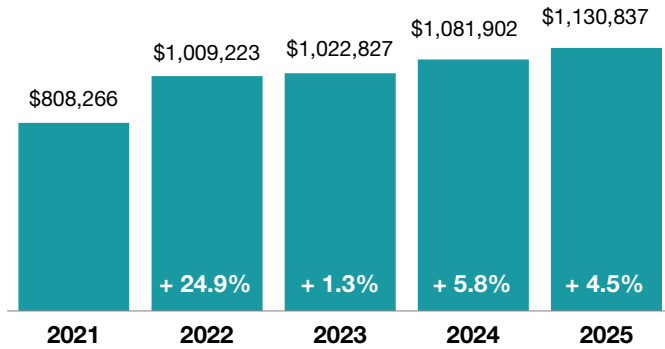
Everglades City	+ 48.6%
34102	+ 19.1%
Naples Beach	+ 6.9%
34117	+ 1.7%
34108	+ 0.5%

Bottom 5 Areas: Change in Median Sales Price from 2024

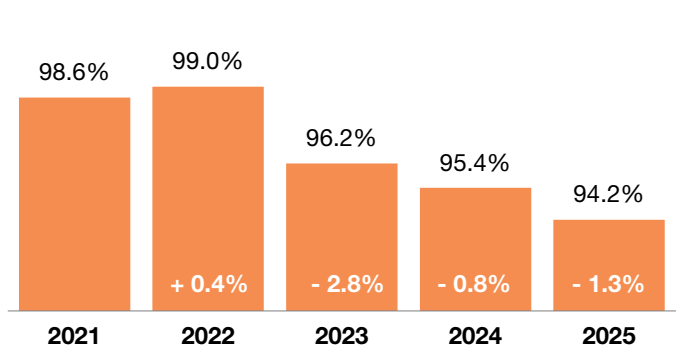
Immokalee / Ave Maria	- 6.6%
34114	- 7.7%
34104	- 8.2%
Ave Maria	- 11.5%
34137	- 100.0%

Quick Facts

Average Closed Price



Percent of List Price Received



Top 5 Areas: Change in Average Closed Price from 2024

Everglades City	+ 96.1%
34102	+ 27.9%
Naples Beach	+ 14.8%
Immokalee	+ 13.4%
34108	+ 11.0%

Bottom 5 Areas: Change in Average Closed Price from 2024

South Naples	- 6.8%
Central Naples	- 9.2%
Ave Maria	- 10.2%
34105	- 11.3%
34113	- 12.6%

Top 5 Areas: Change in Pct. of List Price Received from 2024

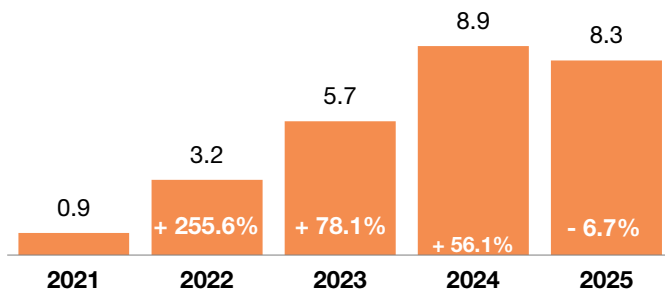
34116	- 0.4%
Ave Maria	- 0.4%
34117	- 0.6%
34104	- 0.6%
34120	- 0.8%

Bottom 5 Areas: Change in Pct. of List Price Received from 2024

34113	- 1.6%
34105	- 1.7%
34108	- 1.7%
Immokalee	- 2.8%
Everglades City	- 5.0%

Months Supply of Inventory

At the end of the year.



