



San Francisco *PIPELINE* REPORT

San Francisco Planning Department

December 2011



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Quarter 3 2011

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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 encompass various stages of development: from applications filed to entitlements secured, building permits issued to projects under construction. 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. When a project is issued a Certificate of Final Completion by DBI, it is taken out of the pipeline.

To filter inactive projects, the current pipeline only includes projects filed during the last five years, projects approved in the last four years (with the exception of large projects, which are kept for seven years), and projects for which construction has begun during the past three years.

Data sources for the pipeline are chiefly the project databases maintained by the Planning Department and the Department of Building Inspection, respectively, but data is also periodically obtained from the San Francisco Redevelopment Agency. Affordable housing projects sponsored by 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 are not included in the *Pipeline Report*.

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 altogether prior to receiving a permit or completion. The pipeline, then, represents a particular scenario that assumes that all proposed development projects are eventually entitled and all entitled development projects eventually built. In reality, this is not the case.

The Relevance of the Pipeline

The pipeline serves as a barometer of development trends in the medium to long term time horizon. 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, specifically tracking the changes to the city's housing stock and commercial uses. This report is meant to be a short overview.

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 September 30, 2011. 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.

Q3 2011 Pipeline at a Glance

- There are currently around 800 projects in the pipeline of varying sizes, complexities and stages.
- These projects, if completed, would add 45,800 net new housing units to the city's housing stock.
- Three large projects, Parkmerced, Treasure Island and Candlestick/Hunters Point Shipyard, would together add more than 25,000 units and several million square feet of commercial space over the next decades. These projects are now entitled by the City.
- The pipeline would also add a net of 16.4 million sq. ft. of non-residential uses. Within this total, office and retail space would see net gains of 11.3 million and 3.1 million sq. ft., respectively. There is an expected loss of 415,000 sq. ft. of light industrial or Production, Distribution and Repair (PDR) space because of conversion to commercial and residential space. Several hospital projects are also underway, including San Francisco General Hospital and California Pacific Medical Center.
- One in six projects (with approximately 2,000 units) are in the construction phase; other projects adding 2,200 units have received building permits approvals and an additional 16,700 units have received land use entitlements.

The Development Pipeline

There are currently just below 800 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 even as the Department is not always the entitling entity.

Of the pipeline projects, 68 percent are exclusively residential and 21 percent are mixed-use projects with both residential and commercial components. Only about one in 10 projects are non-residential developments without a residential component.

A net total of 46,600 new housing units would be added to the city's housing stock according to current data. This is still high relative to historical numbers and is largely due to the filing of applications during the past three years for new large scale, long term development programs for Parkmerced, Treasure Island and the Bayview Waterfront. The vast majority of pipeline projects, however, are small scale consisting of one to three units. The number of filings have been much lower since the economic slowdown began in earnest.

Pipeline projects could also bring a net addition of 16.4 million sq ft of commercial development.

Projects by Overall Status

Table 1 on the following page shows the following:

- Around 15 percent of all projects, representing 2,000 net added housing units and 800,000 sq ft of commercial space, are under construction.
- Around 25 percent of projects (with 3,300 net units and 800,000 sq. ft. commercial space) have received building permit approvals and may have already begun construction.
- Around one in three projects (including 3,500 net new units and an addition of 2 million sq ft of commercial space) have filed building permit applications with the Department of Building Inspections. Some of these may not yet be entitled by the Planning Department.

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	96	7,620	4,878,000	1,022,000	0	2,753,000	-87,000	997,000	187,000
Approved by Planning	115	30,280	7,883,000	196,000	5,000	5,246,000	-60,000	2,005,000	492,000
BP Filed	265	3,460	1,985,000	6,000	0	1,930,000	-90,000	76,000	63,000
BP Approved/ Issued/Re-Instated	195	3,260	820,000	76,000	0	763,000	-98,000	45,000	25,000
Construction	123	1,990	841,000	362,000	0	564,000	-71,000	52,000	-66,000
Grand Total	794	46,620	16,407,000	1,662,000	5,000	11,256,000	-407,000	3,174,000	701,000

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.

- Fourteen percent of the pipeline projects and 66 percent of the units have received Planning Department approvals. If and when constructed, these projects would add some 30,300 new units to the city's housing stock, and up to 7.9 million sq ft of commercial space. These projects now must secure building permits.
- Thirteen percent of projects, representing 7,600 units and 4.5 million commercial square feet are under Planning Department review.

Amount and Type of Net New Commercial Space

Projects in the current pipeline as noted also represent a potential net addition of 16.4 million sq ft of commercial development that would result in the following land use inventory changes:

- 11.3 million sq ft of office space
- 3.2 million sq ft of retail space
- 700,000 sq ft of visitor-serving uses, such as hotels or hostels.
- 1.7 million sq ft of cultural, institutional, educational (CIE) and medical space
- An overall loss of around 400,000 sq ft of space for production, distribution and repair (PDR).

- Office and retail uses remain the most common among the non-residential projects.

Location of New Development

Table 2 on the next page shows the three most active areas for residential development include Bayview/Hunter's Point/Candlestick (where the Bayview Waterfront Project is located), Treasure Island and Parkmerced. All these projects have now been entitled. Full realization of these three projects will be decades into the future. These three areas would account for around 25,800 net units or almost half of all net additional units in the pipeline. (See Map 1 for area boundaries used.)

Other areas with active residential development include Downtown, Market & Octavia, and Rincon Hill.

On the commercial side, more than 90 percent of the new space would be added in the Bayview/Candlestick, Downtown districts, Mission Bay, and Transbay areas. Of these, the bulk of this space would take place in Bayview and Downtown C-3 districts.

It is worth noting how geographically concentrated development is, for both residential and commercial uses. In both cases, the majority of potential development would happen in a handful of projects in a handful of districts.

TABLE 2: Residential and Commercial Pipeline, by Neighborhood

Neighborhood	Projects	Percent	Net Units	Percent	Avg Units / Project	Net Comm'l Sq. Ft.	Percent	Residential Rank	Commercial Rank
Balboa Park	6	0.8%	280	0.6%	47	4,800	0.0%	19	23
Bernal Heights	35	4.4%	60	0.1%	2	164,620	1.0%	29	10
Buena Vista	18	2.3%	110	0.2%	6	12,940	0.1%	25	21
BVHP Area A,B	29	3.7%	240	0.5%	9	289,010	1.8%	21	9
Candlestick	2	0.3%	10,440	22.4%	5,218	6,120,000	37.3%	1	1
Central	75	9.4%	120	0.3%	2	15,540	0.1%	24	19
Central Waterfront	9	1.1%	410	0.9%	45	2,870	0.0%	18	25
Downtown	49	6.2%	5,060	10.9%	115	1,657,420	10.1%	4	3
East SoMa	33	4.2%	1,280	2.7%	39	-62,610	-0.4%	9	29
Executive Park	2	0.3%	190	0.4%	94	0	0.0%	22	26
India Basin	2	0.3%	10	0.0%	4	-560	-0.0%	31	27
Ingleside, Other	31	3.9%	70	0.2%	2	42,640	0.3%	27	13
Inner Sunset	31	3.9%	60	0.1%	2	14,960	0.1%	28	20
Japantown	3	0.4%	0	0.0%	1	3,550	0.0%	32	24
Marina	20	2.5%	130	0.3%	6	32,470	0.2%	23	18
Market Octavia	40	5.0%	2,190	4.7%	55	12,070	0.1%	6	22
Mission	58	7.3%	620	1.3%	11	-90,980	-0.6%	13	30
Mission Bay	6	0.8%	460	1.0%	77	1,272,880	7.8%	17	4
Northeast	47	5.9%	1,030	2.2%	22	-163,100	-1.0%	12	32
Other S Bayshore	15	1.9%	470	1.0%	31	42,160	0.3%	16	14
Outer Sunset	25	3.1%	90	0.2%	4	32,870	0.2%	26	17
Park Merced	2	0.3%	5,860	12.6%	2,930	478,380	2.9%	3	6
Richmond	81	10.2%	270	0.6%	3	35,990	0.2%	20	16
Rincon Hill	8	1.0%	2,680	5.7%	335	-94,530	-0.6%	5	31
Showpl/Potrero	25	3.1%	1,750	3.8%	70	427,900	2.6%	7	7
South Central, Other	65	8.2%	1,240	2.7%	19	118,140	0.7%	10	11
South of Market, Other	4	0.5%	470	1.0%	156	681,350	4.2%	15	5
TB Combo	16	2.0%	1,630	3.5%	102	4,845,900	29.5%	8	2
Treasure Island	1	0.1%	7,800	16.7%	7,800	381,000	2.3%	2	8
VisVal	3	0.4%	10	0.0%	4	-1,250	-0.0%	30	28
Western Addition	30	3.8%	1,080	2.3%	36	41,510	0.3%	11	15
WSoMa	23	2.9%	520	1.1%	23	89,040	0.5%	14	12
Grand Total	794	100.0%	46,630	100.0%	17,268	16,406,980	100.0%		

Pipeline Projects by Current Zoning Category

There is considerable variation on project sizes between--but also within--zoning district categories. Some zoning districts display similarly typed and sized projects, while others are host to a great variety of project sizes and types. First let us turn to the residential pipeline.

Residential Pipeline

Figure 1a shows the share of the total pipeline by zoning district type for number of projects, units and non-residential square feet, respectively. This chart indirectly measures project sizes. While most projects (around 55 percent as per the left-most column) fall in residential districts, these same *projects* account for just over 30 percent of *units*, (and less than 10 percent of the non-residential space). Figures 1b and 1c give more detail on the size distribution for residential and non-residential

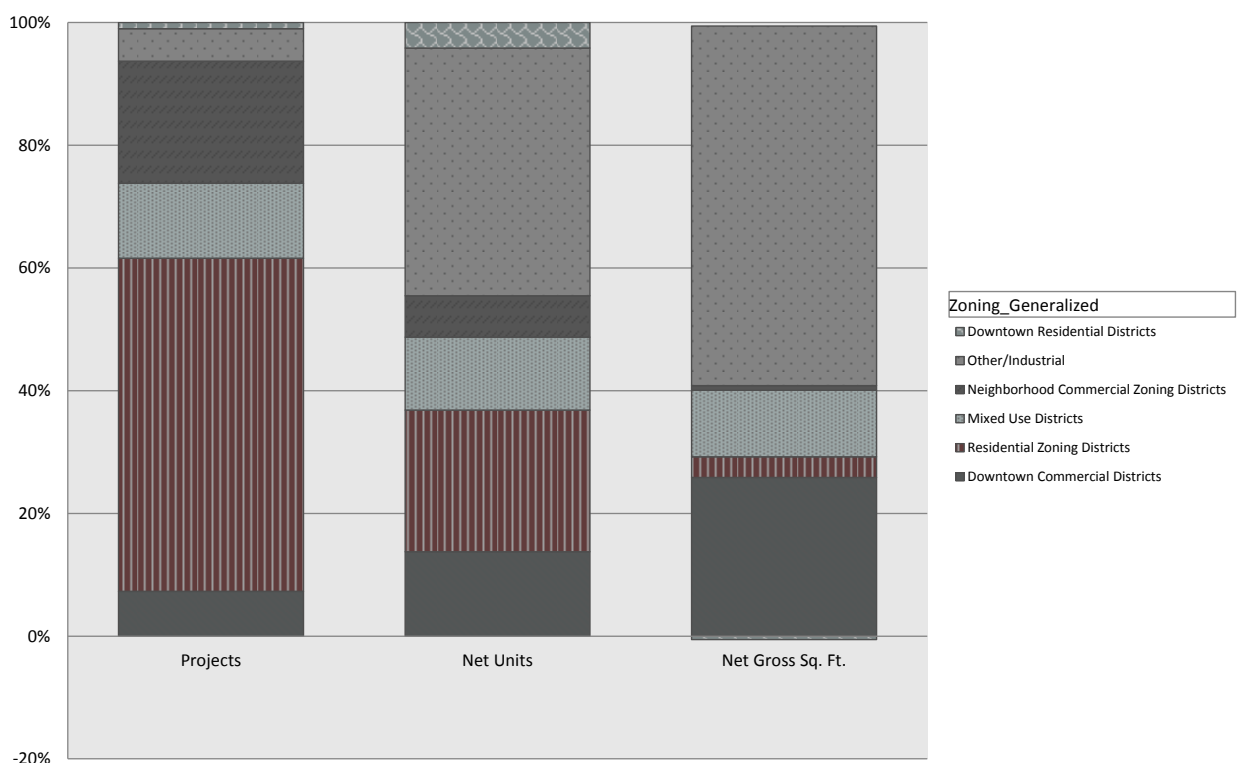
projects, respectively, using box plots. The median is the thick line in the center of each box and the size of the box denotes percentiles. The dots are outliers.

