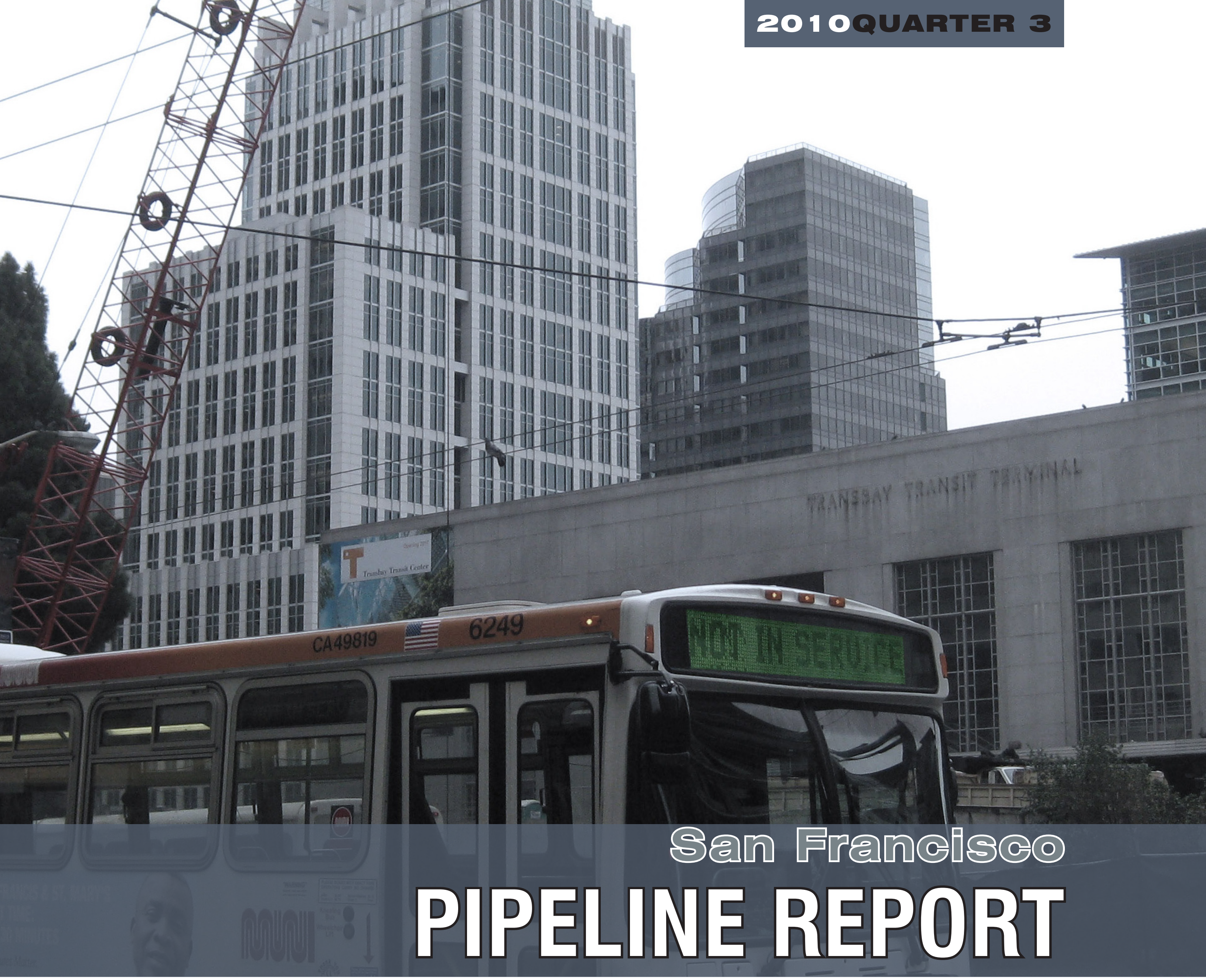
2010 QUARTER 3



San Francisco PIPELINE REPORT

San Francisco Planning Department
November 2010

San Francisco

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Table of Contents

Contents

List of Figures, Tables and Maps

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, 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.*

Q3 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 44,100 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 project and its EIR have been approved by the Planning Commission.
- The pipeline would also add a net of 15.7 million sq. ft. of non-residential uses. Within this total, office and retail space would see net gains of 10.9 million and 3.2 million sq. ft., respectively. There is an expected loss of nearly 375,000 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 1,200 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.
- Overall, there has been a slight uptick in units and commercial space filings in the quarter, reflecting primarily larger projects rather than a larger number of applications.

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 make the pipeline more inclusive even as the Department is not always the entitling entity.

Of the pipeline projects, 70 percent are exclusively residential and 20 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 44,100 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 recent filings, moreover, have declined substantially.

Pipeline projects will also bring a net addition of 15.7 million sq ft of commercial development.

Projects by Overall Status

Table 1 on the following page shows the following:

- Around 14 percent of all projects, representing 1,200 net added housing units and 500,000 sq ft of commercial space, are under construction.
- Around 25 percent of projects (with 2,200 net units and almost 900,000 sq. ft. commercial space) have received building permit approvals and may have already begun construction.
- Around one in three projects (including 3,400 net new units and an addition of 1.4 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	115	20,710	6,181,000	1,002,000	0	3,161,000	-86,000	1,998,000	106,000
Approved by Planning	95	16,690	6,722,000	189,000	-33,000	5,354,000	-44,000	1,011,000	245,000
BP Filed	275	3,350	1,437,000	-35,000	0	1,466,000	-140,000	146,000	0
BP Approved/ Issued/Re-Instated	197	2,160	881,000	40,000	0	825,000	-81,000	71,000	25,000
Construction	114	1,180	478,000	426,000	20,000	67,000	-25,000	-9,000	0
Grand Total	796	44,100	15,699,000	1,622,000	-13,000	10,873,000	-375,000	3,216,000	376,000

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.

- Twelve percent of the pipeline projects and 38 percent of the units have received Planning Department approvals. If and when constructed, these projects would add some 17,000 new units to the city's housing stock, and up to 6.7 million sq ft of commercial space. These projects now must secure a building permit.
- Fourteen percent of projects, representing nearly half of the units in the pipeline are under Planning Department review. Collectively, these projects represent some 20,700 net new units and 6.2 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 15.7 million sq ft of commercial development that would result in the following land use inventory changes:

- 10.9 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 400,000 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 located), Treasure Island and Parkmerced. Both Treasure Island and Parkmerced are still in the environmental review stages of development, while the Candlestick/ Shipyard project has cleared this stage as of July 2010 and is now 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, Transbay, Market & Octavia, and Rincon Hill; altogether, these areas will total around 10,400 new units.

On the commercial side, nearly 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

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%	280	0.6%	56	4,800	0.0%	19	23
Bernal Heights	37	4.6%	60	0.1%	2	164,930	1.1%	29	10
Buena Vista	15	1.9%	110	0.2%	7	26,520	0.2%	25	18
BVHP Area A,B	29	3.6%	410	0.9%	16	189,010	1.2%	17	9
Candlestick	2	0.3%	10,440	23.7%	5,218	6,120,000	39.0%	1	1
Central	71	8.9%	120	0.3%	2	11,950	0.1%	23	22
Central Waterfront	9	1.1%	410	0.9%	45	2,870	0.0%	18	25
Downtown	40	5.0%	3,920	8.9%	106	1,541,060	9.8%	4	3
East SoMa	32	4.0%	1,760	4.0%	57	606,620	3.9%	8	5
Executive Park	2	0.3%	260	0.6%	128	14,000	0.1%	20	20
India Basin	3	0.4%	10	0.0%	3	-3,120	-0.0%	31	27
Ingleside, Other	30	3.8%	70	0.2%	2	42,640	0.3%	27	14
Inner Sunset	36	4.5%	60	0.1%	2	12,130	0.1%	28	21
Japantown	4	0.5%	230	0.5%	59	3,550	0.0%	21	24
Marina	22	2.8%	120	0.3%	5	25,660	0.2%	24	19
Market Octavia	39	4.9%	2,030	4.6%	53	-43,330	-0.3%	6	29
Mission	57	7.2%	760	1.7%	14	-30,440	-0.2%	13	28
Mission Bay	5	0.6%	130	0.3%	27	1,272,880	8.1%	22	4
Northeast	47	5.9%	1,050	2.4%	22	-291,580	-1.9%	12	31
Other S Bayshore	14	1.8%	470	1.1%	33	40,660	0.3%	15	15
Outer Sunset	27	3.4%	90	0.2%	3	46,340	0.3%	26	13
Park Merced	2	0.3%	5,860	13.3%	2,930	478,380	3.0%	3	6
Richmond	84	10.6%	460	1.0%	5	37,210	0.2%	16	16
Rincon Hill	7	0.9%	1,870	4.2%	267	-94,530	-0.6%	7	30
Showpl/Potrero	30	3.8%	1,740	3.9%	58	426,750	2.7%	9	7
South Central, Other	72	9.0%	1,260	2.9%	18	113,230	0.7%	10	11
TB Combo	18	2.3%	2,490	5.6%	138	4,606,980	29.3%	5	2
Treasure Island	1	0.1%	6,000	13.6%	6,000	250,000	1.6%	2	8
VisVal	3	0.4%	10	0.0%	4	-1,250	-0.0%	30	26
Western Addition	30	3.8%	1,100	2.5%	37	30,760	0.2%	11	17
WSoMa	23	2.9%	530	1.2%	23	94,450	0.6%	14	12
Grand Total	796	100.0%	44,110	100.0%	56	15,699,130	100.0%	0	0

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 districts.