Top 5 Areas: Months Supply of Inventory

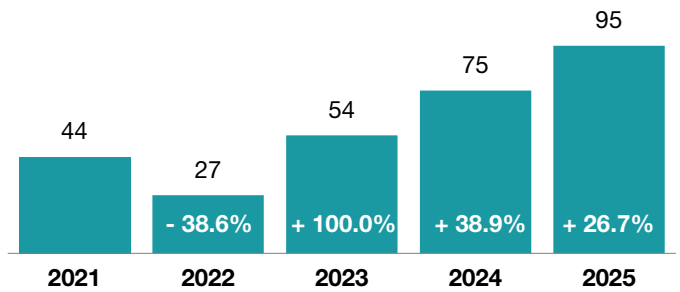
34102	14.4
34103	13.7
Naples Beach	12.3
34108	10.0
34110	9.2

Bottom 5 Areas: Months Supply of Inventory

34117	6.2
34119	6.2
Everglades City	4.7
34116	4.1
Immokalee	0.6

Days on Market

At the end of the year.



Top 5 Areas: Change in Days on Market from 2024

34104	+ 49.2%
34110	+ 42.5%
34119	+ 40.7%
North Naples	+ 38.5%
34113	+ 38.4%

Bottom 5 Areas: Change in Days on Market from 2024

34117	+ 14.8%
Immokalee / Ave Maria	+ 6.8%
34142	+ 6.8%
Ave Maria	+ 3.3%
Everglades City	- 18.2%

Property Type Review

93

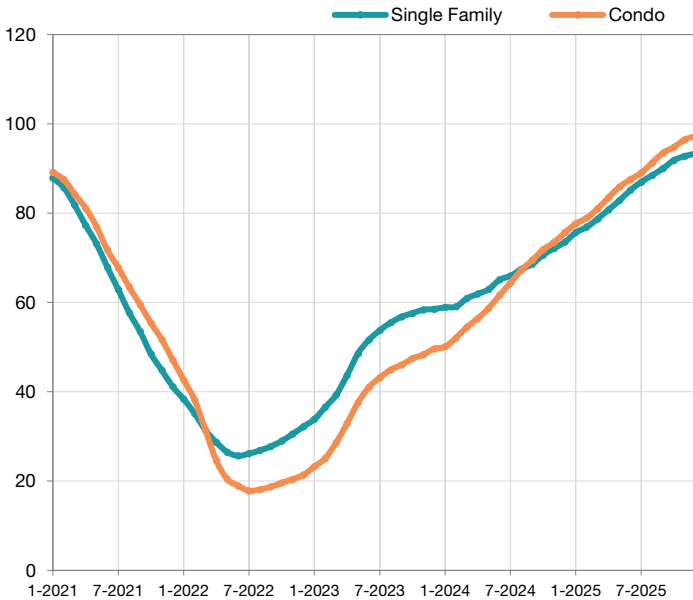
Average Days on Market
Single Family

97

Average Days on Market
Condo

Days on Market

This chart uses a rolling 12-month average for each data point.



Condo Market Share in 2025

34103	70.2%
34112	67.4%
South Naples	62.7%
34108	61.8%
Naples Beach	61.2%
34105	60.9%
34109	60.8%
34110	60.6%
34113	56.6%
34104	55.8%
North Naples	52.3%
Central Naples	52.2%
34102	52.1%
Naples	48.4%
Collier County	47.6%
34114	42.0%
34119	40.8%
Everglades City	33.3%
Ave Maria	31.2%
Immokalee / Ave Maria	26.0%
34142	26.0%
34116	25.8%
East Naples	23.9%
34120	15.8%
Immokalee	1.6%
34117	0.0%
34137	0.0%