Per Figure 1b, the largest projects, as measured by the median, are found in Downtown Residential and Downtown Commercial zone classes. While these projects tend to be much larger than those in other district categories, there is tremendous variation *within* these districts as well. Projects in residential districts, on the other hand, are far more homogenous, with the vast majority of projects counting fewer than 5 units. In the residential districts, there are a number of projects substantially larger than the rest, as seen from the outliers.¹

Figure 1c shows the size distribution for commercial projects, with lands zoned public accounting for the largest sizes, but note that this includes

¹ The outliers are here defined as points falling beyond the 1.5 * interquartile range thresholds (i.e. values at 25th and 75th percentiles.).

FIGURE 1a: Pipeline Share of Total, by Zoning Category



only a handful of projects, as noted at the top of the chart.

Table 3 similarly shows the overall pipeline distribution by general zoning categories. The vast majority of the residential pipeline falls on four land zoning classes: Public, Residential, Mixed Use, and Commercial. Two large projects are situated on parcels zoned “Public Land”: the Bayview Waterfront project, most of which is at Candlestick Point and the Treasure Island

redevelopment project.² These projects could add more than 18,200 units.

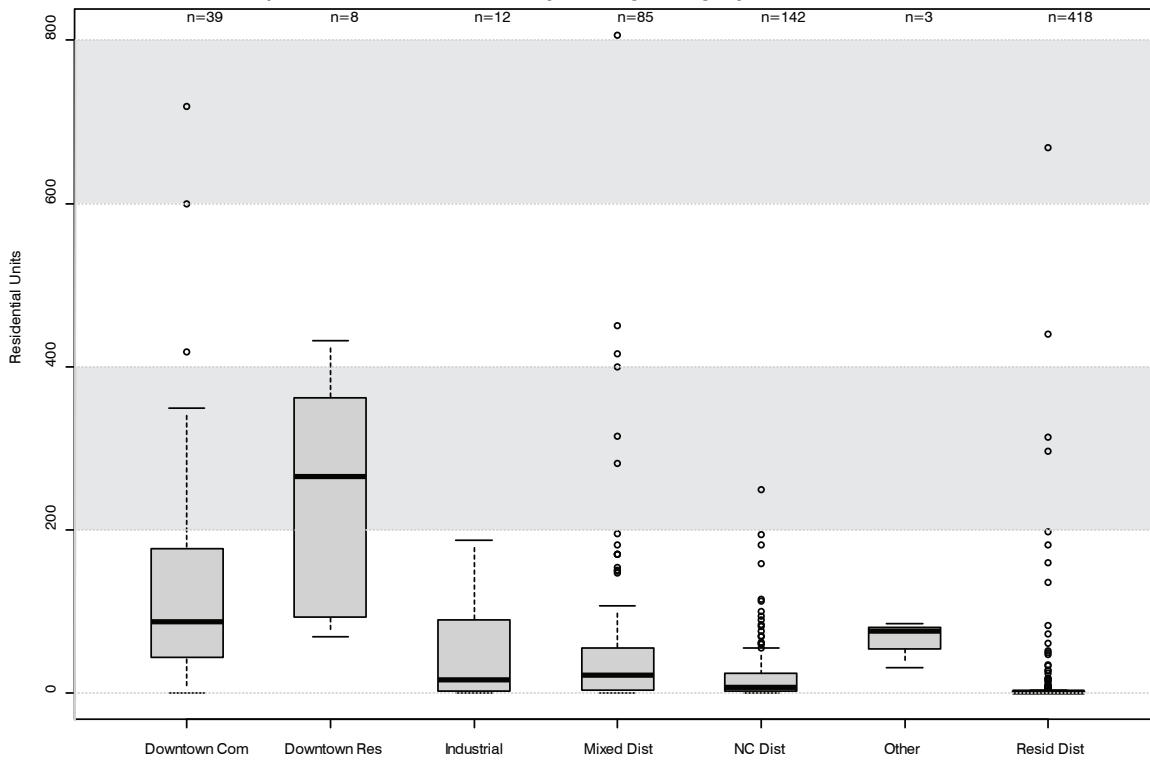
Residential projects on *residentially* zoned lots, representing the largest number of projects, account for 10,700 units, or the second largest class. Two thirds of these units, however, are in

² Technically, the Bayview Waterfront project spans multiple zoning districts, but has been accounted for here exclusively in the “Public” category where the majority of its units are located. Treasure Island has been rezoned as a part of the proceedings, but is here still counted under the Public heading.

Table 3: Residential and Commercial Pipeline by Generalized Zoning Category

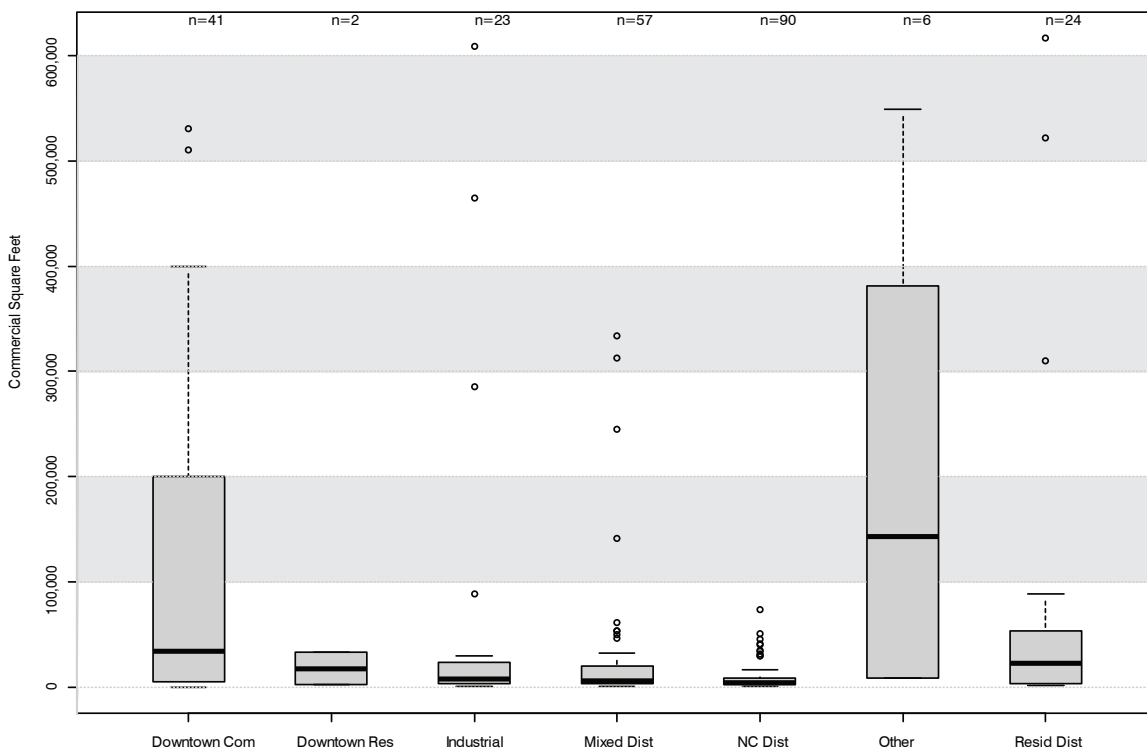
District Type	Simplified Zoning	Projects	Net Units	Net Gross Sq. Ft.	Cult., Inst., Educ.	Medical	Office	Prod., Dist., Repair	Retail	Visitor
Industrial	M	7	310	662,000	44,000	0	5,000	5,000	609,000	0
	PDR	20	190	272,000	0	0	119,000	114,000	38,000	0
	SLI	4	90	-74,000	0	0	2,000	-78,000	2,000	0
Downtown Commercial Districts	C-2	20	3,980	506,000	0	0	136,000	-77,000	384,000	63,000
	C-3	37	2,310	3,788,000	162,000	0	2,609,000	2,000	235,000	780,000
	C-M	1	120	0	0	0	2,000	-4,000	2,000	0
Residential Zoning Districts	RH	342	a	223,000	-17,000	0	218,000	-10,000	32,000	0
	RM	66	9,730	367,000	69,000	12,000	102,000	0	485,000	-300,000
	RTO	23	230	-31,000	-14,000	0	-21,000	-19,000	24,000	0
Mixed Use Districts	CRNC	1	0	68,000	68,000	0	0	0	0	0
	CVR	1	20	-9,000	4,000	0	0	0	-14,000	0
	MUG	3	50	0	0	0	0	0	0	0
	MUO	5	20	98,000	0	0	66,000	-31,000	7,000	50,000
	MUR	11	870	-82,000	0	0	-9,000	-85,000	12,000	0
	RC	26	2,380	726,000	924,000	0	-14,000	43,000	67,000	-294,000
	RED	5	40	-10,000	0	0	0	-10,000	0	0
	RSD	3	50	-1,000	0	0	0	-6,000	5,000	0
	SLR	17	500	56,000	0	0	-7,000	-4,000	71,000	-4,000
	SPD	3	0	4,000	0	0	4,000	-1,000	1,000	0
	SSO	1	0	33,000	0	0	-14,000	0	5,000	41,000
	UMU	15	1,010	20,000	0	0	-5,000	-35,000	60,000	0
Neighborhood Commercial Zoning Districts	MB	6	610	892,000	0	0	875,000	0	17,000	0
	NC	113	1,300	80,000	29,000	-45,000	101,000	-68,000	39,000	24,000
Downtown Residential Districts	NCT	45	1,840	47,000	37,000	38,000	-5,000	-71,000	39,000	0
	DTR	8	1,940	-95,000	0	0	-36,000	-71,000	12,000	0
Other	P	11	18,230	8,868,000	357,000	0	7,127,000	0	1,043,000	341,000
Grand Total		794	46,620	16,407,000	1,662,000	5,000	11,256,000	-407,000	3,174,000	701,000

FIGURE 1b: Residential Pipeline Size Distribution, by Zoning Category



Includes projects where units > 0 and units < 1000, removing the largest outliers and non-residential projects

FIGURE 1c: Non-Residential Pipeline Size Distribution, by Zoning Category



Includes projects where commercial sq ft > 0 and commercial sq ft < 1,000,000 sq ft, removing the largest outliers and non-commercial projects

the Parkmerced redesign project and a couple of large San Francisco Housing Authority projects (one in the Potrero Hill area, the other on Sunnydale Ave as part of the Hope SF program). The remainder of projects on residentially zoned parcels are relatively small with about a quarter of projects being single family housing projects. Small scale projects of one to nine units account for more than 90 percent of the residential projects. Only a handful are larger and thus account for the majority of units.

The mixed use districts, a diverse group ranging from Eastern Neighborhoods districts to chinatown, account for 5,600 units in 97 projects.

