

2008 QUARTER 1



San Francisco PIPELINE REPORT

San Francisco Planning Department

June 2008



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What is the Pipeline?

The San Francisco consolidated pipeline consists of development projects that would add residential units or commercial space, applications for which have been formally submitted to the Planning Department or the Department of Building Inspection (DBI). Pipeline projects are at various stages of development: from applications having been filed to entitlements secured; from building permits approved and issued to projects under construction (see diagram below). The pipeline includes only those projects with a land use or building permit application. It does not include projects undergoing preliminary Planning Department project review or projections based on area plan analysis.

To filter inactive projects, the current pipeline only includes projects filed during the last five years, projects approved in the last four years, and projects that started construction during the past three years. In addition, when a project is issued a Certificate of Final Completion by the DBI, it is taken out of the pipeline.

Data sources for the pipeline include the Planning Department, the Department of Building Inspection, the San Francisco Redevelopment Agency, and the City Assessor's Office. Affordable housing projects sponsored by the San Francisco Redevelopment Agency and the Mayor's Office of Housing figure in the pipeline database only after an application has been filed with either the Planning Department or the Department of Building Inspection. Projects in the pre-development stages, as well as projects currently under the review of the Redevelopment Commission, are not included in the Pipeline Report, unless a building permit application has been filed.¹

The Pipeline Report measures housing production in terms of housing units. Non-residential development, on the other hand, is measured in terms of building square footage. Depending on the proposed development project, square footage can be added with new construction or expansion, reduced with demolition or

alteration, or re-allocated with conversion to other uses. Note that this report counts *net change*, or new space or units minus existing space lost through conversion or demolition.

Time Frame and Certainty of Development

As the pipeline spans the entire project development life cycle for small and large projects ranging from addition of an extra unit in the rear yard to multi-structure complexes of residential and commercial development needing environmental impact reports and transportation studies, it follows that the entitlement and ultimate actualization of some projects is several years and occasionally decades into the future, while some projects are abandoned prior to receiving a permit. The pipeline, then represents a particular scenario that assumes that all development permits is eventually entitled, and all entitled development is eventually built. In reality, this is not the case.

The Relevance of the Pipeline

The pipeline serves as a barometer of development trends. It illustrates the location and scale of current and proposed future construction and reveals where new land uses are being established; it also records demolition and a partial listing of conversion of existing land uses. In sum, the pipeline provides a short- to medium-term picture of changing land uses, tracking especially the changes to the city's housing stock and commercial uses.

Accuracy and Timeliness

The pipeline is compiled and consolidated from different data sources and is subject to errors due to varying accuracy and currency of original sources. The data in this report is pulled from original sources current through March 31, 2008. While we make an effort to consolidate multiple permits for different components of the same project from different agencies, it is not possible to validate the accuracy of all projects. Should you find inaccuracies and omissions, please e-mail your comments to aksel.olsen@sfgov.org.

¹ For a list of affordable housing projects, please see Appendix A, List 6 in the 2007 Housing Inventory, available at http://www.sfgov.org/site/uploadedfiles/planning/Citywide/pdf/Housing_Inventory_2007.pdf.

Q1 2008 Pipeline at a Glance

- There are currently 1,074 projects in the pipeline of varying sizes and complexities.
- These projects, if completed, would add some 54,000 net new housing units to the city's housing stock. This figure has grown dramatically the past three quarters due to large development program applications, including Bayview Waterfront Project, Treasure Island, and a Park Merced expansion project.
- The Bayview Waterfront project, consisting of a number of sites along the southeastern waterfront, would account for 11,400 units and nearly 8 million sq. ft. of office, R&D, retail and community space, as well as a 10,000 seat arena at Candlestick Point.
- The pipeline would also add a net of 15.7 million commercial square footage. Within this total, office and retail space would see net gains of 9.7 million and 3.7 million sq. ft., respectively. There is a projected net loss of 700,000 sq. ft. of light industrial or Production, Distribution and Repair (PDR) space because of conversion to commercial and residential space.
- Nearly one in five projects (with approximately 7,500 units) are in the construction phase, while just over 2,400 have received building permits approvals or land use entitlements
- Well over half of all projects (with 34,500 units, or two thirds of all pipeline units, and 13 million commercial square feet) are still at the early stages of development, with permit applications filed with the Planning Department or the Department of Building Inspection.
- About 14,500 new units are proposed to be built in the Bayview/Hunters Point area, 7,800 on Treasure Island, and 6,000 in the 19th Avenue area. Some 4,400 and 2,400 new units are under construction or are proposed to be built in Rincon Hill and the C-3 financial district respectively.

The Pipeline

There are currently around 1,100 projects in the pipeline. Around 35 of these are projects sponsored through the San Francisco Redevelopment Agency. The Planning Department makes an effort to track these projects to make the pipeline more inclusive.

Of these projects, over two-thirds (about 70 percent) are exclusively residential and over one in six are mixed-use projects with both residential and commercial components. Only a small percentage of the pipeline projects or about 10 percent are commercial developments without a residential component.

A net total of 54,000 new housing units would be added to the city's housing stock according to the current pipeline. This is up more than 80 percent from the first quarter of 2007, largely due to the filing of applications for new large scale development programs for Park Merced, Treasure Island, and the Bayview Waterfront. Pipeline projects also comprise a net addition of 15.7 million sq. ft. of commercial development, up 264 percent since Q1 2007.

Project Status

Table 1 on the following page shows the following:

- Some 20 percent of all projects, representing 7,500 net added housing units and 190,000 sq. ft. of commercial space, are under construction.
- About one in five of the projects (with 2,500 net units) have received building permit approvals and may have already begun construction.
- These projects (with a total of 10,000 net new units) are expected to be online in the next six to 36 months.
- About 35 percent of all projects (including 4,900 net new units and an addition of 1.1 million sq. ft. of commercial space) have filed building permit applications with the Department of Building Inspection. A number of these projects have already received Planning Department entitlements.

TABLE 1: Residential and Commercial Pipeline, by Pipeline Status and Land Use Category

Pipeline Status / Stage in the Development Process	Total No. of Projects	Net Housing Units	Net Comm'l Sq. Ft.	Net Commercial Gross Square Footage					
				CIE	Medical	Office	PDR	Retail	Visitor
Filed with Planning	157	34,510	12,985,000	637,000	38,000	7,787,000	404,000	2,664,000	1,464,000
Approved by Planning	70	4,560	1,132,000	127,000	12,000	829,000	-302,000	517,000	-51,000
BP Filed	406	4,920	1,153,000	78,000	27,000	1,330,000	-452,000	220,000	-16,000
BP Approved/Issued/Re-Instated	215	2,470	223,000	83,000	0	-53,000	-171,000	295,000	70,000
Construction	226	7,520	196,000	89,000	0	-200,000	-174,000	50,000	433,000
Grand Total	1,074	53,980	15,690,000	1,014,000	77,000	9,693,000	-694,000	3,746,000	1,900,000

Notes:

/1/ Housing units in all tables rounded to nearest 10 units unless noted.

/2/ Commercial square feet in all tables rounded to nearest 1,000 square feet.

- Seven percent of the pipeline projects and eight percent of the units have received Planning Department approvals. If and when constructed, these projects would add 4,600 new units to the city's housing stock and over one million sq. ft. of commercial space. These projects now must secure a building permit.
- Nearly 160 projects in the pipeline (14 percent) are under Planning Department review. Collectively, these projects represent some 35,000 net new units and 13 million sq. ft. of non-residential uses. Thus, 80 percent of non-residential space and two thirds of the units in the pipeline are in this early stage.

Amount and Type of Net New Commercial Space

Projects in the current pipeline also propose a net addition of 15.7 million sq. ft. of commercial development that would result in the following land use inventory changes:

- 9.7 million sq. ft. of additional office space
- 3.7 million sq. ft. of additional retail space
- 1.9 million sq. ft. of additional visitor-serving space (includes hotels)
- 1 million sq. ft. of additional cultural, institutional, educational (CIE) and medical space

- A net loss of 700,000 sq. ft. of production, distribution, and repair space, a large portion of which would go to housing use.²

The net addition of 9.7 million sq. ft. of office space represents nearly two thirds of the total net change in proposed commercial development. Retail and visitor-related square footage follow with about 24 percent and 12 percent, respectively.

Location of New Development

Table 2 below shows that most of the proposed new residential construction in the pipeline are in Bayview/Hunter's Point, Treasure Island and 19th Avenue Area (Park Merced). (See Map 1 for area boundaries used.) These areas would account for around 28,100 net units or more than half of all net additional units in the pipeline.

Other areas with active residential development include Rincon Hill, Market & Octavia and Downtown C-3, with a total of 9,800 net new units.

Small scale, in-fill projects make up the bulk of pipeline projects, but account for a minority of units: The bottom half of all pipeline projects would add just 3,800 net new units, or seven percent of the total number of pipeline units.

Nearly six out of seven commercial square feet would be added in the Bayview, Downtown districts (C-3), port lands, Excelsior, and Market &

² PDR space here refers only to building square footage or built space. It does not include undeveloped or "vacant" land area containing PDR uses such as construction yards or ground storage.

TABLE 2: Residential and Commercial Pipeline, by Neighborhood

Neighborhood	Projects	Percent	Net Units	Percent	Net Comm'l Sq. Ft.	Percent
19th Ave	3	0.3%	6,000	11.1%	462,000	2.9%
Bayview	68	6.3%	14,370	26.6%	8,089,000	51.6%
Bernal Heights	59	5.5%	150	0.3%	-1,000	-0.0%
Central Waterfront	15	1.4%	1,070	2.0%	-56,000	-0.4%
Downtown/C-3	45	4.2%	2,410	4.5%	3,400,000	21.7%
East SoMa	47	4.4%	2,320	4.3%	-301,000	-1.9%
Excelsior	26	2.4%	100	0.2%	577,000	3.7%
Geary Blvd	80	7.4%	900	1.7%	172,000	1.1%
Glen Park	7	0.7%	10	0.0%	0	0.0%
Haight Ashbury/Cole Valley	17	1.6%	80	0.1%	19,000	0.1%
Inner Sunset	23	2.1%	70	0.1%	0	0.0%
Judah	24	2.2%	60	0.1%	14,000	0.1%
Lake Merced	4	0.4%	0	0.0%	39,000	0.2%
Marina	54	5.0%	620	1.1%	28,000	0.2%
Market & Octavia	37	3.4%	2,960	5.5%	554,000	3.5%
Mid-Market	16	1.5%	2,270	4.2%	385,000	2.5%
Mission	95	8.8%	800	1.5%	412,000	2.6%
Mission Bay	8	0.7%	770	1.4%	421,000	2.7%
Noe Valley	38	3.5%	40	0.1%	0	0.0%
Northeast	79	7.4%	2,080	3.9%	30,000	0.2%
Ocean View	35	3.3%	100	0.2%	-22,000	-0.1%
Outer Mission	35	3.3%	270	0.5%	28,000	0.2%
Outer Sunset	14	1.3%	80	0.1%	42,000	0.3%
Port	4	0.4%	320	0.6%	828,000	5.3%
Presidio	17	1.6%	30	0.1%	31,000	0.2%
Richmond	21	2.0%	20	0.0%	6,000	0.0%
Rincon Hill	15	1.4%	4,440	8.2%	-166,000	-1.1%
Showplace & Potrero Hill	42	3.9%	1,540	2.9%	-113,000	-0.7%
Transbay	2	0.2%	560	1.0%	391,000	2.5%
Twin Peaks	20	1.9%	190	0.4%	42,000	0.3%
Upper Market	39	3.6%	80	0.1%	20,000	0.1%
Van Ness Corridor	1	0.1%	100	0.2%	0	0.0%
Visitation Valley	29	2.7%	70	0.1%	0	0.0%
West SoMa	27	2.5%	1,190	2.2%	92,000	0.6%
Western Addition	14	1.3%	100	0.2%	21,000	0.1%
Taraval	13	1.2%	40	0.1%	-3,000	-0.0%
Treasure Island	1	0.1%	7,800	14.4%	250,000	1.6%
Grand Total	1,074	100.0%	53,980	100.0%	15,690,000	100.0%

Octavia. The bulk of this space would take place in Bayview and Downtown C-3 districts.

