

THE MANHATTAN MARKET REPORT

Q4 2025

REPORT CRITERIA

Multifamily, Mixed-Use and Development transactions between **\$1,000,000 - \$50,000,000** from **Month 1, 2025 - Month 28, 2025**

Zip Codes: 10002, 10003, 10004, 10005, 10006, 10007, 10009, 10011, 10012, 10013, 10014, 10019, 10021, 10023, 10024, 10025, 10026, 10027, 10028, 10029, 10030, 10031, 10032, 10033, 10034, 10035, 10037, 10038, 10039, 10040, 10044, 10065, 10069, 10075, 10128, 10280

Neighborhoods: Astor Row, Battery Park City, Carnegie Hill, Central Harlem, Central Midtown, Central Park South, Chinatown, Civic Center, Clinton - Hell's Kitchen, East Harlem, East Village, Financial District, Flatiron District, Fort George, Garment District, Gramercy Park, Greenwich Village, Hamilton Heights, Harlem, Hudson Heights, Hudson Square, Hudson Yards, Inwood, Kips Bay, Koreatown, Le Petit Senegal, Lenox Hill, Lincoln Square, Little Italy, Lower East Side, Manhattan Valley, Manhattanville, Marcus Garvey Park, Meatpacking, Morningside Heights, Murray Hill, NoHo, NoLiTa, Nomad, North Chelsea, SoHo, South Chelsea, St. Nicholas Historic District, Sugar Hill, Sutton Place, Times Square - Theatre District, TriBeCa, Tudor City, Turtle Bay, Two Bridges, Upper East Side, Upper Manhattan, Upper West Side, Washington Heights, West Harlem, West Village, Yorkville