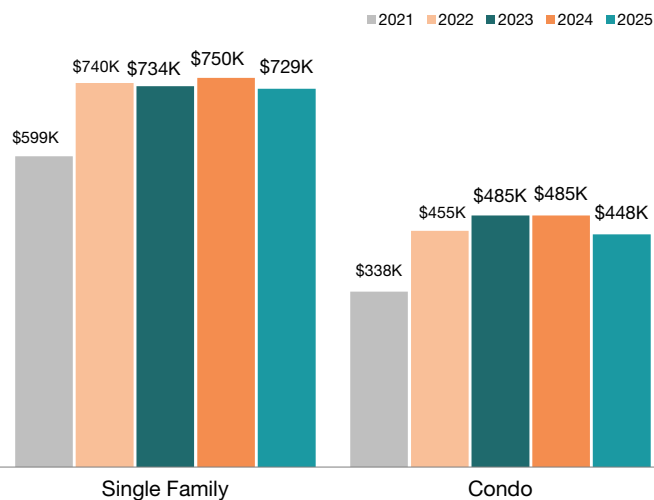
- 2.8%

One-Year Change in Price
Single Family

- 7.5%

One-Year Change in Price
Condo

Median Closed Price



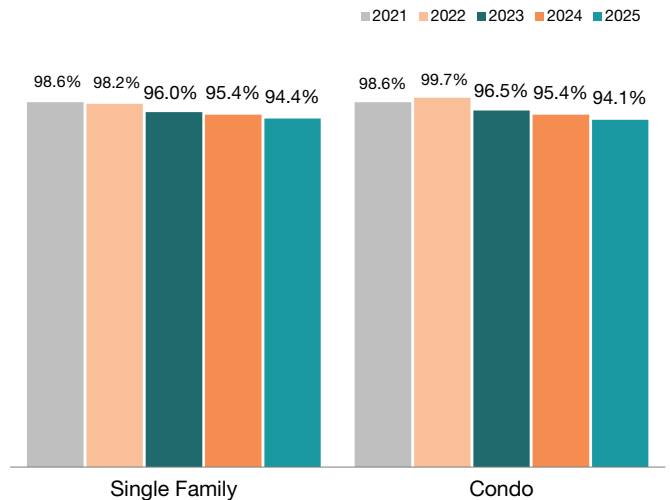
94.4%

Pct. of List Price Received
Single Family

94.1%

Pct. of List Price Received
Condo

Percent of List Price Received



Price Range Review

\$300,001 to \$500,000

Price Range with Shortest Average Days on Market Until Sale

\$5,000,001 and Above

Price Range with Longest Average Days on Market Until Sale

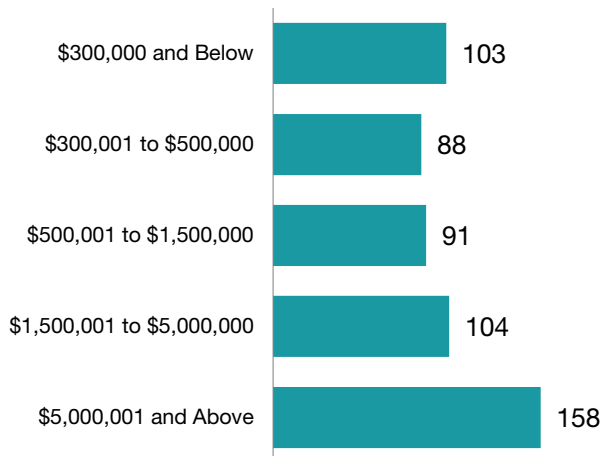
6.2%

of Sales at Year End Priced \$300,000 and Below

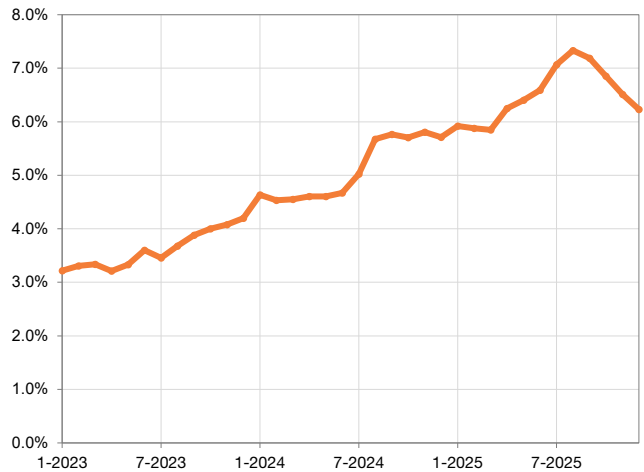
+ 5.9%

One-Year Change in Homes for Sale Priced \$300,000 and Below

Days on Market Until Sale by Price Range



Share of Homes for Sale At Year End \$300,000 and Below



\$500,001 to \$1,500,000

Price Range with the Most Closed Sales

