

Q3 2026

Manhattan Townhouse Market Report

COMPASS



Photo: 111 East 19th Street
Agent/Team: The Takk Team

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SOURCES

REBNY RLS,
ACRIS (Automated City Register Information System)

Manhattan

Market Report

Neighborhood Map



Methodology

Geography covered in this report is Manhattan.

Inventory is calculated based on all single-family townhouses actively listed during the quarter at the time the report is prepared.

Contract Signed figures for the current quarter are based on publicly reported single-family townhouse transactions at the time the report is prepared. The signed price reflects the latest available asking price.

Recorded Sales figures for the quarter are based on known single-family townhouse closings recorded at the time the report is prepared.

Median Price is the middle price of a given dataset.

Average Price is the sum of all prices divided by the total number of properties.

Months of Supply is an estimated time it would take to sell all current active listings based on the trailing 12-month sales rate.

Time on Market is calculated by how many properties entered contract during the quarter in the given period.

Discount is the percentage difference between the initial list and recorded sale price.

Bedroom Count is the number of bedrooms a property has, as reported in the listing, or acquired from tax records, when available.

Current Quarter is reflective of the initial day of the quarter until the 20th day of the quarter's closing month. These numbers will be updated in subsequent reports to reflect the dataset of the entire quarter.

Quarters

Q1: January 1 - March 31

Q2: April 1 - June 30

Q3: July 1 - September 30

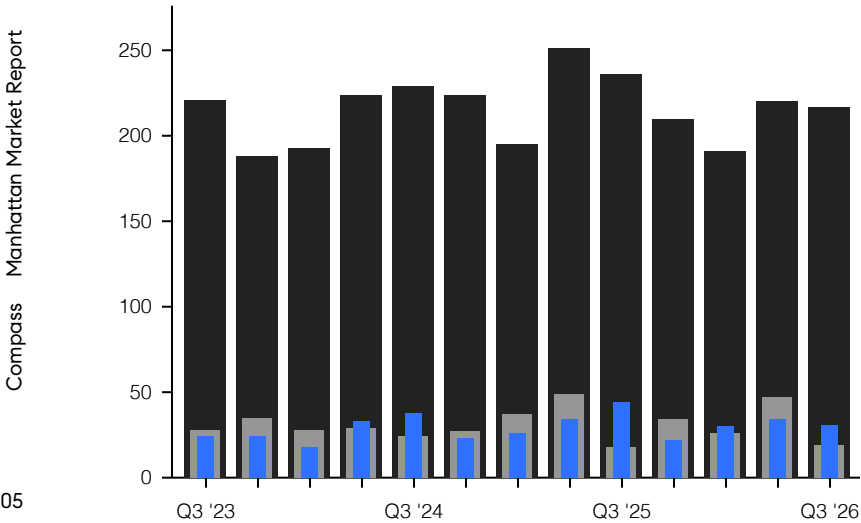
Q4: October 1 - December 31

Townhouses

OVERVIEW

- Sales slowed 29.5% from last year's strong third quarter performance, though a number of closings are still pending following last quarter's contract activity
- Inventory was down 8.1% year over year and there were 11.8% fewer new listings during the quarter
- Contract prices shifted downward due to significantly different-sized properties transacting during Q3
- Sales on the Upper East Side, the Upper West Side, and Downtown have remained consistent year-to-date

