

Market Update

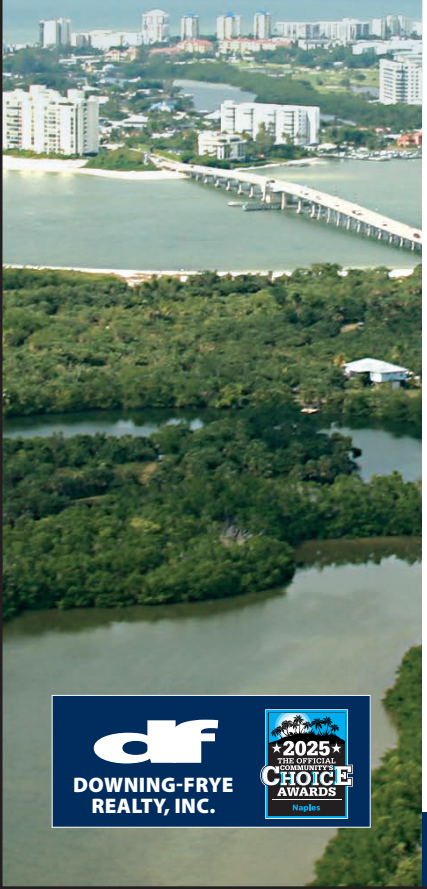
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DOWNING-FRYE: *ANOTHER SUCCESSFUL YEAR*

"2025 was an interesting year for the local real estate market," said Mike Hughes, General Manager for Downing-Frye Realty, Inc. "In 2024, Downing-Frye agents participated in 1,653 closed transactional sides. In 2025, Downing-Frye agents participated in 1,652 closed transactional sides! We were within one closing of duplicating our success from the previous year.

However, there is a story here. In the first half of the year our closings were down largely due to the tariff concerns. In the second half of 2025, we largely wiped out the first half deficit. This was helped by the lack of tropical (hurricane) activity in 2025. With no hurricanes to be concerned with, the summer and fall sales were elevated compared to the previous year.

We closed 2025 with 181 closings in the month of December. This was a 62% increase over the previous December. Hopefully this momentum continues into the 2026 year. We enter 2026 with a great supply of listing inventory and our agents are excited to see what the new year brings!"

NAPLES AREA: SALES SPARKED BY PRICE DECREASES

The Naples Area Board of REALTORS® (NABOR®) reported November 2025 figures as compared to November 2024: Total closed sales were up by 9.8% and pending sales were up by 16.9%. New listings were down by 14.2%, but total active listings were up by 1.6%. Single-family listings totaled 2,649 and condominium listings totaled 3,108. Single-family closed sales were up by 5.7% and had a median closed sales price of $680,000, down 8.1%. Condominium closed sales were up by 14.6% and had a median closed sales price of $420,000, up 1.2% from November 2024. The overall median closed price in November decreased 4.9% to $546,950 from $576,000 in November 2024.

BONITA / ESTERO: NOVEMBER MOMENTUM

The Bonita Springs-Estero Realtors reported that November 2025 showed firm buyer momentum amid expanding choice. Single-family new listings totaled 2,821 (–14.5%) with pending sales up to 2,050 (+34.9%); the median price settled at $415,000 (–4.1%) with 62 median days to contract and 95.7% of list received. Condos posted 1,728 new listings (–13.5%) and 1,082 pendings (+37.8%); the median price measured $340,000 (–6.9%) with 65 days to contract and 94.3% of list received. Supply remains ample: 8.5-months' supply for single-family homes and 13.6-months' supply for condos.

MARCO ISLAND AREA: SALES UP 61%

The Marco Island Area Assoc. of Realtors® reported November 2025 figures as compared to November 2024: Inventory was up 34%; the number of properties sold was up by 61%; the average days on market was 187 days, down by 4%; and the dollar volume sold was $64M, up 24% from the year before. In November, the median sale price for homes was $1.3M, for condos was $609K and for lots was $1.9M.

FLORIDA: PENT-UP DEMAND

Florida's median sale price for single-family homes was down in November 2025 compared to a year ago, but it only fell by two tenths of 1%, to $410,000. The median sale price for condo and townhouse sales declined year-over-year by 3.8% to just under $300,000. Closings were positive for both property type categories. Closed sales of single-family homes were up by nearly 3% compared to a year ago, while closed sales of condos and townhouses were up by just over 1%. Year-over-year, single-family inventory was only up by a little over 3%, and the condo and townhouse inventory was the smallest year-over-year inventory increase since June of 2022, at 6%, a far cry from last November when condo and townhouse inventory was up over 46% year-over-year.

USA: PENDING SALES INCREASE

Pending home sales in November jumped by 3.3% from the prior month and 2.6% year-over-year. "Homebuyer momentum is building. The data shows the strongest performance of the year after accounting for seasonal factors, and the best performance in nearly three years, dating back to February 2023," said NAR Chief Economist Lawrence Yun. "Improving housing affordability–driven by lower mortgage rates and wage growth rising faster than home prices–is helping buyers test the market. More inventory choices compared to last year are also attracting more buyers to the market."

DOWNING-FRYE REALTY, INC.

2025 THE OFFICIAL COMMUNITY'S CHOICE AWARDS Naples

Sources: The Bonita Springs-Estero REALTORS®/SWFLMLS, Naples Area Board of REALTORS®, National Assoc. of REALTORS®, Florida REALTORS® Marco Island Area Assoc. of REALTORS®

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