+ 42.8%

Price Range with Strongest One-Year Change in Sales: \$300,000 and Below

\$5,000,001 and Above

Price Range with the Fewest Closed Sales

- 3.0%

Price Range with Weakest One-Year Change in Sales: \$500,001 to \$1,500,000

Closed Sales by Price Range



Bedroom Count Review

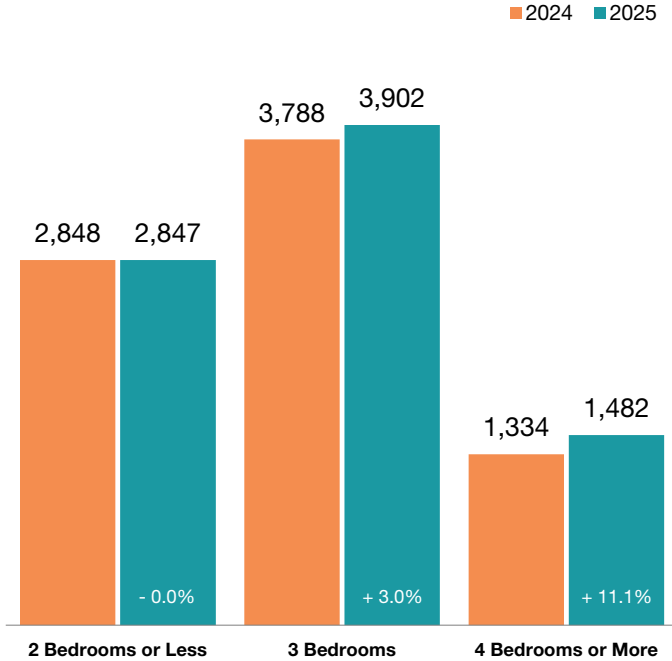
- 0.0%

Reduction in Total Sales
2 Bedrooms or Less

+ 11.1%

Growth in Total Sales
4 Bedrooms or More

Total Sales



4 Bedrooms or More Market Share in 2025

34102	33.8%
34117	30.9%
34119	28.3%
34120	24.2%
Naples Beach	23.7%
North Naples	21.1%
34108	20.8%
34116	20.1%
East Naples	19.5%
Naples	18.1%
Collier County	17.9%
34103	17.5%
Ave Maria	17.1%
34109	16.0%
34110	15.5%
Immokalee / Ave Maria	15.3%
34142	15.3%
34105	14.0%
34114	13.9%
Central Naples	12.6%
34113	11.3%
34104	8.4%
South Naples	8.1%
Immokalee	6.5%
34112	5.7%
Everglades City	0.0%
34137	0.0%