Projects by Year of First Filing

The year of the initial filing of either the application for planning entitlements or the building permit application provides a measure of trends in the development market.

Figure 1 below shows the number of units and commercial square footage by the year the application was first filed with the Planning Department or the Department of Building Inspection. While there are some projects with a very long history in the pipeline, the bulk of projects for both residential and commercial development came into the pipeline in the past two years. A few large projects filed during 2007 mean that while the *number* of projects is fairly evenly distributed over the past few years, in terms of the number of *units* and *commercial square feet* there is a considerable concentration in 2007.

Filings for residential construction continued apace and of the units in the pipeline; more than two thirds of units (and half the projects) in the pipeline have permit applications filed in 2006 or later. Three quarters of commercial square feet in the pipeline was filed in 2007.

Figure 1 also shows that only a few of commercial projects that are still in the pipeline were filed in the years between 2001 and 2005; most of the projects filed in those years may have already been completed and are no longer in the pipeline. The overall number of projects filed will be discussed in a later section.

FIGURE 1: Projects in Current Pipeline, by Year Filed

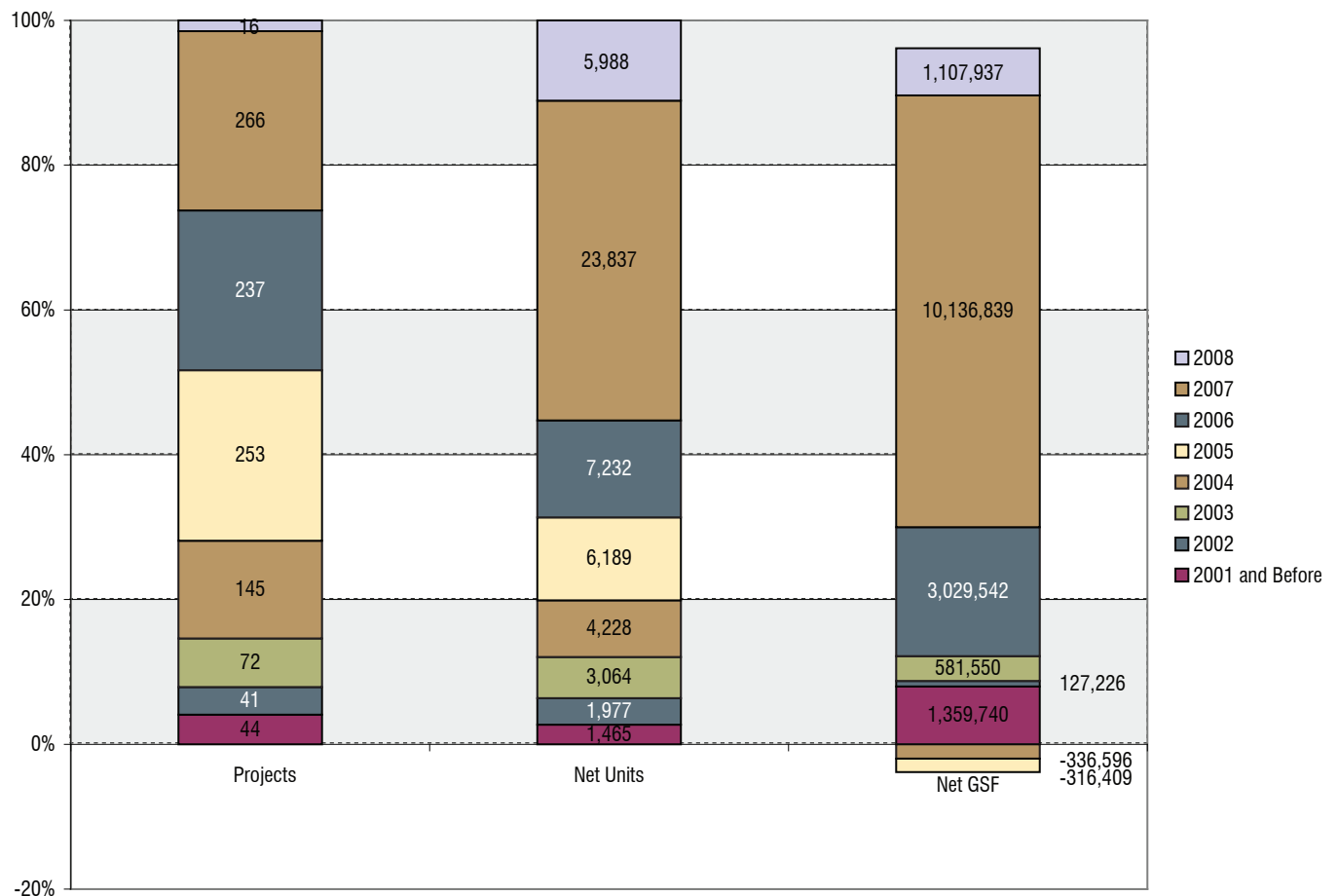


TABLE 3: Residential and Commercial Pipeline by Generalized Zoning Category

Generalized Zoning	Area, Pct	Projects	Net Units	Net Comm'l Sq. Ft.	CIENET	MEDNET	MIPSNET	PDRNET	RETNET	VISITNET
Residential	46.3%	613	8,180	644,000	205,000	7,000	104,000	-43,000	458,000	-87,000
High Density Residential	0.2%	11	3,360	-201,000	0	0	-142,000	-71,000	12,000	0
Mixed Use	6.5%	221	6,160	152,000	95,000	38,000	-49,000	-230,000	244,000	46,000
Commercial	2.8%	88	9,200	6,683,000	98,000	0	4,056,000	-55,000	1,304,000	1,333,000
Industrial	11.6%	134	18,770	7,758,000	229,000	20,000	5,723,000	-295,000	1,474,000	608,000
Public	32.7%	7	8,310	654,000	388,000	12,000	0	0	254,000	0
Grand Total	100.0%	1,074	53,980	15,690,000	1,014,000	77,000	9,693,000	-694,000	3,746,000	1,900,000

Pipeline Projects by Zoning Category

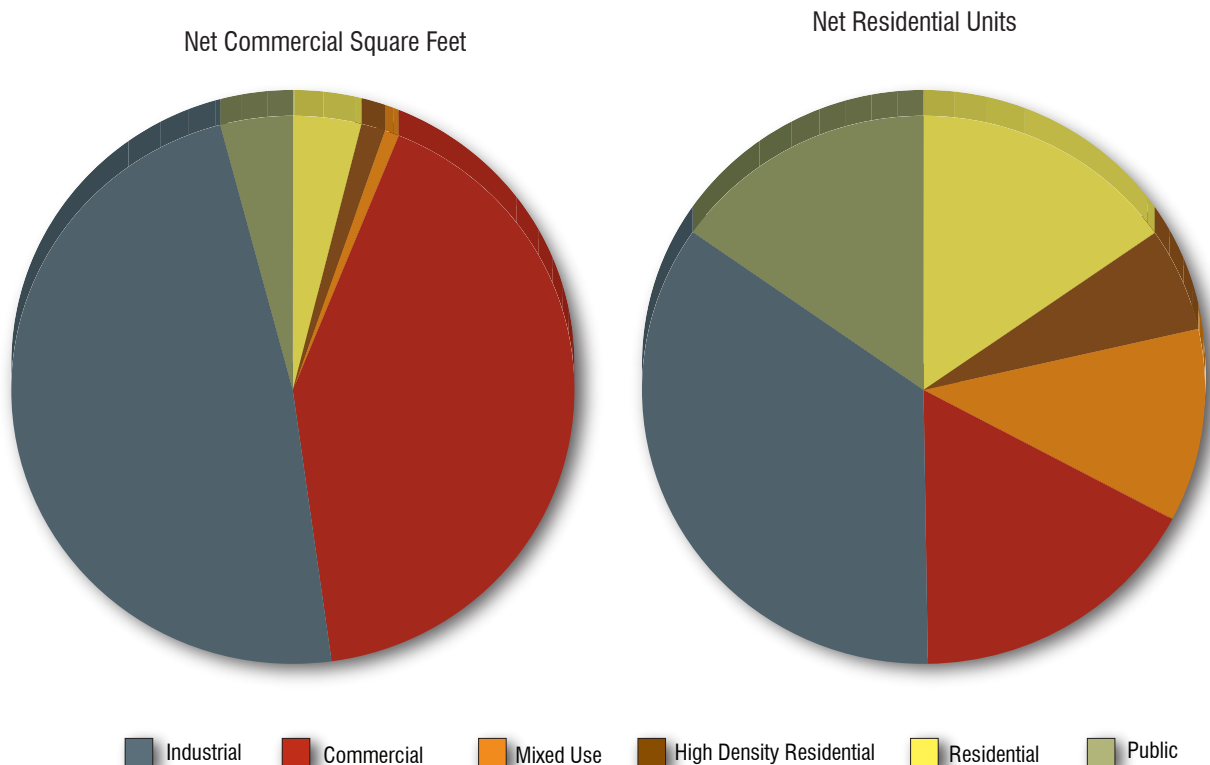
Table 3 shows the pipeline by general zoning categories. Figure 2 illustrates the distribution of the residential pipeline by zoning category.

Residential Pipeline

About one in two units in the current pipeline is proposed in industrially zoned areas of the city (M-1, M-2, C-M and SLI). These projects, proposing some 18,800 net new units, are in some

cases conversions of existing industrial buildings, in others new development. The added residential units in industrial areas are accompanied by loss of about 700,000 sq. ft. of PDR space (see Table 3). These projects are mostly in buildings with 20 units or more.

One in six of all proposed residential units are in commercial districts (C-2, C-3). These districts comprise less than three percent of the total city area but will account for 9,200 units. These units are concentrated in 88 development projects

FIGURE 2: Distribution of Units by Zoning Category

(representing eight percent of all pipeline projects), suggesting the relatively large scale of these projects.

While comprising only six percent of city area, nearly 11 percent of new units are proposed in mixed-use districts. About 6,200 new units could go in these areas, mainly in neighborhood commercial districts. These areas carry the third largest amount of added units. Further, as Treasure Island is zoned “Public,” this district now accounts for some 8,200 units as well.

Also of note, the high-density, transit-accessible downtown neighborhoods of Rincon Hill and Transbay account for less than one percent of the city’s land area, but will nonetheless account for around six percent of all units in the pipeline and one percent of the projects. These projects are thus large, averaging more than 300 net added units per project.

Conversely, residential projects in the Residential (R) districts tend to be small scaled, in-fill developments, accounting for some 57 percent of proposed projects but just 15 percent of the total units (or 8,200 net units) in the pipeline. Most of these units, in turn, would be the result of just one project, the expansion of Park Merced Residential zoning districts comprise 46 percent of the city area.

Commercial Pipeline

Commercial development is concentrated in two general zoning districts. As with the residential pipeline, a large portion of commercial development would take place in the commercial districts. Around 43 percent of added square feet of commercial space are proposed in these districts.

As of the second half of 2007, the most active district for commercial development has become the city’s industrially zoned areas. Development here would add some net 7.8 million square feet, or just below half of proposed commercial development. This chiefly reflects the large scale Bayview Waterfront Project, which would itself add more than eight million commercial square feet as currently proposed. (The former number just quoted indicates that other projects in industrial

areas propose to convert commercial spaces to other uses.)

Districts in other zoning classes account for a negligible amount of added commercial space.

Breaking down commercial space into subcategories, the three largest types land-use classes of commercial development for the city as a whole are office space (9.7 million sq. ft.), retail (3.8 million sq. ft.), and visitor-related (1.9 million sq. ft.) uses.