Pipeline Projects by Current Zoning Category

There is considerable variation in project size distributions as a function of the generalized zoning category. Some zoning districts display similarly typed and sized projects, while others will be host to a great variety of project sizes and types. First let us turn to the residential pipeline.

Residential Pipeline

Figure 1 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 57 percent as per the left-most column) fall in residential districts, these same districts account for just over 30 percent of units, (and less than 10 percent of the non-residential space).

The largest projects, as measured by the median, are found in High Density Residential and Commercial zone classes. Projects in these districts are fairly diverse in size. Projects in residential districts, on the other hand, are far more homogenous, with the vast majority of projects counting fewer than 5 units.

FIGURE 1: Pipeline Share of Total, by Zoning Category

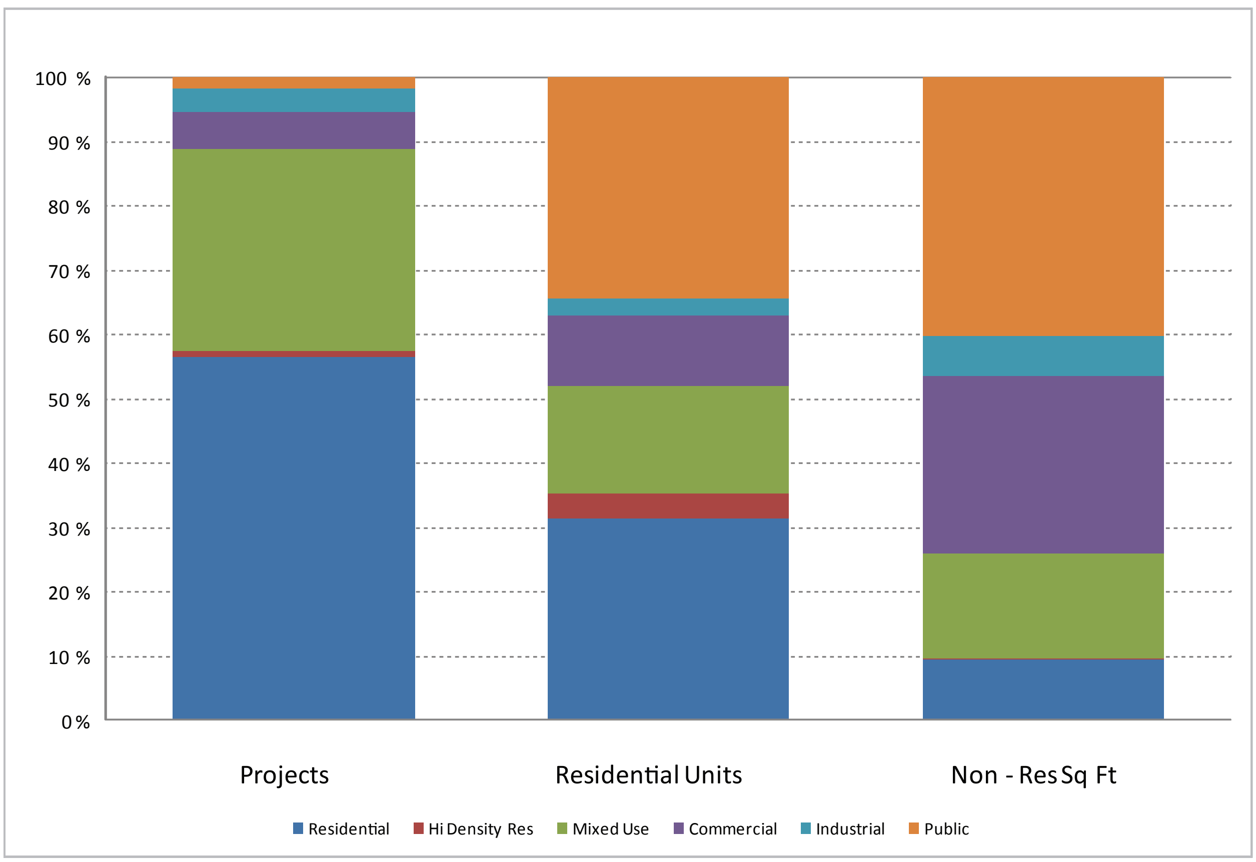


TABLE 3: Residential and Commercial Pipeline by Generalized Zoning Category

District Type	Simplified Zoning	Projects	Net Units	Net Gross Sq. Ft.	Cult., Inst., Educ.	Medical	Office	Prod., Dist., Repair	Retail	Visitor
Commercial	C-2	14	2,720	546,800	0	0	135,500	-32,600	380,600	63,300
	C-3	32	2,310	3,617,600	156,400	0	2,506,600	900	267,200	686,600
	C-M	1	120	300	0	0	2,400	-4,500	2,400	0
Commercial Total		47	5,150	4,164,800	156,400	0	2,644,500	-36,200	650,200	749,800
Hi Density Res	DTR	8	1,950	-94,500	0	0	-35,500	-70,900	11,900	0
Hi Density Res Total		8	1,950	-94,500	0	0	-35,500	-70,900	11,900	0
Industrial	M	8	480	548,200	7,500	0	11,000	-93,000	622,700	0
	PDR	16	180	252,600	3,700	0	113,400	104,300	31,200	0
	SLI	4	530	26,300	0	0	2,000	-6,200	30,500	0
	HP-RA	1	50	0	0	0	0	0	0	0
Industrial Total		29	1,240	827,000	11,200	0	126,400	5,100	684,400	0
Mixed Use	CRNC	1	0	68,000	68,000	0	0	0	0	0
	CVR	1	20	-9,100	4,500	0	0	0	-13,500	0
	MUG	4	60	-1,900	0	0	0	-1,900	0	0
	MUO	3	20	47,800	0	0	49,500	-2,500	800	0
	MUR	10	850	-82,400	0	0	-8,800	-85,300	11,700	0
	NC	117	1,650	87,700	29,200	-45,100	141,300	-57,600	-4,200	24,000
	NCT	46	1,790	10,300	37,100	0	-6,500	-86,400	66,100	0
	RC	24	2,150	586,900	903,800	0	-33,100	31,200	33,700	-348,600
	RSD	3	50	-1,100	0	0	0	-6,100	5,000	0
	SLR	17	510	61,500	0	0	-200	-9,800	71,500	0
	SPD	2	0	2,400	0	0	3,900	-1,400	0	0
	SSO	1	0	32,500	0	0	-13,500	0	5,000	41,000
	UMU	16	970	23,700	0	0	-15,400	-14,300	53,400	0
	MB	4	130	891,900	0	0	875,200	0	16,700	0
Mixed Use Total		249	8,190	1,718,400	1,042,500	-45,100	992,400	-234,100	246,200	-283,600
Public	P	14	17,130	8,531,400	369,200	12,000	6,852,600	-2,300	1,089,900	210,000
Public Total		14	17,130	8,531,400	369,200	12,000	6,852,600	-2,300	1,089,900	210,000
Residential	RED	6	90	6,400	0	20,000	-3,800	-9,800	0	0
	RH	356	650	227,700	-8,100	0	215,600	-7,700	27,800	0
	RM	63	9,490	342,900	59,100	0	101,600	0	482,200	-300,000
	RTO	24	230	-24,800	-8,500	0	-21,300	-19,000	23,900	0
Residential Total		449	10,450	552,100	42,600	20,000	292,100	-36,500	534,000	-300,000
Grand Total		796	44,100	15,699,100	1,621,900	-13,100	10,872,600	-375,000	3,216,500	376,200

Table 3 shows the overall 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. Two large projects are parcels zoned "Public Land": the Bayview Waterfront project, most of which is at Candlestick Point[1] and the Treasure Island redevelopment project. These projects could add more than 17,000 units.