INVENTORY CONTRACTS SALES



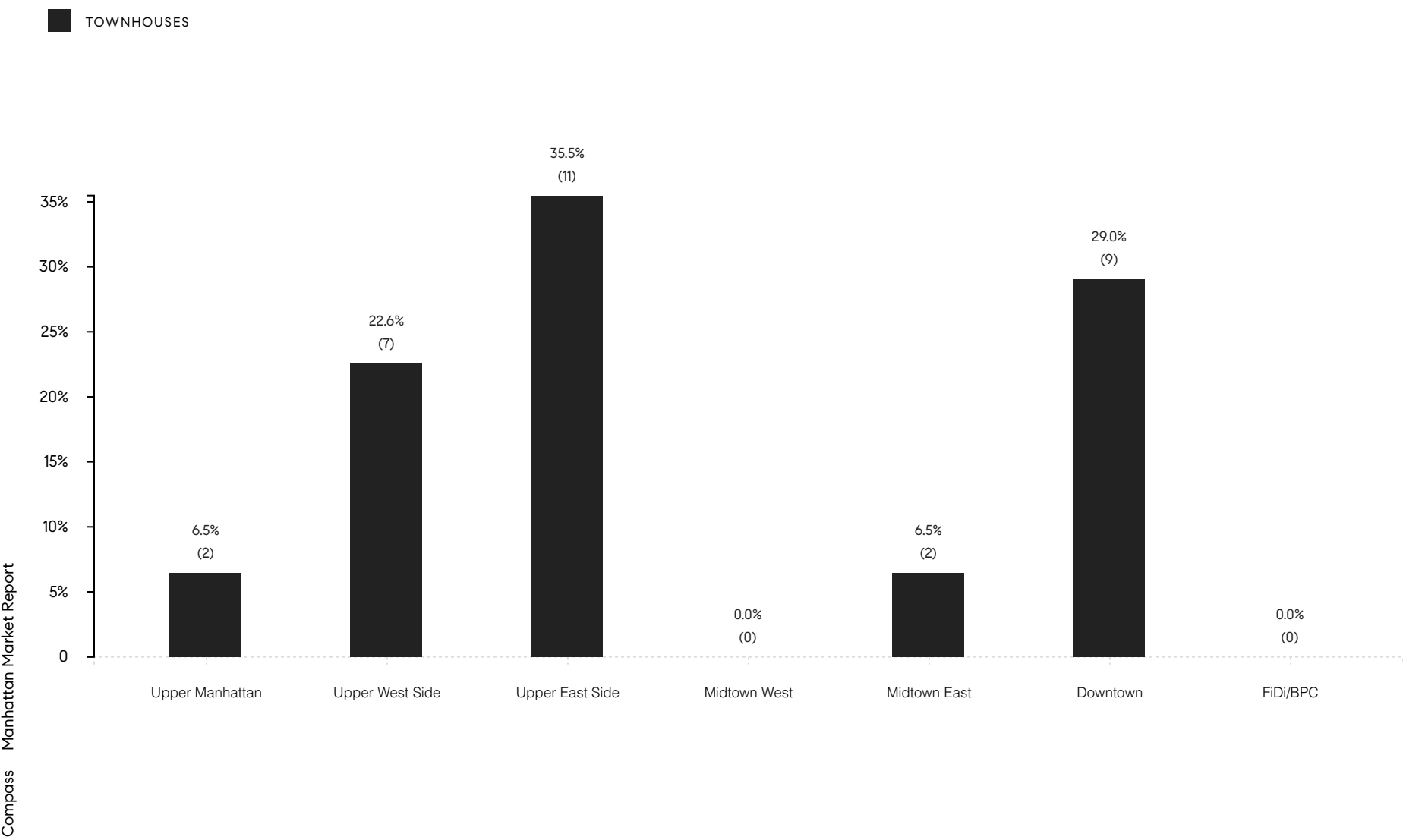
Sales	Q3 '26	Q2 '26	%Δ	Q3 '25	%Δ
# SALES	31	34	-8.8%	44	-29.5%
AVG. DISCOUNT	15%	13%	-	15%	-
MEDIAN PRICE	\$7,400,000	\$6,397,500	15.7%	\$8,962,500	-17.4%
AVERAGE PRICE	\$9,011,573	\$10,418,412	-13.5%	\$9,539,820	-5.5%
AVERAGE PPSF	\$1,469	\$1,721	-14.6%	\$1,780	-17.5%
AVERAGE SF	5,830	5,571	4.6%	5,535	5.3%

Contracts	Q3 '26	Q2 '26	%Δ	Q3 '25	%Δ
# CONTRACTS	19	47	-59.6%	18	5.6%
AVG. DISCOUNT	9%	11%	-	9%	-
MEDIAN PRICE	\$4,798,000	\$7,950,000	-39.6%	\$6,247,500	-23.2%
AVERAGE PRICE	\$6,139,526	\$14,142,170	-56.6%	\$10,991,278	-44.1%
AVERAGE PPSF	\$1,316	\$1,957	-32.8%	\$1,616	-18.6%
AVERAGE SF	4,734	6,313	-25.0%	6,540	-27.6%