Residential projects on downtown commercial zoned lots would add 6,400 new units in 58 projects.

Another 600 units are pending on industrially zoned lands. About a third of these projects are mixed use projects with a commercial component. The added residential units in industrial areas are accompanied by loss of PDR space and addition of retail space (see Table 3).

Projects in neighborhood commercial districts would add 3,100 units in 158 projects.

Also of note, the high-density, transit-accessible downtown neighborhoods of Rincon Hill and Transbay which account for a fraction of one percent of the city's land area, nonetheless account for more than four percent of all units in the pipeline in a handful of projects. These projects are thus large, averaging more than 250 net units per project.

In contrast, residential projects in the low-density residential (RH) districts are by per zoning requirements relatively small scaled, in-fill developments, accounting for some 43 percent of proposed projects but just 2 percent of the total units (or 1,000 net units) in the pipeline. Projects on RM-zoned lots, in turn, account for 8 percent of projects and 21 percent of units, again largely because of a large project, the Parkmerced Redesign project. In terms of land area, residential zoning districts form the largest group, comprising 46 percent of the city land area.

Commercial Pipeline

Non-residential development is predominantly allowed in commercial and mixed use districts³; thus the majority of commercial space are proposed to be added in these land classes.

The commercial pipeline in general is characterized by 81 projects, but also 166 mixed use projects which contain both residential and non-residential components. The commercial component in the 221 mixed use district projects are, in general also small, with half of projects being smaller than 5,000 gross square feet, respectively. (Some of these projects in mixed use districts are exclusively residential.)

The largest concentration of potential commercial development is in a small number of projects in areas currently zoned public⁴. Development here would add some net 8.9 million square feet, or more than half of all proposed commercial development, in just 11 projects. The largest of these proposed developments is the Bayview Waterfront Project which would add more than six million commercial square feet as currently proposed; however, there were several variants with less development analyzed as a part of the environmental review.

Downtown Commercial districts account for a sizable concentration of non-residential development, with 4.3 million square feet in 58 projects. The mixed use districts account for a larger *number* of projects (even if this count may include projects that are exclusively residential) totalling 1.8 million square feet. The remaining districts account for only a minor portion of non-residential development.

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

³ Some institutional uses are allowed in residential districts, such as day care and residential care. Further, P-zoned properties are occasionally developed.

⁴ See footnote 2.

FIGURE 2: Residential Pipeline, by Status & Building Size

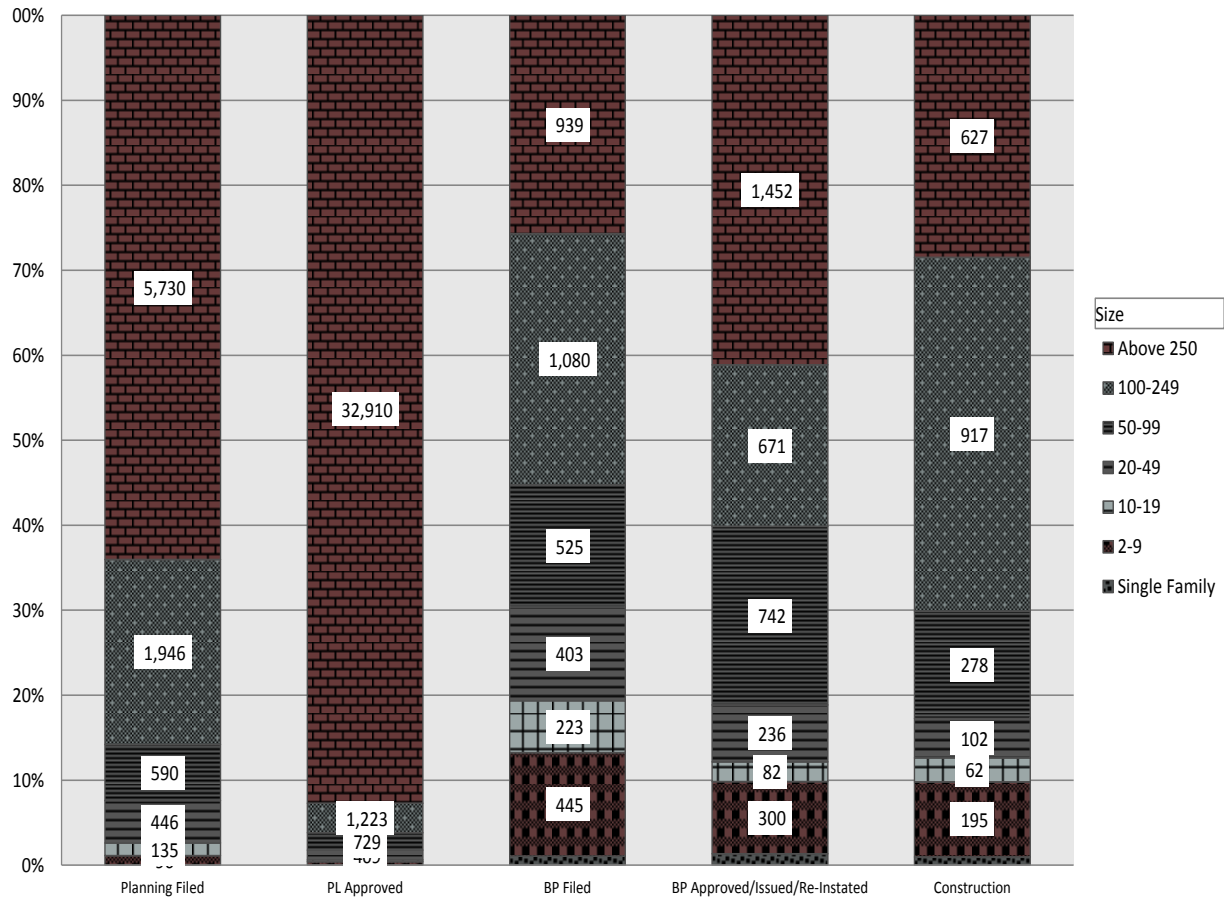
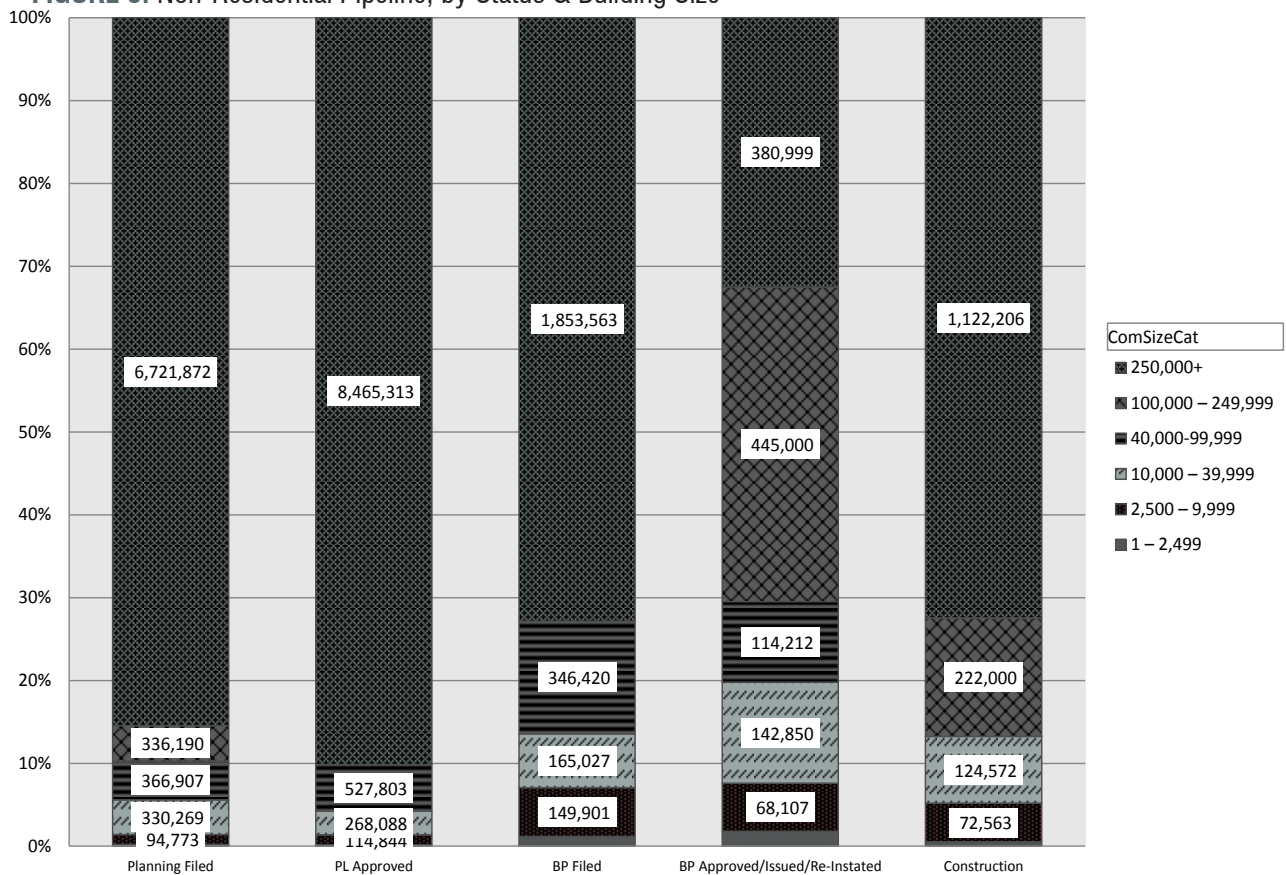


FIGURE 3: Non-Residential Pipeline, by Status & Building Size



Residential Pipeline by Project Size

Table 4 shows the residential pipeline by neighborhood and the number of units in the project.⁵

⁵ In most cases this measures the number of units in the building. However, a handful of projects include more than one building thus making this accounting an approximation.

Different areas exhibit different project size distributions. Thus we see that, for instance, Downtown will get the bulk of its units in large projects (50-99 units, 100-249 units, above 249 units). This is also the case for areas like Market Octavia, Showplace Square, and in particular Transbay and Rincon Hill. Conversely, for Inner

TABLE 4: Projects 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		
Balboa Park	0	8	13	31	71	159	0	282	21
Bernal Heights	12	53	0	0	0	0	0	65	29
Buena Vista	0	44	0	24	56	0	0	124	25
BVHP Area A,B	4	27	0	0	73	188	0	292	20
Candlestick	0	0	0	0	0	198	10,500	10,698	1
Central	19	140	18	0	0	0	0	177	23
Central Waterfront	1	13	16	40	151	196	0	417	18
Downtown	0	35	17	327	536	1,484	3,270	5,669	4
East SoMa	3	29	70	212	372	336	282	1,304	10
Executive Park	0	0	0	0	81	107	0	188	22
India Basin	0	7	0	0	0	0	0	7	31
Ingleside, Other	11	45	0	28	0	0	0	84	27
Inner Sunset	10	39	25	0	0	0	0	74	28
Japantown	0	5	0	0	0	0	0	5	32
Marina	2	36	0	108	0	0	0	146	24
Market Octavia	1	44	61	275	371	1,056	440	2,248	7
Mission	4	117	106	82	136	194	0	639	14
Mission Bay	0	0	0	0	0	147	315	462	17
Northeast	2	71	66	176	282	500	0	1,097	12
Other S Bayshore	7	9	0	0	102	0	668	786	13
Outer Sunset	5	31	10	0	55	0	0	101	26
Park Merced	0	0	0	0	0	182	8,898	9,080	2
Richmond	8	174	31	39	83	0	0	335	19
Rincon Hill	0	0	0	0	69	337	2,270	2,676	5
Showpl/Potrero	3	33	15	69	0	100	2,150	2,370	6
South Central, Other	19	126	39	55	122	0	1,700	2,061	8
South of Market, Other	0	0	0	0	0	150	319	469	16
TB Combo	0	5	19	0	151	503	950	1,628	9
Treasure Island	0	0	0	0	0	0	8,619	8,619	3
VisVal	0	16	0	0	0	0	0	16	30
Western Addition	2	36	61	64	153	0	861	1,177	11
WSoMa	5	30	10	66	0	0	416	527	15
Grand Total	118	1,173	577	1,596	2,864	5,837	41,658	53,823	

Notes:

/1/ Housing unit counts are not rounded.