The second largest share is found on residentially zoned lots, accounting for 10,500 units in 450 projects. Two thirds of these units, however, are in 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 93 percent of the residential projects. Only a handful are larger, with a few mentioned above.

Thirdly, the mixed use districts, ranging from neighborhood commercial to Eastern Neighborhoods districts, account for 8,200 units in 249 projects, or around 33 units per project.

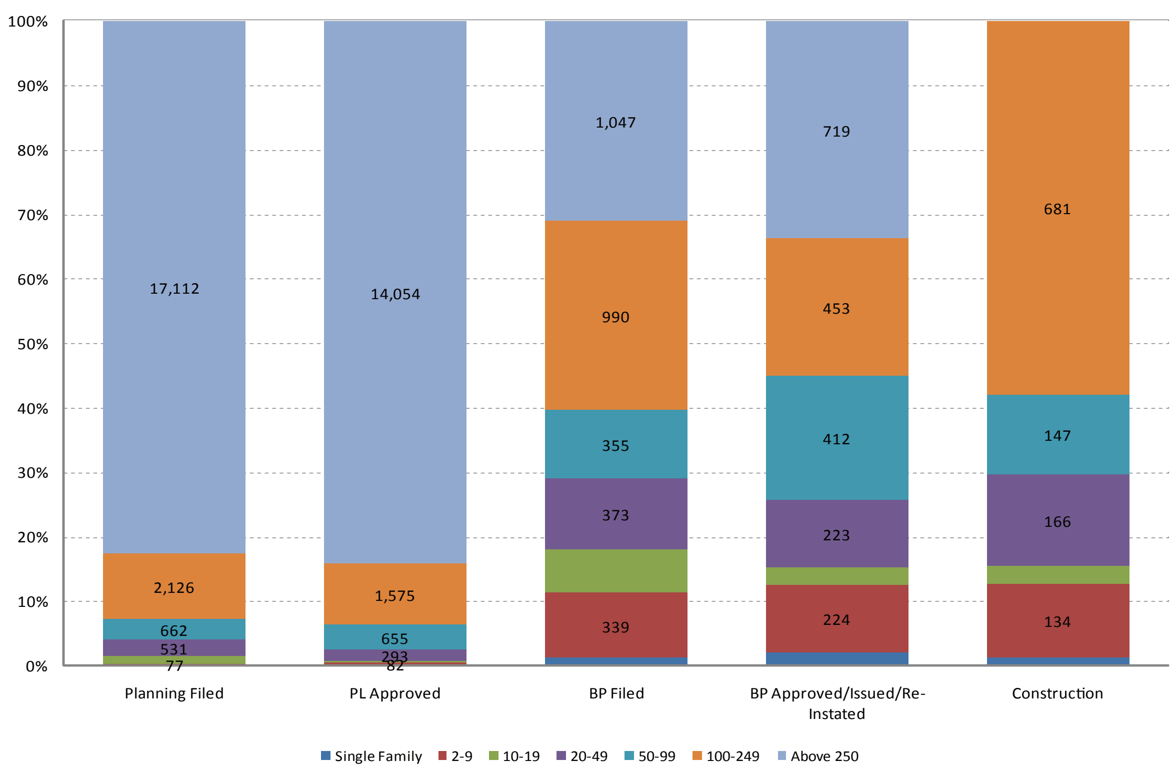
The fourth largest of these shares is on commercially zoned parcels, accounting for 5,100 units in 47 projects, or averaging 109 units per project.

Another 1,240 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 which account for a fraction of one

1 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.

FIGURE 2: Residential Pipeline, by Status & Building Size



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.

Residential projects in the Residential (R) districts, on the other hand, tend to be small scaled, in-fill developments, accounting for some 56 percent of proposed projects but just 21 percent of the total units (or 10,500 net units) in the pipeline. Moreover, half of these units would be the result of just one 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

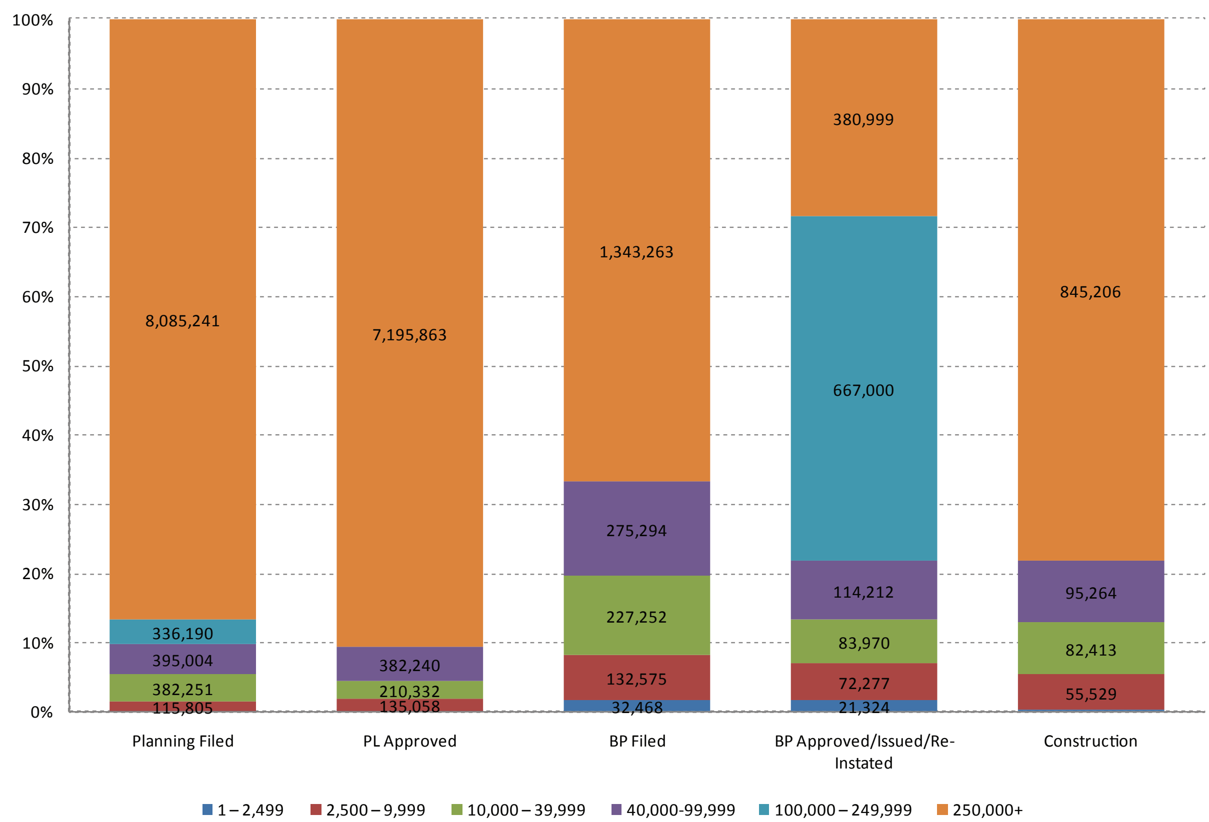
Commercial development is typically found in commercial and mixed use districts; thus the vast majority of the net commercial space are proposed to be added in these land classes. The commercial pipeline in general is characterized by 80 projects, but also 155 mixed use projects which contain both residential and non-residential components. 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.)

The largest concentration of potential commercial development is in a few areas currently zoned public[2]. Development here would add some net 8.5 million square feet, or more than half of all proposed commercial development, in just 13 projects. The largest of these proposed development 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.