Inventory	Q3 '26	Q2 '26	%Δ	Q3 '25	%Δ
# ACTIVES	217	220	-1.4%	236	-8.1%
MEDIAN PRICE	\$8,900,000	\$9,625,000	-7.5%	\$8,250,000	7.9%
AVERAGE PRICE	\$13,258,392	\$13,312,550	-0.4%	\$12,989,104	2.1%
AVERAGE PPSF	\$2,029	\$2,080	-2.5%	\$2,019	0.5%
AVERAGE SF	6,415	6,278	2.2%	6,210	3.3%

Townhouses

SINGLE-FAMILY SALES BY SUBMARKET

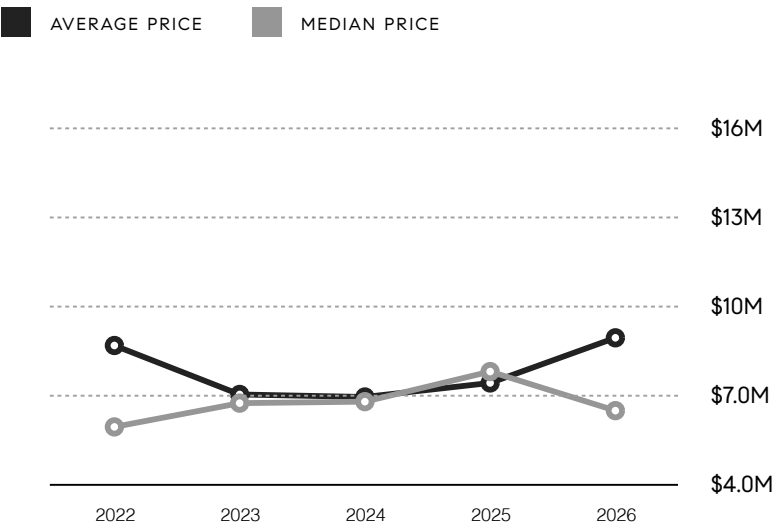


Upper West Side

SINGLE-FAMILY TOWNHOUSES

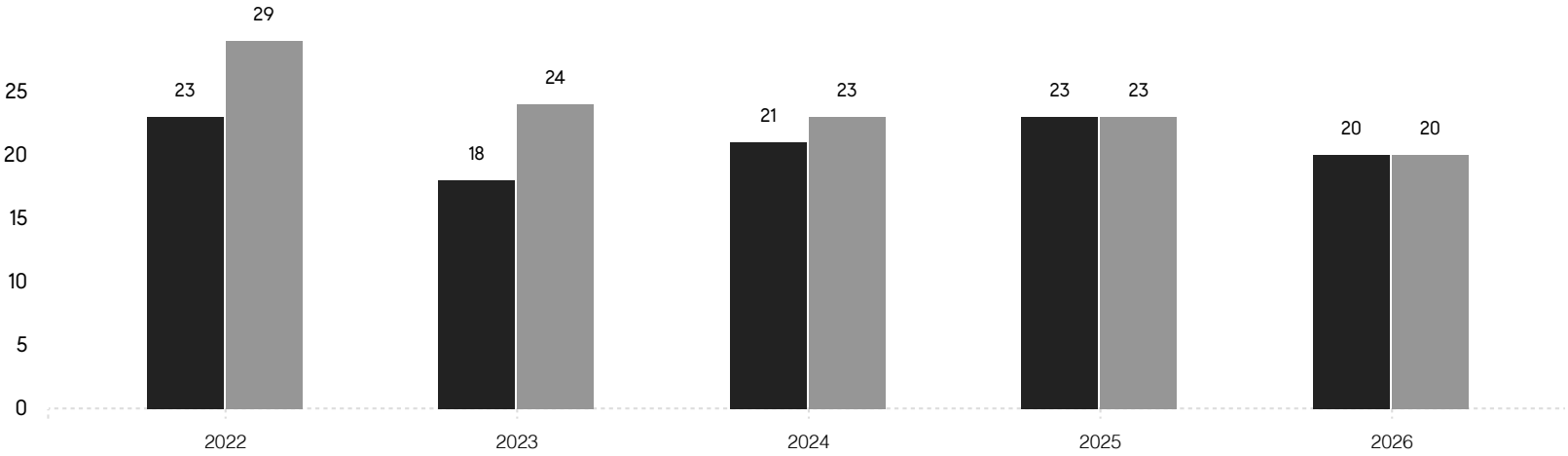
Sales	YTD 2026	YTD 2025	%Δ
# SALES	20	23	-13.0%
AVG. DISCOUNT	14%	16%	-
MEDIAN PRICE	\$6,212,500	\$5,700,000	9.0%
AVERAGE PRICE	\$8,622,938	\$7,227,631	19.3%
AVERAGE PPSF	\$1,275	\$1,169	9.1%
AVERAGE SF	6,374	6,167	3.4%