/2/ As the table categorizes by building size, numbers here represent total units as opposed to net units (subtracting replaced units), for which reason the unit count is higher than in other summary tables.

Sunset, the largest addition come in projects of two to nine units and single family projects. For the city as a whole, three out of every four units could come in a relative small number of projects or development programs containing more than 250 units, while the overwhelming majority of areas have a size distribution that is leaning more on the smaller end of the spectrum, suggesting the relative geographic concentration of proposed development.

Small scale, in-fill projects make up the bulk of pipeline projects, but account for a minority of units: More than two thirds of the residential projects would entail buildings with 10 units or less, while half the projects include three units or less. Summing the bottom half of all pipeline projects would contribute 2,900 units, or six percent of the total number of pipeline units. Areas where these small projects are typical include areas like Richmond, Ingleside, Inner Sunset, and Central

Except for Parkmerced, development in residentially zoned areas in the western part of the city is limited in scope and consists chiefly of small-scale in-fill projects. The majority of units, and the vast majority of projects are in buildings of 1 or 2 to 9 units.

Figure 2 shows the residential pipeline by building size and pipeline status. The residential pipeline shows that:

- Of the 3,500 units with building permits approved, 2,100 units are in buildings of 100 units and above.

- Only three percent of the residential pipeline will be in buildings with nine units or less across all entitlement stages.
- Single family homes constitute a fraction of one percent of the total units in the pipeline.

Project Size by Proposed Use

Nearly seven out of ten projects are residential. Another 21 percent are mixed use projects with residential and non-residential components. The remaining 10 percent or so of the projects are distributed among the commercial categories, with office, institutional and retail being the most frequent. There are also a few PDR and hotel projects.

The office projects are the largest in the pipeline, with a median size of 200,000 square feet. No other use type comes close to that, with the nearest follow-up being visitor-related uses, with a median size of 47,800 square feet.

Mixed projects, which contain more than one non-residential use, but where there is not a predominant use among them, are relatively rare. Two of these include California Pacific Medical Center projects currently under review. They are categorized under “Mixed” because they contain both institutional and office uses.

The “Mixres” category, which refers to projects with both residential and non-residential

TABLE 5: Pipeline Project Size, by Proposed Land Use

Proposed Use	Projects	Percent	Mean	Standard Deviation	Percentile				
					0	25	50 (Median)	75	100
CIE	19	2%	86,417	142,688	2,420	8,700	26,000	69,562	548,776
MIPS	25	3%	243,945	347,003	4,000	53,030	200,000	312,932	1,743,000
Mixed	7	1%	277,417	481,027	5,566	9,990	21,886	325,743	1,243,002
Mixres	162	21%	391,881	1,910,411	2,540	12,463	31,050	127,425	18,720,000
PDR	12	2%	52,813	131,750	1,000	2,175	5,825	28,410	464,553
Resident	530	69%	19,800	70,671	1,200	2,400	2,400	4,500	967,200
Retail/Ent	9	1%	125,399	214,731	8,681	10,265	16,000	53,000	608,688
Visitor	4	1%	53,731	17,296	40,370	44,593	47,750	56,889	79,054
Total	768	100%	111,508	894,235	1,000	2,400	3,600	28,605	18,720,000

components, includes the Bayview Waterfront project, helping explain both the high average size in the group as well as the 100th percentile at 18.7 million square feet. However, the group also includes a number of small and mid-sized projects with residential uses and ground floor retail. The median project size, at 26,000 square feet, gives a sense of the size.

Residential use-projects are the most numerous category, with 7 out of ten projects falling under this heading. They are fairly small, commonly two units as evidenced by the median. Seventy-five percent of projects are three units or less.⁶

Conversion of Commercial Space to Residential Use⁷

⁶ The data on size of each unit is spotty, so the square footage numbers reported for residential projects is based on a unit size assumption of 1,200 square feet per unit.

⁷ 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 the specific projects representing conversions or demolitions resulting in a net loss of PDR space (Table 6) and office space (Table 7).

There are 47 projects in the current pipeline database proposing demolition or conversion of existing production, distribution and repair-use (PDR) buildings to residential use.⁸ The corresponding figure for the conversion of office space is 34 projects. These projects represent approximately six percent (or 2,700 units) and five percent (or 2,400 units), respectively, of the residential units in the pipeline.

Conversion of PDR Space

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

- If the pipeline were developed as proposed, about 575,000 sq ft of PDR space would be lost to conversion or demolition.⁹ It would be

⁸ 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.

⁹ 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 not involving conversion or demolition of PDR space are not counted in this table. Table 1 shows a net loss of 375,000 sq ft as it is a net tally of all projects that add, convert or demolish PDR space while this table only counts loss.

TABLE 6: PDR Space Conversion to Residential Use, by Planning District

Neighborhood	Projects	Percent	Net Units	Percent	PDR Net	Percent	Avg Units / Project	Avg PDR Loss / Project
Balboa Park	1	2.1%	30	1.1%	-3,700	0.6%	30	-3,700
BVHP Area A,B	1	2.1%	10	0.4%	-3,900	0.7%	10	-3,900
Central Waterfront	2	4.3%	140	5.2%	-23,300	4.0%	70	-11,650
Downtown	3	6.4%	230	8.6%	-64,100	11.1%	77	-21,370
East SoMa	12	25.5%	580	21.7%	-180,700	31.3%	48	-15,060
India Basin	1	2.1%	0	0.0%	-2,600	0.5%	0	-2,600
Marina	1	2.1%	30	1.1%	-7,000	1.2%	30	-7,000
Market Octavia	2	4.3%	130	4.9%	-20,900	3.6%	65	-10,450
Mission	10	21.3%	370	13.9%	-121,300	21.0%	37	-12,130
Northeast	2	4.3%	70	2.6%	-33,300	5.8%	35	-16,650
Richmond	2	4.3%	10	0.4%	-3,000	0.5%	5	-1,500
Rincon Hill	2	4.3%	550	20.6%	-70,900	12.3%	275	-35,450
Showpl/Potrero	1	2.1%	100	3.7%	-15,500	2.7%	100	-15,500
TB Combo	2	4.3%	370	13.9%	-3,700	0.6%	185	-1,850
Western Addition	1	2.1%	30	1.1%	-9,100	1.6%	30	-9,100
WSoMa	4	8.5%	30	1.1%	-13,900	2.4%	8	-3,480
Grand Total	47	100.0%	2,670	100.0%	-576,800	100.0%	57	-12,270

TABLE 7: Office Space Conversion to Residential Use, by Planning District

Neighborhood	Projects	Percent	Net Units	Percent	Office Net	Percent	Avg Units / Project	Avg Loss / Project
Balboa Park	1	2.9%	30	1.3%	-6,200	1.0%	30	-6,200
Downtown	10	29.4%	580	24.6%	-300,800	48.4%	58	-30,100
East SoMa	2	5.9%	60	2.5%	-8,800	1.4%	30	-4,400
Inner Sunset	1	2.9%	20	0.8%	-2,200	0.4%	20	-2,200
Market Octavia	6	17.6%	740	31.4%	-54,900	8.8%	123	-9,200
Northeast	1	2.9%	20	0.8%	-15,900	2.6%	20	-15,900
Rincon Hill	2	5.9%	610	25.8%	-60,000	9.7%	305	-30,000
Showpl/Potrero	2	5.9%	140	5.9%	-46,800	7.5%	70	-23,400
South Central, Other	2	5.9%	10	0.4%	-3,900	0.6%	5	-2,000
TB Combo	2	5.9%	120	5.1%	-91,500	14.7%	60	-45,800
Western Addition	2	5.9%	20	0.8%	-9,400	1.5%	10	-4,700
WSoMa	3	8.8%	10	0.4%	-21,400	3.4%	3	-7,100
Grand Total	34	100.0%	2,360	100.0%	-621,700	100.0%	69	-18,300

replaced with residential units (2,700) and/or other commercial uses.

- Most of the PDR to residential conversions are found in Bayview Hunters Point, Central Waterfront, East SoMa and Mission districts, accounting together for more than two thirds of the overall loss. The loss of PDR space in these neighborhoods would in turn bring in 1,600 net new housing units.

Conversion of Office Space

- Approximately 600,000 sq ft of office space is 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 and Transbay districts would lose the most office space – around 400,000 square feet, or five out of eight converted square feet.
- A total of 2,400 units are proposed to be built replacing the lost office space.

Nearly all units replacing office uses are in mid- to high-rise residential structures of 20 to 500 housing units in high density zoning districts. These projects are mostly concentrated in the eastern half of the city: Rincon Hill, East SoMa, Showplace

Square & Potrero Hill, Transbay, Mission and Downtown.

These conversions of a number of *individual* office buildings reported here notwithstanding, taken together with other commercial developments in the pipeline as shown in Table 1, the overall result would still be a net addition of office space. As reported in Table 1, the net addition of office amounts to 11 million sq. ft. citywide.

Projects Under Planning Review

Project Application Filings

Table 8 shows that a total of 9 planning applications¹⁰ were filed in the third quarter of 2011, down from 20 projects in the previous quarter. Corresponding to these 9 projects are 440 residential units and 50,000 square feet of commercial development. The quarter's filings are now below the six quarter moving average, perhaps suggesting a slight slowdown in applications overall. Taken as a whole since 2001 (Figures 4 and 5), numbers are still below the mid-decade boom years, and will probably remain so in the foreseeable future. Still, the average size of projects has ticked up a bit since recent decade lows. There are, however as seen in this report, still a large reservoir of projects in the pipeline from before the recession. As the completion of many of the larger projects are many years in the future, they may be less prone to short term economic stresses. Still, some sponsors will undoubtedly find it much harder to secure financing for their projects, the relative strength of the San Francisco market in this downturn notwithstanding.

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 authorization, while others are abandoned altogether before approval.

A few of the projects filed during the third quarter of 2011 include:

- At 8 Washington Street, a project would include the temporary removal of the existing golden gateway tennis and swim club facility and the construction of two mixed use buildings and outdoor health club facilities (170 residential units, 18,600 sq. ft. of retail and restaurant, a 12,000 sq. ft. health club and 520 parking spaces

- At Octavia & Laguna, a mixed use development - residential over podium garage, with approx. 182 units of apartments, 126 spaces maximum parking garage, and 3,900 sq.ft. corner retail space
- At 1321 Mission Street, the demolition of the existing building and construction of a new 11-story mixed-use building with 180 dwelling units and 4,400 sf of ground level commercial

Other Project Activity

- At 1155 Fourth St, a 6 story structure with 147 dwelling units and 9,400 square feet of retail in the Mission Bay district is under construction, under the jurisdiction of the San Francisco Redevelopment Agency.

¹⁰ For the purposes of this table, we only count projects where housing units or space would be added, and thus ignore administrative filings. Note that the filings may represent different versions of the same project should a later entitlement be applied for the same property, and that numbers may thus include a measure of overlap....