Commercial districts account for the second largest concentration of non-residential development,

2 See footnote 2.

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



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

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	6	13	31	71	159	0	280	19
Bernal Heights	14	50	0	0	0	0	0	64	29
Buena Vista	0	40	0	0	56	0	0	96	26
BVHP Area A,B	5	27	0	0	73	0	355	460	17
Candlestick	0	0	0	0	0	198	10,500	10,698	1
Central	15	136	18	0	0	0	0	169	22
Central Waterfront	1	14	16	40	151	196	0	418	18
Downtown	0	35	17	283	258	1,304	2,579	4,476	4
East SoMa	2	31	70	261	306	333	779	1,782	10
Executive Park	0	0	0	30	0	226	0	256	20
India Basin	0	10	0	0	0	0	0	10	31
Ingleside, Other	10	45	0	28	0	0	0	83	27
Inner Sunset	14	38	25	0	0	0	0	77	28
Japantown	0	5	0	0	0	231	0	236	21
Marina	2	42	0	103	0	0	0	147	23
Market Octavia	2	35	76	227	278	994	440	2,052	8
Mission	2	117	97	88	193	319	0	816	13
Mission Bay	0	0	0	0	0	134	0	134	24
Northeast	2	79	51	152	257	552	0	1,093	12
Other S Bayshore	6	9	0	0	102	0	668	785	14
Outer Sunset	5	34	10	0	55	0	0	104	25
Park Merced	0	0	0	0	0	182	8,898	9,080	2
Richmond	5	174	31	80	83	150	0	523	16
Rincon Hill	0	0	0	0	70	337	1,464	1,871	9
Showpl/Potrero	3	46	0	69	0	100	2,150	2,368	6
South Central, Other	18	148	57	42	122	0	1,700	2,087	7
TB Combo	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	30
Western Addition	2	29	61	85	153	0	861	1,191	11
WSoMa	5	32	0	86	0	0	416	539	15
Grand Total	113	1,203	561	1,605	2,430	5,918	38,566	50,396	0

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.

Residential Pipeline by Project Size

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

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 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 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. 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.

Project Size by Proposed Use

More than two thirds of all projects are residential. Another 19 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

3 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.

TABLE 5: Pipeline Project Size, by Proposed Land Use

Proposed Use	Projects	Percent	Mean	Standard Deviation	Percentile				
					0	25	50 (Median)	75	100
CIE	22	3%	65,356	126,345	2,420	8,878	16,293	48,342	548,776
MIPS	23	3%	252,581	358,873	4,000	54,930	200,000	323,439	1,743,000
PDR	11	1%	57,341	137,198	1,000	2,175	6,000	28,940	464,553
Retail/Ent	14	2%	81,546	179,182	810	3,788	11,075	34,542	608,688
Visitor	4	1%	59,138	18,843	40,370	44,593	58,563	73,108	79,054
Mixed	6	1%	321,987	510,860	5,566	12,956	28,443	471,114	1,243,002
Mixres	155	19%	391,184	1,854,231	2,540	15,829	33,380	142,800	18,720,000
Resident	561	70%	18,441	68,171	1,200	2,400	2,400	3,600	967,200
All	796	100%	103,225	835,468	810	2,400	3,600	25,144	18,720,000

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 58,900 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 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 33,300 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.[4]

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

4 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.

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 6) and office space (Table 7).

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

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	2.0%	30	0.9%	-3,700	0.7%	30	-3,700
BVHP Area A,B	2	4.1%	360	10.3%	-106,900	18.9%	180	-53,450
Central	1	2.0%	0	0.0%	-1,800	0.3%	0	-1,800
Central Waterfront	2	4.1%	140	4.0%	-23,300	4.1%	70	-11,650
Downtown	2	4.1%	160	4.6%	-19,500	3.4%	80	-9,750
East SoMa	13	26.5%	1,020	29.2%	-110,900	19.6%	78	-8,530
India Basin	2	4.1%	10	0.3%	-5,100	0.9%	5	-2,550
Marina	1	2.0%	30	0.9%	-7,000	1.2%	30	-7,000
Market Octavia	2	4.1%	120	3.4%	-20,900	3.7%	60	-10,450
Mission	8	16.3%	330	9.5%	-97,000	17.1%	41	-12,130
Northeast	2	4.1%	160	4.6%	-39,300	6.9%	80	-19,650
Richmond	2	4.1%	10	0.3%	-3,000	0.5%	5	-1,500
Rincon Hill	2	4.1%	550	15.8%	-70,900	12.5%	275	-35,450
Showpl/Potrero	1	2.0%	100	2.9%	-15,500	2.7%	100	-15,500
South Central, Other	1	2.0%	20	0.6%	-8,500	1.5%	20	-8,500
TB Combo	2	4.1%	370	10.6%	-3,700	0.7%	185	-1,850
Western Addition	1	2.0%	30	0.9%	-9,100	1.6%	30	-9,100
WSoMa	4	8.2%	50	1.4%	-19,600	3.5%	13	-4,900
Grand Total	49	100.0%	3,490	100.0%	-565,600	100.0%	71	-11,540

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	2.7%	30	1.2%	-6,200	0.8%	30	-6,200
Central	1	2.7%	0	0.0%	-2,000	0.3%	0	-2,000
Downtown	8	21.6%	490	19.8%	-190,800	25.0%	61	-23,900
East SoMa	3	8.1%	110	4.5%	-12,600	1.7%	37	-4,200
Inner Sunset	1	2.7%	20	0.8%	-2,200	0.3%	20	-2,200
Market Octavia	6	16.2%	730	29.6%	-54,900	7.2%	122	-9,200
Northeast	2	5.4%	130	5.3%	-31,900	4.2%	65	-16,000
Richmond	1	2.7%	0	0.0%	-2,000	0.3%	0	-2,000
Rincon Hill	2	5.4%	610	24.7%	-60,000	7.9%	305	-30,000
Showpl/Potrero	2	5.4%	140	5.7%	-46,800	6.1%	70	-23,400
South Central, Other	2	5.4%	10	0.4%	-3,900	0.5%	5	-2,000
TB Combo	3	8.1%	170	6.9%	-325,100	42.6%	57	-108,400
Western Addition	2	5.4%	20	0.8%	-9,400	1.2%	10	-4,700
WSoMa	3	8.1%	10	0.4%	-15,000	2.0%	3	-5,000
Grand Total	37	100.0%	2,470	100.0%	-762,700	100.0%	67	-20,600

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 6 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 (3,500) 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 7 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 2,500 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 10.9 million sq. ft. citywide.

7 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.

Projects Under Planning Review

Project Application Filings

Table 8 below shows that a total of 25 planning applications[8] were filed in the second quarter of 2010, up from 20 projects in the previous quarter. However, this number only represents 20 residential units and 16,000 square feet of commercial development. The quarter's filings are significantly below the eight quarter moving average. If this were to continue, it would suggest a turn for the worse in the real estate market to the extent that new project filings serve as an indicator for that. Future quarters will show. Taken as a whole since 2000 (Figures 4 and 5), there has been a slight downward trend of the *number of projects* filed and approved, respectively. More recently in terms of number of *units* filed for, the downward trend has become evident. While recent months had shown a tentative improvement, the third quarter does seem to mark a hiatus in the recovery. 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. Still, 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, while others are abandoned altogether.

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

- On 2895 San Bruno Ave, the conversion of a gas station to five four story mixed use buildings on an 11,250 sq. ft lot. The project would include 10 residential units, 4,230 sq. ft. of retail, and 6,748 sq. ft. of office.

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

- At 1731 15th St, seismic retrofit and building rehabilitation of existing residential hotel. The project would increase number of rooms from 27 to 52.
- At 245 Valencia St, a proposal to construct a new church including a below grade off-street parking structure.

Other Project Activity

There is movement in the largest projects in the pipeline. The Bayview Waterfront Project, with 10,500 housing units and as up to 5,000,000 square feet of mixed office, research and development and light manufacturig uses depending on the final disposition of the 49ers to building a new stadium at the Shipyard, was approved by the Planning Commission in August, bringing the project one step closer to realization.

Meanwhile, the Parkmerced project, with 5,600 new units and local area serving retail is currently undergoing hearings at the Planning Commission, where urban design and open space, sustainability, transportation and economic feasibility will be debated in the final months of the year. In January, the project EIR as well as planning code changes, will be considered by the Commission.

The Treasure Island Redevelopment Project, with 7,000 new housing units Environmental Impact Report was published over the summer, followed by a commenting period. The Comments and Responses document is anticipated to be published in early Spring 2011, after which the EIR will be brought forward for certification by the San Francisco Planning Commission and the Treasure Island Development Authority Board.