Historic Prices



Historic Sales

■ YEAR-TO-DATE ■ FULL-YEAR



Upper East Side

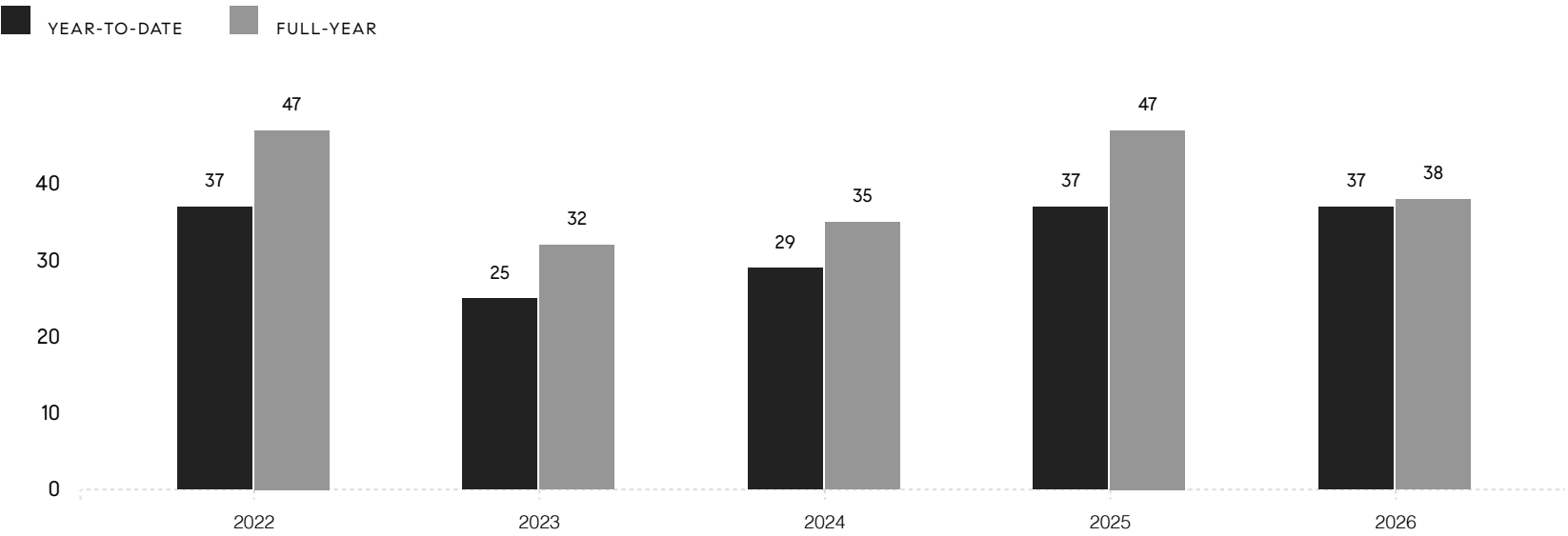
SINGLE-FAMILY TOWNHOUSES

Sales	YTD 2026	YTD 2025	%Δ
# SALES	37	37	0.0%
AVG. DISCOUNT	15%	15%	-
MEDIAN PRICE	\$8,550,000	\$8,750,000	-2.3%
AVERAGE PRICE	\$12,699,105	\$10,266,049	23.7%
AVERAGE PPSF	\$1,712	\$1,763	-2.9%
AVERAGE SF	6,796	5,834	16.5%