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TRANSACTIONS SOLD

74

Total Transactions

↑7%

Total Transactions
Q4 25 vs. Q4 24

\$ VOLUME SOLD

\$675.2M

Total Dollar Volume

↓6%

Total Dollar Volume
Q4 25 vs. Q4 24

UNITS SOLD

1,253

Total Units

↓18%

Total Units
Q4 25 vs. Q4 24

BUILDABLE SF SOLD

526,855

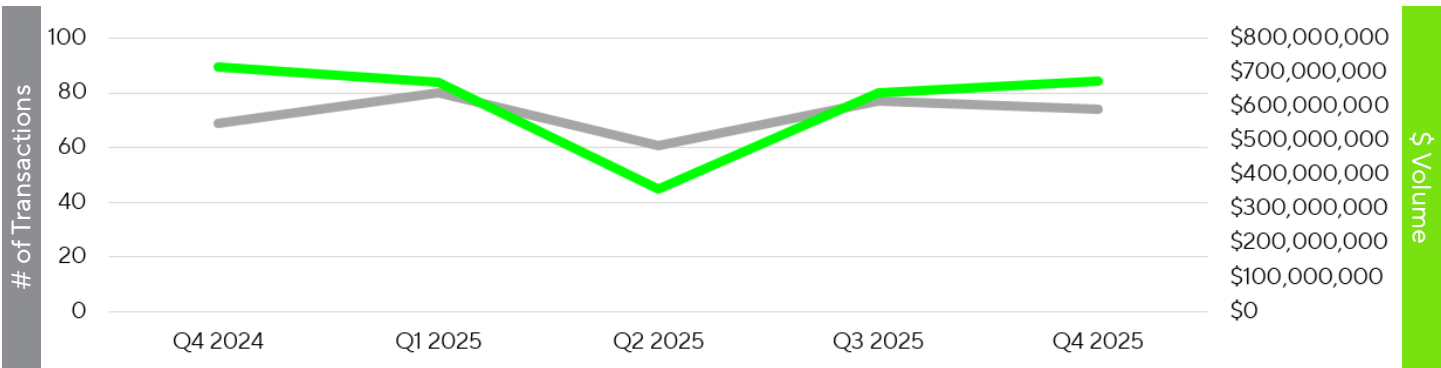
Total Buildable SF

↑902%

Total Buildable SF
Q4 25 vs. Q4 24

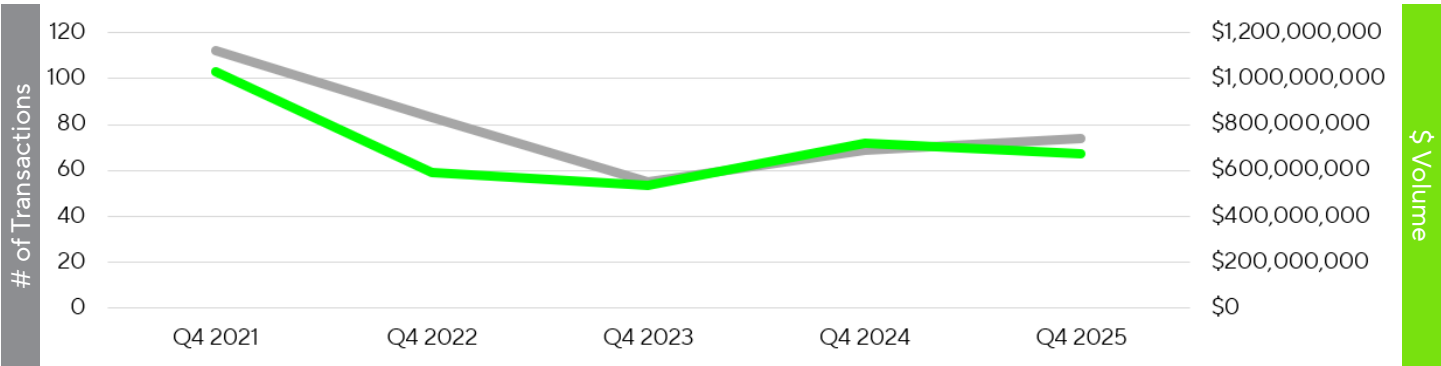
QUARTER OVER QUARTER

Quarterly total dollar volume and total transaction counts in Manhattan



YEAR OVER YEAR

Yearly total dollar volume and total transaction counts in Manhattan



MANHATTAN

Q4 2025 MARKET REPORT

MULTIFAMILY METRICS AND TOP TRANSACTIONS

42

TRANSACTIONS SOLD

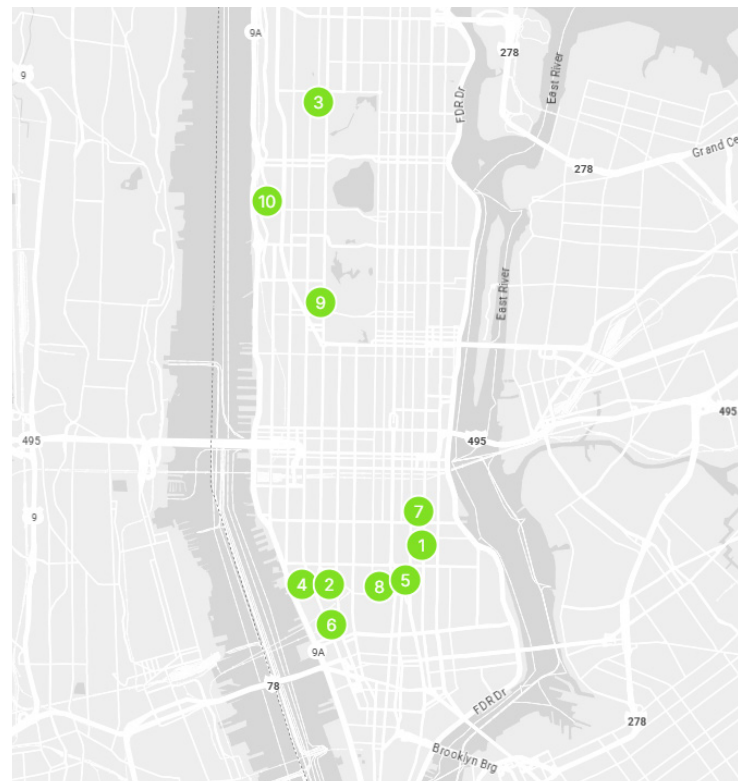
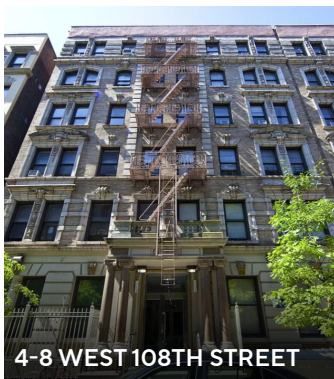
\$256.7M