To be sure, even if these projects were to be approved within the first months of the new year, full realization would be decades into the future, just as has been the case with the development of Mission Bay.

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
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	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	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	1,157,000	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	330	12	1,014,000	20	180	9	47,000
2007 Q3	53	19,980	377	4,081,000	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	25	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	29	630	22	24,000
2009 Q2	25	330	13	100,000	22	450	20	82,000
2009 Q3	29	230	8	10,000	10	540	54	42,000
2009 Q4	23	340	15	171,000	16	570	36	89,000
2010 Q1	19	280	15	13,000	14	180	13	170,000
2010 Q2	20	930	47	1,630,000	19	350	18	-21,000
2010 Q3	25	70	3	16,000	16	10,420	651	3,760,000

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

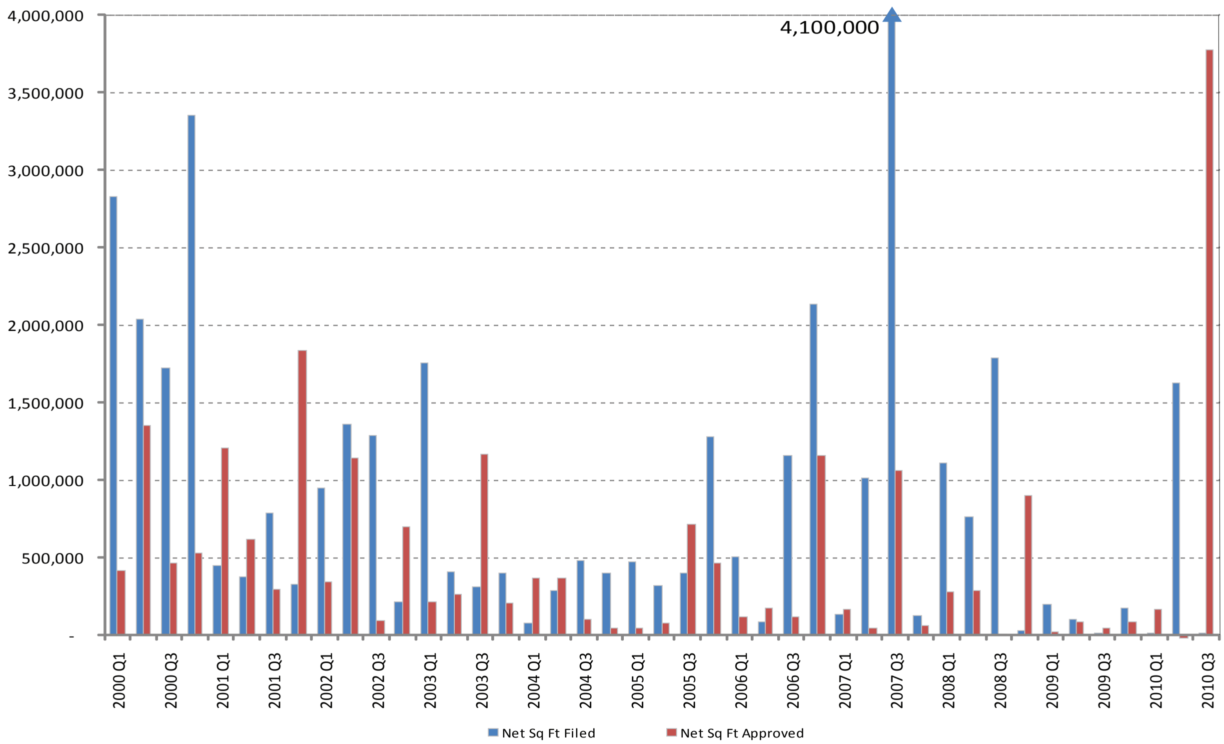
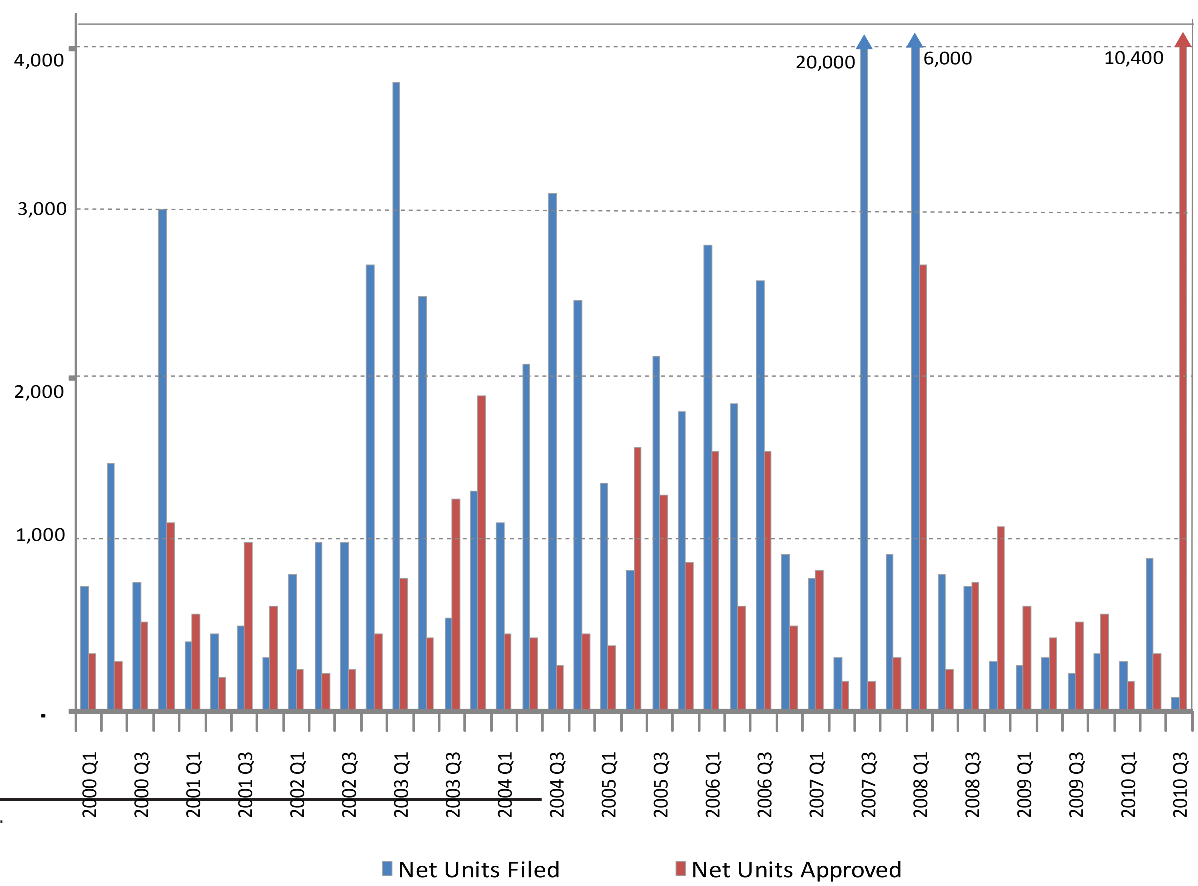
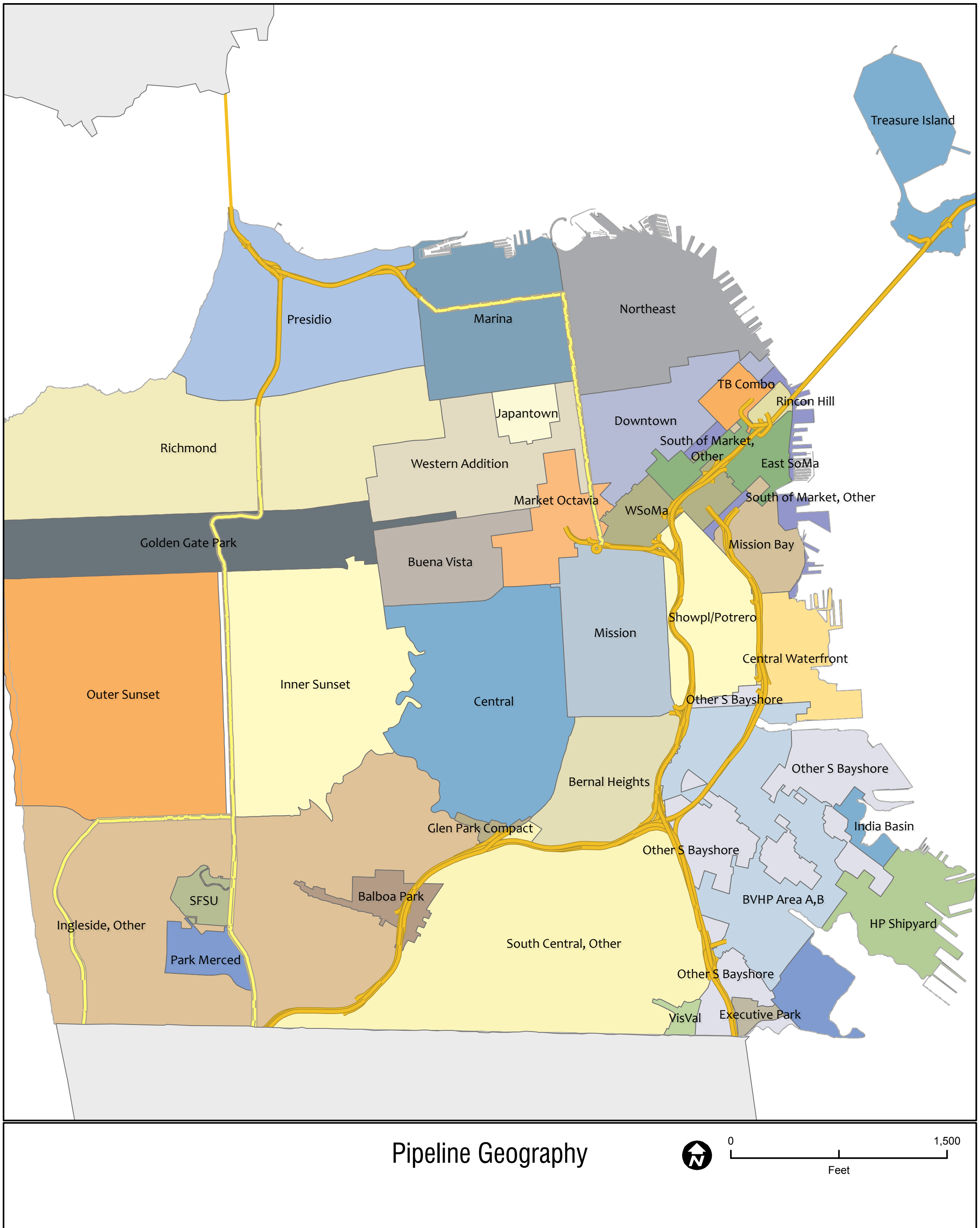