Historic Prices



Historic Sales

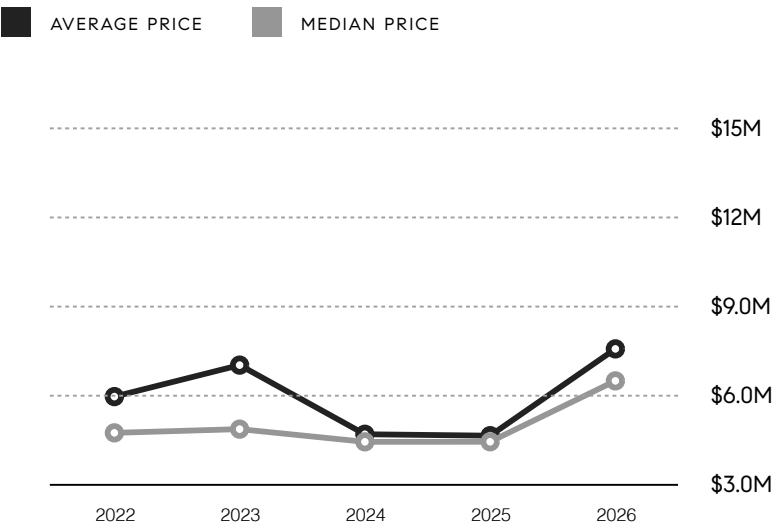


Midtown East

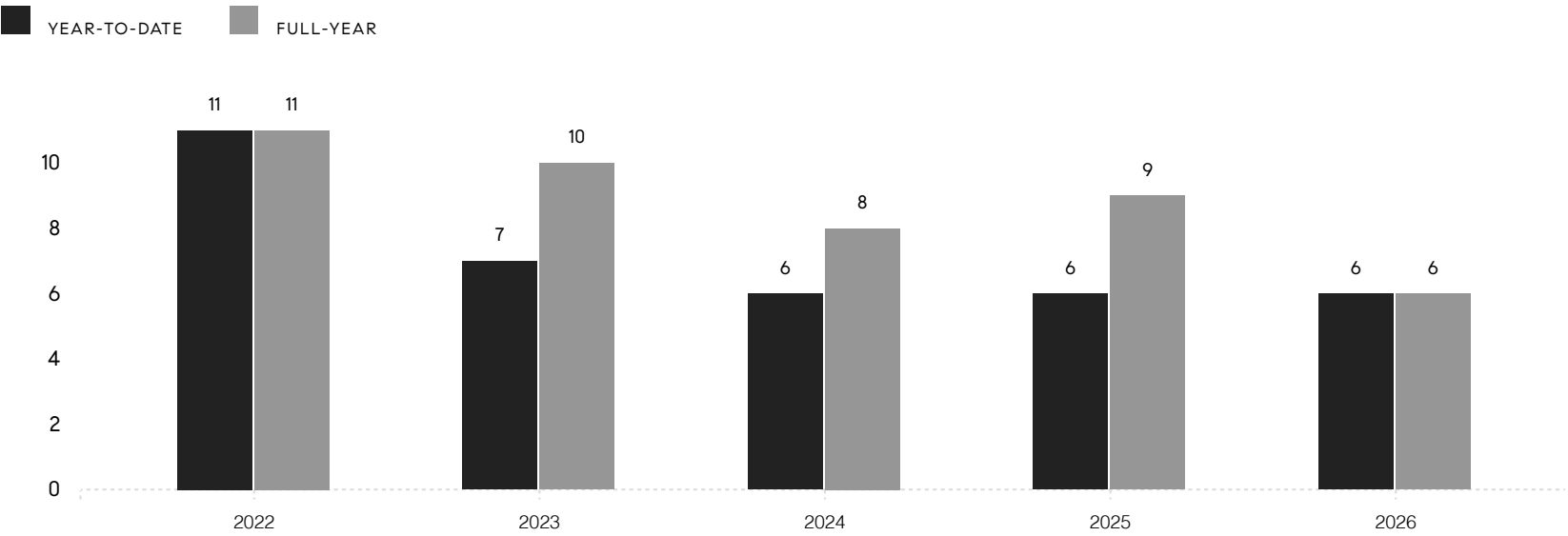
SINGLE-FAMILY TOWNHOUSES

Sales	YTD 2026	YTD 2025	%Δ
# SALES	6	6	0.0%
AVG. DISCOUNT	13%	21%	-
MEDIAN PRICE	\$5,918,750	\$4,430,000	33.6%
AVERAGE PRICE	\$6,839,583	\$4,993,333	37.0%
AVERAGE PPSF	\$1,015	\$1,081	-6.1%
AVERAGE SF	6,386	4,683	36.4%