High density residential and industrial districts will see some loss of commercial square footage as these are converted to residential development.

Residential Pipeline by Project Size

Table 4 below shows the residential pipeline by neighborhood and the number of units in the project.³

The three most active areas for residential development include Bayview/Hunter’s Point (where the Bayview Waterfront Project is located), Treasure Island and the 19th Avenue Area, location of Park Merced. Beyond a geographic concentration of future development in a handful of districts, individual projects are large as well. Almost all proposed units in Rincon Hill, Bayview, Treasure Island and 19th Avenue Area are in projects with 250 units or more. In Mid-Market, Market & Octavia, and Downtown C-3, the projects are still large, with projects in the range of 50-99 units being also common.

Except for Park Merced, in residentially zoned areas in western part of the city, development is limited in scope and consists chiefly of small-scale in fill projects. Thus, of the total of 75 units in the pipeline in the Richmond, Noe Valley and Glen Park, all development is in structures of 9 units or less.

Table 5 and Figure 3 below show the residential pipeline by building size and pipeline status. The residential pipeline shows that:

³ In most cases, this, is a measures the number of units in the building. However, a handful of projects include more than one building thus making this accounting problematic.

TABLE 4: Project by Neighborhood and Building Size

Neighborhood	Project Size							Grand Total	Rank
	Single Family	2-9	10-19	20-49	50-99	100-249	Above 250		
19th Ave	0	0	0	0	0	322	5,677	5,999	3
Bayview	30	32	30	24	100	664	13,495	14,375	1
Bernal Heights	37	40	10	69	0	0	0	156	21
Central Waterfront	1	2	12	116	289	262	391	1,073	12
Downtown/C-3	1	10	14	132	822	834	600	2,413	6
East SoMa	4	21	59	343	616	462	810	2,315	7
Excelsior	13	15	19	0	56	0	0	103	22
Geary Blvd	34	67	49	162	83	531	0	926	13
Glen Park	7	0	0	0	0	0	0	7	36
Haight Ashbury/Cole Valley	5	20	0	0	56	0	0	81	27
Inner Sunset	14	21	0	34	0	0	0	69	30
Judah	16	22	20	0	0	0	0	58	31
Marina	14	22	63	87	203	0	250	639	16
Market & Octavia	4	32	39	193	180	1,309	1,210	2,967	5
Mid-Market	0	0	0	175	88	206	1,798	2,267	8
Mission	28	148	103	75	182	276	0	812	14
Mission Bay	0	0	0	0	64	433	268	765	15
Noe Valley	24	22	0	0	0	0	0	46	32
Northeast	15	86	102	272	632	999	0	2,106	9
Ocean View	26	10	30	31	0	0	0	97	25
Outer Mission	10	67	81	47	61	0	0	266	19
Outer Sunset	8	2	11	0	55	0	0	76	28
Port	0	0	0	0	0	0	319	319	18
Presidio	8	18	0	0	0	0	0	26	34
Richmond	19	3	0	0	0	0	0	22	35
Rincon Hill	0	5	0	0	309	389	3,734	4,437	4
Showplace & Potrero Hill	19	19	12	97	0	838	557	1,542	10
Transbay	0	0	0	0	0	140	420	560	17
Twin Peaks	12	5	0	0	0	175	0	192	20
Upper Market	20	25	0	44	0	0	0	89	26
Van Ness Corridor	0	0	0	0	0	100	0	100	23
Visitacion Valley	15	45	12	0	0	0	0	72	29
West SoMa	1	25	37	111	143	453	416	1,186	11
Western Addition	3	18	0	79	0	0	0	100	23
Taraval	4	27	10	0	0	0	0	41	33
Treasure Island	0	0	0	0	0	0	7,800	7,800	2
Grand Total	392	829	713	2,091	3,939	8,393	37,745	54,102	NA

Notes:

/1/ Housing unit counts are not rounded.

TABLE 5: Residential Project Size Distribution and Pipeline Status

Planning Status	Project Size							Grand Total
	Single Family	2-9	10-19	20-49	50-99	100-249	Above 250	
Planning Filed	20	74	241	624	1,495	3,569	28,487	34,510
PL Approved	4	62	52	214	510	1,028	2,698	4,568
BP Filed	171	378	275	765	813	869	1,707	4,978
BP Approved/ Issued/Re-Instated	92	135	70	225	419	963	579	2,483
Construction	105	180	75	263	702	1,964	4,274	7,563
Grand Total	392	829	713	2,091	3,939	8,393	37,745	54,102

Notes:

/1/ Housing unit counts are not rounded.

- Of the 2,400 units with building permits approved, 1,500 units are in buildings of 100 units and above – or about 62 percent.
- Only two percent of the residential pipeline will be in buildings with nine units or less.
- Single family homes constitute less than one percent of the total units in the pipeline.

Conversion of Commercial Space to Residential Use⁴

There are 77 projects in the current pipeline database proposing demolition or conversion of existing Production, distribution and Repair buildings to residential or other use.⁵ The corresponding

⁴ Numbers represented here differ from those reported in Table 1. Table 1 represents the net change of all projects whereas numbers here are limited to projects representing conversions or demolitions resulting in a net loss of PDR space (Table 6) and office space (Table 7).

⁵ This pipeline only accounts for PDR built space. Hence, the conversion of undeveloped or vacant lands currently in PDR uses, such as construction or open storage yards are not accounted for in this report.

FIGURE 3: Residential Pipeline, by Status & Building Size

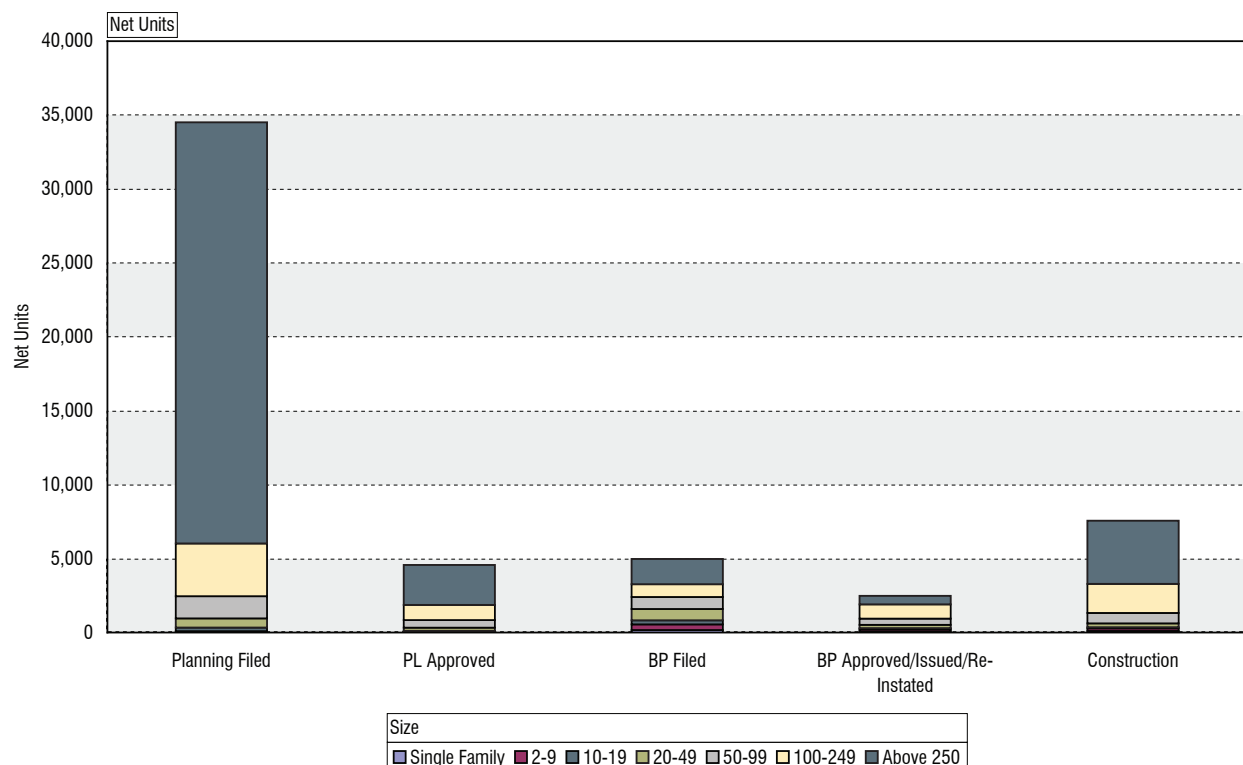


TABLE 6: PDR Space Conversion to Residential Use

Neighborhood	PDR Net	Percent	Projects	Percent	Net Units	Percent
Bayview	-230,000	14.8%	5	6.5%	600	9.7%
Central Waterfront	-244,000	15.7%	6	7.8%	710	11.5%
Downtown/C-3	-43,000	2.8%	2	2.6%	150	2.4%
East SoMa	-267,000	17.2%	18	23.4%	1,300	21.0%
Excelsior	-2,000	0.1%	1	1.3%	20	0.3%
Geary Blvd	-6,000	0.4%	1	1.3%	10	0.2%
Marina	-9,000	0.6%	2	2.6%	40	0.6%
Market & Octavia	-183,000	11.8%	5	6.5%	490	7.9%
Mid-Market	-57,000	3.7%	2	2.6%	70	1.1%
Mission	-59,000	3.8%	9	11.7%	140	2.3%
Northeast	-92,000	5.9%	8	10.4%	500	8.1%
Ocean View	-4,000	0.3%	1	1.3%	30	0.5%
Outer Mission	-11,000	0.7%	2	2.6%	20	0.3%
Presidio	-1,000	0.1%	1	1.3%	10	0.2%
Rincon Hill	-74,000	4.8%	4	5.2%	730	11.8%
Showplace & Potrero Hill	-229,000	14.8%	5	6.5%	1,090	17.6%
West SoMa	-42,000	2.7%	5	6.5%	310	5.0%
Grand Total	-1,551,000	100.0%	77	100.0%	6,200	100.0%

figure for the conversion of office space is 39 projects. These projects represent approximately 11 percent (or 6,200 units) and six percent (or 3,600

units), respectively, of the residential units in the pipeline.

Nearly all units replacing office uses are in mid- to high-rise residential structures of 20 to 500 housing

TABLE 7: Office Space Conversion to Residential Use

Neighborhood	Office Net	Percent	Projects	Percent	Net Units	Percent
Bayview	-1,000	0.1%	1	2.6%	0	0.0%
Downtown/C-3	-589,000	43.9%	8	20.5%	500	13.7%
East SoMa	-140,000	10.4%	4	10.3%	150	4.1%
Geary Blvd	-8,000	0.6%	1	2.6%	30	0.8%
Inner Sunset	-9,000	0.7%	1	2.6%	10	0.3%
Marina	-11,000	0.8%	3	7.7%	80	2.2%
Market & Octavia	-21,000	1.6%	4	10.3%	450	12.4%
Mid-Market	-50,000	3.7%	1	2.6%	90	2.5%
Mission	-5,000	0.4%	1	2.6%	10	0.3%
Northeast	-147,000	10.9%	4	10.3%	210	5.8%
Ocean View	-14,000	1.0%	2	5.1%	50	1.4%
Rincon Hill	-166,000	12.4%	4	10.3%	1,500	41.2%
Showplace & Potrero Hill	-47,000	3.5%	2	5.1%	140	3.8%
Transbay	-110,000	8.2%	1	2.6%	420	11.5%
West SoMa	-25,000	1.9%	2	5.1%	20	0.5%
Grand Total	-1,343,000	100.0%	39	100.0%	3,640	100.0%

units. These projects are mostly concentrated in the eastern half of the city: Rincon Hill, East SoMa, Showplace Square & Potrero Hill, Transbay, Mission and Downtown, Western SoMa.