94.2%

Percent of List Price Received
in 2025 for
All Properties

93.9%

Percent of List Price Received
in 2025 for
2 Bedrooms or Less

94.9%

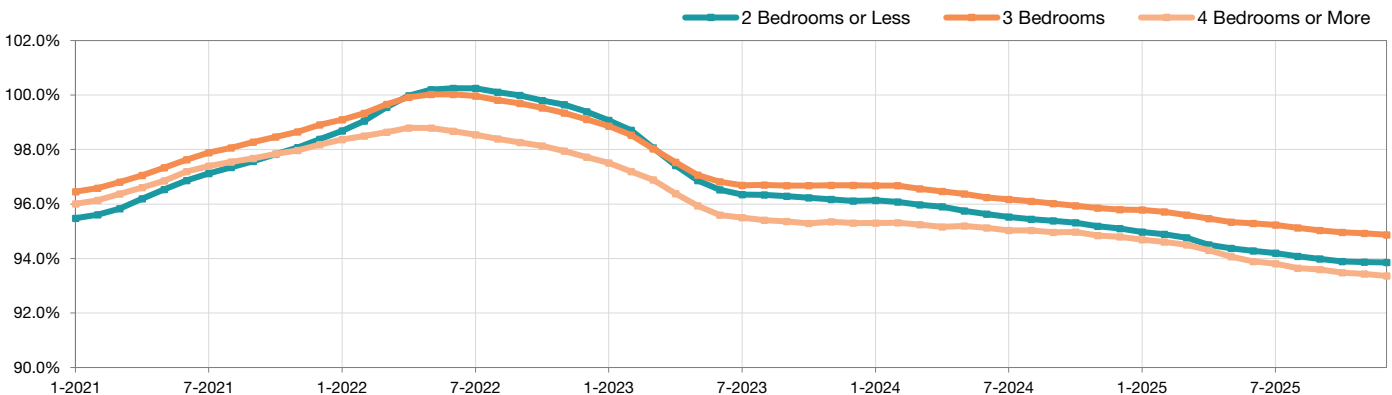
Percent of List Price Received
in 2025 for
3 Bedrooms

93.4%

Percent of List Price Received
in 2025 for
4 Bedrooms or More

Percent of List Price Received

This chart uses a rolling 12-month average for each data point.



Area Overviews



	Total Total Sales	Change from 2024	Change from 2021	New Listings	Average Days on Market	Inventory of Homes for Sale	Months Supply of Inventory	Pct. of List Price Received
Collier County	9,107	+ 3.2%	- 46.8%	17,464	97	6,413	8.5	94.1%
Central Naples	1,133	+ 5.5%	- 51.5%	1,936	84	599	6.3	94.7%
East Naples	2,032	- 0.9%	- 38.1%	3,775	90	1,344	7.9	95.4%
Immokalee / Ave Maria	354	+ 19.6%	+ 5.4%	656	94	205	6.9	95.2%
Naples Beach	1,415	+ 11.2%	- 53.4%	3,214	123	1,451	12.3	92.1%
North Naples	1,938	- 1.6%	- 50.5%	3,489	90	1,173	7.3	94.4%
South Naples	1,377	+ 4.6%	- 48.4%	2,703	92	942	8.2	94.0%
Everglades City	3	- 57.1%	- 70.0%	12	211	7	4.7	86.9%
Naples	7,892	+ 2.7%	- 48.2%	15,110	95	5,507	8.4	94.2%
Ave Maria	292	+ 31.5%	+ 7.0%	603	94	201	8.3	95.2%
Immokalee	62	- 16.2%	0.0%	50	94	3	0.6	95.2%
34102	420	+ 15.4%	- 99.1%	1,025	139	504	14.4	91.3%
34103	383	- 1.3%	- 56.4%	944	125	438	13.7	92.0%
34104	502	+ 11.1%	- 50.9%	854	88	285	6.8	94.9%
34105	422	+ 2.4%	- 54.3%	770	85	242	6.9	93.6%
34108	612	+ 17.5%	- 52.4%	1,245	110	509	10.0	92.7%
34109	530	+ 10.9%	- 98.9%	913	84	302	6.8	94.4%
34110	587	- 11.1%	- 98.7%	1,144	104	450	9.2	93.7%
34112	774	+ 7.1%	- 98.3%	1,541	86	541	8.4	94.0%
34113	603	+ 1.5%	- 98.7%	1,162	101	401	8.0	93.9%
34114	797	- 1.5%	- 98.3%	1,569	103	601	9.0	94.2%
34116	209	- 0.5%	- 99.6%	312	70	72	4.1	96.1%
34117	285	+ 20.8%	- 99.4%	459	70	148	6.2	96.7%
34119	821	- 1.3%	- 98.2%	1,432	83	421	6.2	94.8%
34120	950	- 5.5%	- 98.0%	1,745	85	593	7.5	96.0%
34137	0	--	--	2	--	2	0.0	0.0%
34142	354	+ 19.6%	- 99.2%	656	94	205	6.9	95.2%

