2010 QUARTER 2

San Francisco PIPELINE REPORT

San Francisco Planning Department

August 2010

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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.

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. 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 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. 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, 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 June 30, 2010. 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.*

Q2 2010 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 43,800 net new housing units to the city's housing stock. This high figure remains so due to large development program applications under Planning review, including the 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 10,000 units and up to 6 million sq. ft. of office, R&D, retail and community space. One alternative would include a 70,000-seat football stadium at Candlestick Point, reducing the office/R&D component to 2 million sq. ft.
- The pipeline would also add a net of 14 million commercial square footage. Within this total, office and retail space would see net gains of 10.7 million and 2.5 million sq. ft., respectively. There is a projected loss of nearly 750,000 sq. ft. of light industrial or Production, Distribution and Repair (PDR) space because of conversion to commercial and residential space.
- One in six projects (with approximately 1,500 units) are in the construction phase; other projects adding 2,100 units have received building permits approvals and an additional 6,200 units have received land use entitlements.
- One in six of all projects (with 32,300 units, or more than two thirds of all pipeline units, and 13.2 million commercial square feet) are still at the early stages of development, awaiting land use entitlements from the Planning Department.
- Overall, there has been a slight uptick in units and commercial space filings in the quarter, reflecting primarily larger rather than more numerous filings.

The Pipeline by the Numbers

There are currently just under 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[1] make the pipeline more inclusive even as the Department is not always the entitling entity.

Of the pipeline projects, two out of every three are exclusively residential and one in five are mixed-use projects with both residential and commercial components. Only about one in nine projects are commercial developments without a residential component.

A net total of 43,800 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 two years for new large scale, long term development programs for Park Merced, Treasure Island and the Bayview Waterfront. The size of these projects notwithstanding, the vast majority of pipeline projects (but not the units) are in small projects consisting of one to three units. Recent filings are, however, down substantially.

Pipeline projects also comprise a net addition of 15.3 million sq ft of commercial development.

Project Status

Table 1 on the following page shows the following:

- Around 14 percent of all projects, representing 1,500 net added housing units and 100,000 sq ft of commercial space, are under construction.
- Around 23 percent of projects (with 2,300 net units) have received building permit approvals and may have already begun construction.
- Around one in three projects (including 3,300 net new units and an addition of 1.3 million

1 It should be noted that, by comparison to recent reports that there has been a not insignificant drop in number of projects. We have been cleaning the data and removing inactive projects and moving some from the construction to the complete column. In addition, of course, the rate of new filing is also modest relative to what it was.

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	113	30,780	12,190,000	1,166,000	0	8,052,000	-122,000	2,777,000	316,000
Approved by Planning	91	5,870	848,000	480,000	-33,000	163,000	-2,000	188,000	52,000
BP Filed	287	3,330	1,347,000	-52,000	0	1,469,000	-249,000	179,000	0
BP Approved/Issued/ Re-Instated	182	2,330	850,000	30,000	0	821,000	-81,000	56,000	25,000
Construction	114	1,480	100,000	37,000	20,000	69,000	-8,000	-17,000	0
Grand Total	787	43,780	15,335,000	1,661,000	-13,000	10,574,000	-463,000	3,183,000	393,000

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.

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.

- Twelve percent of the pipeline projects and 13 percent of the units have received Planning Department approvals. If and when constructed, these projects would add 5,900 new units to the city's housing stock, and one million sq ft of commercial space. These projects now must secure a building permit.
- Fourteen percent of projects, representing more than two thirds of the units in the pipeline are under Planning Department review. Collectively, these projects represent some 30,800 net new units and 12.2 million sq ft of non-residential uses. The majority of units and uses are in this early stage of development.

Amount and Type of Net New Commercial Space

Projects in the current pipeline as noted also represent a potential net addition of 15.3 million sq ft of commercial development that would result in the following land use inventory changes:

- 10.6 million sq ft of additional office space
- 3.2 million sq ft of additional retail space
- 400,000 sq ft of additional visitor-serving uses, such as hotels or hostels.
- 1.6 million sq ft of additional cultural, institutional, educational (CIE) and medical space
- An overall loss of around 500,000 sq ft of space for production, distribution and repair (PDR).
- Office and retail uses remain the most common non-residential projects.

Location of New Development

Table 2 on the following page shows the three most active areas for residential development include Bayview/Hunter's Point/Candlestick (where the Bayview Waterfront Project is predominantly located), Treasure Island and Park Merced. However, Treasure Island and Park Merced are in the environmental review stages of development, while the Candlestick/Shipyard project has cleared this stage as of July of this year. In all three cases the full realization of these projects will be decades into the future. (See Map 1 for area boundaries used.) These areas alone would account for around 25,800 net units or almost half of all net additional units in the pipeline.

Other areas with active residential development include Downtown, Transbay, Market & Octavia, and Rincon Hill, totalling around 10,400 new units.

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	5	0.6%	270	0.6%	54	4,800	0.0%	20	22
Bernal Heights	36	4.6%	60	0.1%	2	320	0.0%	27	25
Buena Vista	14	1.8%	80	0.2%	6	26,520	0.2%	24	16
BVHP Area A,B	31	3.9%	400	0.9%	16	163,160	1.1%	18	9
Candlestick	2	0.3%	10,440	23.8%	5,218	6,120,000	39.9%	1	1
Central	71	9.0%	120	0.3%	2	18,430	0.1%	22	18
Central Waterfront	10	1.3%	470	1.1%	47	2,870	0.0%	16	24
Downtown	42	5.3%	3,930	9.0%	101	1,537,880	10.0%	4	3
East SoMa	29	3.7%	1,430	3.3%	49	-47,620	-0.3%	9	29
Executive Park	1	0.1%	340	0.8%	340	14,000	0.1%	19	20
India Basin	3	0.4%	10	0.0%	3	-3,120	-0.0%	30	26
Ingleside, Other	30	3.8%	70	0.2%	2	42,640	0.3%	25	12
Inner Sunset	36	4.6%	60	0.1%	2	12,130	0.1%	26	21
Japantown	4	0.5%	230	0.5%	59	3,550	0.0%	21	23
Marina	21	2.7%	110	0.3%	5	25,660	0.2%	23	17
Market Octavia	38	4.8%	2,020	4.6%	55	552,110	3.6%	6	5
Mission	56	7.1%	750	1.7%	13	-34,940	-0.2%	13	28
Mission Bay	4	0.5%	0	0.0%	0	1,272,880	8.3%	31	4
Northeast	51	6.5%	1,120	2.6%	22	-292,750	-1.9%	11	31
Other S Bayshore	15	1.9%	520	1.2%	35	40,660	0.3%	15	13
Outer Sunset	26	3.3%	40	0.1%	1	36,680	0.2%	28	15
Park Merced	2	0.3%	5,800	13.2%	2,902	478,380	3.1%	3	6
Richmond	81	10.3%	460	1.1%	6	37,810	0.2%	17	14
Rincon Hill	7	0.9%	1,970	4.5%	281	-170,350	-1.1%	7	30
Showpl/Potrero	28	3.6%	1,740	4.0%	62	426,750	2.8%	8	7
South Central, Other	70	8.9%	1,250	2.9%	18	102,670	0.7%	10	10
Transbay	18	2.3%	2,490	5.7%	138	4,606,980	30.0%	5	2
Treasure Island	1	0.1%	6,000	13.7%	6,000	250,000	1.6%	2	8
VisVal	4	0.5%	10	0.0%	3	-6,080	-0.0%	29	27
Western Addition	28	3.6%	1,070	2.4%	38	18,020	0.1%	12	19
WSoMa	23	2.9%	530	1.2%	23	94,650	0.6%	14	11
Grand Total	787	1	43,790	1	15,502	15,334,690	1		

On the commercial side, nearly 90 percent of the 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 relatively concentrated development is, for both residential and commercial uses. In both cases, the majority of potential development would happen in a handful of districts.

Pipeline Projects by Current Zoning Category

Residential Pipeline

Table 3 shows the pipeline distribution by general zoning categories. The vast majority of the residential pipeline falls on four land zoning classes: High Density Residential, Mixed Use, Commercial and Public. The largest of these is the Public Land category. The Bayview Waterfront project, most of which is at Candlestick Point, is classified under this heading.[2] Also found in this category is the Treasure Island redevelopment project. These two projects alone could add more than 17,000 units, and thus make up the bulk of units in this category.

The second largest share is found on residentially zoned lots, accounting for 10,400 units in 490 projects, with an average size of 24 units. Two thirds of these units is comprised of the Park Merced redesign project currently undergoing environmental review, as well as a couple of large San Francisco Housing Authority projects, one in the Potrero Hill area, and one on Sunnydale Ave as part of the Hope sq ft program. The remainder of projects on residentially zoned parcels are relatively small, with most of the projects being two to nine unit projects.