About 67 percent of the PDR conversion projects and about 60 percent of the office conversion projects are in the Planning or Building Permits Filed stage and are under review. Should approval be granted, these projects, depending on their size and complexity, on average might take between three to five years to be completed.

Conversion of PDR Space

- If the pipeline is developed as proposed, some 1.5 million sq. ft. of PDR space will be lost to conversion or demolition.⁶ It would be replaced with residential units (6,100) and/or other commercial uses.
- Most of the PDR loss will be in East SoMa, Central Waterfront and Bayview, each accounting for a PDR space loss of around 250,000 sq. ft., and together half of the overall loss. The loss of PDR space in these three neighborhoods would bring in 2,600 net new housing units.
- In addition to residential uses, the net loss of PDR space will be replaced chiefly by the following land uses: retail (265,000 sq. ft.), Cultural/Institutional/ Educational (151,000 sq. ft.), and Visitor-related (110,000 sq. ft.).

Table 6 above provides a measure of how many units are produced relative to the lost PDR space.

Conversion of Office Space

- Approximately 1.5 million sq. ft. of office space are proposed to be converted to residential and/or other commercial use. This loss of office space is mainly taking place in the northeastern part of the city where most office space is located. Table 7 shows that the Downtown C-3 districts would lose the most office space

– around 600,000 sq. ft., or four out of 10 sq. ft. of the total conversion.

- A total of 3,600 units are proposed to be built replacing the lost office space. In addition to housing, small amounts of retail, visitor-related and PDR spaces are being proposed in the converted offices.

These conversions of a number of individual office buildings notwithstanding, taken together with other commercial developments in the pipeline, the overall result would still be a net addition of office space. As reported in Table 1, the net addition of office amounts to 9.7 million square feet citywide.

Projects Under Planning Review

Project Application Filings

Table 8 below shows that a total of 86 permit applications were filed in the first quarter of 2008. This count, while slightly down from the fourth quarter of 2007, represents nearly 6,200 units and more than a million sq. ft. of commercial development and, relative to the past few quarters, maintains a high unit count due to the filing of another sizable, long term project. Taken as a whole since 2000 (Figures 4 and 5), there has been a slight downward trend of the number of projects filed and approved, respectively, but in terms of number of units filed for, there is no indication of a downward trend, neither in the short or medium term. The recent economic slowdown has not been seen yet, and projects, on average, remain fairly large.

Projects approved during any given quarter shows a time lag relative to the projects filed curve. A project is often approved in another quarter than the one in which it was filed, particularly for projects needing environmental review and/or conditional use.

Major projects filed during the first quarter of 2008 include:

⁶ Table 6 shows only projects that include the conversion or loss of PDR space to residential use. Other, separate projects proposing to add PDR space and do not involve conversion or demolition of PDR space are not counted in this table. Table 1 shows a net loss of 700,000 sq. ft. as it is a tally of all projects that add, convert or demolish PDR space.

Table 8: Projects Filed With and Approved by the Planning Department

Quarter Filed	Filed				Approved			
	Projects	Net Units	Avg Units/Project	Net Sq. Ft	Projects	Net Units	Avg Units/Project	Net Sq. Ft
2007 Q1	80	1,460	18	147,000	37	620	17	29,000
2007 Q2	61	580	10	1,013,000	27	780	29	5,000
2007 Q3	93	18,740	202	2,993,000	34	290	9	325,000
2007 Q4	98	4,000	41	132,000	31	280	9	-5,000
2008 Q1	86	6,170	72	1,088,000	36	260	7	6,000

TABLE 9: All Projects Under Planning Review, by Case Type

Suffix	Projects	Percent	Net Units	Percent	Net Comm'l Sq. Ft.	Percent
'Beauty Pageant'	12	2.2%	70	0.1%	2,129,000	14.0%
Conditional Use	191	35.8%	12,300	25.0%	1,451,000	9.5%
Discretionary Review	72	13.5%	390	0.8%	177,000	1.2%
Variance	75	14.0%	2,850	5.8%	-445,000	-2.9%
Exception to Downtown Controls	14	2.6%	2,140	4.4%	-156,000	-1.0%
Environmental/Historical Review	138	25.8%	30,730	62.5%	11,718,000	77.0%
Other Planning Review	32	6.0%	700	1.4%	347,000	2.3%
Total	534	100.0%	49,180	100.0%	15,221,000	100.0%

- Park Merced expansion project, slated for development of 5,700 units, 400,000 sq. ft. of retail and infrastructure improvements over a 20-year period; this was the largest project filed in the first quarter of the year.
- 260 Fifth Street, a project which would add 151 units with ground floor retail and demolish a warehouse; aiming for LEED gold.
- 245 Hyde Street, a remodel of an existing 2-story office/retail structure to include 65 units.
- 949 Market Street, construction of a new 5-story 367,000 sq ft retail center.

Also during the first quarter, a total of 36 projects with 262 units and 6,300 sq. ft. of commercial were approved.

Projects Under Planning Review

Project applications under Planning Department review total 534, representing nearly 50,000 units and 15 million sq. ft. of commercial space (Table

9). Twelve projects are being reviewed subject to the Planning Code's §321 concerning the annual limit on office space ('Beauty Pageant'), 191 are awaiting conditional use hearings, while at least 138 projects are going through environmental review.⁷ It is the environmental review cases that represent the most long range projects, and these cases also account for the largest amount of square footage and residential units.

Finally, it is a matter of judgment whether these large-scale development programs should be included in the standard pipeline tally, or whether they should be accounted for separately. To the extent that they represent development programs as much as individual projects, it might make more sense to include them once a building permit would be sought down the line. That would entail that the pipeline would be more project oriented, and with a more short term focus. It was, in the

⁷ A single project may require both environmental clearance, a variance, and a conditional use permit. For the reporting in this table, however, each case was assigned just one review type to avoid duplicate accounting. Categories are listed in order of precedence. If a project needs both a Conditional Use review and 'Beauty Pageant' review, it will be listed in this table under 'Beauty Pageant', the category highest up in the table. This table is therefore a simplification of the review process.

end, decided to keep these plans in for now in the interest of being inclusive.

Figure 4: Pipeline Project Applications and Residential Units Filed and Approved with the Planning Department, by Quarter

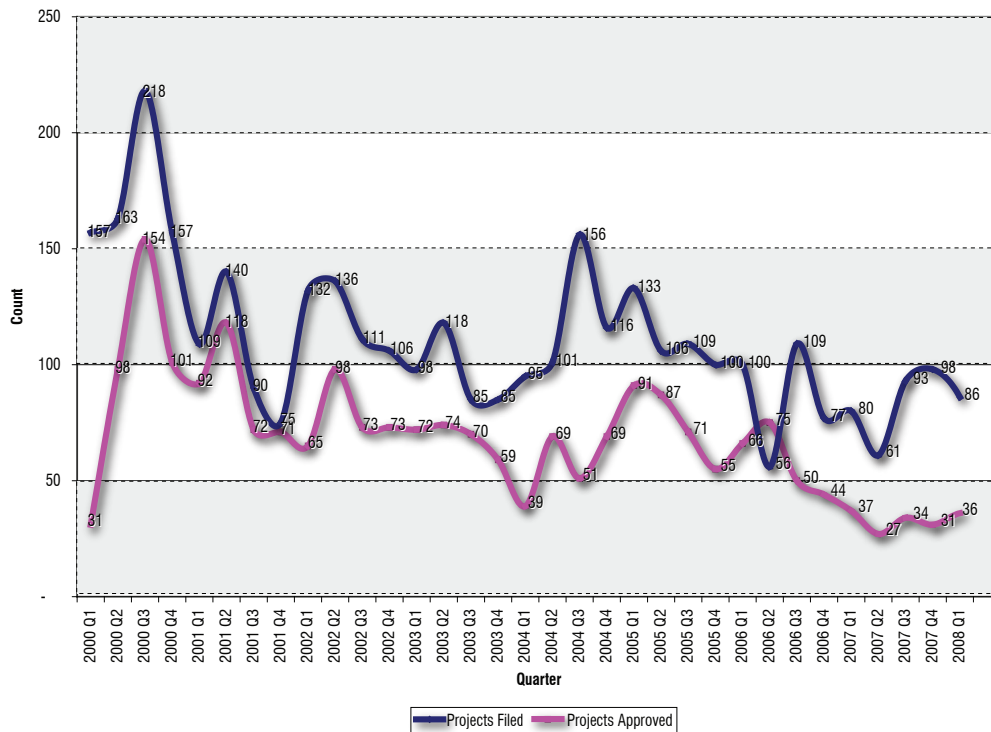
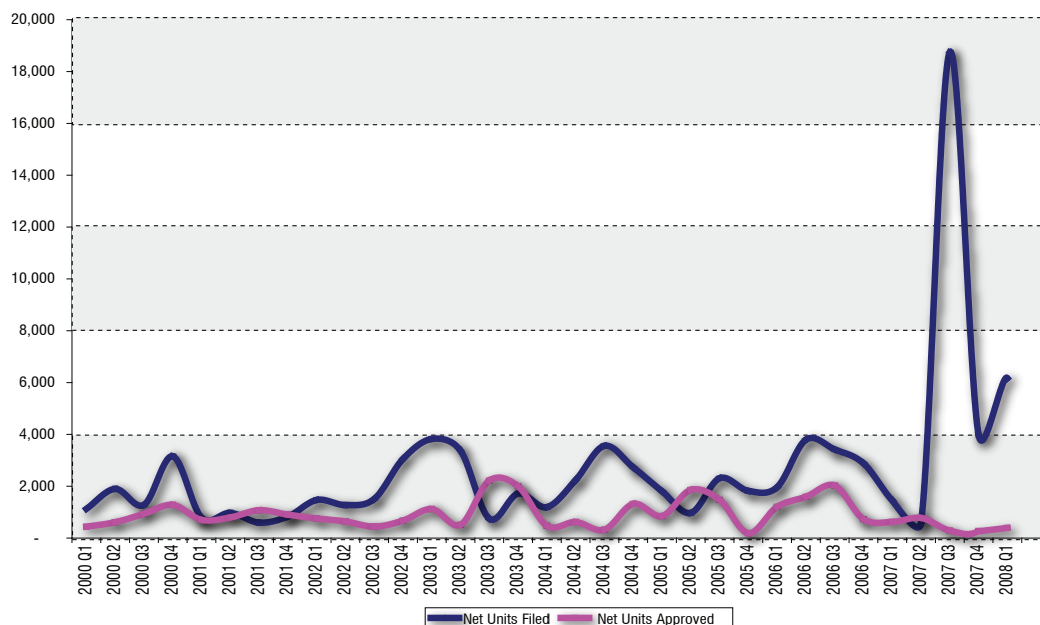
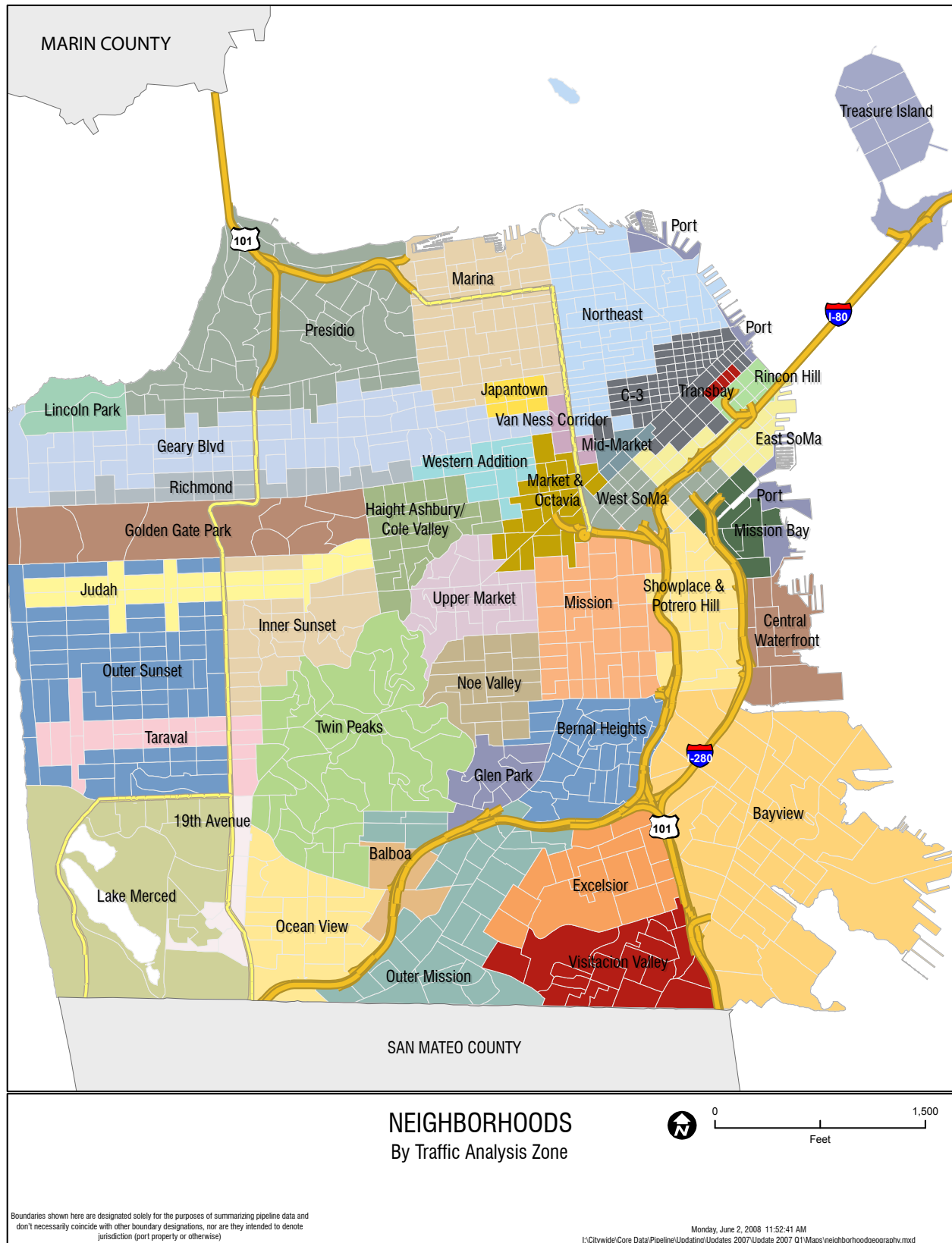