TABLE 8: Pipeline 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
2001 Q1	63	410	7	444,000	53	570	11	1,207,000
2001 Q2	78	460	6	375,000	56	210	4	619,000
2001 Q3	55	510	9	791,000	46	1,000	22	298,000
2001 Q4	44	320	7	328,000	45	640	14	1,839,000
2002 Q1	78	820	11	951,000	35	250	7	341,000
2002 Q2	56	1,020	18	1,357,000	41	220	5	1,141,000
2002 Q3	66	1,000	15	1,288,000	29	240	8	96,000
2002 Q4	66	2,690	41	215,000	32	470	15	700,000
2003 Q1	82	3,800	46	1,751,000	49	810	17	217,000
2003 Q2	87	2,510	29	412,000	56	440	8	263,000
2003 Q3	57	550	10	310,000	47	1,270	27	1,169,000
2003 Q4	57	1,330	23	402,000	40	1,890	47	206,000
2004 Q1	63	1,130	18	73,000	32	460	14	369,000
2004 Q2	81	2,090	26	289,000	52	440	8	364,000
2004 Q3	104	3,130	30	474,000	39	280	7	105,000
2004 Q4	84	2,480	30	403,000	30	470	16	46,000
2005 Q1	77	1,380	18	471,000	47	400	9	46,000
2005 Q2	75	850	11	317,000	50	1,590	32	76,000
2005 Q3	74	2,140	29	401,000	50	1,300	26	713,000
2005 Q4	81	1,800	22	1,282,000	41	890	22	468,000
2006 Q1	45	2,820	63	480,000	49	1,570	32	116,000
2006 Q2	28	1,840	66	85,000	36	640	18	178,000
2006 Q3	55	2,600	47	1,157,000	30	1,580	53	119,000
2006 Q4	39	950	24	2,136,000	27	500	19	1,157,000
2007 Q1	32	800	25	137,000	20	840	42	168,000
2007 Q2	28	310	11	1,014,000	20	180	9	47,000
2007 Q3	53	20,020	378	4,089,000	16	170	11	1,061,000
2007 Q4	46	930	20	125,000	18	310	17	59,000
2008 Q1	37	6,040	163	1,106,000	26	2,690	103	275,000
2008 Q2	33	830	25	760,000	26	350	13	281,000
2008 Q3	32	750	23	1,791,000	25	760	30	2,000
2008 Q4	25	300	12	25,000	35	1,080	31	876,000
2009 Q1	23	260	11	195,000	27	630	23	30,000
2009 Q2	25	330	13	100,000	22	490	22	82,000
2009 Q3	29	230	8	10,000	10	540	54	42,000
2009 Q4	23	340	15	171,000	15	560	37	89,000
2010 Q1	19	280	15	13,000	13	180	14	149,000
2010 Q2	22	950	43	1,630,000	18	340	19	-21,000
2010 Q3	26	70	3	17,000	17	10,420	613	3,756,000
2010 Q4	20	930	47	10,000	18	550	31	791,000
2011 Q1	25	890	36	64,000	12	5,700	475	480,000
2011 Q2	20	130	7	-8,000	19	8,890	468	640,000
2011 Q3	9	440	49	48,000	11	1,040	95	47,000

Notes:

The case types for the purposes of this list include Transportation Study, Certificate of Appropriateness, Office Development Annual Limit - Sec. 321, Conditional Use, Environmental Review, Federal Environmental Review, Proposition M Review, Variance, Exception to Downtown Controls - Sec. 309.

FIGURE 4: Pipeline Project Applications Filed and Approved with the Planning Department, by Quarter

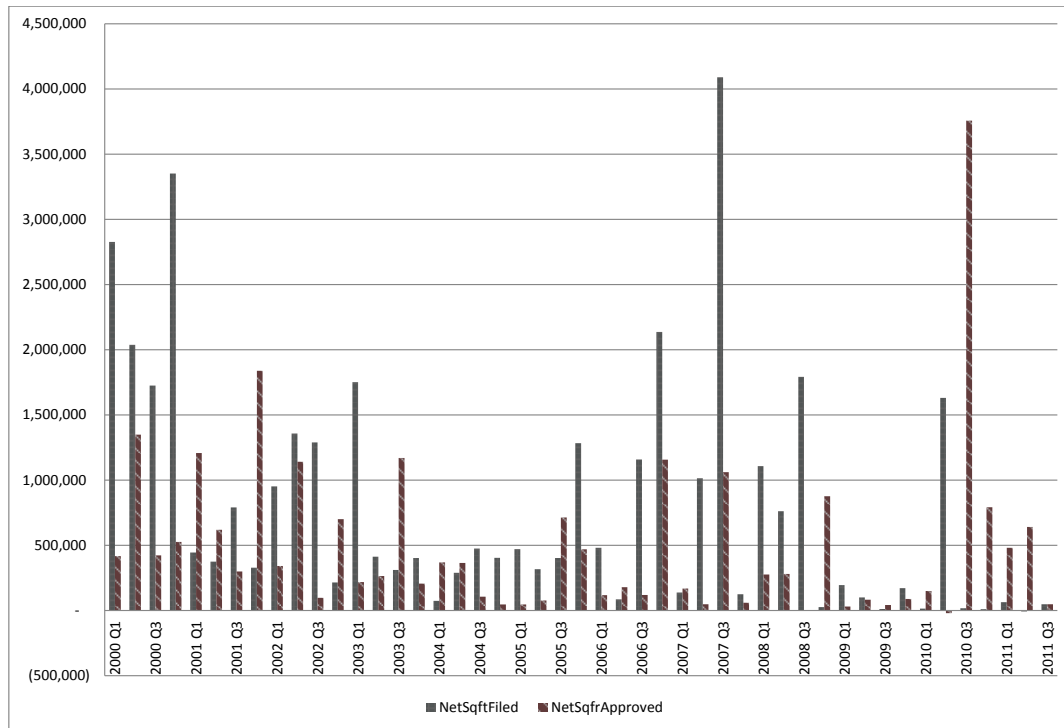
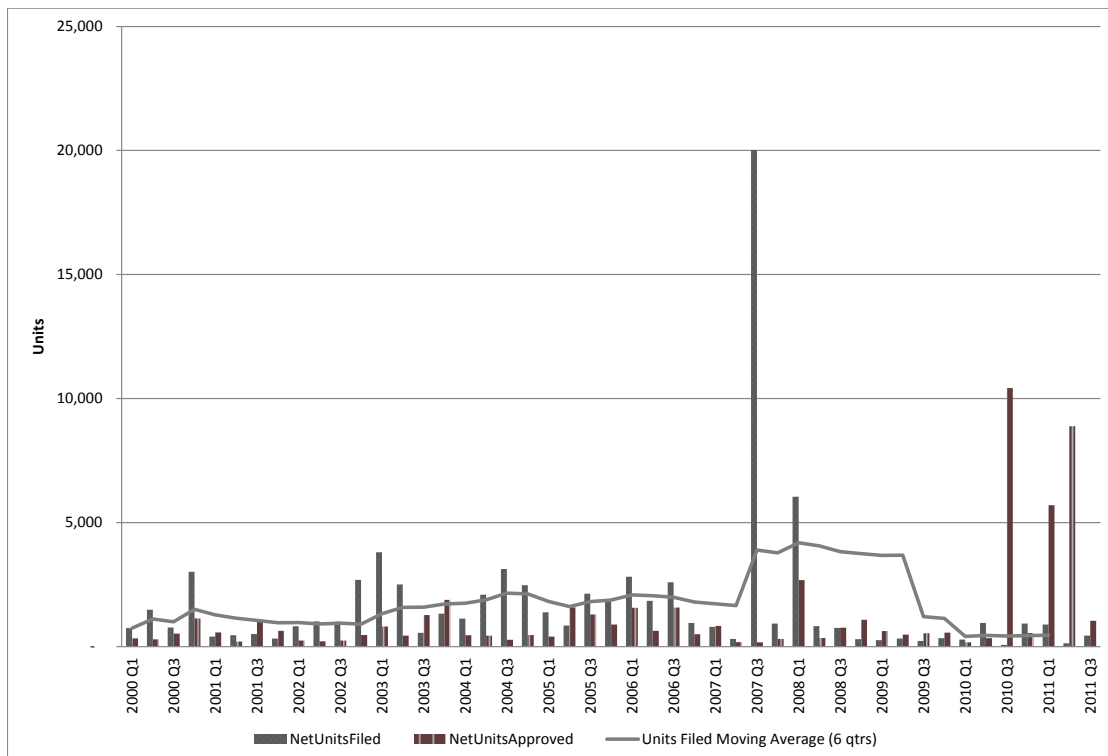


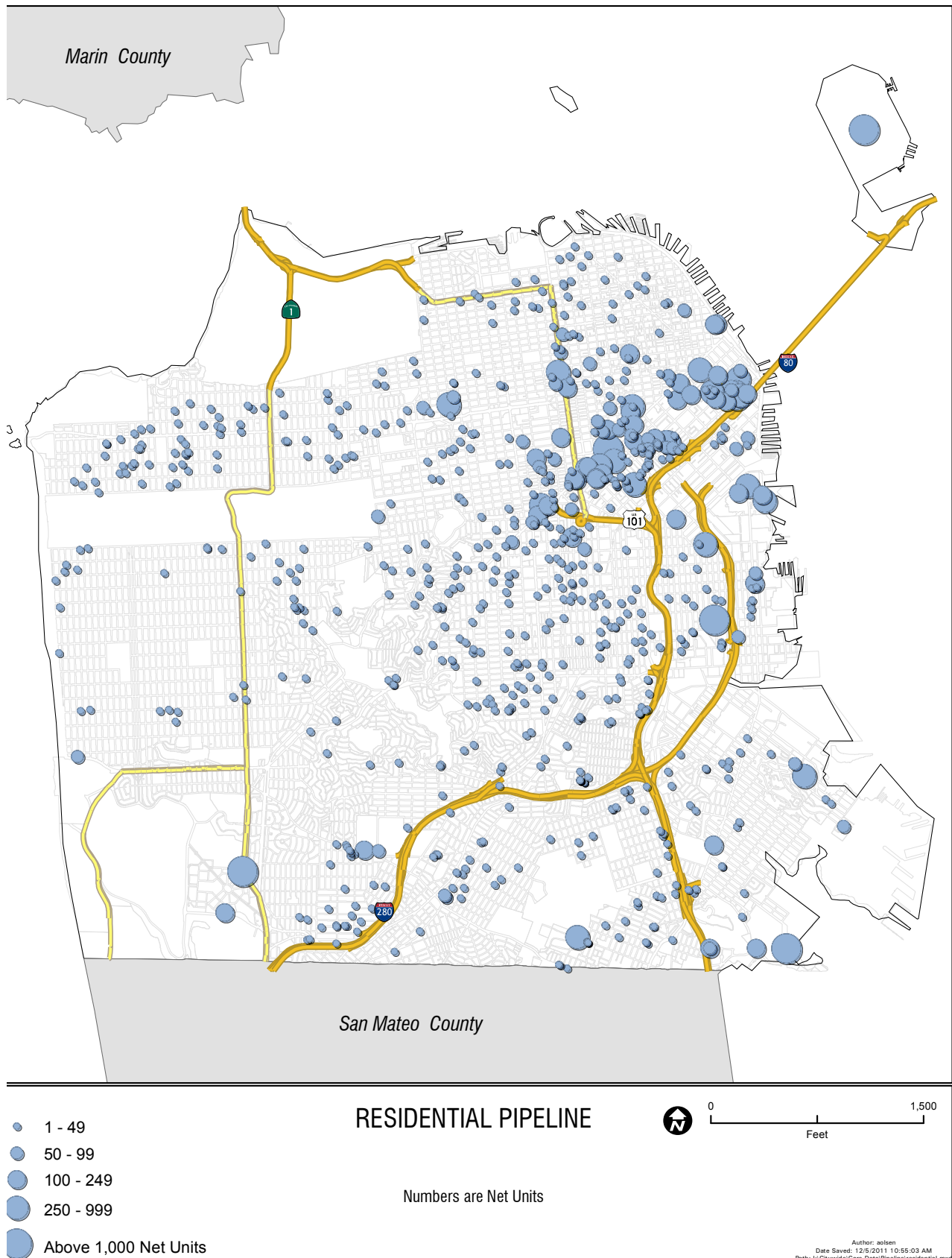
FIGURE 5: Pipeline Units Filed and Approved by the Planning Department, by Quarter