Thirdly, the mixed use districts, ranging from neighborhood commercial to eastern neighborhoods districts, account for 7,500 units in 244 projects, or around 31 units per project.

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, somewhat skewing the distribution.

The fourth largest of these shares is on commercially zoned parcels, accounting for 5,500 units in 60 projects, averaging 110 units per project.

Another 2,600 units are pending on industrially zoned lands. 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).

Also of note, the high-density, transit-accessible downtown neighborhoods of Rincon Hill and Transbay account for a fraction of one percent of the city's land area, but 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.

Conversely, residential projects in the Residential (R) districts tend to be small scaled, in-fill developments, accounting for some 54 percent of proposed projects but just 21 percent of the total units (or 11,600 net units) in the pipeline. Half of these units, in turn, would be the result of just one project, the Park Merced Redesign project. In terms of land area, residential zoning districts form the largest group, comprising 46 percent of the city land area.

Commercial Pipeline

Commercial development is proposed chiefly in public, commercial and mixed use districts, with 94 percent of the net commercial space proposed to be added in these land classes. The commercial pipeline in general is characterized by 88 projects, but also 153 mixed use projects which contain both residential and non-residential components. Looking at the exclusively commercial projects, half are smaller than 25,000 gross square feet while two thirds are smaller than 61,000 gross square feet. The bulk of the square footage is thus comprised by a relatively small number of projects.

The commercial component in the 244 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 244 projects in mixed use districts are exclusively residential.)

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
Commercial	C-2	13	2,000	535,000	0	0	136,000	-33,000	368,000	63,000
	C-3	30	2,000	3,618,000	156,000	0	2,507,000	-1,000	270,000	687,000
	C-M	1	0	0	0	0	2,000	-4,000	2,000	0
	NC	1	1,000	12,000	0	0	0	0	12,000	0
	RC	1	0	0	0	0	0	0	0	0
	RH	1	0	0	0	0	0	0	0	0
	C	1	0	0	0	0	0	0	0	0
Hi Density Res	DTR	8	2,000	-170,000	0	0	-111,000	-71,000	12,000	0
Industrial	M	8	0	548,000	8,000	0	11,000	-93,000	623,000	0
	PDR	18	0	227,000	4,000	0	113,000	78,000	31,000	0
	SLI	6	1,000	-50,000	0	0	2,000	-99,000	47,000	0
	UMU	1	0	0	0	0	0	0	0	0
	HP-RA	1	0	0	0	0	0	0	0	0
Mixed Use	CRNC	2	0	88,000	88,000	0	0	0	0	0
	CVR	1	0	-9,000	4,000	0	0	0	-14,000	0
	MUG	3	0	-2,000	0	0	0	-2,000	0	0
	MUO	3	0	48,000	0	0	50,000	-3,000	1,000	0
	MUR	8	0	-52,000	0	0	-9,000	-47,000	4,000	0
	NC	117	2,000	76,000	39,000	-45,000	135,000	-49,000	-44,000	40,000
	NCT	43	2,000	-9,000	24,000	0	-7,000	-86,000	60,000	0
	RC	25	2,000	568,000	900,000	0	-33,000	13,000	37,000	-349,000
	RSD	4	0	-2,000	0	0	0	-6,000	4,000	0
	SLR	16	1,000	63,000	0	0	1,000	-10,000	72,000	0
	SPD	2	0	2,000	0	0	4,000	-1,000	0	0
	SSO	1	0	33,000	0	0	-14,000	0	5,000	41,000
	UMU	16	1,000	24,000	0	0	-15,000	-14,000	53,000	0
	MB	3	0	892,000	0	0	875,000	0	17,000	0
Public	P	13	17,000	8,498,000	368,000	12,000	6,851,000	0	1,057,000	210,000
Residential	RC	1	0	32,000	0	0	2,000	0	31,000	0
	RED	6	0	6,000	0	20,000	-4,000	-10,000	0	0
	RH	348	1,000	40,000	19,000	0	-2,000	-6,000	29,000	0
	RM	62	9,000	343,000	59,000	0	102,000	0	482,000	-300,000
	RTO	23	0	-25,000	-8,000	0	-21,000	-19,000	24,000	0
Grand Total		**787**	**44,000**	**15,335,000**	**1,661,000**	**-13,000**	**10,574,000**	**-463,000**	**3,183,000**	**393,000**

The largest concentration of potential commercial development is in a few areas currently zoned public[3]. Development here would add some net 8.5 million square feet, or more than half of all proposed commercial development, in just 13 projects. This chiefly reflects the large scale Bayview Waterfront Project, which would itself add more than eight million commercial square feet as currently proposed, although there were several variants with less development analyzed as a part of the environmental review.

Commercial districts account for the second largest concentration of non-residential development, with 27 percent of the total in 48 projects. The mixed use districts account for a larger *number* of projects (even if this count may include projects that are exclusively residential) totalling 1.7 million net new square feet. Other districts account for only a minor amount of non-residential development.

3 See footnote 2.

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

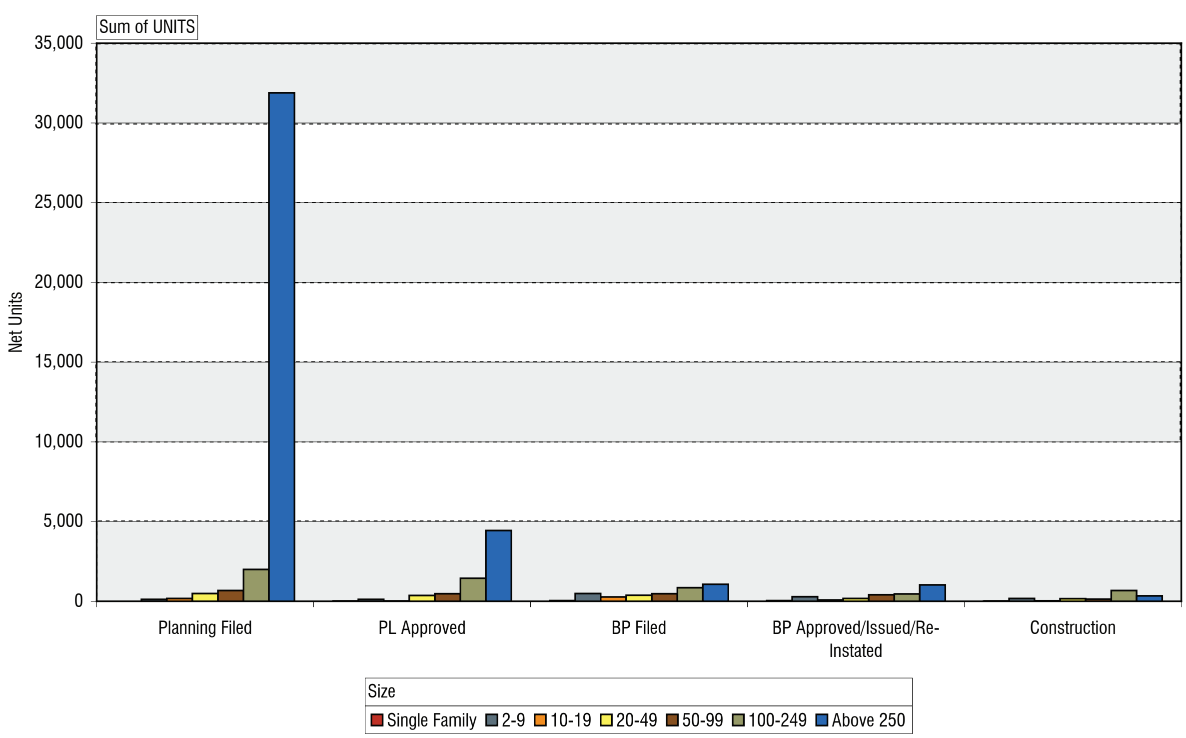
Residential Pipeline by Project Size

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

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 Sunset, the largest addition come in projects of two to nine units and single family projects. For

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

FIGURE 1: Residential Pipeline, by Status & Building Size



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. Adding this bottom half of all pipeline projects would contribute just 630 units, or one percent of the total number of pipeline units. Areas where