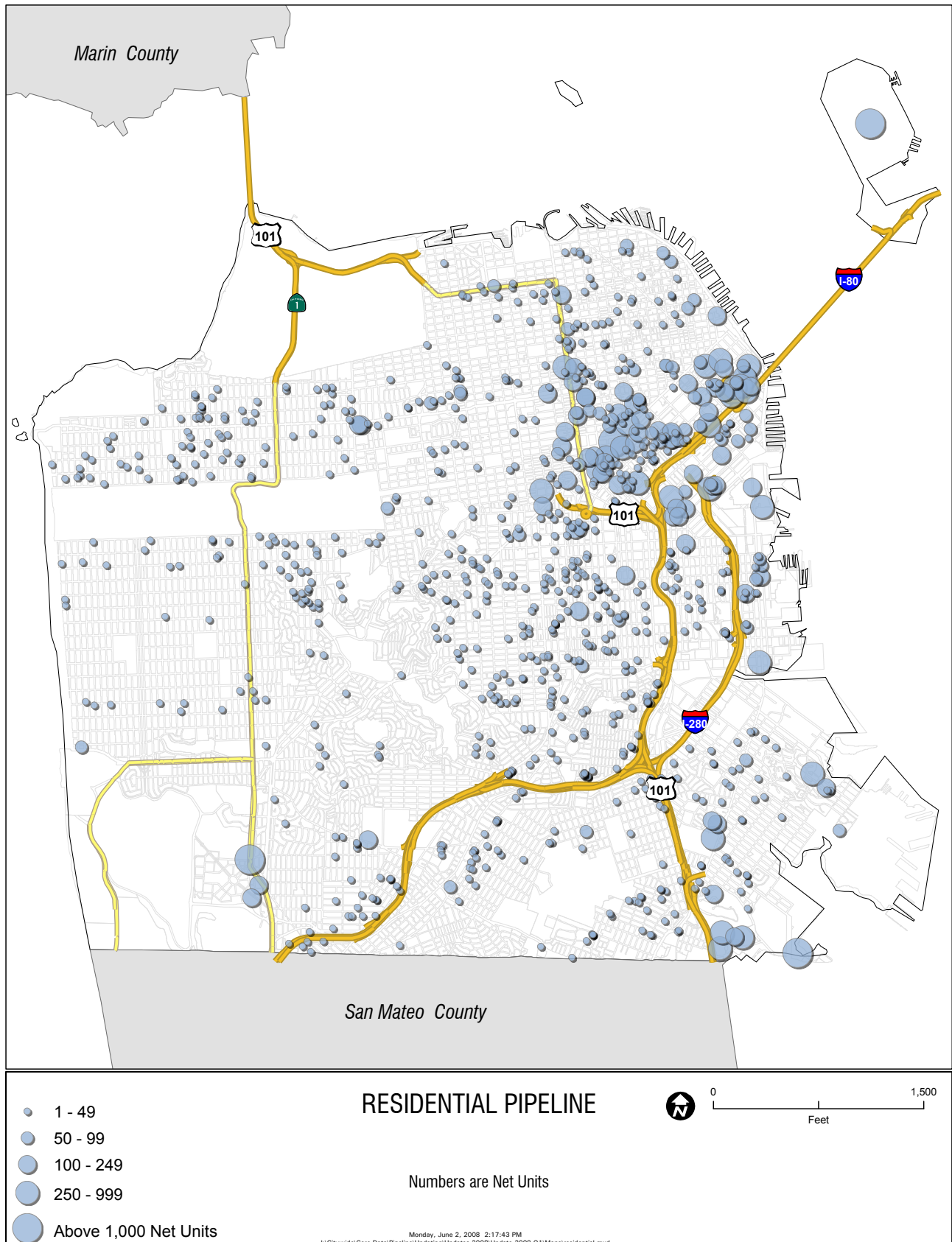
Figure 5: Pipeline Project Applications and Residential Units Filed and Approved by the Planning Department, by Quarter



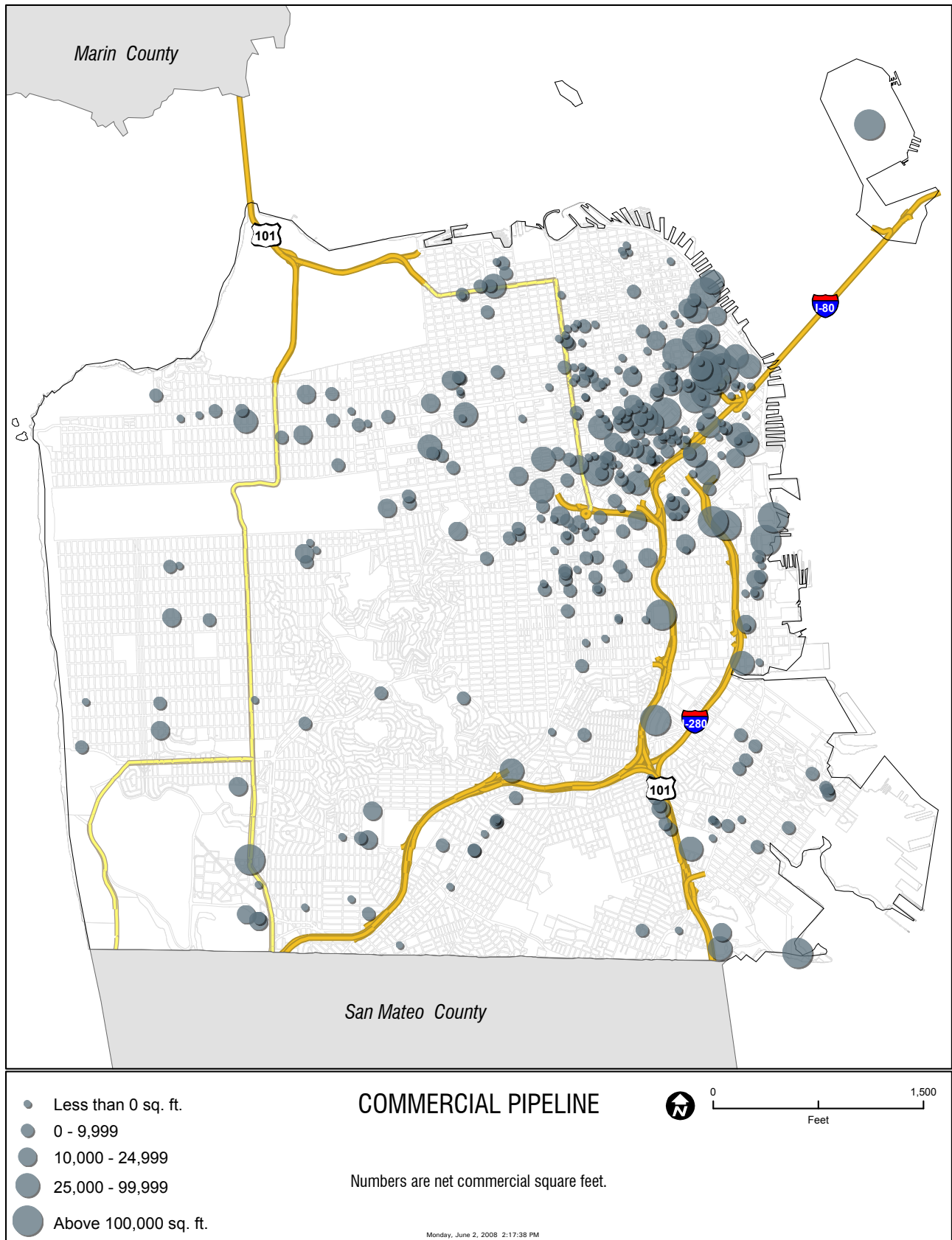
MAP 1: Neighborhoods Highlighted in the Pipeline Report