Historic Prices



Historic Sales

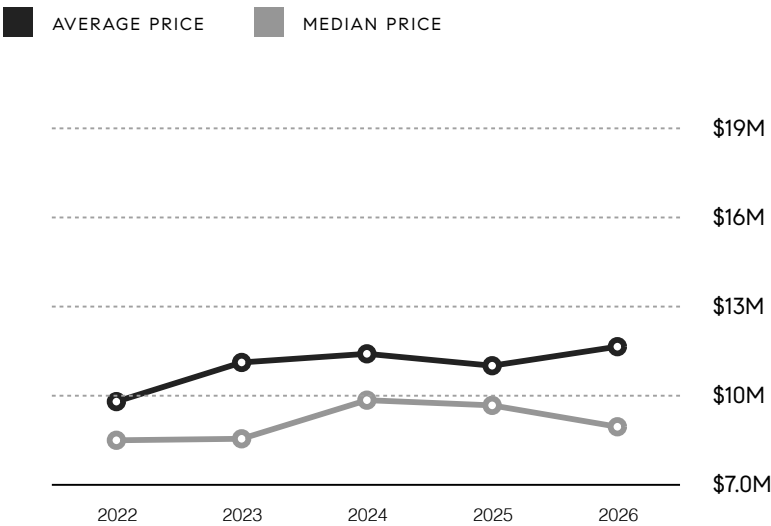


Downtown

SINGLE-FAMILY TOWNHOUSES

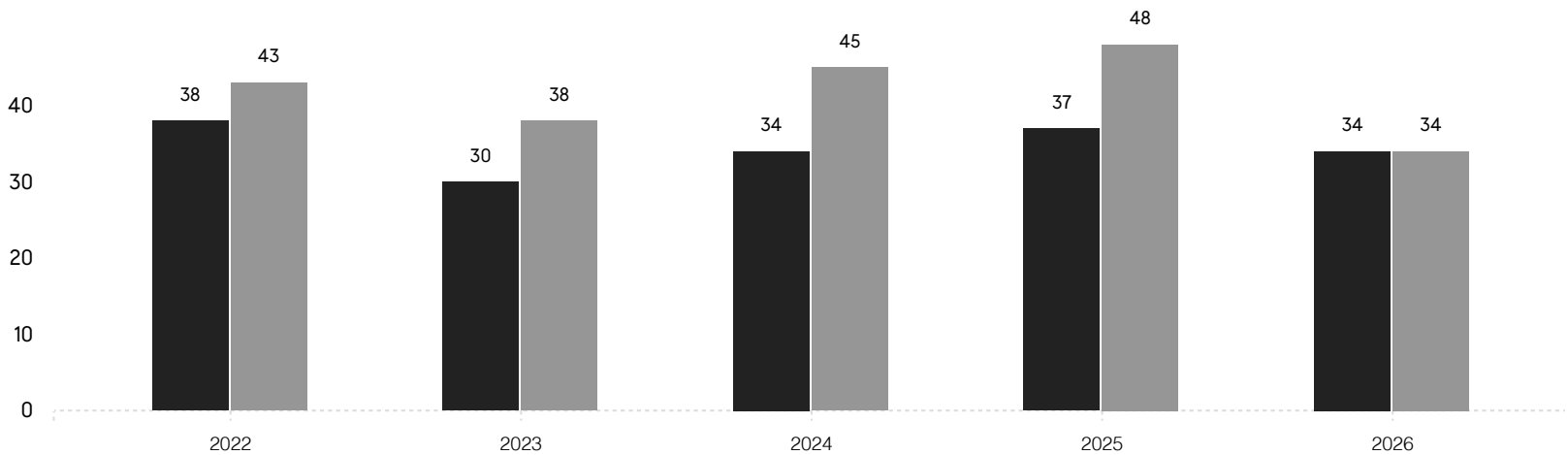
Sales	YTD 2026	YTD 2025	%Δ
# SALES	34	37	-8.1%
AVG. DISCOUNT	12%	15%	-
MEDIAN PRICE	\$8,437,500	\$9,900,000	-14.8%
AVERAGE PRICE	\$11,353,684	\$11,556,863	-1.8%
AVERAGE PPSF	\$2,120	\$2,310	-8.2%
AVERAGE SF	4,907	5,031	-2.5%