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		
Balboa Park	0	6	13	31	60	159	0	269	20
Bernal Heights	14	50	0	0	0	0	0	64	27
Buena Vista	0	38	0	0	56	0	0	94	24
BVHP Area A,B	5	27	0	24	0	0	355	411	18
Candlestick	0	0	0	0	0	198	10,500	10,698	1
Central	14	137	18	0	0	0	0	169	22
Central Waterfront	1	14	16	24	231	196	0	482	17
Downtown	1	35	31	283	258	1,304	2,579	4,491	4
East SoMa	3	27	70	261	201	346	510	1,418	10
Executive Park	0	0	0	0	0	0	340	340	19
India Basin	0	10	0	0	0	0	0	10	30
Ingleside, Other	9	47	0	28	0	0	0	84	25
Inner Sunset	14	38	25	0	0	0	0	77	26
Japantown	0	5	0	0	0	231	0	236	21
Marina	2	38	0	103	0	0	0	143	23
Market Octavia	2	33	76	217	278	1,001	440	2,047	8
Mission	2	116	93	105	141	319	0	776	14
Northeast	2	82	62	156	195	665	0	1,162	11
Other S Bayshore	7	9	0	0	102	0	668	786	13
Outer Sunset	5	34	10	0	0	0	0	49	28
Park Merced	0	0	0	0	0	127	8,898	9,025	2
Richmond	3	175	31	80	83	150	0	522	16
Rincon Hill	0	0	0	0	70	113	1,787	1,970	9
Showpl/Potrero	2	44	0	69	0	100	2,150	2,365	6
South Central, Other	18	145	47	42	122	0	1,700	2,074	7
Transbay	0	5	19	0	202	503	1,756	2,485	5
Treasure Island	0	0	0	0	0	0	6,000	6,000	3
VisVal	0	16	0	0	0	0	0	16	29
Western Addition	2	29	61	53	153	0	861	1,159	12
WSoMa	5	32	0	86	0	0	416	539	15
Grand Total	111	1,192	572	1,562	2,152	5,412	38,960	49,961	

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.

these small projects are typical include areas like Richmond, Ingleside, Inner Sunset, and Central

Except for Park Merced, 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. Accordingly, of the total 32 projects with 77 units in the Inner Sunset and 84 in Ingleside, all but three projects are sized at nine units or less and 27 are single-unit projects.

Figure 1 shows the residential pipeline by building size and pipeline status. The residential pipeline shows that:

- Of the 2,300 units with building permits approved, 1,500 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.

Conversion of Commercial Space to Residential Use[5]

There are 49 projects in the current pipeline database proposing demolition or conversion of existing production, distribution and repair-use (PDR) buildings to residential use.[6] The corresponding figure for the conversion of office space is 37 projects. These projects represent approximately eight percent (or 3,600 units) and seven percent (or 3,300 units), respectively, of the residential units in the pipeline.

Conversion of PDR Space

Table 5 provides a measure of how many units are produced relative to the lost PDR space.

- If the pipeline were developed as proposed, about 550,000 sq ft of PDR space would be lost to conversion or demolition.[7] It would be replaced with residential units (3,600) and/or other commercial uses.
- Most of the PDR to residential conversions are found in Bayview Hunters Point, East SoMa and Mission districts, accounting together for more than half of the overall loss. The loss of PDR space in these neighborhoods would in turn bring in 1,700 net new housing units.

Conversion of Office Space

- Approximately 800,000 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 6 shows that the Downtown and Transbay districts would lose the most office space – around 500,000 square feet, or five out of eight converted square feet.
- A total of 2,900 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 notwithstanding, taken together with other commercial developments in the pipeline counted 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 10.6 million square feet citywide.

5 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 5) and office space (Table 6).
6 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.

7 Table 5 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 463,000 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 5: 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	2.0%	30	0.8%	-3,700	0.7%	30	-3,700
BVHP Area A,B	2	4.1%	360	10.1%	-106,900	19.4%	180	-53,450
Central Waterfront	2	4.1%	140	3.9%	-23,300	4.2%	70	-11,650
Downtown	2	4.1%	160	4.5%	-19,500	3.5%	80	-9,750
East SoMa	14	28.6%	1,040	29.1%	-90,000	16.3%	74	-6,430
India Basin	2	4.1%	10	0.3%	-5,100	0.9%	5	-2,550
Marina	1	2.0%	30	0.8%	-7,000	1.3%	30	-7,000
Market Octavia	2	4.1%	110	3.1%	-20,900	3.8%	55	-10,450
Mission	8	16.3%	340	9.5%	-97,000	17.6%	43	-12,130
Northeast	3	6.1%	280	7.8%	-57,500	10.4%	93	-19,170
Richmond	2	4.1%	10	0.3%	-3,000	0.5%	5	-1,500
Rincon Hill	2	4.1%	550	15.4%	-70,900	12.8%	275	-35,450
Showpl/Potrero	1	2.0%	100	2.8%	-15,500	2.8%	100	-15,500
South Central, Other	1	2.0%	20	0.6%	-8,500	1.5%	20	-8,500
Transbay	2	4.1%	370	10.4%	-3,700	0.7%	185	-1,850
WSoMa	4	8.2%	50	1.4%	-19,600	3.6%	13	-4,900
Grand Total	49	100.0%	3,570	100.0%	-552,000	100.0%	73	-11,270

TABLE 6: 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	2.7%	30	1.0%	-6,200	0.7%	30	-6,200
Central	1	2.7%	0	0.0%	-2,000	0.2%	0	-2,000
Downtown	8	21.6%	490	16.9%	-190,800	22.8%	61	-23,900
East SoMa	3	8.1%	110	3.8%	-12,600	1.5%	37	-4,200
Inner Sunset	1	2.7%	20	0.7%	-2,200	0.3%	20	-2,200
Market Octavia	6	16.2%	740	25.5%	-54,900	6.6%	123	-9,200
Northeast	2	5.4%	130	4.5%	-31,900	3.8%	65	-16,000
Rincon Hill	3	8.1%	1,030	35.5%	-135,800	16.2%	343	-45,300
Showpl/Potrero	2	5.4%	140	4.8%	-46,800	5.6%	70	-23,400
South Central, Other	2	5.4%	10	0.3%	-3,900	0.5%	5	-2,000
Transbay	3	8.1%	170	5.9%	-325,100	38.8%	57	-108,400
Western Addition	2	5.4%	20	0.7%	-9,400	1.1%	10	-4,700
WSoMa	2	5.4%	10	0.3%	-13,800	1.6%	5	-6,900
Richmond	1	2.7%	0	0.0%	-2,000	0.2%	0	-2,000
Grand Total	37	100.0%	2,900	100.0%	-837,400	100.0%	78	-22,600

Projects Under Planning Review

Project Application Filings

Table 7 below shows that a total of 20 planning applications[8] were filed in the second quarter of 2010, similar to the count in the previous quarter. This count represents 930 units and 1.6 million square feet of commercial development. While the quarter's filings are below the eight quarter moving average, both the number of units and square feet are above this figure, perhaps suggesting a turning point in the market. Future quarters will show. Taken as a whole since 2000 (Figures 3 and 4), there has been a slight downward trend of the *number of projects* filed and approved, respectively. More recently in terms of number of *units* filed for, the downward trend has become evident., but, as noted, with a possible reversal of this trend There are, however as seen in this report, still a large reservoir of projects in the pipeline. 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. However, some sponsors will undoubtfully 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.

A few of the projects filed during the second quarter of 2010 include:

- Two projects by The Housing Authority: The Sunnydale HOPE SF Master Plan, a project to remove 785 existing residential units, and the development of 1,700 new residential units, affordable and market rate units. A similar project is proposed for Potrero Hope SF Master Plan.
- At 740 Illinois Street, a proposal to replace the existing commercial fueling facility and construct 70 dwelling units and 52 parking spaces.
- At Pier 30-32, the America's Cup 34 Project would include 14 team bases, 38,000 sq ft of hospitality/retail/concession space, 308,000 sq ft of endlosed team bases, 147,000 sq ft of unenclosed team bases, and approximately 115,688 sq ft of open space, for a total of 608,688 sq ft of programmed space.
- At 150 Otis St, the conversion of a former juvenile detention center to 75 apartments for war veterans with accessory medical services.

8 For the purposes of this table, we only count projects where housing units or space would be added, and thus ignore administrative filings..