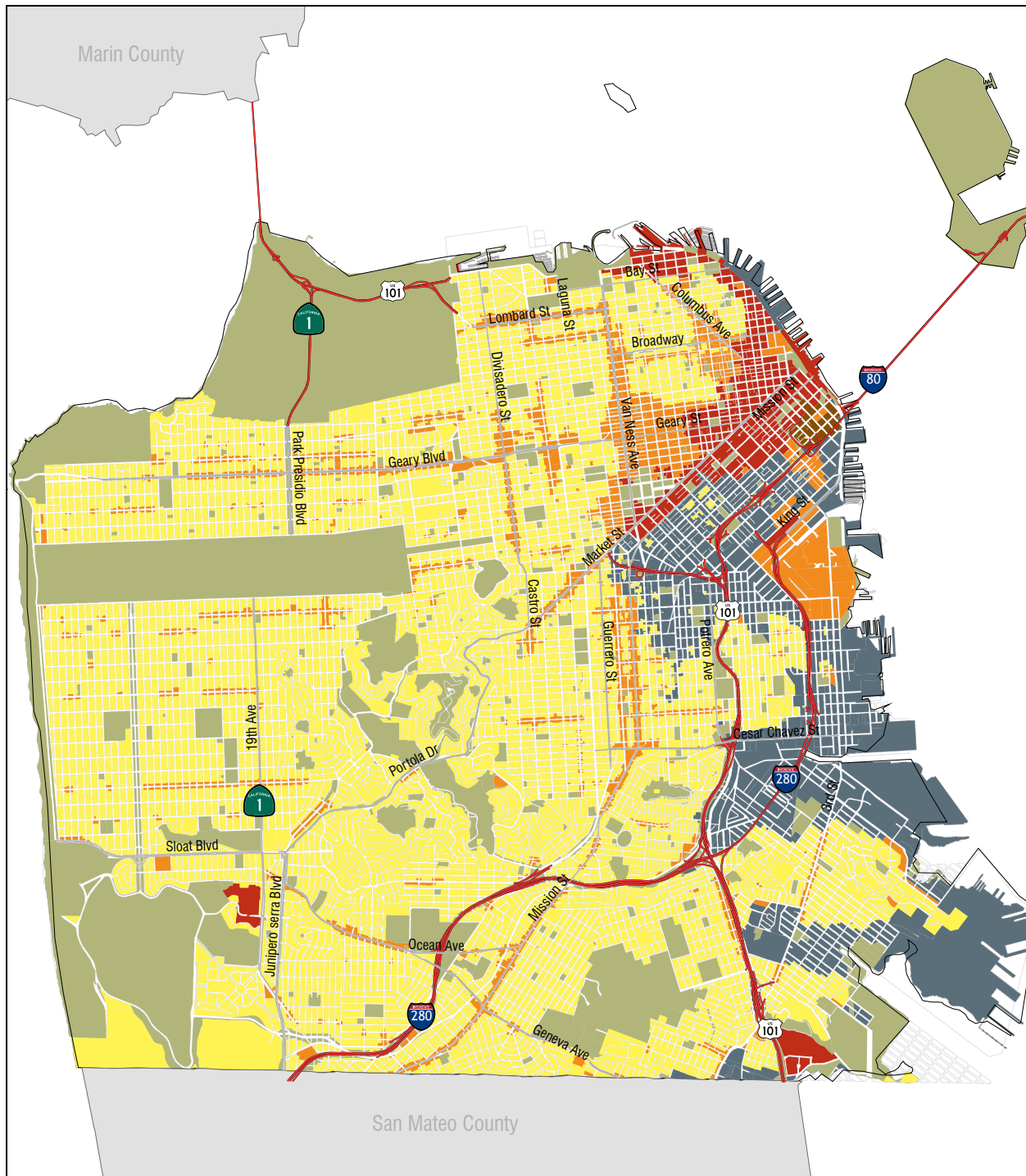
MAP 2: Residential Pipeline



MAP 3: Commercial Pipeline



MAP 4: Generalized Zoning Districts



- | | |
|---|--|
| Commercial | Residential |
| Mixed Use | High Density Residential |
| Industrial | Public |

GENERALIZED ZONING DISTRICTS



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 **SAN FRANCISCO
PLANNING DEPARTMENT**

TABLE 10: List of Projects and Data Dictionary

PROJECT LOCATION	
Block Lot	Concatenated 4-digit assessor block + 3-digit assessor's lot Numbers
Address	Name and address of project.
Planning Neighborhood	Areas related to current planning efforts and roughly to city neighborhoods.
PROJECT STATUS	
Under Construction	Project is under construction.
BP Approved	DBI approved building permit.
BP Issued	Project sponsor has picked up approved building permit (proxy measure of under construction)
BP Reinstated	DBI reinstates a lapsed building permit (lapses after 1 year with no activity).
BP Filed	Application for building permit filed with DBI.
PL Approved	All Planning actions approved.
PL Filed	Project application filed with the Planning Department
Bestdate	The date of the most recent action leading to the BESTSTAT value, i.e., a project's current pipeline status (e.g., date building permit application is filed if BESTAT = BP Filed).
DEVELOPMENT PROFILE	
Units	Net total dwelling units.
Net GSF (Commercial)	Nonresidential gross square feet (GSF). Best interpreted as net new useable GSF with demolition of existing space subtracted (not total project gsf).
	CIE or Cultural, Institutional, Educational includes educational services, social services, museums, zoos, and membership organizations.
	Medical includes health services offices and hospitals and laboratories throughout the City.
	MIPS is largely any activity where information is the chief commodity that is processed (managerial, information, professional, business services, multi-media).
	PDR or Production, Distribution and Repair includes automobile and other repair services throughout the City, plus construction, transportation, communications, utilities, agriculture mining, manufacturing, wholesale trade, and motion picture production distribution, and services located outside of the downtown, transbay, and Northeast Districts. Does not include undeveloped or vacant land area used for PDR activities such as construction yard or open storage area.
	Retail Includes retail trade, amusement and recreation services, and personal services located throughout the City.
	Visitor (or Hotel) includes hotels and other lodging located throughout the City.
Land Use	This field summarises in one word what type of project is being proposed. Apart from the commercial categories listed, this field includes <ul style="list-style-type: none"> - Mixres (when both commercial and residential uses are proposed) - Mixed (when no residential use present and when multiple commercial uses are proposed and not one is dominating (>80% of commercial square feet)) - Resident is used to denote any residential project where there is no commercial component.

Quarter 1, 2008

Subset of pipeline where project adds either more than 10 units or 10,000 GSF

Block Lot	Address	District	Net Comm'l sf	Net Units	Land Use	Bestdate
CONSTRUCTION						
3702053	1169 MARKET ST	Mid-Market	13,540	1033	Mixres	11/9/2007
3745001	300 SPEAR ST	Rincon Hill	36,000	826	Mixres	12/28/2007
3765015	425 First Street	Rincon Hill	-75,816	722	Resident	1/4/2008
4991279	101 EXECUTIVE PARK BL	Bayview	14,000	450	Resident	12/28/2007
3719001	301 MISSION ST	Transbay	-102,057	420	Resident	5/19/2006
3749059	45 LANSING ST	Rincon Hill	-14,000	305	Resident	10/10/2007
8704004	300 Berry (Arterra)	Mission Bay	600	268	Mixres	3/1/2006
3702038	1160 MISSION ST	Mid-Market	5,025	250	Mixres	8/7/2007
3800001	601 KING ST	Showplace & Potrero Hill	-31,290	224	Resident	12/5/2007
4991039	Jamestown Ave. PUD	Bayview	0	198	Resident	10/1/2007
8713001	555 MISSION ROCK ST	Mission Bay	0	192	Resident	1/7/2008
0814007	1 POLK ST	Market & Octavia	-5,330	179	Mixres	12/26/2007
3785133	673-683 BRANNAN ST, 16	West SoMa	-10,000	162	Resident	4/8/2005
4021001	601 ALABAMA ST	Mission	2,995	151	Mixres	1/2/2008
0716006	990 POLK ST	Northeast	-1,668	143	Mixres	12/28/2007
0742008	724-730 Van Ness Av/650	Northeast	-13,291	134	Resident	1/7/2008
0854009	55 PAGE ST	Market & Octavia	6,170	127	Mixres	12/20/2007
3750090	631 FOLSOM ST	C-3	3,677	120	Mixres	7/5/2007
0338025	230 TURK ST	Northeast	3,000	113	Resident	11/15/2007
3707033	74 NEW MONTGOMERY ST	C-3	-133,619	111	Mixres	1/8/2008
8707001	325 BERRY ST	Mission Bay	0	110	Resident	5/4/2007
3751153	766 HARRISON ST	East SoMa	-4,171	98	Resident	1/3/2008

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Block Lot	Address	District	Net Comm'l sf	Net Units	Land Use	Bestdate
0141011	150 BROADWAY	Northeast	6,000	87	Mixres	11/27/2007
0740011	650 EDDY ST	Northeast	0	83	Resident	12/21/2007
0331004	141 MASON ST	C-3	-4,500	81	Resident	1/3/2008
4228010	1300 Indiana St.	Central Waterfront	-9,800	81	Mixres	12/19/2007
3752091	831 FOLSOM ST	East SoMa	-10,312	69	Resident	12/17/2007
0739006	810 VAN NESS AV	Northeast	4,500	52	Mixres	12/5/2007
3708056	1 ECKER ST	C-3	-238,920	51	Mixres	12/26/2007
0834022	77 VAN NESS AV	Market & Octavia	21,200	50	Mixres	1/3/2008
5306029	4601 3rd street	Bayview	4,999	50	Mixres	11/26/2007
6423236	1828 GENEVA AV	Outer Mission	0	47	Resident	12/27/2007
3775007	1 SOUTH PARK	East SoMa	-48,500	35	Mixres	12/17/2007
0345012A	168 HYDE ST	C-3	-4,869	31	Resident	1/4/2008
0733002	1300 EDDY ST	Geary Corridor	-16,583	30	Resident	12/19/2006
0688020	1521 SUTTER ST	Geary Corridor	-7,550	28	Resident	10/26/2007
3704006	418 - 420 JESSIE ST	Mid-Market	-36,160	25	Mixres	4/6/2007
4044030	2198 03RD ST/638 19TH S	Central Waterfront	0	24	Resident	7/20/2007
3589001	2200 Mission St	Mission	-1,400	23	Resident	12/18/2007
3732062	436 CLEMENTINA ST	East SoMa	-5,625	20	Resident	12/5/2007
3731058	75 MOSS ST	East SoMa	0	14	Resident	12/18/2007
0669010	1158 SUTTER ST	Northeast	2,200	14	Mixres	1/3/2008
0176029	843 MONTGOMERY ST	Northeast	-19,149	13	Resident	8/1/2006
3590031	2235 MISSION ST	Mission	0	12	Resident	1/7/2008
7153013	310 DE LONG ST	Ocean View	0	12	Resident	9/17/2007
3724072	888 Howard St (InterContin	C-3	434,000	0	Visitor	12/18/2007
8702004	242 KING ST	Mission Bay	15,000	0	Mixres	12/27/2007

Block Lot	Address	District	Net Comm'l sf	Net Units	Land Use	Bestdate
8721014	255 King St	Port	381,282	0	Mips	1/7/2008
3708023	40 JESSIE ST	C-3	50,000		Cie	11/13/2007

BP ISSUED

8720001	435 CHINA BASIN ST	Port	0	319	Resident	4/3/2007
3701063	55 09TH ST	Mid-Market	2,622	260	Mixres	5/19/2005
1084004	3575 GEARY BL	Geary Corridor	0	150	Resident	11/14/2007
3799007	675 TOWNSEND ST	Showplace & Potrero Hill	35,000	148	Mixres	7/23/2004
3518017	275 10TH ST	West SoMa	0	135	Resident	7/19/2007
5421011	5600 03RD ST	Bayview	-103,453	116	Resident	9/21/2007
5421003	5600 03RD ST	Bayview	-6,819	112	Mixres	12/2/2005
4058010	2235 03RD ST	Central Waterfront	5,339	102	Mixres	6/2/2003
0768013	701 GOLDEN GATE AV	Van Ness Corridor	0	100	Resident	8/21/2007
3747019	333 FREMONT ST	Rincon Hill	-30,417	88	Resident	5/16/2005
8704001	330 BERRY ST	Mission Bay	0	64	Resident	7/19/2007
0492025	2026 LOMBARD ST	Marina	40,370	61	Mixres	4/11/2007
1156023	850 BRODERICK ST	Western Addition	0	47	Resident	9/21/2007
5696036	992 PERALTA AV	Bernal Heights	0	47	Resident	7/1/2004
0816002	231 FRANKLIN ST	Market & Octavia	780	33	Mixres	11/1/2007
4106022	910 MINNESOTA ST	Central Waterfront	0	30	Resident	10/18/2007
5322045	4800 Third St.	Bayview	669	18	Mixres	10/2/2007
0196008	700 MONTGOMERY ST	Northeast	-22,655	12	Resident	11/30/2007
5981011	2574 SAN BRUNO AV	Excelsior	16,600	0	Cie	11/13/2007
8709006	1500 OWENS ST	Mission Bay	160,600	0	Mips	5/24/2007
5598008	491 BAY SHORE BL	Bayview	150,265	0	Retail/ent	11/21/2007
3973002C	480 POTRERO AV	Showplace & Potrero Hill	23,800		Cie	8/17/2004