FIGURE 5: Pipeline Units Filed and Approved by the Planning Department, by Quarter



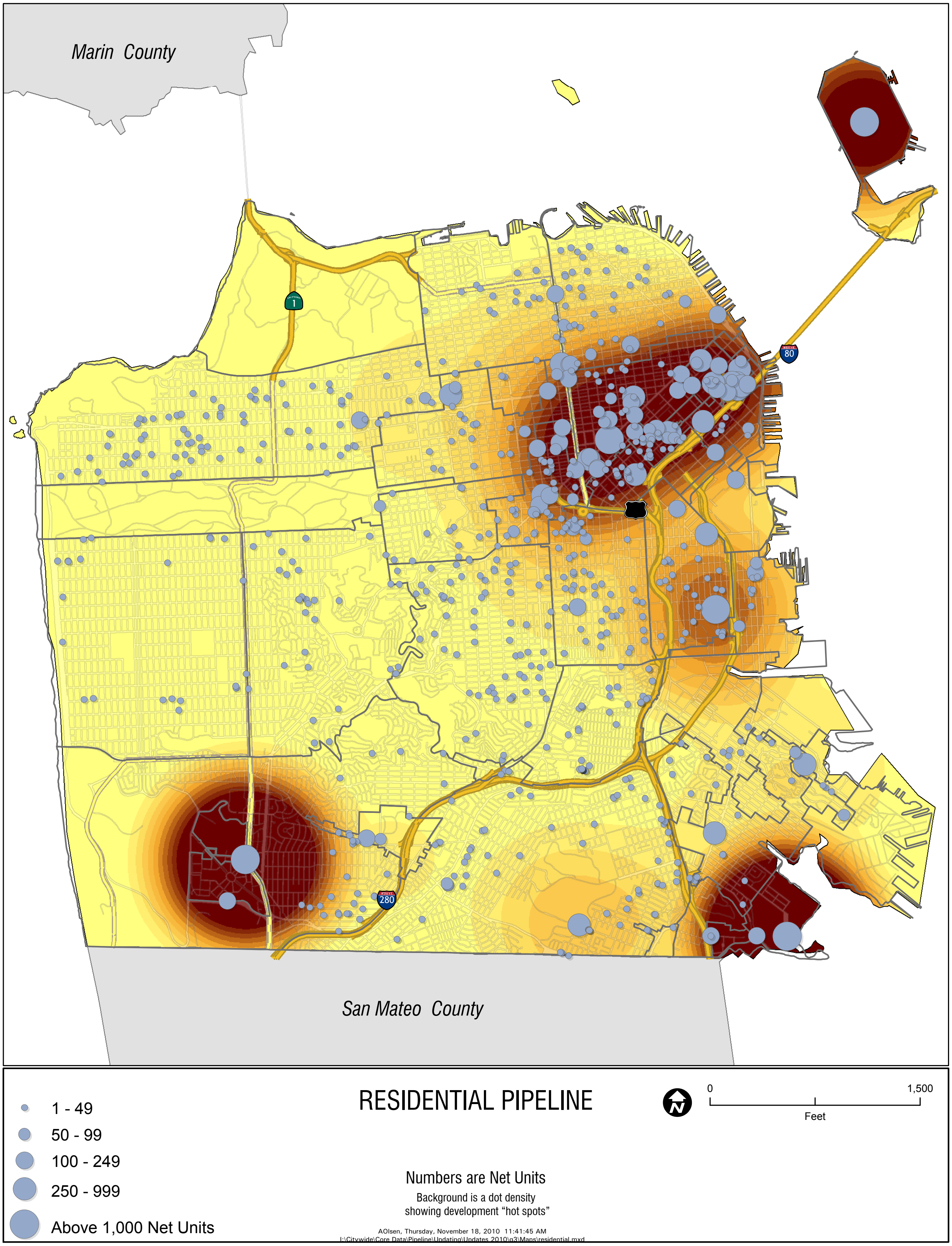
report.