TABLE 7: 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
2000 Q1	73	750	10	2,826,000	16	330	21	417,000
2000 Q2	64	1,490	23	2,037,000	25	290	12	1,348,000
2000 Q3	97	770	8	1,724,000	42	520	12	462,000
2000 Q4	76	3,010	40	3,351,000	53	1,140	22	525,000
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	44	640	15	1,789,000
2002 Q1	78	820	11	951,000	35	250	7	341,000
2002 Q2	56	1,020	18	1,357,000	40	220	6	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	48	1,400	29	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	53	440	8	414,000
2004 Q3	104	3,130	30	478,000	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	503,000	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	1,345,000	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	330	12	1,014,000	20	180	9	47,000
2007 Q3	52	9,740	187	430,000	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	25	2,670	107	275,000
2008 Q2	33	830	25	760,000	26	260	10	288,000
2008 Q3	32	760	24	1,791,000	25	760	30	2,000
2008 Q4	25	300	12	26,000	36	1,100	31	898,000
2009 Q1	23	260	11	195,000	28	630	23	1,000
2009 Q2	25	330	13	100,000	21	220	10	5,000
2009 Q3	28	230	8	10,000	9	330	37	27,000
2009 Q4	23	340	15	171,000	16	570	36	89,000
2010 Q1	19	280	15	16,000	14	180	13	170,000
2010 Q2	20	930	47	1,630,000	19	350	18	-21,000

FIGURE 2: Pipeline Project Applications Filed and Approved with the Planning Department, by Quarter

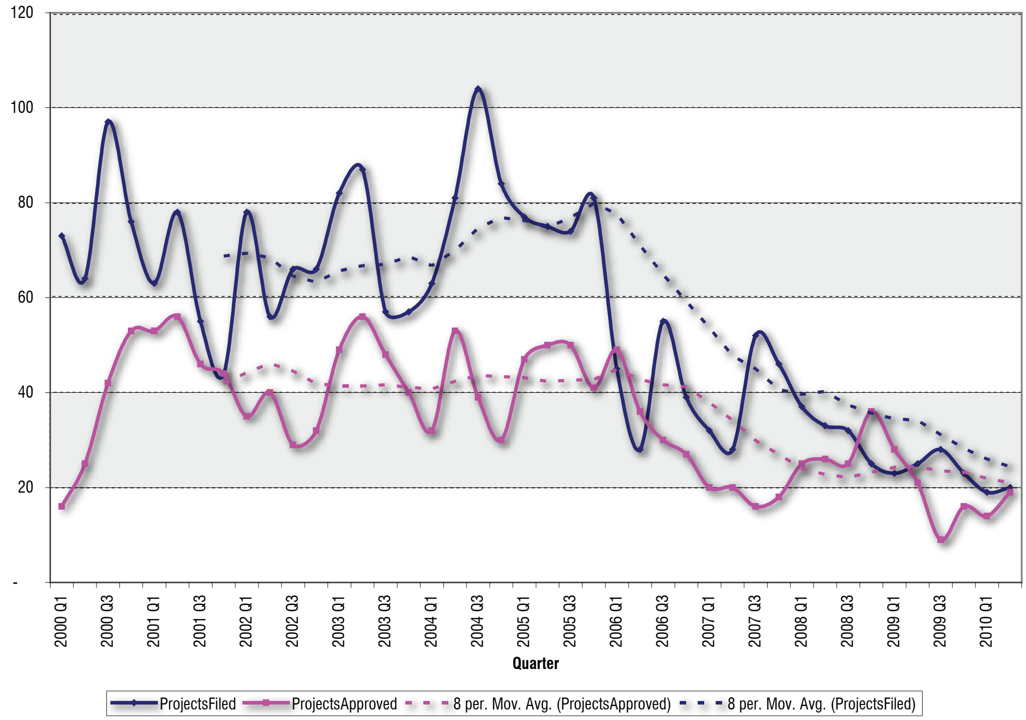
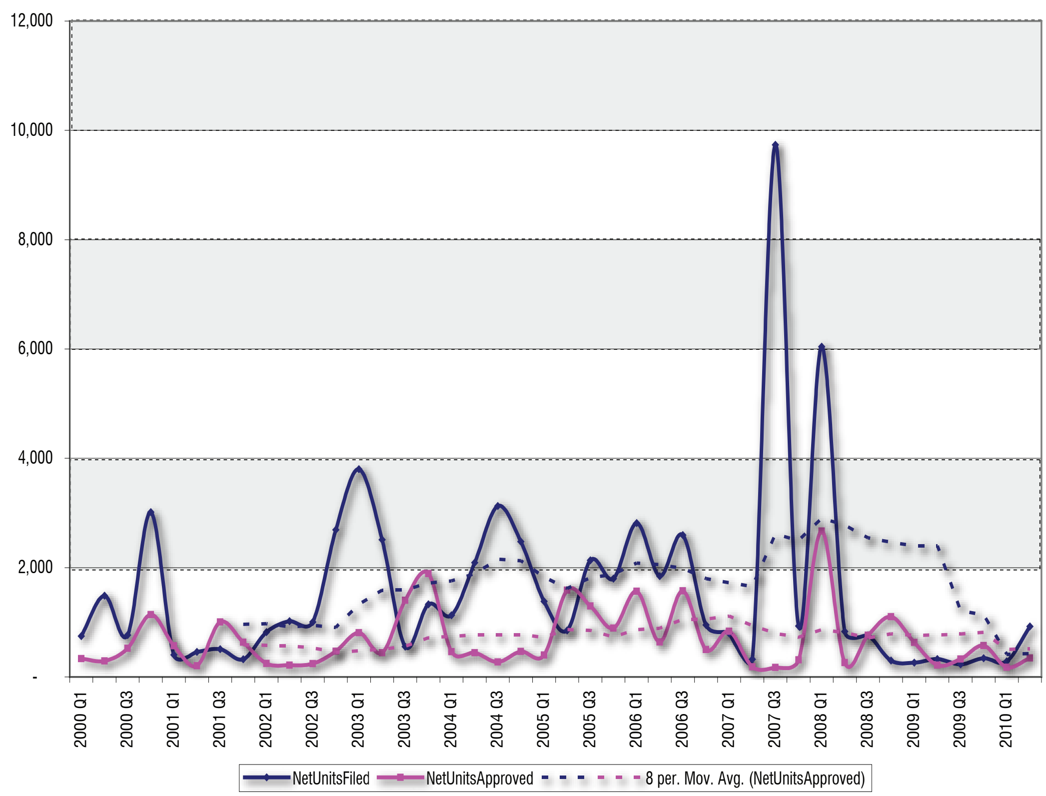
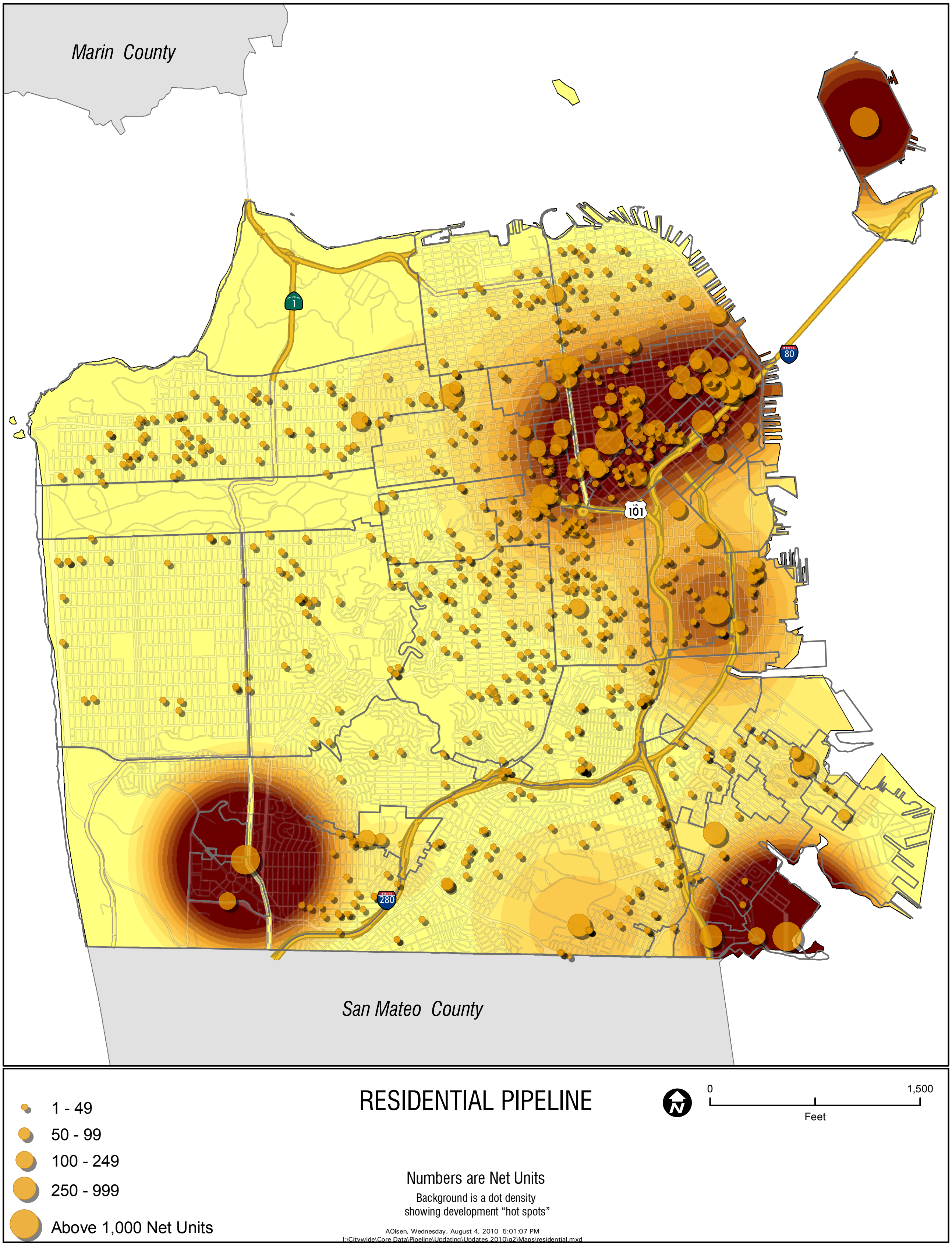