\$ VOLUME SOLD

696

UNITS SOLD

	ADDRESS	SALE PRICE	NEIGHBORHOOD	UNITS	\$/UNIT	SF	\$/SF
1	317 2nd Avenue	\$20,400,000	Gramercy Park	18	\$1,133,333	13,152	\$1,551
2	235 West 11th Street	\$19,250,000	West Village	4	\$4,812,500	5,659	\$3,402
3	4-8 West 108th Street	\$17,750,000	Manhattan Valley	48	\$369,792	41,940	\$423
4	83 Jane Steet	\$14,550,126	West Village	3	\$4,850,042	4,648	\$3,130
5	113 East 11th Street	\$14,275,000	East Village	20	\$713,750	12,300	\$1,161
6	59 Morton Street	\$12,025,000	West Village	4	\$3,006,250	4,500	\$2,672
7	225 East 25th Street	\$10,400,000	Kips Bay	21	\$495,238	9,920	\$1,048
8	22 East 10th Street	\$9,750,000	Greenwich Village	5	\$1,950,000	5,600	\$1,741
9	12 West 68th Street	\$8,950,000	Lincoln Square	15	\$596,667	13,380	\$669
10	330 West 88th Street	\$8,500,000	Upper West Side	9	\$944,444	4,822	\$1,763



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MIXED-USE METRICS AND TOP TRANSACTIONS

26

TRANSACTIONS SOLD

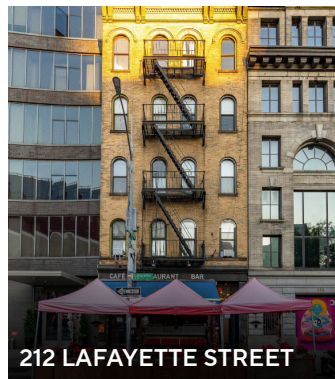
\$293.8M

\$ VOLUME SOLD

557

UNITS SOLD

	ADDRESS	SALE PRICE	NEIGHBORHOOD	UNITS	\$/UNIT	SF	\$/SF
1	251 East 31st St, 571 2nd Ave & 563-567 2nd Ave	\$38,000,000	Kips Bay	70	\$542,857	32,962	\$1,152
2	765 1st Avenue	\$33,335,000	Tudor City	33	\$1,010,151	15,455	\$2,156
3	90 Bedford Street	\$32,700,000	West Village	23	\$1,421,739	15,586	\$2,098
4	212 Lafayette Street	\$18,025,000	SoHo	17	\$1,060,294	8,815	\$2,045
5	1 Arden Street	\$16,900,000	Washington Heights	95	\$177,895	66,056	\$256
6	205-207 8th Avenue	\$16,625,000	Chelsea - South	26	\$639,423	21,600	\$770
7	245 Eldridge Street	\$16,500,000	Lower East Side	12	\$1,375,000	14,161	\$1,165
8	135 West 24th Street	\$12,500,000	Chelsea - South	24	\$520,833	12,609	\$991
9	80 Horatio Street	\$10,250,000	West Village	9	\$1,138,888	6,133	\$1,671
10	273 5th Avenue	\$9,200,000	NoMad	5	\$1,840,000	6,128	\$1,501