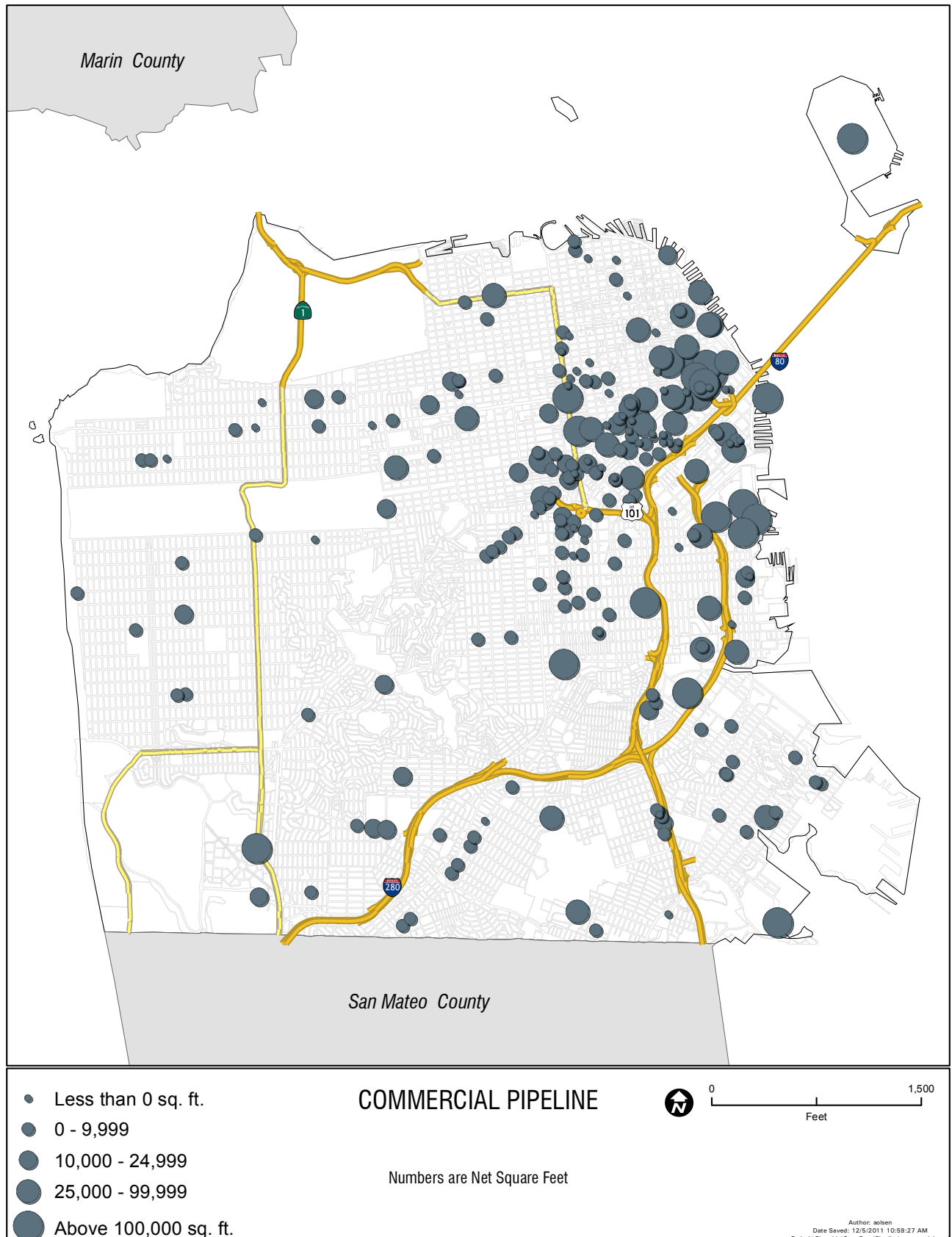
MAP 1: Neighborhoods Highlighted in the Pipeline Report



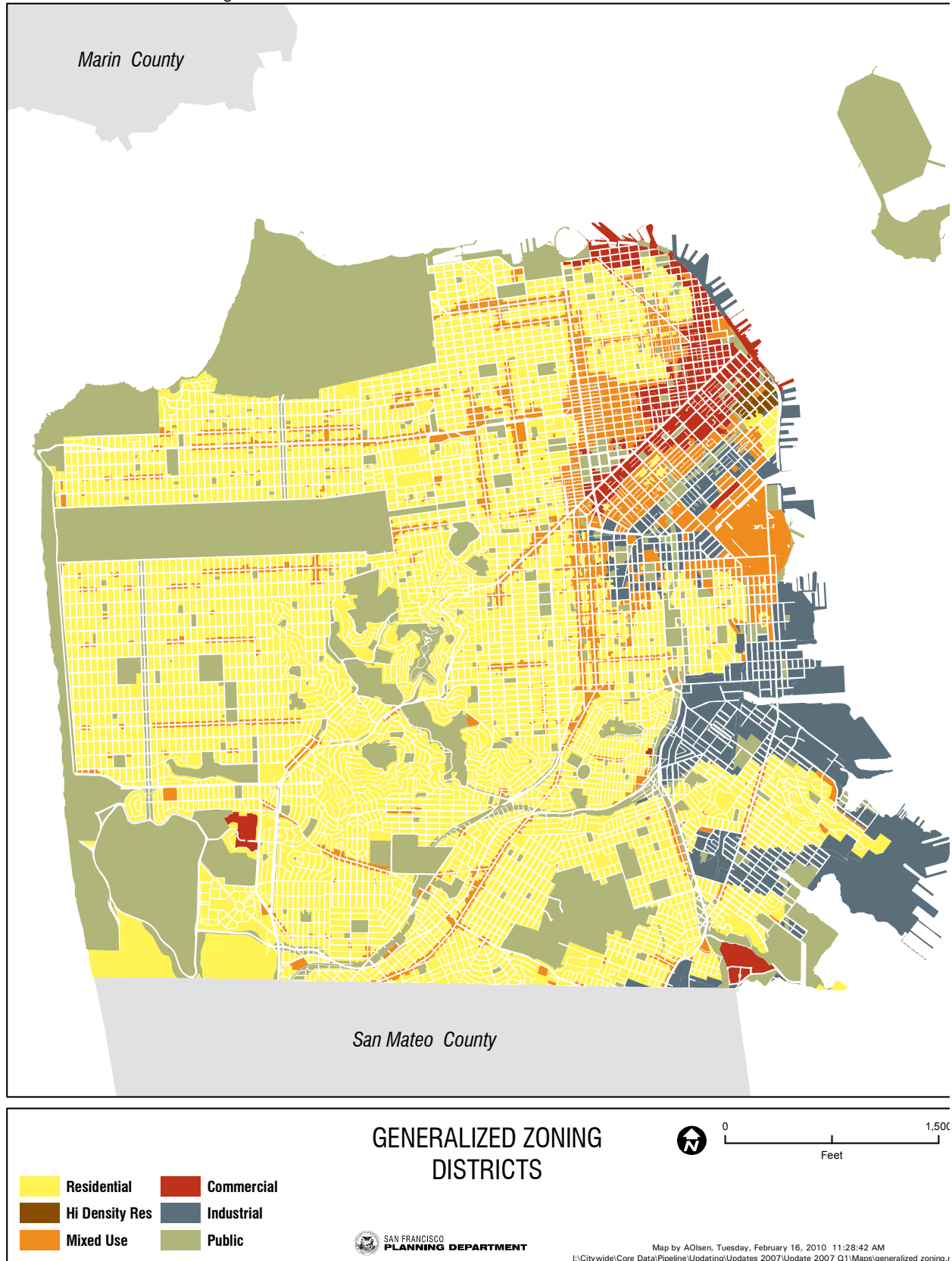
MAP 2: Residential Pipeline



MAP 3: Commercial Pipeline



MAP 4: Generalized Zoning Districts



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 BESTSTAT = BP Filed).
DEVELOPMENT PROFILE	
Units	Net total dwelling units.
Net Comm'l Sq. Ft	Nonresidential gross square feet (GSF). Best interpreted as net new useable GSF with demolition of existing space subtracted (not total project gsf).
CIE	CIE or Cultural, Institutional, Educational includes educational services, social services, museums, zoos, and membership organizations.
MED	Medical includes health services offices and hospitals and laboratories throughout the City.
MIPS	MIPS is largely any activity where information is the chief commodity that is processed (managerial, information, professional, business services, multi-media).
PDR	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 yards or open storage areas.
RETAIL/ENT	Retail Includes retail trade, amusement and recreation services, and personal services located throughout the City.
VISITOR	Visitor (or Hotel) includes hotels and other lodging located throughout the City.
Land Use	This field summarizes 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 3, 2011

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

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
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CONSTRUCTION

4154001	1001 POTRERO AV	Showpl/Potrero	419k	0	CIE	CIE	12/15/2010
8720001	435 CHINA BASIN ST	South of Market, Other	0k	319	Resident	--N/A--	6/23/2011
3766009	333 Harrison St	Rincon Hill	0k	308	Resident	--N/A--	8/10/2011
3721122	535 MISSION ST	TB Combo	296k	0	MIPS	MIPS	8/31/2011
0766001	525 GOLDEN GATE AV	Downtown	277k		MIPS	MIPS	6/4/2010
3717019	120 HOWARD ST	Downtown	67k	0	MIPS	MIPS	9/13/2011
4058010	2235 03RD ST	Central Waterfront	5k	196	Mixres	Retail/Ent	9/15/2011
4991277	833-881 Jamestown	Candlestick	0k	198	Resident	--N/A--	9/17/2007
3180003	1150 OCEAN AV	Balboa Park	15k	159	Mixres	Retail/Ent	9/20/2011
0323015	472 ELLIS ST	Downtown	-66k	60	Resident	--N/A--	9/15/2011
0871016	1844 MARKET ST	Market Octavia	3k	113	Mixres	Retail/Ent	7/17/2007
3704069	973 MARKET ST	Downtown	-53k	100	Mixres	Retail/Ent	8/14/2008
4228158	1301 Indiana St	Central Waterfront	-10k	71	Mixres	Retail/Ent	12/19/2007
3513008	150 OTIS ST	Market Octavia	-90k	76	Resident	--N/A--	9/15/2011
3788012	166 TOWNSEND ST	East SoMa	-74k	66	Mixres	Retail/Ent	9/20/2011
3731074	A WOMANS PLACE	East SoMa	0k	25	Resident	--N/A--	7/1/2008
3532014	299 VALENCIA ST	Market Octavia	4k	44	Mixres	Retail/Ent	7/8/2011
0816003	205 FRANKLIN ST	Market Octavia	14k	0	Mixed	Retail/Ent	9/21/2011
0756001	1345 TURK ST	Western Addition	0k	32	Resident	--N/A--	9/15/2011
4287018	1263 CONNECTICUT ST	Other S Bayshore	28k	0	PDR	PDR	9/13/2011
0599008	1840 WASHINGTON ST	Marina	-7k	26	Resident	--N/A--	9/21/2011
1028028	2829 CALIFORNIA ST	Western Addition	0k	12	Mixres	Retail/Ent	8/30/2011
3794002A	750 02ND ST	East SoMa	-3k	14	Mixres	Retail/Ent	9/20/2011
1127007	1816 EDDY ST	Western Addition	0k	19	Resident	--N/A--	10/8/2010
2018003	2400 NORIEGA ST	Outer Sunset	12k	0	CIE	CIE	8/23/2011