FIGURE 3: Pipeline Units Filed and Approved by the Planning Department, by Quarter

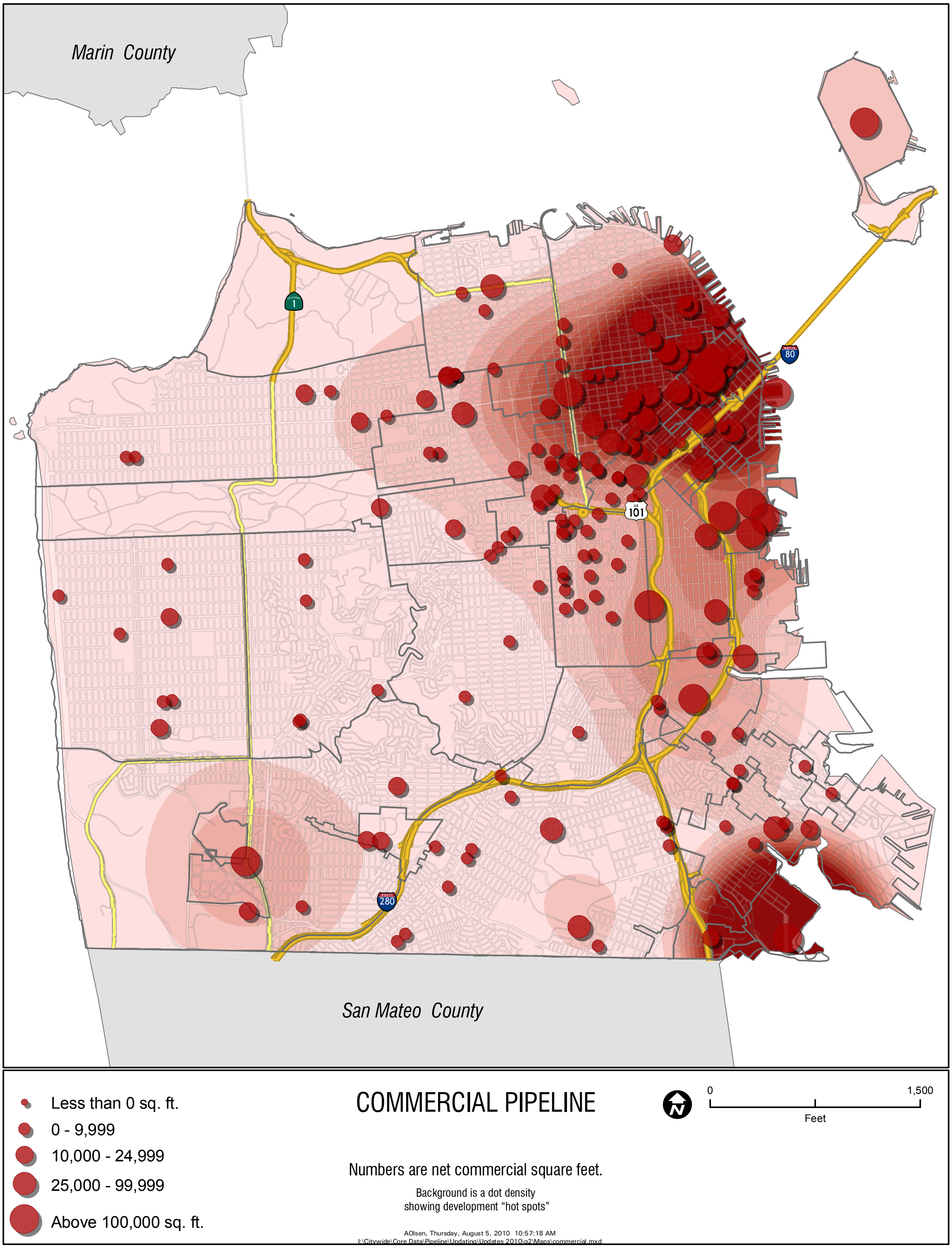


MAP 1: Neighborhoods Highlighted in the Pipeline Report

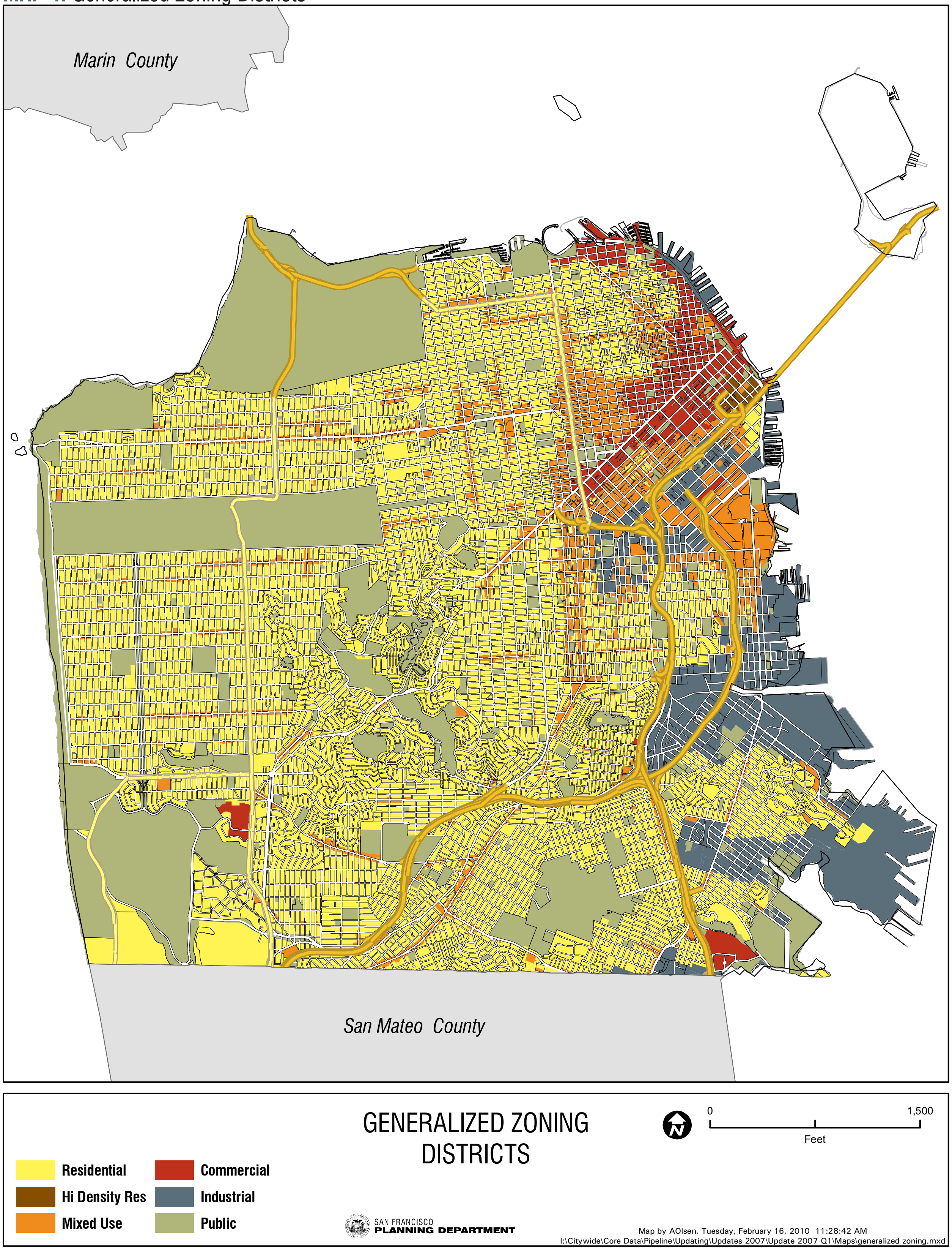
MAP 2: Residential Pipeline



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	**Current pipeline status of a project application.**
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 GSF (Commercial)	Nonresdential 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 yards or open storage areas.
	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 summarizes in one word what type of project is being proposed. Apart from the commcercial categories listed, this field includes - 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 2, 2010

