

Market Update

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DOWNING-FRYE: *LISTING INVENTORY POISED FOR SALES*

"September and October are historically the slow part of the year for real estate sales activity in Southwest Florida," said Mike Hughes, General Manager of Downing-Frye Realty, Inc.. "The summer visitors are gone, and the winter visitors are not here yet. The sales during this period can be a little better if interest rates and/or pricing are favorable. Downing-Frye agents had 90 closings in September compared to 132 closings in September 2025. In September 2024, we had 113 closings.

For pending sales contracts, Downing-Frye agents had 77 pending sales in September 2026 compared to 107 pending sales in September 2025. For reference, we had 86 pending sales contracts in September 2024.

We are almost through the slow portion of the year for sales. Our agents are getting ready for what is usually the busy winter season. The car carriers will be arriving soon! Right now, it looks like the inventory of listings is adequate for the coming season."

NAPLES AREA: SUSTAINED BUYER DEMAND

The Naples area housing market's new listings decreased 15.5% in August to 792 from 937 new listings in August 2025. Demand for homes in Naples continued to tighten the overall inventory, which decreased 16.3% to 4,093 properties from 4,892 properties in August 2025. Days on market decreased 7.5% to 99 days from 107 days in August 2025, and the number of price decreases fell 30.2% to 790 from 1,132 in August 2025; indicators that more homes are selling faster when they are priced right. For August, overall closed sales increased 1.1% to 622 closed sales from 615 closed sales in August 2025. August's pending sales continued to outperform last August, increasing 1.9% to 769 pending sales from 755 pending sales. Year-to-date pending sales are up an impressive 21.7%, while total sales have increased 16.2%.

BONITA / ESTERO: ROBUST BUYER DEMAND

August 2026 showed continued market improvement across Southwest Florida, with pending sales rising 12% and closed sales up 2.3% year-over-year. The overall median sales price climbed 3.1% to $347,325 ($430,000 for single-family homes, up 3.6%, and $522,500 in Bonita Springs-Estero, up 6%). Single-family pending sales were up 10.8% and supply tightened to 5.0 months (-17.9%). The Condo/townhome sector experienced a sharp 20.6% surge in pending sales with a stable median price of $334,000 (-0.1% YoY). Inventory continues to contract across the region, with new listings dipping 1.0% and total active inventory falling 12.2% year-over-year.

MARCO ISLAND AREA: SELLING FASTER

The Marco Island Area Assoc. of Realtors® reported August 2026 figures as compared to August 2025: Inventory was down 34% to 378 properties for sale; the number of properties sold was up by 26%; the average time on market was 77 days, and the dollar volume sold was $95M, up 17% from the year before. In August, the median sales price for homes was $1.6M, for condos was $663K and for lots was $503K.

FLORIDA: PRICES HOLD FIRM

Florida median home prices rose in August for single-family homes, condos and townhouses, even as higher mortgage rates slowed sales growth. The median sale price for single-family homes increased just over 1% from August 2025 to $415,000, and condos and townhouses climbed nearly 3% to just under $298,000. One reason prices held up was tighter inventory. The supply of both single-family homes and condos and townhouses fell by double digits from a year ago.

USA: PENDING SALES INCREASE

Pending home sales in August increased by 0.3% month-over-month and decreased 4.7% year-over-year. "Buyers steadily entered into contracts in August even though mortgage rates increased," said NAR Chief Economist Dr. Lawrence Yun. "Nationally, contract signings today are running roughly 30% below where they were in the years leading up to the pandemic," Yun added. "Transaction activity peaked in 2021 when mortgage rates fell to near 3%, a historic low, and has not approached that level since."

DOWNING-FRYE REALTY, INC.
2026 THE OFFICIAL COMMUNITY'S CHOICE AWARDS Naples WINNER
Voted "Naples Best" for 24 years!

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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