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Block Lot	Address	District	Net Comm'l sf	Net Units	Land Use	Bestdate
BP APPROVED						
3704069	973 MARKET ST	Mid-Market	8,372	100	Mixres	9/15/2005
3789003	72 TOWNSEND ST	East SoMa	0	74	Resident	1/16/2008
0031001	2351 POWELL ST	Northeast	-74,250	74	Resident	11/17/2004
3519067	346 09TH ST	West SoMa	4,125	58	Mixres	5/27/2004
3706063	721 MARKET ST	C-3	-70,000	44	Mixres	5/5/2005
0334008	430 EDDY ST	C-3	0	24	Resident	3/7/2005
5868006	4 CRAUT ST	Outer Mission	0	18	Resident	10/20/2005
0041019	7 VANDEWATER ST	Northeast	-280	12	Mixres	10/28/2004
6190033	81 ERVINE ST	Outer Mission	40,000	2	Resident	1/25/2008
2607099	399 BUENA VISTA EAST A	Upper Market	15,720		Cie	7/14/2005
0297005	524 POST ST	C-3	23,375		Retail/ent	5/6/2004

BP Filed

3783001	801 BRANNAN ST	Showplace & Potrero Hill	-115,000	557	Mixres	8/17/2005
4991240	601 CRESCENT WY	Bayview	0	411	Resident	1/14/2004
3748006	340 FREMONT ST	Rincon Hill	-42,650	384	Mixres	9/19/2005
5431A001	5800 03RD ST	Bayview	-90,000	355	Mixres	9/28/2005
3911001	1 HENRY ADAMS ST	Showplace & Potrero Hill	-2,055	212	Mixres	8/17/2005
3787026	655 04TH ST	East SoMa	-2,356	192	Mixres	1/13/2006
3735047	1 HAWTHORNE ST	C-3	-25,279	135	Mixres	9/8/2005
0667018A	1529 PINE ST	Northeast	-8,176	113	Resident	3/19/2007
4991241	EXECUTIVE PARK (FUTURE	Bayview	0	110	Resident	8/29/2007
0691008	1285 SUTTER ST	Northeast	-8,308	107	Mixres	12/6/2007
0348015	277 GOLDEN GATE AV	Mid-Market	-49,945	88	Resident	10/18/2007

Block Lot	Address	District	Net Comm'l sf	Net Units	Land Use	Bestdate
4059009	2298 03RD ST	Central Waterfront	14,000	80	Mixres	2/6/2006
3747012	325 FREMONT ST	Rincon Hill	0	70	Resident	7/20/2005
3736085	48 TEHAMA ST	Rincon Hill	0	66	Resident	7/12/2006
3788012	166 TOWNSEND ST	East SoMa	-73,625	66	Resident	8/29/2006
3548032	1875 MISSION ST	Mission	0	60	Resident	2/10/2006
6569004	3400 CESAR CHAVEZ ST	Mission	2,147	60	Mixres	11/1/2007
1052023	2420 SUTTER ST	Marina	-1,900	58	Mixres	3/30/2007
1228005	690 STANYAN ST	Haight Ashbury/Cole Valley	10,800	56	Mixres	2/15/2006
0287014	300 GRANT AV	C-3	0	56	Resident	12/22/2006
0056006	1789 MONTGOMERY ST	Northeast	0	51	Resident	10/27/2005
3774025	250 BRANNAN ST	East SoMa	-127,396	51	Resident	1/30/2007
0293002	153 KEARNY ST	C-3	-40,000	51	Resident	3/28/2006
3731126	229 07TH ST	East SoMa	16,196	49	Mixres	9/23/2005
3703086	570 JESSIE ST	Mid-Market	-15,000	47	Resident	2/2/2006
3532014	299 VALENCIA ST	Market & Octavia	3,940	44	Mixres	11/9/2006
0596024	1946 POLK ST	Northeast	-9,245	43	Mixres	11/14/2007
0619012	1860 VAN NESS AV	Northeast	1,625	35	Mixres	2/21/2006
0349001	101 GOLDEN GATE AV	Mid-Market	20,000	35	Mixres	8/25/2005
0668012	1465 PINE ST	Northeast	0	35	Resident	3/16/2005
0343014	181 TURK ST	Mid-Market	3,060	32	Mixres	8/23/2006
0756001	1345 TURK ST	Western Addition	0	32	Resident	1/23/2008
3754039	1075 FOLSOM ST	East SoMa	5,000	31	Resident	12/22/2005
3754066	1091 FOLSOM ST	East SoMa	-2,250	30	Resident	6/10/2005
4224038	1000 MISSISSIPPI ST	Showplace & Potrero Hill	0	28	Resident	5/1/2007
3542009	2140 MARKET ST	Market & Octavia	2,624	28	Mixres	11/17/2004

Block Lot	Address	District	Net Comm'l sf	Net Units	Land Use	Bestdate
0599008	1840 WASHINGTON ST	Marina	-7,000	26	Resident	4/14/2006
3730023	1174 FOLSOM ST	West SoMa	-5,200	26	Mixres	7/28/2004
3727168	1145 MISSION ST	West SoMa	1,996	25	Mixres	6/9/2006
3732071	468 CLEMENTINA ST	East SoMa	-500	25	Resident	7/20/2005
0184031	1355 PACIFIC AV	Northeast	-18,632	24	Resident	8/24/2006
0274008	850 BUSH ST	Northeast	0	23	Resident	12/30/2005
5817006	300 ALEMANY BL	Bernal Heights	0	22	Resident	7/7/2006
3752019	870 HARRISON ST	East SoMa	-6,120	22	Mixres	7/14/2006
3591024	793 SOUTH VAN NESS AV	Mission	5,829	22	Resident	2/10/2006
1101022	2139 O'FARRELL	Geary Corridor	-14,712	21	Resident	10/30/2007
3521005	340 11TH ST	West SoMa	5,682	20	Mixres	4/11/2005
3521007	350 11TH ST	West SoMa	0	20	Resident	4/11/2005
3731003	226 06TH ST	East SoMa	0	20	Resident	10/19/2005
3776092	246 RITCH ST	East SoMa	-4,130	19	Resident	1/5/2007
7088056	320 RANDOLPH ST	Ocean View	-10,428	18	Mixres	8/29/2006
3548039	1801 MISSION ST	Mission	2,600	18	Mixres	7/17/2006
5868007	55 TRUMBULL ST	Outer Mission	0	18	Resident	12/13/2006
3588012	3500 19TH ST	Mission	2,950	17	Mixres	5/1/2006
0666006	1522 BUSH ST	Marina	0	15	Resident	1/15/2004
3726047	537 NATOMA ST	East SoMa	-5,425	14	Mixres	9/1/2005
0282004	723 TAYLOR ST	C-3	0	14	Resident	5/2/2005
3557063	208 DOLORES ST	Market & Octavia	0	13	Resident	11/18/2003
1084001B	1 Stanyan Street	Geary Corridor	-1,807	13	Mixres	12/14/2007
5260001	4101 03RD ST	Bayview	0	12	Resident	5/15/2003
6356066	209 HAHN ST	Visitation Valley	0	12	Resident	6/16/2005

Block Lot	Address	District	Net Comm'l sf	Net Units	Land Use	Bestdate
6520036	3135 24TH ST	Mission	-13,640	12	Mixres	11/13/2007
1028028	2829 CALIFORNIA ST	Marina	112	12	Mixres	10/31/2007
3987010	140 PENNSYLVANIA AV	Showplace & Potrero Hill	0	12	Resident	8/4/2004
0512019	2395 LOMBARD ST	Marina	-1,890	12	Resident	3/15/2006
0512041	2395 Lombard Street	Marina	5,816	12	Resident	3/15/2006
3732068	456 CLEMENTINA ST	East SoMa	0	12	Resident	7/11/2005
1368049	4614 CALIFORNIA ST	Presidio	13,686	0	Mixed	1/23/2007
1535016	495 09TH AV	Geary Corridor	17,000	0	Cie	12/3/2003
0242027	855 SACRAMENTO ST	C-3	20,000	0	Vacant	3/21/2008
3905003	2460 ALAMEDA ST	Mission	20,000	0	Pdr	11/14/2006
3940001	201 16TH ST	Port	446,600	0	Mips	11/13/2007
3735063	222 02ND ST	C-3	400,000	0	Mips	11/30/2007
8709004	1600 OWENS ST	Mission Bay	245,000	0	Mips	11/9/2007
0312010	1 KEARNY ST	C-3	27,420	0	Mixres	7/13/2006
7380038	655 BROTHERHOOD WY	Lake Merced	15,000	0	Cie	12/20/2007
3717019	120 HOWARD ST	C-3	67,000	0	Mips	11/17/2006
4352007	1301 CESAR CHAVEZ ST	Central Waterfront	81,979	0	Mips	10/15/2007
1098009	1401 DIVISADERO ST	Geary Corridor	57,000	-21	Mips	12/21/2006
0269026	350 BUSH ST	C-3	347,300		Mips	8/7/2007

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3746001	201 Folsom St	Rincon Hill	0	806	Resident	11/18/2003
3507039	1401 MARKET ST	Market & Octavia	525,500	719	Mixres	7/20/2006
0857001	55 Laguna Street	Market & Octavia	28,090	491	Mixres	1/17/2008
3747001E	399 FREMONT ST	Rincon Hill	-2,256	432	Mixres	8/4/2006
0647007	1634 PINE ST	Marina	448	250	Mixres	4/3/2007

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Block Lot	Address	District	Net Comm'l sf	Net Units	Land Use	Bestdate
3508052	1340 & 1390 MISSION ST	Market & Octavia	-19,200	237	Mixres	6/10/2004
3547002A	1880 MISSION ST	Market & Octavia	-63,512	194	Resident	10/6/2005
0716007	990 Polk Street	Northeast	-1,668	160	Resident	11/22/2004
4106001A	900 MINNESOTA ST	Central Waterfront	-129,260	160	Mixres	1/5/2006
1083002	3575 GEARY BL	Geary Corridor	4,200	150	Mixres	4/6/2006
7331003	800 Brotherhood Way	19th Street Corridor	0	127	Resident	5/19/2005
3722082	125 03rd st.	C-3	430,000	95	Mixres	4/6/2004
1073013	800 PRESIDIO AV	Geary Corridor	10,180	83	Mixres	1/25/2008
0331003	125 MASON ST	C-3	0	81	Resident	10/30/2006
0283004A	620 SUTTER ST	C-3	-46,435	78	Mixres	1/23/2006
0619009	1800 Van Ness Ave.	Northeast	7,383	62	Mixres	4/4/2005
0331002	149 MASON ST	C-3	0	56	Resident	5/4/2006
2515001	2800 SLOAT BL	Outer Sunset	9,656	55	Resident	3/21/2006
3994003	680 ILLINOIS ST	Central Waterfront	7,926	35	Mixres	12/1/2005
0341005	938-942 MARKET ST	C-3	-40,674	33	Mixres	4/6/2005
4224015	1004 MISSISSIPPI ST	Showplace & Potrero Hill	0	28	Resident	11/15/2007
0522002A	2601 VAN NESS AV	Marina	0	27	Resident	12/2/2003
2623006	376 CASTRO ST	Upper Market	1,900	24	Mixres	2/6/2006
0682010	2000 POST ST	Geary Corridor	0	24	Resident	1/5/2005
0256018	851 CALIFORNIA ST	Northeast	-33,000	23	Resident	4/19/2006
3560001	2210 MARKET ST	Upper Market	2,000	20	Mixres	2/1/2007
3728014	1234 HOWARD	West SoMa	-1,500	18	Resident	10/30/2006
1028003	2829 California Street	Marina	373	12	Mixres	1/17/2008
3533024	85 BROSANAN ST (AKA 480	Market & Octavia	0	11	Resident	3/14/2006
2062031	1801 NORIEGA ST	Outer Sunset	6,400	11	Mixres	6/3/2005