MAP 1: Neighborhoods Highlighted in the Pipeline Report

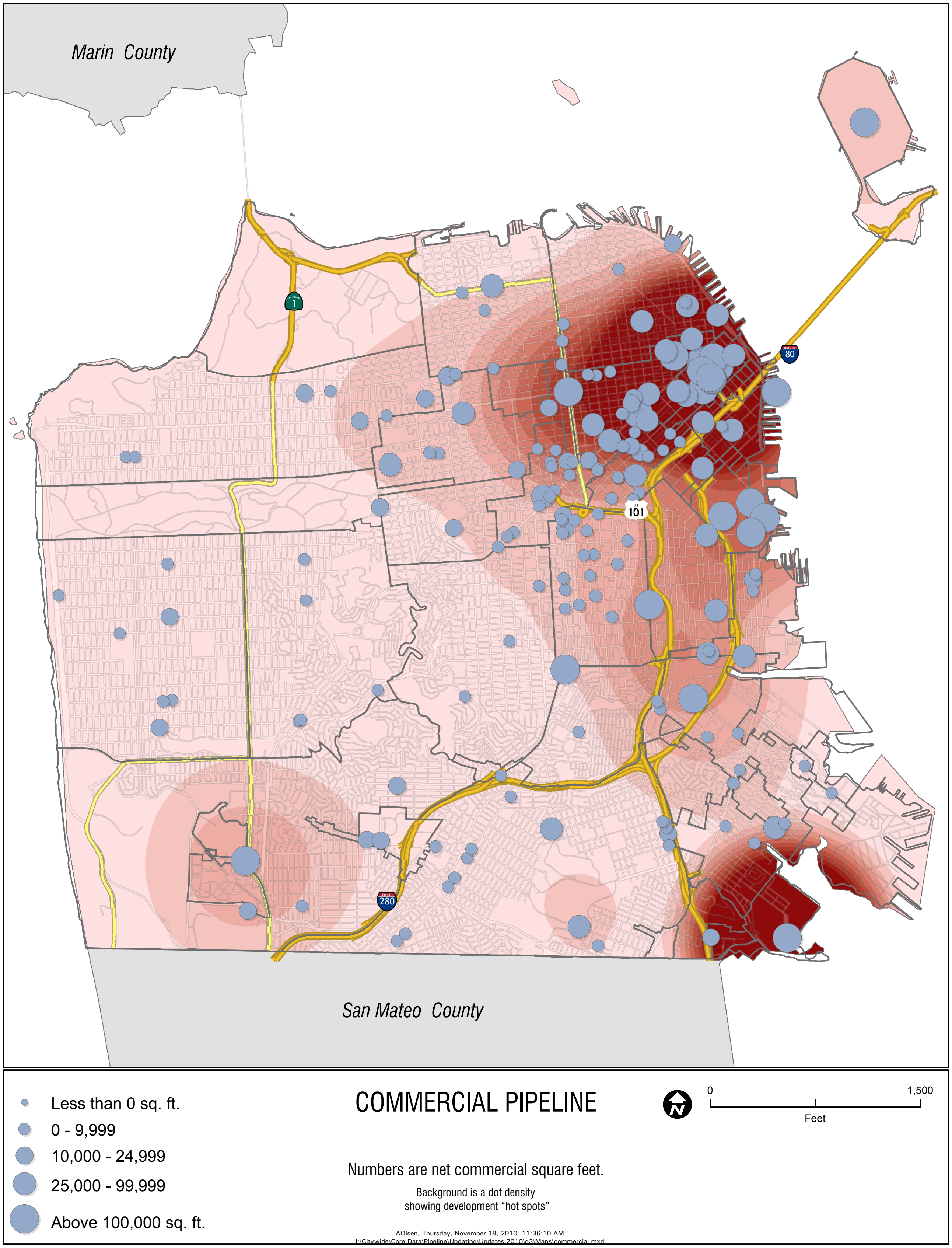


Boundaries shown here are designated solely for the purposes of summarizing pipeline data and don't necessarily coincide with other boundary designations, nor are they intended to denote jurisdiction (port property or otherwise)

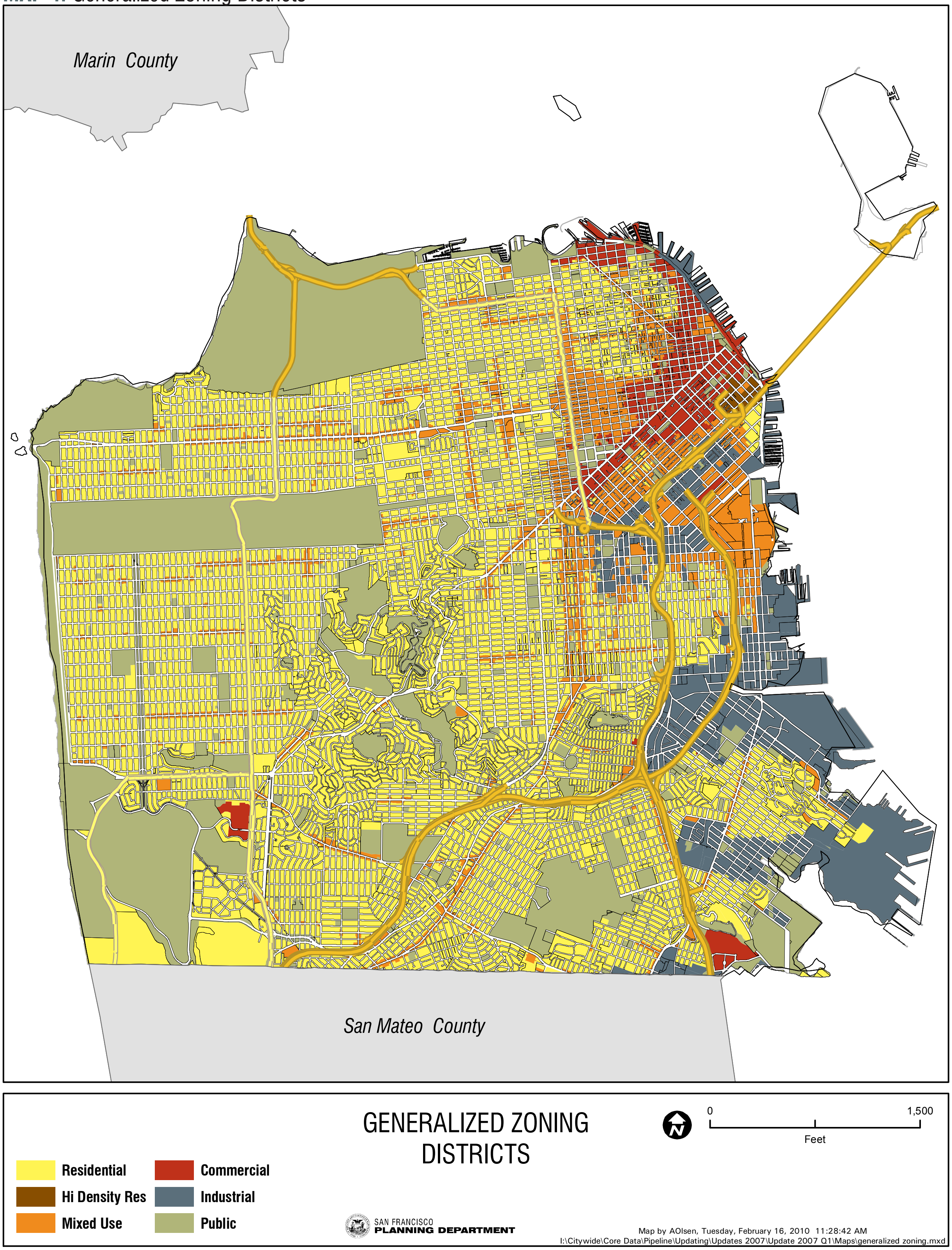
MAP 2: Residential Pipeline



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 Comm'l Sq. Ft	Nonresdential 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 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 3, 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
4154001	1001 POTRERO AV	Showpl/Potrero	419,070	0	CIE	CIE	7/15/2010
3721122	535 MISSION ST	TB Combo	296,430	0	MIPS	MIPS	9/21/2010
1084010	3575 GEARY BL	Richmond	20,957	150	Mixres	MIPS	8/16/2010
4991277	833-881 Jamestown	Candlestick	0	198	Resident	--N/A--	9/17/2007
0792028	365 FULTON STREET	Market Octavia	0	120	Resident	--N/A--	9/23/2010
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
3708022	16 Jessie St	TB Combo	-238,920	51	Mixres	Retail/Ent	8/26/2010
4228158	1301 Indiana St	Central Waterfront	-9,800	71	Mixres	Retail/Ent	12/19/2007
3731126	Westbrook Plaza (Batmal	East SoMa	16,196	49	Mixres	MED	9/9/2010
3731074	A WOMANS PLACE	East SoMa	0	25	Resident	--N/A--	7/1/2008
1029095	2901 CALIFORNIA ST	Western Addition	14,800	0	CIE	CIE	9/22/2010
4991617	101 EXECUTIVE PARK BL	Executive Park	14,000	30	Resident	--N/A--	9/8/2010
0599008	1840 WASHINGTON ST	Marina	-7,000	26	Resident	--N/A--	9/15/2010
1460040	420 29TH AV	Richmond	-2,500	20	Mixres	Retail/Ent	6/29/2010
1101022	2139 OFARRELL	Western Addition	-14,712	21	Resident	--N/A--	6/29/2010
1460015	420 29TH AV	Richmond	-6,720	20	Resident	--N/A--	9/15/2010
5868007	55 TRUMBULL ST	South Central, Other	0	18	Resident	--N/A--	9/21/2010
0839029	261 OCTAVIA ST	Market Octavia	0	15	Resident	--N/A--	9/21/2010
0282004	723 TAYLOR ST	Downtown	0	12	Resident	--N/A--	8/30/2010