BP ISSUED

3507041	1401 MARKET ST	Downtown	12k	719	Mixres	Retail/Ent	4/25/2008
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Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3702052	1190 MISSION ST	Downtown	0k	418	Resident	--N/A--	6/30/2011
8720016	1455 03RD ST	Mission Bay	381k	0	MIPS	MIPS	4/23/2010
8711023	185 CHANNEL ST	Mission Bay	0k	315	Resident	--N/A--	8/15/2011
8709004	1600 OWENS ST	Mission Bay	245k	0	MIPS	MIPS	6/3/2008
8711014	1110 04TH ST	South of Market, Other	0k	150	Resident	--N/A--	1/26/2011
0691008	1285 SUTTER ST	Downtown	-8k	107	Mixres	Retail/Ent	8/15/2011
3749064	25 ESSEX ST	TB Combo	0k	120	Resident	--N/A--	6/8/2011
0349001	101 GOLDEN GATE AV	Downtown	20k	90	Mixres	CIE	8/24/2011
0768013	701 GOLDEN GATE AV	Market Octavia	0k	100	Resident	--N/A--	8/21/2007
0348015	277 GOLDEN GATE AV	Downtown	-50k	88	Resident	--N/A--	12/22/2008
7380038	655 BROTHERHOOD WY	Ingleside, Other	15k	0	CIE	CIE	12/12/2008
5476009	6600 Third Street	BVHP Area A,B	0k	30	Resident	--N/A--	2/22/2011
0346005	350 GOLDEN GATE AV	Downtown	0k	19	Resident	--N/A--	8/16/2011
3747012	325 FREMONT ST	Rincon Hill	0k	69	Resident	--N/A--	12/17/2010
3725101	474 NATOMA STREET	Downtown	0k	55	Resident	--N/A--	11/13/2009
4624004	Hunters View	Other S Bayshore	0k	52	Resident	--N/A--	9/9/2010
3555056	1731 15TH ST	Mission	0k	25	Resident	--N/A--	8/8/2011
0596024	1946 POLK ST	Northeast	-9k	39	Mixres	Retail/Ent	8/17/2011
0492025	2026 LOMBARD ST	Marina	40k	0	Visitor	Visitor	4/11/2007
0619012	1860 VAN NESS AV	Northeast	2k	35	Mixres	Retail/Ent	11/17/2008
0668012	1465 PINE ST	Northeast	0k	35	Resident	--N/A--	5/10/2011
5943008	268 MADISON ST	South Central, Other	25k	1	Mixres	Retail/Ent	6/6/2011
1145003	2130 FULTON ST	Western Addition	26k	0	CIE	CIE	1/10/2011
6473040	5735 MISSION ST	South Central, Other	5k	20	Mixres	CIE	2/18/2011
1742043	1266 09TH AV	Inner Sunset	-3k	15	Mixres	Retail/Ent	12/9/2010
3554027	411 VALENCIA ST	Mission	1k	16	Mixres	Retail/Ent	6/22/2011

BP REINSTATED

3721013	524 HOWARD ST	TB Combo	200k	0	MIPS	MIPS	6/8/2007
0671006	1450 FRANKLIN ST	Western Addition	-24k	69	Resident	--N/A--	6/25/2009
0854001	1600 MARKET ST	Market Octavia	17k	24	Mixres	Retail/Ent	9/16/2011
0343014	181 TURK ST	Downtown	3k	32	Mixres	Retail/Ent	3/10/2009

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Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
0274008	850 BUSH ST	Northeast	0k	23	Resident	--N/A--	4/10/2008

BP APPROVED

3547002A	1880 MISSION ST	Mission	-64k	194	Resident	--N/A--	8/20/2009
3789003	72 TOWNSEND ST	East SoMa	0k	74	Resident	--N/A--	9/23/2011
4224015	1004 MISSISSIPPI ST	Showpl/Potrero	0k	28	Resident	--N/A--	1/16/2009

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3710017	350 MISSION ST	TB Combo	416k	0	MIPS	MIPS	8/1/2011
3735063	222 02ND ST	TB Combo	400k	0	MIPS	MIPS	11/30/2007
3748006	340 FREMONT ST	Rincon Hill	-43k	384	Mixres	Retail/Ent	9/19/2005
0269028	350 BUSH ST	Downtown	347k	0	MIPS	MIPS	8/7/2007
8721012	455 Mission Bay S Blvd	Mission Bay	334k	0	MIPS	MIPS	6/26/2008
3732009	900 FOLSOM ST	East SoMa	6k	282	Mixres	Retail/Ent	6/1/2011
3701064	55 9TH ST	Downtown	0k	273	Resident	--N/A--	8/23/2011
3736114	Foundry Square III	TB Combo	252k	0	MIPS	MIPS	9/8/2008
3749059	45 LANSING ST	Rincon Hill	-14k	224	Resident	--N/A--	9/14/2010
5431A043	5800 03RD ST	BVHP Area A,B	0k	188	Resident	--N/A--	9/28/2005
3732008	260 05TH ST	East SoMa	-36k	182	Mixres	Retail/Ent	6/1/2011
8713001	1155 04TH ST	Mission Bay	0k	147	Resident	--N/A--	8/4/2011
0872005	1960-1998 MARKET ST	Market Octavia	9k	115	Mixres	Retail/Ent	12/21/2010
3510001	1415 MISSION ST	Downtown	0k	117	Mixres	MIPS	10/31/2008
3535001	2001 MARKET ST	Market Octavia	-15k	82	Mixres	Retail/Ent	12/20/2010
4991600	101 EXECUTIVE PARK BL	Executive Park	0k	107	Resident	--N/A--	10/25/2010
4352007	1301 CESAR CHAVEZ ST	BVHP Area A,B	82k	0	MIPS	MIPS	10/15/2007
3553008	490 SOUTH VAN NESS AV	Mission	-1k	84	Mixres	Retail/Ent	10/5/2010
4991601	101 EXECUTIVE PARK BL	Executive Park	0k	81	Resident	--N/A--	6/16/2005
0165021	235 BROADWAY	Northeast	5k	75	Mixres	Retail/Ent	5/16/2011
3731003	226 06TH ST	East SoMa	0k	37	Resident	--N/A--	6/16/2008
1098009	1401 DIVISADERO ST	Western Addition	57k	-21	MIPS	MIPS	12/21/2006
3736085	48 TEHAMA ST	TB Combo	0k	66	Resident	--N/A--	7/12/2006

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
6969011	5050 MISSION ST	South Central, Other	0k	61	Resident	--N/A--	6/10/2010
0165022	717 BATTERY ST	Northeast	28k	0	MIPS	MIPS	12/1/2008
4059009	2298 03RD ST	Central Waterfront	14k	40	Mixres	Retail/Ent	2/6/2006
3788039	345 BRANNAN ST	East SoMa	53k	0	MIPS	MIPS	10/27/2008
3703086	570 JESSIE ST	Downtown	-15k	47	Resident	--N/A--	2/2/2006
0837003	1 FRANKLIN ST	Market Octavia	2k	35	Mixres	Retail/Ent	12/3/2009
5992A060	495 CAMBRIDGE ST	South Central, Other	0k	35	Resident	--N/A--	12/22/2010
3754039	1075 FOLSOM ST	East SoMa	5k	31	Resident	--N/A--	12/22/2005
3727168	1145 MISSION ST	Downtown	2k	25	Mixres	Retail/Ent	6/9/2006
3754066	1091 FOLSOM ST	East SoMa	-2k	30	Resident	--N/A--	6/10/2005
4792029	1212 THOMAS AV	BVHP Area A,B	30k	0	PDR	PDR	7/23/2008
0527002	2559 VAN NESS AV	Marina	-2k	27	Resident	--N/A--	6/1/2011
3560001	2210 MARKET ST	Market Octavia	2k	22	Mixres	Retail/Ent	10/2/2008
0512025	2353 LOMBARD ST	Marina	1k	21	Mixres	Retail/Ent	7/29/2010
3548032	1875 MISSION ST	Mission	-35k	23	Mixres	Retail/Ent	12/23/2010
3521005	340 11TH ST	WSoMa	6k	20	Mixres	Retail/Ent	4/11/2005
3732071	468 CLEMENTINA ST	East SoMa	0k	25	Resident	--N/A--	7/20/2005
3752019	870 HARRISON ST	WSoMa	-6k	22	Mixres	Retail/Ent	7/14/2006
1368049	4614 CALIFORNIA ST	Richmond	14k	0	Mixed	MIPS	1/23/2007
0101004	1741 POWELL ST	Northeast	-12k	18	Mixres	Retail/Ent	8/12/2009
3548039	1801 MISSION ST	Mission	3k	18	Mixres	Retail/Ent	7/17/2006
3588012	3500 19TH ST	Mission	3k	17	Mixres	Retail/Ent	5/1/2006
3547027	80 JULIAN AV	Mission	13k	7	Mixres	CIE	11/30/2010
3726047	537 NATOMA ST	East SoMa	-5k	14	Mixres	PDR	9/1/2005
3776092	246 RITCH ST	East SoMa	-4k	19	Resident	--N/A--	1/5/2007
4058008	616 20TH ST	Central Waterfront	-1k	16	Mixres	Retail/Ent	12/9/2010
0832026	360 OCTAVIA ST	Market Octavia	1k	16	Mixres	Retail/Ent	10/1/2008
3617008	1050 VALENCIA ST	Mission	0k	15	Mixres	Retail/Ent	12/27/2010
3821007	1150 16th Street	Showpl/Potrero	1k	15	Mixres	Retail/Ent	7/22/2011
0832025	300 OCTAVIA ST	Market Octavia	0k	16	Resident	--N/A--	10/1/2008
1084001B	1 Stanyan Street	Richmond	-2k	13	Mixres	Retail/Ent	12/14/2007
3557062	200 DOLORES ST	Market Octavia	-8k	13	Resident	--N/A--	8/19/2008

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Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3197010	1446 OCEAN AV	Balboa Park	-2k	13	Resident	--N/A--	10/31/2008
2901C001	701 PORTOLA DR	Inner Sunset	10k	0	Retail/Ent	Retail/Ent	7/25/2011
3704015	942 MISSION ST	Downtown	54k		Visitor	Visitor	5/13/2011

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4886008	Bayview Waterfront	Candlestick	6120k	10,237	Mixres	MIPS	8/3/2010
7303001	Parkmerced	Park Merced	478k	5,677	Mixres	Retail/Ent	5/25/2011
1939001	Treasure Island	Treasure Island	381k	7,800	Mixres	Retail/Ent	3/15/2011
3702053	1169 MARKET ST	Downtown	34k	1,083	Mixres	Retail/Ent	8/3/2006
3746001	390 Main St	Rincon Hill	0k	806	Resident	--N/A--	11/18/2003
4624009	Hunters View	Other S Bayshore	1k	349	Mixres	Retail/Ent	12/10/2008
3834001	1000 16TH ST	Showpl/Potrero	26k	450	Mixres	Retail/Ent	7/28/2011
3747320	The Californian	Rincon Hill	-2k	432	Mixres	MIPS	8/4/2006
5262004	2095 Jerrold Ave	BVHP Area A,B	128k		PDR	PDR	3/26/2010
0857001	55 Laguna Street	Market Octavia	28k	440	Mixres	Retail/Ent	1/17/2008
3704071	949 Market Street	Downtown	237k	0	Retail/Ent	Retail/Ent	11/8/2010
3765015	One Rincon Hill Phase II	Rincon Hill	0k	340	Resident	--N/A--	8/16/2005
8722001	300 16TH ST	Mission Bay	313k	0	MIPS	MIPS	10/2/2008
3722027	151 THIRD ST	Downtown	67k		CIE	CIE	7/13/2010
0757025	1100 GOLDEN GATE AV	Western Addition	0k	98	Resident	--N/A--	12/18/2008
0813007	1390 MARKET ST	Market Octavia	-2k	230	Mixres	Retail/Ent	5/28/2009
0345004	220 GOLDEN GATE AV	Downtown	-31k	172	Mixres	MIPS	9/10/2008
0331010	168 EDDY ST	Downtown	15k	170	Mixres	Retail/Ent	3/26/2009
7331003	800 Brotherhood Way	Park Merced	0k	182	Resident	--N/A--	12/10/2007
0794015	746 LAGUNA ST	Market Octavia	2k	136	Mixres	MIPS	5/13/2010
0807010	580 HAYES ST	Market Octavia	42k	90	Mixres	MED	3/9/2011
3722079	134-140 NEW MONTGO	TB Combo	-85k	118	Mixres	Retail/Ent	12/11/2008
3767305	429 BEALE ST	Rincon Hill	-36k	113	Resident	--N/A--	5/14/2009
1073013	800 PRESIDIO AV	Richmond	10k	83	Mixres	CIE	4/28/2011
3703079	1036-1040 MISSION ST	Downtown	1k	100	Mixres	Retail/Ent	5/14/2009
1228005	690 STANYAN ST	Buena Vista	11k	56	Mixres	Retail/Ent	10/23/2008
1052024	2655 BUSH ST	Western Addition	-41k	84	Mixres	Retail/Ent	10/10/2008