Historic Prices



Historic Sales

■ YEAR-TO-DATE ■ FULL-YEAR

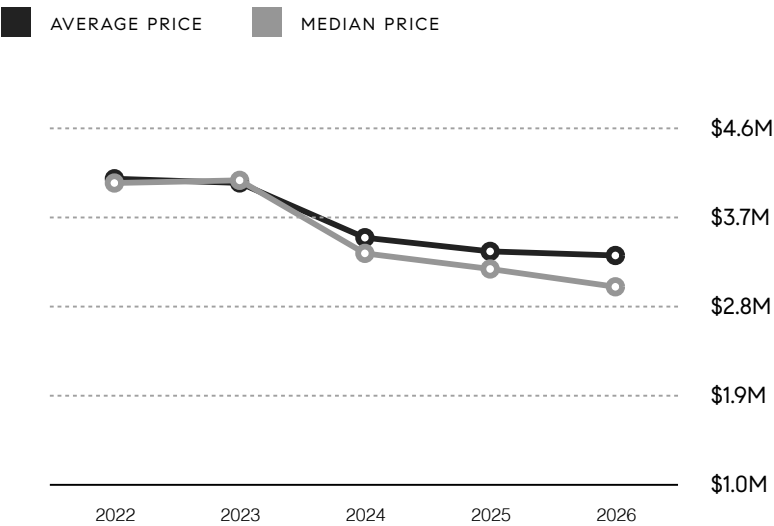


Upper Manhattan

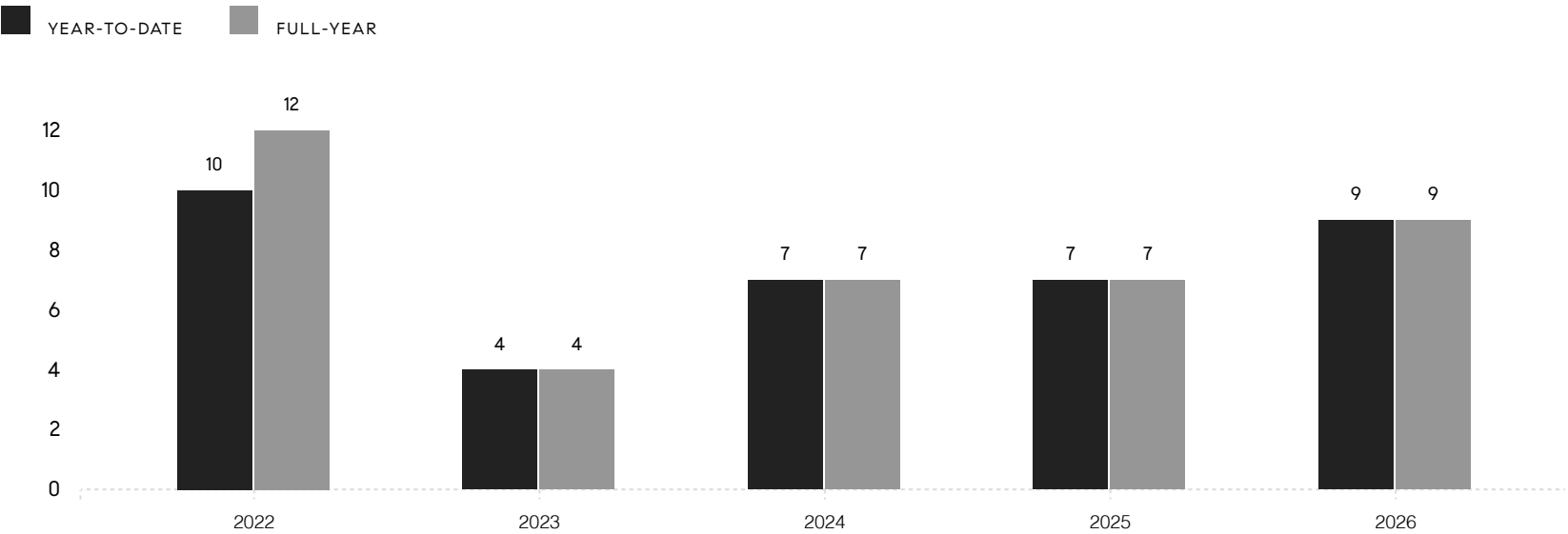
SINGLE-FAMILY TOWNHOUSES

Sales	YTD 2026	YTD 2025	%Δ
# SALES	9	7	28.6%
AVG. DISCOUNT	13%	8%	-
MEDIAN PRICE	\$2,999,999	\$3,210,000	-6.5%
AVERAGE PRICE	\$3,316,111	\$3,474,286	-4.6%
AVERAGE PPSF	\$748	\$781	-4.2%
AVERAGE SF	4,487	4,578	-2.0%

Historic Prices



Historic Sales



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