Block Lot	Address	District	Net Comm'l sf	Net Units	Land Use	Bestdate
3721068	535 MISSION ST	Excelsior	296,430	0	Mips	8/2/2007
3794024	144 KING ST	East SoMa	43,845		Visitor	10/17/2005
3777047	695 BRYANT ST	West SoMa	25,600		Cie	4/14/2005
1764031	1348 10TH AV	Judah Corridor	11,900		Cie	2/11/2005

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4886008	Bayview Waterfront Project	Bayview	7,996,866	11379	Mixres	12/3/2007
1939001	Treasure I /Yerba B I Dev Ar	Treasure Island	250,000	7800	Mixres	12/4/2007
7303001	Parkmerced - 3711 19th Av	19th Street Corridor	478,383	5677	Mixres	1/8/2008
3708006	50 01ST ST	C-3	1,134,000	600	Mixres	12/21/2006
3762106	725-765 Harrison Street	East SoMa	26,900	510	Resident	11/8/2005
4991075	5 THOMAS MELLON CR	Bayview	55,960	499	Mixres	3/9/2006
3756003	350 08TH ST	West SoMa	56,700	416	Mixres	9/7/2007
4624003	227 West Point Road	Bayview	620	401	Mixres	2/14/2007
4355006	3240 Third Street	Central Waterfront	-32,969	391	Mixres	4/20/2006
3732009	900 FOLSOM ST	East SoMa	6,340	300	Mixres	7/6/2007
3766009	105 HARRISON ST	Rincon Hill	0	259	Resident	10/29/2007
0350003	1066 MARKET ST	Mid-Market	5,840	255	Mixres	7/19/2006
0697037	1333 GOUGH ST	Geary Corridor	0	231	Resident	7/15/2005
0813006	1390 MARKET ST	Market & Octavia	-1,500	230	Mixres	10/25/2006
7324001	77 CAMBON DR	19th Street Corridor	-16,540	195	Mixres	8/16/2007
3736074	41 TEHAMA ST	Rincon Hill	-1,400	176	Resident	10/31/2006
3180003	1150 OCEAN AV	Twin Peaks	15,100	175	Mixres	7/25/2006
0331010	168 EDDY ST	C-3	15,000	170	Mixres	11/20/2007
3510001	1415 MISSION ST	West SoMa	300	156	Mixres	11/2/2006
3955002	1740 17th Street	Showplace & Potrero Hill	24,208	154	Mixres	8/31/2004

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Block Lot	Address	District	Net Comm'l sf	Net Units	Land Use	Bestdate
3725015	938 HOWARD ST	C-3	-18,956	154	Mixres	3/27/2006
3732008	260 05TH ST	East SoMa	-35,843	151	Mixres	1/24/2008
0317007	450 OFARRELL ST	C-3	-11,000	144	Mixres	9/19/2007
3719010	181 FREMONT ST	Transbay	492,866	140	Mixres	5/15/2007
8704005	330 & 335 BERRY STREET	Mission Bay	0	131	Resident	6/8/2007
4646020	900 INNES AVE	Bayview	8,613	128	Mixres	9/17/2004
3616007	2558 MISSION ST	Mission	0	125	Resident	12/21/2005
0201012	8 Washington Street	Northeast	12,500	120	Mixres	4/9/2003
0792028	365 FULTON STREET	Market & Octavia	0	120	Resident	6/8/2007
3726103	114 07th Street	East SoMa	-26,222	119	Mixres	3/28/2007
0872005	1960-1998 MARKET ST	Market & Octavia	9,000	115	Mixres	5/29/2007
3767305	429 BEALE ST	Rincon Hill	-35,628	113	Resident	9/27/2007
0526021	2550 VAN NESS AV	Northeast	-51,353	109	Mixres	5/17/2005
3508054	66 9TH STREET	Market & Octavia	0	107	Resident	6/6/2007
3703079	1036-1040 MISSION ST	Mid-Market	6,000	106	Mixres	12/21/2007
3749064	FOLSOM AND ESSEX	Rincon Hill	0	100	Resident	6/8/2007
3912001	1-25 Division Street	Showplace & Potrero Hill	-35,453	100	Mixres	1/26/2006
0059003	1620 MONTGOMERY ST	Northeast	-39,796	95	Resident	1/27/2005
3740027	SPEAR STREET	Rincon Hill	0	85	Resident	6/8/2007
3784085	570 TOWNSEND ST	West SoMa	-17,729	85	Mixres	8/16/2007
1052024	2655 BUSH ST	Marina	-40,617	84	Mixres	12/1/2005
0345002	145 LEAVENWORTH ST/ 3	C-3	0	84	Resident	7/13/2006
3732074	251 06TH ST	East SoMa	1,450	83	Mixres	9/29/2004
0165006	717 BATTERY ST	Northeast	20,519	78	Mixres	6/15/2007
0808036	401 Grove Street	Market & Octavia	7,000	70	Mixres	5/23/2007

Block Lot	Address	District	Net Comm'l sf	Net Units	Land Use	Bestdate
3753140	935 FOLSOM ST	East SoMa	-13,808	69	Mixres	5/25/2006
0287013	300 Grant Ave.	C-3	-1,250	66	Mixres	11/2/2006
4045006	2121 3rd Street/740 Illinois	Central Waterfront	-5,000	66	Mixres	4/11/2006
0336017	245 HYDE ST	C-3	-26,640	65	Resident	3/26/2008
3994001B	2065 03RD ST	Central Waterfront	-4,725	62	Mixres	6/7/2006
3639004A	2660 HARRISON ST	Mission	-11,423	62	Resident	9/16/2004
6969001	5050 MISSION ST	Outer Mission	-1,270	61	Mixres	3/10/2008
3543011	2175 MARKET ST	Market & Octavia	5,813	60	Mixres	8/31/2006
3725101	474 NATOMA STREET	C-3	0	58	Resident	12/5/2007
5992A060	495 CAMBRIDGE ST	Excelsior	0	56	Resident	5/4/2006
3776149	424 BRANNAN ST	East SoMa	0	55	Resident	12/22/2005
3753005	205 SHIPLEY ST	East SoMa	-11,000	51	Mixres	5/26/2006
0595013	1645-1661 PACIFIC AV	Northeast	-27,275	50	Resident	7/25/2007
4591A010	SHIPYARD PARCEL 54	Bayview	0	50	Resident	6/8/2007
3534069	25 DOLORES ST	Market & Octavia	-19,037	46	Resident	7/17/2006
3980007	1717 17TH ST	Showplace & Potrero Hill	-13,369	41	Mixres	12/22/2005
1450008	5400 GEARY BL	Geary Corridor	50,550	39	Mixres	6/1/2004
3701020	1270 Mission Street	Mid-Market	4,258	36	Mixres	5/12/2004
0279011	1080 SUTTER ST	Northeast	1,339	35	Mixres	10/25/2006
2636025	Crestmont Drive	Inner Sunset	0	34	Resident	3/25/2004
3794014	111 TOWNSEND ST	East SoMa	-13,136	34	Mixres	12/14/2004
0570010	1622 BROADWAY	Marina	0	34	Resident	9/15/2005
3753081	345 06TH ST	East SoMa	324	33	Mixres	9/15/2005
6935001	1607-1649 Ocean Ave.	Ocean View	-19,485	31	Resident	5/4/2006
3639002	2652 HARRISON ST	Mission	-7,250	30	Resident	1/11/2006

Block Lot	Address	District	Net Comm'l sf	Net Units	Land Use	Bestdate
0620006	1601 LARKIN ST	Northeast	-19,050	28	Resident	8/25/2004
4228015	1240 MINNESOTA ST	Central Waterfront	20,500	27	Mixres	9/29/2004
0279014	1299 BUSH ST	Northeast	-5,532	26	Mixres	8/31/2004
3752023	397 05TH ST	East SoMa	5,000	24	Mixres	9/24/2007
4711118	HUDSON AVENUE (NW CO	Bayview	0	24	Resident	6/6/2007
0807010	580 HAYES ST	Market & Octavia	42,432	22	Mixres	7/6/2005
3728069	121 09TH ST	West SoMa	-4,975	20	Mixres	3/31/2005
0853021	102-104 OCTAVIA STREET	Market & Octavia	0	20	Resident	6/8/2007
3732112	452 TEHAMA ST	East SoMa	-4,917	20	Mixres	2/15/2007
1460014B	420 29TH AV	Geary Corridor	-2,500	20	Mixres	7/25/2006
3729081	209 09TH ST (aka 207 9th	West SoMa	-11,600	19	Resident	10/13/2005
3721019	562 HOWARD ST	Excelsior	0	19	Mixres	10/3/2007
0194009	740 WASHINGTON ST	Northeast	-9,050	18	Mixres	2/28/2007
1018012	3657 SACRAMENTO ST	Geary Corridor	0	18	Resident	11/20/2007
3596113	899 VALENCIA ST	Mission	4,705	18	Mixres	8/11/2005
0729046	1210 SCOTT STREET/1770	Geary Corridor	0	18	Resident	6/8/2007
0303015	865 POST ST	Northeast	-4,658	18	Resident	5/11/2004
3148001	4550 MISSION ST	Outer Mission	-3,250	17	Mixres	7/19/2006
3617008	1050 VALENCIA ST	Mission	400	16	Mixres	12/20/2007
6473038	5735- 5743 MISSION ST	Outer Mission	-7,153	16	Mixres	10/19/2006
0668013	1461 PINE ST	Northeast	-5,416	15	Mixres	9/2/2004
0839029	261 OCTAVIA ST	Market & Octavia	0	15	Resident	8/9/2006
4108003C	1025 TENNESSEE ST	Central Waterfront	-6,550	12	Mixres	9/9/2004
5869014	4199 MISSION ST	Outer Mission	600	12	Mixres	5/16/2007
3704071	949 Market Street	Mid-Market	367,000	0	Retail/ent	2/22/2008

Block Lot	Address	District	Net Comm'l sf	Net Units	Land Use	Bestdate
0173001	600 BATTERY ST	Northeast	92,400	0	Mips	10/17/2007
3704015	942 MISSION ST	C-3	53,514	0	Visitor	2/14/2008
1149011	350 MASONIC AV	Geary Corridor	69,308	-1	Cie	9/13/2005
1029003	2901 California Street	Marina	15,604	-3	Cie	2/2/2007
2463A014	2233 VICENTE ST	Outer Sunset	13,469		Retail/ent	4/14/2005
3788039	345 BRANNAN ST	East SoMa	53,030		Mips	4/16/2007
3533007	250 VALENCIA ST	Market & Octavia	14,926		Mixed	9/13/2005
3736114	525 HOWARD ST	Excelsior	252,793		Mips	1/2/2008
3727004	150 07TH ST	West SoMa	10,808		Retail/ent	4/2/2007
0347013	399 GOLDEN GATE AV	Mid-Market	53,000		Retail/ent	12/28/2006
3785003	690 05TH ST	West SoMa	32,500		Visitor	1/24/2006
0138001	802 DAVIS ST	Northeast	245,400		Visitor	10/22/2003
2018003	2400 NORIEGA ST	Outer Sunset	12,366		Cie	9/6/2007
3710017	350 MISSION ST	C-3	934,668		Mips	12/21/2006
5431A015	320-350 PAUL AV	Bayview	33,489		Pdr	9/27/2007
0828012	735 Fell Street	Western Addition	16,000		Cie	7/3/2007
4154001	1001 POTRERO AV	Mission	419,070		Cie	6/20/2007
0236017	100 CALIFORNIA ST	C-3	68,775		Mips	12/6/2006
0238002	300 CALIFORNIA ST	C-3	61,600		Mips	12/19/2007
9900015	Exploratorium Relocation Pr	Northeast	36,248		Cie	9/1/2006

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