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Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3180001	50 PHELAN AV	Balboa Park	12k	71	Mixres	Retail/Ent	7/12/2010
0327011	72 ELLIS ST	Downtown	79k		Visitor	Visitor	3/25/2010
6969001	5050 MISSION ST	South Central, Other	7k	61	Mixres	Retail/Ent	8/14/2008
0808036	401 Grove Street	Market Octavia	5k	63	Mixres	Retail/Ent	7/14/2011
0711031	1100 ELLIS ST	Western Addition	12k	0	CIE	CIE	8/6/2009
0336017	245 HYDE ST	Downtown	-27k	65	Resident	--N/A--	4/10/2008
0258033	500 PINE ST	Downtown	57k		MIPS	MIPS	3/15/2001
3706063	721 MARKET ST	Downtown	-70k	44	Mixres	MIPS	4/20/2006
2515001	2800 SLOAT BL	Outer Sunset	10k	55	Resident	--N/A--	11/13/2008
0347016	399 GOLDEN GATE AV	Downtown	53k	0	Retail/Ent	Retail/Ent	11/27/2007
0293002	153 KEARNY ST	Downtown	-40k	51	Resident	--N/A--	4/13/2006
3532091	245 VALENCIA ST	Market Octavia	13k	0	CIE	CIE	9/22/2011
0595013	1645-1661 PACIFIC AV	Northeast	-27k	50	Resident	--N/A--	11/4/2010
3794024	144 KING ST	East SoMa	44k	0	Visitor	Visitor	4/7/2011
3753008	374 5TH ST	East SoMa	0k	47	Resident	--N/A--	12/20/2010
3534069	25 DOLORES ST	Market Octavia	-19k	47	Resident	--N/A--	4/7/2011
3785003	690 05TH ST	WSoMa	32k	0	Visitor	Visitor	6/17/2009
3980008	1717 17TH ST	Showpl/Potrero	-13k	41	Mixres	PDR	7/15/2010
1029003	2901 California St	Western Addition	16k	-3	CIE	CIE	6/16/2009
3753081	345 06TH ST	East SoMa	0k	36	Mixres	Retail/Ent	4/2/2009
0828012	735 Fell St	Western Addition	16k	0	CIE	CIE	2/2/2008
0279011	1080 SUTTER ST	Downtown	1k	35	Mixres	Retail/Ent	5/28/2009
0570010	1622 BROADWAY	Marina	0k	34	Resident	--N/A--	3/12/2009
3639002	2652 HARRISON ST	Mission	-7k	30	Resident	--N/A--	12/16/2010
7148040	ONE CAPITOL AV	Ingleside, Other	0k	28	Resident	--N/A--	5/13/2010
0028014	1255- 1275 COLUMBUS A	Northeast	-9k	20	Mixres	Retail/Ent	6/8/2011
2623006	376 CASTRO ST	Buena Vista	2k	24	Mixres	Retail/Ent	2/6/2006
3564091	2299 MARKET ST	Central	7k	18	Mixres	Retail/Ent	8/16/2010
3731101	42 HARRIET ST	East SoMa	0k	23	Resident	--N/A--	12/20/2010
3596113	899 VALENCIA ST	Mission	5k	18	Mixres	Retail/Ent	5/26/2011
3965001	2401 16TH ST	Mission	2k	12	Mixres	MIPS	4/21/2011
1028003	2829 California Street	Western Addition	0k	12	Mixres	Retail/Ent	1/17/2008

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Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
0668013	1461 PINE ST	Northeast	-5k	15	Mixres	Retail/Ent	5/9/2006
3553054	1501 15TH ST	Mission	8k	40	Retail/Ent	Retail/Ent	5/9/2011

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3708006	50 01ST ST	TB Combo	1134k	600	Mixres	Visitor	12/21/2006
6310001	1654 Sunnydale Ave	South Central, Other	59k	915	Mixres	Retail/Ent	4/28/2010
3720001	TRANSBAY TOWER	TB Combo	1743k	0	MIPS	MIPS	7/1/2008
4167004	1 TURNER TR	Showpl/Potrero	30k	1,094	Mixres	Retail/Ent	6/30/2010
0694005	CPMC HOSPITAL	Downtown	702k	-25	Mixed	CIE	6/10/2010
3719010	181 FREMONT ST	TB Combo	493k	140	Mixres	MIPS	5/15/2007
6575002	CPMC - ST. LUKE'S HOSPIT	Bernal Heights	165k	0	Mixed	CIE	6/10/2010
9900030	America's Cup Pier 30/32	South of Market, Other	609k	0	Retail/Ent	Retail/Ent	6/24/2010
3756003	350 08TH ST	WSoMa	57k	416	Mixres	Retail/Ent	9/7/2007
0244001	950 MASON STREET	Northeast	-295k	160	Mixres	Visitor	2/11/2009
0331016	231 ELLIS ST	Downtown	22k	400	Mixres	MIPS	1/24/2006
3736074	41 TEHAMA ST	TB Combo	-1k	350	Resident	--N/A--	10/31/2006
1075001	Westside Courts Phas	Western Addition	0k	450	Resident	--N/A--	12/31/2008
9900015	Pier 15	Northeast	36k	0	CIE	CIE	8/11/2009
0647007	1634 PINE ST	Western Addition	0k	250	Mixres	MIPS	11/5/2008
3706093	706 MISSION ST	Downtown	35k	220	Mixres	CIE	9/11/2008
0836002	1540 MARKET ST	Market Octavia	-13k	180	Mixres	Retail/Ent	2/27/2009
0201012	8 Washington Street	Northeast	32k	170	Mixres	Retail/Ent	12/4/2007
0168058	8 Washington Street	Northeast	28k	170	Mixres	Retail/Ent	8/5/2011
0238002	300 CALIFORNIA ST	Downtown	62k	0	MIPS	MIPS	12/19/2007
0831023	MARKET OCTAVIA - PARC	Market Octavia	4k	182	Mixres	Retail/Ent	8/3/2011
3509043	104 9th Street	Downtown	-8k	180	Mixres	Retail/Ent	9/29/2011
3507042	1400 MISSION ST	Downtown	4k	165	Mixres	Retail/Ent	4/8/2009
3725015	938 HOWARD ST	East SoMa	-19k	154	Mixres	Retail/Ent	3/27/2006
0192014	Chinese Hospital	Northeast	68k	0	CIE	CIE	6/26/2008
0250001	1401 CALIFORNIA ST	Northeast	-19k	95	Mixres	Retail/Ent	10/20/2008
3707052	2 NEW MONTGOMERY ST	TB Combo	0k	125	Resident	--N/A--	12/4/2007
3912001	1-25 Division Street	Showpl/Potrero	-35k	100	Mixres	Retail/Ent	1/26/2006

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Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3740027	SPEAR STREET AND FOLS	TB Combo	0k	85	Resident	--N/A--	6/8/2007
9900041H	1/2-PIER 33	Northeast	13k	0	PDR	PDR	8/27/2008
4045002	740 ILLINOIS ST and 2121	Central Waterfront	-8k	70	Resident	--N/A--	2/12/2010
3543011	2175 MARKET ST	Market Octavia	6k	60	Mixres	Retail/Ent	8/31/2006
3703012	527 STEVENSON ST	Downtown	-44k	67	Mixres	Retail/Ent	5/13/2011
0619009	1800 Van Ness Ave.	Northeast	-1k	62	Mixres	Retail/Ent	2/1/2011
0287013	300 Grant Ave.	Downtown	-20k	45	Mixres	Retail/Ent	6/1/2011
3753005	205 SHIPLEY ST	East SoMa	-11k	51	Mixres	Retail/Ent	5/26/2006
3731001	200-214 6th St	East SoMa	3k	50	Mixres	Retail/Ent	2/9/2011
0855011	4 OCTAVIA ST	Market Octavia	4k	49	Mixres	Retail/Ent	10/6/2008
0318020	651 GEARY ST	Downtown	-8k	46	Mixres	Retail/Ent	8/15/2008
4591A010	SHIPYARD PARCEL 54	Other S Bayshore	0k	50	Resident	--N/A--	6/8/2007
1450008	5400 GEARY BL	Richmond	-11k	39	Mixres	Retail/Ent	4/18/2007
3115043	625 MONTEREY BL	Ingleside, Other	21k	0	Retail/Ent	Retail/Ent	5/26/2010
1101007	1301 DIVISADERO ST	Western Addition	-13k	32	Resident	--N/A--	9/1/2010
3576001	2100 MISSION ST	Mission	-5k	29	Mixres	Retail/Ent	9/21/2009
6935001	1607-1649 Ocean Ave.	Balboa Park	-19k	31	Resident	--N/A--	5/4/2006
0853021	102-104 OCTAVIA STREET	Market Octavia	0k	30	Resident	--N/A--	6/8/2007
3752023	397 05TH ST	WSoMa	5k	24	Mixres	Retail/Ent	9/24/2007
0670024	1433 BUSH ST	Downtown	-4k	26	Mixres	Retail/Ent	11/17/2009
0281003	832 SUTTER ST	Downtown	1k	27	Mixres	Retail/Ent	8/24/2008
3148001	4550 MISSION ST	South Central, Other	-3k	17	Mixres	Retail/Ent	7/19/2006
0194009	740 WASHINGTON ST	Northeast	-9k	18	Mixres	CIE	2/28/2007
3721019	562 HOWARD ST	TB Combo	0k	19	Mixres	Retail/Ent	10/3/2007
5457037	2895 SAN BRUNO AV	South Central, Other	11k	10	Mixres	MIPS	7/29/2010
3732112	452 TEHAMA ST	East SoMa	-5k	20	Mixres	Retail/Ent	6/22/2007
1018012	3657 SACRAMENTO ST	Richmond	0k	18	Resident	--N/A--	11/20/2007
0729046	1210 SCOTT STREET	Western Addition	0k	18	Resident	--N/A--	6/8/2007
3753140	935 FOLSOM ST	East SoMa	-14k	69	Mixres	Retail/Ent	4/19/2010
3727004	150 07TH ST	WSoMa	11k	0	Retail/Ent	Retail/Ent	4/2/2007
5869014	4199 MISSION ST	South Central, Other	1k	12	Mixres	Retail/Ent	8/5/2008
3733008	250 4TH ST	South of Market, Other	73k		Visitor	Visitor	1/14/2011

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Acknowledgements

Mayor

Edwin M. Lee

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Alton Chinn

Gary Chen

Scott Dowdee -- *in memoriam*