Area Prices



	2021	2022	2023	2024	2025	Change From 2024	Change From 2021
Collier County	\$465,000	\$595,000	\$625,000	\$639,000	\$617,000	- 3.4%	+ 32.7%
Central Naples	\$320,000	\$428,090	\$445,000	\$452,750	\$449,900	- 0.6%	+ 40.6%
East Naples	\$435,000	\$559,900	\$580,000	\$605,000	\$574,900	- 5.0%	+ 32.2%
Immokalee / Ave Maria	\$330,000	\$407,500	\$420,000	\$417,450	\$389,778	- 6.6%	+ 18.1%
Naples Beach	\$925,000	\$1,250,000	\$1,400,000	\$1,333,000	\$1,425,000	+ 6.9%	+ 54.1%
North Naples	\$510,000	\$652,000	\$715,000	\$695,000	\$665,000	- 4.3%	+ 30.4%
South Naples	\$320,000	\$437,250	\$472,500	\$475,000	\$461,000	- 2.9%	+ 44.1%
Everglades City	\$260,000	\$280,000	\$357,500	\$185,000	\$275,000	+ 48.6%	+ 5.8%
Naples	\$450,000	\$580,000	\$615,000	\$625,000	\$610,000	- 2.4%	+ 35.6%
Ave Maria	\$349,000	\$431,500	\$465,000	\$472,495	\$418,000	- 11.5%	+ 19.8%
Immokalee	\$218,450	\$235,900	\$346,900	\$334,450	\$334,450	0.0%	+ 53.1%
34102	\$1,372,500	\$1,575,500	\$1,912,500	\$1,972,500	\$2,350,000	+ 19.1%	+ 71.2%
34103	\$925,000	\$1,275,000	\$1,400,000	\$1,275,000	\$1,220,000	- 4.3%	+ 31.9%
34104	\$282,750	\$400,500	\$396,950	\$403,000	\$370,000	- 8.2%	+ 30.9%
34105	\$344,000	\$510,000	\$523,000	\$590,000	\$586,250	- 0.6%	+ 70.4%
34108	\$820,000	\$1,100,000	\$1,200,000	\$1,200,000	\$1,206,500	+ 0.5%	+ 47.1%
34109	\$480,000	\$599,950	\$711,250	\$657,500	\$623,750	- 5.1%	+ 29.9%
34110	\$512,000	\$659,000	\$675,000	\$689,500	\$645,000	- 6.5%	+ 26.0%
34112	\$258,000	\$364,000	\$402,000	\$395,000	\$380,000	- 3.8%	+ 47.3%
34113	\$390,000	\$575,500	\$575,185	\$627,000	\$587,500	- 6.3%	+ 50.6%
34114	\$459,450	\$618,000	\$622,802	\$612,000	\$565,000	- 7.7%	+ 23.0%
34116	\$345,000	\$415,000	\$469,150	\$465,000	\$465,000	0.0%	+ 34.8%
34117	\$426,250	\$524,999	\$530,000	\$585,000	\$595,000	+ 1.7%	+ 39.6%
34119	\$530,500	\$685,000	\$745,000	\$737,450	\$722,000	- 2.1%	+ 36.1%
34120	\$426,000	\$549,000	\$570,000	\$610,000	\$575,000	- 5.7%	+ 35.0%
34137	\$0	\$130,000	\$80,000	\$230,000	\$0	- 100.0%	--
34142	\$330,000	\$407,500	\$420,000	\$417,450	\$389,778	- 6.6%	+ 18.1%