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

CONSTRUCTION

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
4991617	101 EXECUTIVE PARK BL	Executive Park	14,000	340	Resident	--N/A--	6/11/2010
3721122	535 MISSION ST	Transbay	296,430	0	MIPS	MIPS	3/31/2010
1084010	3575 GEARY BL	Richmond	20,957	150	Mixres	MIPS	5/7/2010
4991277	833-881 Jamestown	Candlestick	0	198	Resident	--N/A--	9/17/2007
0792028	365 FULTON STREET	Market Octavia	0	120	Resident	--N/A--	6/18/2010
0871016	1844 MARKET ST	Market Octavia	3,033	113	Mixres	Retail/Ent	7/17/2007
3704069	973 MARKET ST	Downtown	-52,750	100	Mixres	Retail/Ent	8/14/2008
3708056	1 ECKER ST	Transbay	-238,920	51	Mixres	Retail/Ent	5/12/2009
4228158	1301 Indiana St.	Central Waterfront	-9,800	71	Mixres	Retail/Ent	12/19/2007
3731126	229 07TH ST	East SoMa	16,196	49	Mixres	MED	6/16/2010
1029095	2901 CALIFORNIA ST	Western Addition	14,800	0	CIE	CIE	6/18/2010
0599008	1840 WASHINGTON ST	Marina	-7,000	26	Resident	--N/A--	6/17/2010
4711118	Hudson Ave and Whitney Y	BVHP Area A,B	0	24	Resident	--N/A--	1/1/2009
4044030	2198 03RD ST	Central Waterfront	0	24	Resident	--N/A--	7/20/2007
1101022	2139 OFARRELL	Western Addition	-14,712	21	Resident	--N/A--	6/15/2010
4755048	903 PALOU AV	BVHP Area A,B	20,000	0	PDR	PDR	6/16/2010
1460015	420 29TH AV	Richmond	-6,720	20	Resident	--N/A--	6/15/2010
0242027	855 SACRAMENTO ST	Northeast	20,000	0	CIE	CIE	6/17/2010
5868007	55 TRUMBULL ST	South Central, Other	0	18	Resident	--N/A--	5/12/2010
0839029	261 OCTAVIA ST	Market Octavia	0	15	Resident	--N/A--	6/15/2010

BP ISSUED

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3507041	1401 MARKET ST	Downtown	12,250	719	Mixres	Retail/Ent	4/25/2008
8720016	1455 03RD ST	Mission Bay	380,999	0	MIPS	MIPS	4/23/2010
3749059	45 LANSING ST	Rincon Hill	-14,000	305	Resident	--N/A--	7/31/2008
8709004	1600 OWENS ST	Mission Bay	245,000	0	MIPS	MIPS	6/3/2008
3180003	1150 OCEAN AV	Balboa Park	15,100	159	Mixres	Retail/Ent	6/21/2010
0768013	701 GOLDEN GATE AV	Market Octavia	0	100	Resident	--N/A--	8/21/2007

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
0348015	277 GOLDEN GATE AV	Downtown	-49,945	88	Resident	--N/A--	12/22/2008
7380038	655 BROTHERHOOD WY	Ingleside, Other	15,000	0	CIE	CIE	12/12/2008
3747012	325 FREMONT ST	Rincon Hill	0	70	Resident	--N/A--	3/27/2008
3725101	474 NATOMA STREET	Downtown	0	55	Resident	--N/A--	11/13/2009
0492025	2026 LOMBARD ST	Marina	40,370	0	Visitor	Visitor	4/11/2007
0619012	1860 VAN NESS AV	Northeast	1,625	35	Mixres	Retail/Ent	11/17/2008
0756001	1345 TURK ST	Western Addition	0	32	Resident	--N/A--	4/16/2010
3794002A	750 02ND ST	East SoMa	-2,710	14	Mixres	Retail/Ent	6/10/2010
1127007	1816 EDDY ST	Western Addition	0	19	Resident	--N/A--	12/9/2008

BP REINSTATED

3721013	524 HOWARD ST	Transbay	200,000	0	MIPS	MIPS	6/8/2007
0671006	1450 FRANKLIN ST	Western Addition	-24,000	69	Resident	--N/A--	6/25/2009
0343014	181 TURK ST	Downtown	3,060	32	Mixres	Retail/Ent	3/10/2009
0274008	850 BUSH ST	Northeast	0	23	Resident	--N/A--	4/10/2008

BP APPROVED

3717019	120 HOWARD ST	Downtown	67,000	0	MIPS	MIPS	9/15/2008
3547002A	1880 MISSION ST	Mission	-63,512	194	Resident	--N/A--	8/20/2009
3789003	72 TOWNSEND ST	East SoMa	0	74	Resident	--N/A--	12/11/2008
4224015	1004 MISSISSIPPI ST	Showpl/Potrero	0	28	Resident	--N/A--	1/16/2009
3591024	793 SOUTH VAN NESS AV	Mission	5,829	22	Resident	Retail/Ent	8/4/2009
2607099	399 BUENA VISTA EAST A	Buena Vista	15,720		CIE	CIE	7/14/2005
6520036	3135 24TH ST	Mission	-13,640	12	Mixres	Retail/Ent	4/15/2010

BP Filed

3735063	222 02ND ST	Transbay	400,000	0	MIPS	MIPS	11/30/2007
3748006	340 FREMONT ST	Rincon Hill	-42,650	384	Mixres	Retail/Ent	9/19/2005
5431A001	5800 03RD ST	BVHP Area A,B	-90,000	355	Mixres	Retail/Ent	9/28/2005
0269028	350 BUSH ST	Downtown	347,300	0	MIPS	MIPS	8/7/2007
8721012	455 Mission Bay S Blvd	Mission Bay	333,945	0	MIPS	MIPS	6/26/2008

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3766009	105 HARRISON ST	Rincon Hill	0	326	Resident	--N/A--	6/30/2010
3736114	525 HOWARD ST	Transbay	251,788	0	MIPS	MIPS	9/8/2008
3787026	655 04TH ST	East SoMa	-2,356	192	Mixres	Retail/Ent	1/13/2006
4058010	2235 03RD ST	Central Waterfront	5,339	196	Mixres	Retail/Ent	7/9/2009
0691008	1285 SUTTER ST	Downtown	-8,308	107	Mixres	Retail/Ent	12/6/2007
3510001	1415 MISSION ST	Downtown	300	117	Mixres	MIPS	10/31/2008
3749064	FOLSOM AND ESSEX	Transbay	0	120	Resident	--N/A--	3/15/2010
0667018A	1529 PINE ST	Northeast	-8,176	113	Resident	--N/A--	3/19/2007
4059009	2298 03RD ST	Central Waterfront	14,000	80	Mixres	Retail/Ent	2/6/2006
4352007	1301 CESAR CHAVEZ ST	BVHP Area A,B	81,979	0	MIPS	MIPS	10/15/2007
3731003	226 06TH ST	East SoMa	0	37	Resident	--N/A--	6/16/2008
3513008	150 OTIS ST	Market Octavia	-90,159	76	Resident	--N/A--	5/14/2010
1098009	1401 DIVISADERO ST	Western Addition	57,000	-21	MIPS	MIPS	12/21/2006
3736085	48 TEHAMA ST	Transbay	0	66	Resident	--N/A--	7/12/2006
6969011	5050 MISSION ST	South Central, Other	0	61	Resident	--N/A--	6/10/2010
3548032	1875 MISSION ST	Mission	0	60	Resident	--N/A--	2/10/2006
0165022	717 BATTERY ST	Northeast	27,870	0	MIPS	MIPS	12/1/2008
3788039	345 BRANNAN ST	East SoMa	53,030	0	MIPS	MIPS	10/27/2008
4624004	63 WEST POINT RD	Other S Bayshore	0	52	Resident	--N/A--	12/22/2009
3532014	299 VALENCIA ST	Market Octavia	3,940	44	Mixres	Retail/Ent	11/9/2006
3703086	570 JESSIE ST	Downtown	-15,000	47	Resident	--N/A--	2/2/2006
0837003	1 FRANKLIN ST	Market Octavia	2,384	35	Mixres	Retail/Ent	12/3/2009
0816003	205 FRANKLIN ST	Market Octavia	14,500	0	Mixed	Retail/Ent	4/13/2010
0668012	1465 PINE ST	Northeast	0	35	Resident	--N/A--	3/16/2005
5943008	268 MADISON ST	South Central, Other	25,000	1	Mixres	Retail/Ent	11/7/2007
3754039	1075 FOLSOM ST	East SoMa	5,000	31	Resident	--N/A--	12/22/2005
3727168	1145 MISSION ST	Downtown	1,996	25	Mixres	Retail/Ent	6/9/2006
4792029	1212 THOMAS AV	BVHP Area A,B	30,000	0	PDR	PDR	7/23/2008
3754066	1091 FOLSOM ST	East SoMa	-2,250	30	Resident	--N/A--	6/10/2005
3560001	2210 MARKET ST	Market Octavia	2,000	22	Mixres	Retail/Ent	10/2/2008
3521005	340 11TH ST	WSoMa	5,682	20	Mixres	Retail/Ent	4/11/2005
3554027	411 VALENCIA ST	Mission	1,400	24	Mixres	Retail/Ent	10/13/2005