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6
TRANSACTIONS SOLD

\$124.7M
\$ VOLUME SOLD

526,855
BUILDABLE SF SOLD

1800 PARK AVENUE

1059-1061 2ND AVENUE

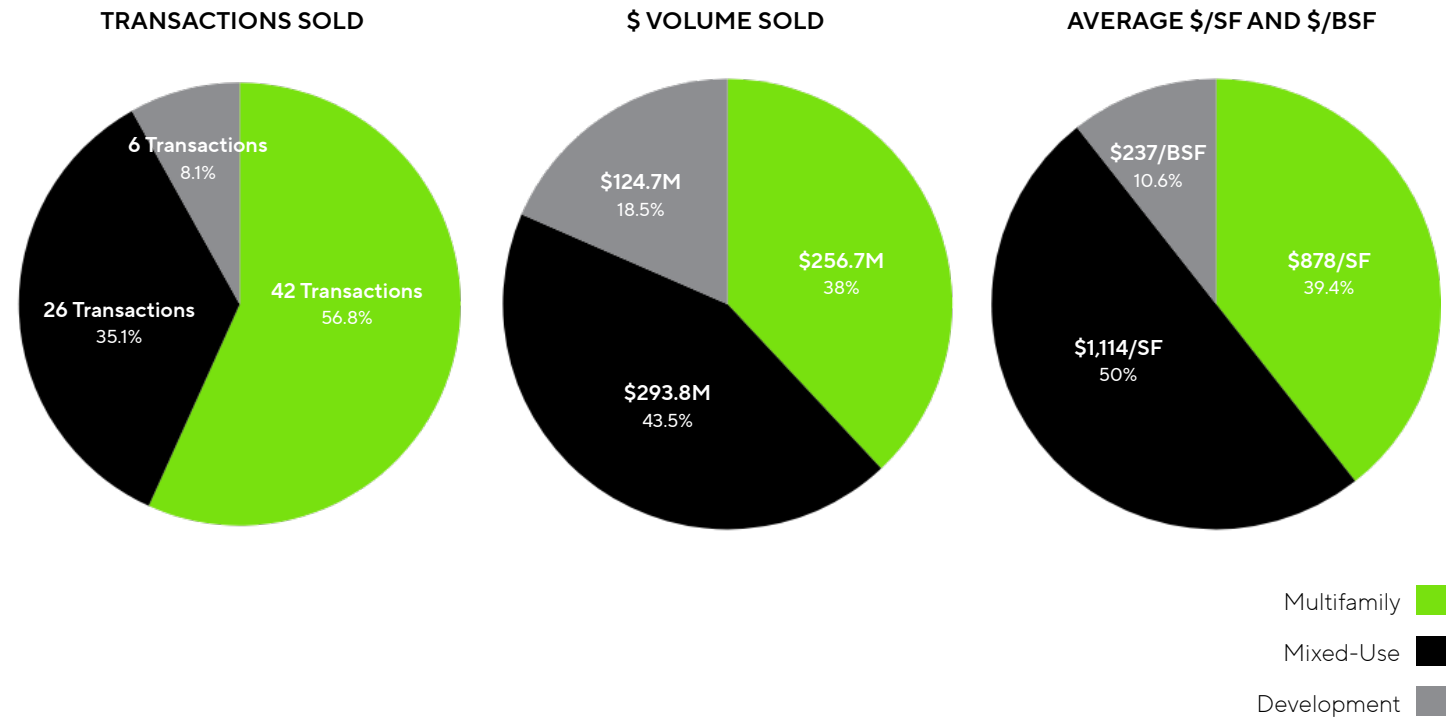
140 FULTON STREET

57 4TH AVENUE

MANHATTAN

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DOLLAR & TRANSACTION VOLUME BY ASSET CLASS



Downtown Manhattan: Battery Park City, Chinatown, Civic Center, East Village, Financial District, Flatiron District, Gramercy Park, Greenwich Village, Hudson Square, Lower East Side, Little Italy, Meatpacking, NoHo, NoLiTa, SoHo, South Chelsea, TriBeCa, Two Bridges, West Village

Midtown, Upper East Side & Upper West Side: Carnegie Hill, Central Midtown, Central Park South, Clinton - Hell's Kitchen, Garment District, Hudson Yards, Kips Bay, Koreatown, Lenox Hill, Lincoln Square, Manhattan Valley, Murray Hill, Nomad, North Chelsea, Sutton Place, Times Square - Theatre District, Tudor City, Turtle Bay, Upper East Side, Upper West Side, Yorkville

Upper Manhattan: Astor Row, Central Harlem, East Harlem, Fort George, Hamilton Heights, Harlem, Hudson Heights, Inwood, Le Petit Senegal, Manhattanville, Marcus Garvey Park, Morningside Heights, St. Nicholas Historic District, Sugar Hill, Upper Manhattan, Washington Heights, West Harlem

TEAM BREAKDOWN

MARKET AMBASSADORS

UPPER MANHATTAN TEAM

Robert Rappa
Noah Trugman

DOWNTOWN MANHATTAN TEAM

Adam Lobel
Zachary Ziskin
Justin Zeitchik
Christian Ingenito
Cheri Roohi

MIDTOWN, UES & UWS TEAM

Adam Lobel
Zachary Ziskin
Justin Zeitchik
Morgan Rosberg
Natanel (Nate) Rahmani

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