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
6473040	5735 MISSION ST	South Central, Other	5,240	20	Mixres	CIE	9/2/2009
3732071	468 CLEMENTINA ST	East SoMa	-500	25	Resident	--N/A--	7/20/2005
3752019	870 HARRISON ST	WSoMa	-6,120	22	Mixres	Retail/Ent	7/14/2006
1368049	4614 CALIFORNIA ST	Richmond	13,686	0	Mixed	MIPS	1/23/2007
0101004	1741 POWELL ST	Northeast	-11,795	18	Mixres	Retail/Ent	8/12/2009
3548039	1801 MISSION ST	Mission	2,600	18	Mixres	Retail/Ent	7/17/2006
3588012	3500 19TH ST	Mission	2,950	17	Mixres	Retail/Ent	5/1/2006
3726047	537 NATOMA ST	East SoMa	-5,425	14	Mixres	PDR	9/1/2005
1028028	2829 CALIFORNIA ST	Western Addition	112	12	Mixres	Retail/Ent	10/31/2007
3776092	246 RITCH ST	East SoMa	-4,130	19	Resident	--N/A--	1/5/2007
1742043	1266 09TH AV	Inner Sunset	-3,000	15	Mixres	Retail/Ent	12/18/2009
4058008	616 20TH ST	Central Waterfront	-1,000	16	Mixres	Retail/Ent	11/24/2009
0832026	360 OCTAVIA ST	Market Octavia	1,000	16	Mixres	Retail/Ent	10/1/2008
2018003	2400 NORIEGA ST	Outer Sunset	12,366	0	CIE	CIE	12/30/2009
0832025	300 OCTAVIA ST	Market Octavia	0	16	Resident	--N/A--	10/1/2008
1084001B	1 Stanyan Street	Richmond	-1,807	13	Mixres	Retail/Ent	12/14/2007
0282004	723 TAYLOR ST	Downtown	0	14	Resident	--N/A--	5/2/2005
3197010	1446 OCEAN AV	Balboa Park	-2,500	13	Resident	--N/A--	10/31/2008
3557062	200 DOLORES ST	Market Octavia	-8,463	13	Resident	--N/A--	8/19/2008
0041009	7 VANDEWATER ST	Northeast	-4,600	11	Resident	--N/A--	7/5/2005

PL APPROVED

3702053	1169 MARKET ST	Downtown	33,540	1083	Mixres	Retail/Ent	8/3/2006
3746001	201 Folsom St	Transbay	0	806	Resident	--N/A--	11/18/2003
4624009	227 West Point Road	Other S Bayshore	620	401	Mixres	Retail/Ent	12/10/2008
4154001	1001 POTRERO AV	Showpl/Potrero	419,070	0	CIE	CIE	12/2/2008
3747320	399 FREMONT ST	Rincon Hill	-2,256	432	Mixres	MIPS	8/4/2006
5262004	2095 Jerrold Ave	BVHP Area A,B	127,779		PDR	PDR	3/26/2010
0857001	55 Laguna Street	Market Octavia	28,090	440	Mixres	Retail/Ent	1/17/2008
3765015	425 First Street	Rincon Hill	-75,816	340	Resident	--N/A--	8/16/2005
8722001	300 16TH ST	Mission Bay	312,932	0	MIPS	MIPS	10/2/2008
0757025	1100 GOLDEN GATE AV	Western Addition	0	98	Resident	--N/A--	12/18/2008

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
0813007	1390 MARKET ST	Market Octavia	-1,500	230	Mixres	Retail/Ent	5/28/2009
0345004	220 GOLDEN GATE AV	Downtown	-30,690	172	Mixres	MIPS	9/10/2008
0331010	168 EDDY ST	Downtown	15,000	170	Mixres	Retail/Ent	3/26/2009
0794015	746 LAGUNA ST	Market Octavia	2,325	143	Mixres	MIPS	5/13/2010
0323015	472 ELLIS ST	Downtown	-65,926	60	Resident	--N/A--	12/12/2008
7331003	800 Brotherhood Way	Park Merced	0	127	Resident	--N/A--	12/10/2007
0872005	1960-1998 MARKET ST	Market Octavia	9,000	115	Mixres	Retail/Ent	6/4/2009
3722079	134-140 NEW MONTGOME	Transbay	-84,660	118	Mixres	Retail/Ent	12/11/2008
3767305	429 BEALE ST	Rincon Hill	-35,628	113	Resident	--N/A--	5/14/2009
3703079	1036-1040 MISSION ST	Downtown	1,256	100	Mixres	Retail/Ent	5/14/2009
1228005	690 STANYAN ST	Buena Vista	10,800	56	Mixres	Retail/Ent	10/23/2008
1052024	2655 BUSH ST	Western Addition	-40,617	84	Mixres	Retail/Ent	10/10/2008
3553008	490 SOUTH VAN NESS AV	Mission	-689	81	Mixres	Retail/Ent	2/26/2010
0327011	72 ELLIS ST	Downtown	79,054		Visitor	Visitor	3/25/2010
0808036	401 Grove Street	Market Octavia	7,000	70	Mixres	Retail/Ent	11/20/2008
6969001	5050 MISSION ST	South Central, Other	7,030	61	Mixres	Retail/Ent	8/14/2008
0711031	1100 ELLIS ST	Western Addition	11,513	0	CIE	CIE	8/6/2009
0336017	245 HYDE ST	Downtown	-26,640	65	Resident	--N/A--	4/10/2008
0258033	500 PINE ST	Downtown	56,830		MIPS	MIPS	3/15/2001
0165021	235 BROADWAY	Northeast	5,000	50	Mixres	Retail/Ent	7/22/2010
0347016	399 GOLDEN GATE AV	Downtown	53,000	0	Retail/Ent	Retail/Ent	11/27/2007
0287013	300 Grant Ave.	Downtown	-1,250	45	Mixres	Retail/Ent	7/10/2008
3785003	690 05TH ST	WSoMa	32,500	0	Visitor	Visitor	6/17/2009
0596024	1946 POLK ST	Northeast	-9,245	43	Mixres	Retail/Ent	11/24/2007
3980008	1717 17TH ST	Showpl/Potrero	-13,369	41	Mixres	PDR	7/15/2010
1029003	2901 California St	Western Addition	15,604	-3	CIE	CIE	6/16/2009
1450008	5400 GEARY BL	Richmond	-10,748	39	Mixres	Retail/Ent	6/27/2008
3753081	345 06TH ST	East SoMa	324	36	Mixres	Retail/Ent	4/2/2009
0828012	735 Fell St	Western Addition	16,000	0	CIE	CIE	2/2/2008
0279011	1080 SUTTER ST	Downtown	1,339	35	Mixres	Retail/Ent	5/28/2009
0570010	1622 BROADWAY	Marina	0	34	Resident	--N/A--	3/12/2009
7148040	ONE CAPITOL AV	Ingleside, Other	0	28	Resident	--N/A--	5/13/2010

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
6473038	5735-5743 MISSION ST	South Central, Other	-7,153	16	Mixres	Retail/Ent	6/12/2008
1460040	420 29TH AV	Richmond	-2,500	20	Mixres	Retail/Ent	12/18/2008
3728069	121 09TH ST	WSoMa	-4,975	20	Mixres	Retail/Ent	7/31/2009
1028003	2829 California Street	Western Addition	373	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
4886008	Hunters Point Expy	Candlestick	6,120,000	10237	Mixres	MIPS	12/3/2007
7303001	3711 19th Ave	Park Merced	478,383	5677	Mixres	Retail/Ent	1/8/2008
1939001	Treasure Island	Treasure Island	250,000	6000	Mixres	Retail/Ent	12/4/2007
3708006	50 01ST ST	Transbay	1,134,000	600	Mixres	Visitor	12/21/2006
6310001	1654 Sunnydale Ave	South Central, Other	59,424	915	Mixres	Retail/Ent	4/28/2010
3720001	425 MISSION ST	Transbay	1,742,950	0	MIPS	MIPS	7/1/2008
4167004	1 TURNER TR	Showpl/Potrero	30,000	1094	Mixres	Retail/Ent	6/30/2010
0694005	1100 VAN NESS AVE	Downtown	702,067	-25	Mixed	CIE	6/10/2010
3719010	181 FREMONT ST	Transbay	492,866	140	Mixres	MIPS	5/15/2007
3710017	350 MISSION ST	Transbay	415,603	0	MIPS	MIPS	11/19/2008
3762106	725-765 Harrison Street	East SoMa	26,900	510	Resident	--N/A--	11/8/2005
3756003	350 08TH ST	WSoMa	56,700	416	Mixres	Retail/Ent	9/7/2007
3834001	1000 16TH ST	Showpl/Potrero	26,500	450	Mixres	Retail/Ent	10/11/2006
0244001	950 MASON STREET	Northeast	-295,000	160	Mixres	Visitor	2/11/2009
0331016	231 ELLIS ST	Downtown	22,000	400	Mixres	MIPS	1/24/2006
3704071	949 Market Street	Downtown	237,300	0	Retail/Ent	Retail/Ent	2/22/2008
3736074	41 TEHAMA ST	Transbay	-1,400	350	Resident	--N/A--	10/31/2006
1075001	2501 Sutter St	Western Addition	0	450	Resident	--N/A--	12/31/2008
3722027	151 THIRD ST	Downtown	66,685		CIE	CIE	4/9/2009
0647007	1634 PINE ST	Western Addition	448	250	Mixres	MIPS	11/5/2008
3706093	706 MISSION ST	Downtown	35,000	220	Mixres	CIE	9/11/2008
0697037	1333 GOUGH ST	Japantown	0	231	Resident	--N/A--	7/15/2005
0836002	1540 MARKET ST	Market Octavia	-13,252	180	Mixres	Retail/Ent	2/27/2009
0201012	8 Washington Street	Northeast	32,100	170	Mixres	Retail/Ent	12/4/2007
0238002	300 CALIFORNIA ST	Downtown	61,600	0	MIPS	MIPS	12/19/2007
3507042	1400 MISSION ST	Downtown	3,640	165	Mixres	Retail/Ent	4/8/2009

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3725015	938 HOWARD ST	East SoMa	-18,956	154	Mixres	Retail/Ent	3/27/2006
0192014	835-845 Jackson St	Northeast	68,010	0	CIE	CIE	6/26/2008
0250001	1401 CALIFORNIA ST	Northeast	-19,056	95	Mixres	Retail/Ent	10/20/2008
3616007	2558 MISSION ST	Mission	0	125	Resident	--N/A--	12/21/2005
0667016	1545 PINE ST	Northeast	-18,000	113	Mixres	Retail/Ent	3/19/2007
3912001	1-25 Division Street	Showpl/Potrero	-35,453	100	Mixres	Retail/Ent	1/26/2006
0526021	2550 VAN NESS AV	Northeast	-51,353	109	Mixres	Retail/Ent	5/17/2005
1073013	800 PRESIDIO AV	Richmond	10,180	83	Mixres	CIE	1/25/2008
3535001	2001 MARKET ST	Market Octavia	-14,517	69	Mixres	Retail/Ent	6/13/2008
3740027	SPEAR STREET AND FOLS	Transbay	0	85	Resident	--N/A--	6/8/2007
9900041H	PIER 31	Northeast	12,990	0	PDR	PDR	8/27/2008
3180001	50 PHELAN AV	Balboa Park	11,682	60	Mixres	Retail/Ent	1/25/2010
3704015	942 MISSION ST	Downtown	53,514	0	Visitor	Visitor	2/14/2008
4045002	740 ILLINOIS ST and 2121	Central Waterfront	-8,500	70	Resident	--N/A--	2/12/2010
3543011	2175 MARKET ST	Market Octavia	5,813	60	Mixres	Retail/Ent	8/31/2006
3753005	205 SHIPLEY ST	East SoMa	-11,000	51	Mixres	Retail/Ent	5/26/2006
0855011	4 OCTAVIA ST	Market Octavia	3,530	49	Mixres	Retail/Ent	10/6/2008
0318020	651 GEARY ST	Downtown	-8,010	46	Mixres	Retail/Ent	8/15/2008
4591A010	142 ALBATROSS	Other S Bayshore	0	50	Resident	--N/A--	6/8/2007
0595013	1645-1661 PACIFIC AV	Northeast	-27,275	50	Resident	--N/A--	7/25/2007
3753008	374 5TH ST	East SoMa	0	47	Resident	--N/A--	8/19/2009
3534069	25 DOLORES ST	Market Octavia	-19,037	37	Resident	--N/A--	8/28/2008
3576001	2100 MISSION ST	Mission	-4,987	29	Mixres	Retail/Ent	9/21/2009
6935001	1607-1649 Ocean Ave.	Balboa Park	-19,485	31	Resident	--N/A--	5/4/2006
3639002	2652 HARRISON ST	Mission	-7,250	30	Resident	--N/A--	1/11/2006
0853021	102-104 OCTAVIA STREET	Market Octavia	0	30	Resident	--N/A--	6/8/2007
3752023	397 05TH ST	WSoMa	5,000	24	Mixres	Retail/Ent	9/24/2007
0670024	1433 BUSH ST	Downtown	-4,420	26	Mixres	Retail/Ent	11/17/2009
0281003	832 SUTTER ST	Downtown	1,176	27	Mixres	Retail/Ent	8/24/2008
4287018	1263 CONNECTICUT ST	Other S Bayshore	27,880	0	PDR	PDR	1/21/2010
0028014	1255- 1275 COLUMBUS A	Northeast	-9,352	20	Mixres	Retail/Ent	7/29/2009
0512025	2353 LOMBARD ST	Marina	964	21	Mixres	Retail/Ent	12/29/2009

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3564091	2299 MARKET ST	Central	6,940	18	Mixres	Retail/Ent	6/10/2008
3148001	4550 MISSION ST	South Central, Other	-3,250	17	Mixres	Retail/Ent	7/19/2006
3731101	42 HARRIET ST	East SoMa	0	23	Resident	--N/A--	2/26/2010
3596113	899 VALENCIA ST	Mission	4,705	18	Mixres	Retail/Ent	8/11/2005
0194009	740 WASHINGTON ST	Northeast	-9,050	18	Mixres	CIE	2/28/2007
0640010	1990 CALIFORNIA ST	Marina	0	11	Resident	--N/A--	5/15/2008
3547027	80 JULIAN AV	Mission	12,900	6	Mixres	CIE	11/30/2009
3721019	562 HOWARD ST	Transbay	0	19	Mixres	Retail/Ent	10/3/2007
3732112	452 TEHAMA ST	East SoMa	-4,917	20	Mixres	Retail/Ent	6/22/2007
3965001	2401 16TH ST	Mission	1,722	12	Mixres	MIPS	10/9/2008
3617008	1050 VALENCIA ST	Mission	400	16	Mixres	Retail/Ent	12/20/2007
1018012	3657 SACRAMENTO ST	Richmond	0	18	Resident	--N/A--	11/20/2007
0729046	1210 SCOTT STREET	Western Addition	0	18	Resident	--N/A--	6/8/2007
3753140	935 FOLSOM ST	East SoMa	-13,808	69	Mixres	Retail/Ent	4/19/2010
3727004	150 07TH ST	WSoMa	10,808	0	Retail/Ent	Retail/Ent	4/2/2007
5869014	4199 MISSION ST	South Central, Other	600	12	Mixres	Retail/Ent	8/5/2008
2463A014	2233 VICENTE ST	Outer Sunset	13,469	0	Retail/Ent	Retail/Ent	4/14/2005
9900030	America's Cup Pier 30/32 S	Market Octavia	608,688		Retail/Ent	Retail/Ent	6/24/2010
3115043	625 MONTEREY BL	Ingleside, Other	21,378		Retail/Ent	Retail/Ent	5/26/2010
3707052	2 NEW MONTGOMERY ST	Transbay	0	125	Resident	--N/A--	12/4/2007

Acknowledgements

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Cover Photo:

Just completed mixed use retail and residential building, 231 Franklin St, by Aksel K Olsen.