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
8709004	1600 OWENS ST	Mission Bay	245,000	0	MIPS	MIPS	6/3/2008
3717019	120 HOWARD ST	Downtown	67,000	0	MIPS	MIPS	7/19/2010
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
4624004	Hunters View	Other S Bayshore	0	52	Resident	--N/A--	9/9/2010
3532014	299 VALENCIA ST	Market Octavia	3,940	44	Mixres	Retail/Ent	9/2/2010
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
1127007	1816 EDDY ST	Western Addition	0	19	Resident	--N/A--	12/9/2008

BP REINSTATED

3721013	524 HOWARD ST	TB Combo	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
3794002A	750 02ND ST	East SoMa	-2,710	14	Mixres	Retail/Ent	8/18/2010

BP APPROVED

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
3591024	793 SOUTH VAN NESS AV	Mission	5,829	29	Resident	Retail/Ent	8/4/2009
4224015	1004 MISSISSIPPI ST	Showpl/Potrero	0	28	Resident	--N/A--	1/16/2009
2607099	399 BUENA VISTA EAST A	Buena Vista	15,720	30	CIE	CIE	7/14/2005

BP Filed

3735063	222 02ND ST	TB Combo	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	333 Harrison St	Rincon Hill	0	308	Resident	--N/A--	6/30/2010
3736114	Foundry Square III	TB Combo	251,788	0	MIPS	MIPS	9/8/2008
4991600	101 EXECUTIVE PARK BL	Executive Park	0	226	Resident	--N/A--	9/8/2010
3749059	45 LANSING ST	Rincon Hill	-14,000	224	Resident	--N/A--	9/14/2010
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	25 ESSEX ST	TB Combo	0	120	Resident	--N/A--	3/15/2010
4352007	1301 CESAR CHAVEZ ST	BVHP Area A,B	81,979	0	MIPS	MIPS	10/15/2007
3513008	150 OTIS ST	Market Octavia	-90,159	76	Resident	--N/A--	5/14/2010
3731003	226 06TH ST	East SoMa	0	37	Resident	--N/A--	6/16/2008
1098009	1401 DIVISADERO ST	Western Addition	57,000	-21	MIPS	MIPS	12/21/2006
5476009	6600 Third Street	BVHP Area A,B	0	30	Resident	--N/A--	7/19/2010
3736085	48 TEHAMA ST	TB Combo	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
4059009	2298 03RD ST	Central Waterfront	14,000	40	Mixres	Retail/Ent	2/6/2006
3788039	345 BRANNAN ST	East SoMa	53,030	0	MIPS	MIPS	10/27/2008
3555056	1731 15TH ST	Mission	0	25	Resident	--N/A--	9/28/2010
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
0668012	1465 PINE ST	Northeast	0	35	Resident	--N/A--	3/16/2005
0816003	205 FRANKLIN ST	Market Octavia	14,500	0	Mixed	Retail/Ent	4/13/2010
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
0512025	2353 LOMBARD ST	Marina	964	21	Mixres	Retail/Ent	7/29/2010
1145003	2130 FULTON ST	Western Addition	26,000	0	CIE	CIE	8/6/2010

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3521005	340 11TH ST	WSoMa	5,682	20	Mixres	Retail/Ent	4/11/2005
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
4058008	616 20TH ST	Central Waterfront	-1,000	16	Mixres	Retail/Ent	11/24/2009
1742043	1266 09TH AV	Inner Sunset	-3,000	15	Mixres	Retail/Ent	12/18/2009
3554027	411 VALENCIA ST	Mission	1,400	16	Mixres	Retail/Ent	10/13/2005
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
3557062	200 DOLORES ST	Market Octavia	-8,463	13	Resident	--N/A--	8/19/2008
3197010	1446 OCEAN AV	Balboa Park	-2,500	13	Resident	--N/A--	10/31/2008

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4886008	Bayview Waterfront	Candlestick	6,120,000	10,237	Mixres	MIPS	8/3/2010
3702053	1169 MARKET ST	Downtown	33,540	1,083	Mixres	Retail/Ent	8/3/2006
3746001	390 Main St	TB Combo	0	806	Resident	--N/A--	11/18/2003
4624009	Hunters View	Other S Bayshore	620	349	Mixres	Retail/Ent	12/10/2008
3747320	The Californian	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	One Rincon Hill Phase II	Rincon Hill	0	340	Resident	--N/A--	8/16/2005
8722001	300 16TH ST	Mission Bay	312,932	0	MIPS	MIPS	10/2/2008
3722027	151 THIRD ST	Downtown	66,685		CIE	CIE	7/13/2010

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
0757025	1100 GOLDEN GATE AV	Western Addition	0	98	Resident	--N/A--	12/18/2008
3732009	900 FOLSOM ST	East SoMa	6,340	269	Mixres	Retail/Ent	5/20/2010
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
3732008	260 05TH ST	East SoMa	-35,843	179	Mixres	Retail/Ent	5/20/2010
7331003	800 Brotherhood Way	Park Merced	0	182	Resident	--N/A--	12/10/2007
0794015	746 LAGUNA ST	Market Octavia	2,325	136	Mixres	MIPS	5/13/2010
0323015	472 ELLIS ST	Downtown	-65,926	60	Resident	--N/A--	12/12/2008
0872005	1960-1998 MARKET ST	Market Octavia	9,000	115	Mixres	Retail/Ent	6/4/2009
3722079	134-140 NEW MONTGO	TB Combo	-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
3180001	50 PHELAN AV	Balboa Park	11,682	71	Mixres	Retail/Ent	7/12/2010
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
0619009	1800 Van Ness Ave.	Northeast	7,383	62	Mixres	Retail/Ent	1/25/2007
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
2515001	2800 SLOAT BL	Outer Sunset	9,656	55	Resident	--N/A--	11/13/2008
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
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
0596024	1946 POLK ST	Northeast	-9,245	39	Mixres	Retail/Ent	11/24/2007

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
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
6473038	5735-5743 MISSION ST	South Central, Other	-7,153	15	Mixres	Retail/Ent	6/12/2008
3564091	2299 MARKET ST	Central	6,940	18	Mixres	Retail/Ent	8/16/2010
3547027	80 JULIAN AV	Mission	12,900	6	Mixres	CIE	8/5/2010
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
7303001	Parkmerced	Park Merced	478,383	5,677	Mixres	Retail/Ent	1/8/2008
1939001	Treasure Island	Treasure Island	250,000	6,000	Mixres	Retail/Ent	12/4/2007
3708006	50 01ST ST	TB Combo	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	TRANSBAY TOWER	TB Combo	1,742,950	0	MIPS	MIPS	7/1/2008
4167004	1 TURNER TR	Showpl/Potrero	30,000	1,094	Mixres	Retail/Ent	6/30/2010
0694005	CPMC HOSPITAL	Downtown	702,067	-25	Mixed	CIE	6/10/2010
3719010	181 FREMONT ST	TB Combo	492,866	140	Mixres	MIPS	5/15/2007
6575002	CPMC - ST. LUKE'S HOSPIT	Bernal Heights	164,617	0	Mixed	CIE	6/10/2010
9900030	America's Cup Pier 30/32	East SoMa	608,688	0	Retail/Ent	Retail/Ent	6/24/2010
3710017	350 MISSION ST	TB Combo	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	TB Combo	-1,400	350	Resident	--N/A--	10/31/2006
1075001	Westside Courts Phas	Western Addition	0	450	Resident	--N/A--	12/31/2008
0647007	1634 PINE ST	Western Addition	448	250	Mixres	MIPS	11/5/2008

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
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
3725015	938 HOWARD ST	East SoMa	-18,956	154	Mixres	Retail/Ent	3/27/2006
0192014	Chinese Hospital	Northeast	68,010	0	CIE	CIE	6/26/2008
8711014	1000 FOURTH STREET (BL	Mission Bay	0	134	Resident	--N/A--	9/1/2010
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
3707052	2 NEW MONTGOMERY ST	TB Combo	0	125	Resident	--N/A--	12/4/2007
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	82	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	TB Combo	0	85	Resident	--N/A--	6/8/2007
9900041H	1/2-PIER 33	Northeast	12,990	0	PDR	PDR	8/27/2008
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
3532091	245 VALENCIA ST	Market Octavia	13,256	0	CIE	CIE	8/12/2010
0595013	1645-1661 PACIFIC AV	Northeast	-27,275	50	Resident	--N/A--	7/25/2007
4591A010	SHIPYARD PARCEL 54	Other S Bayshore	0	50	Resident	--N/A--	6/8/2007
3731001	Hugo Hotel	East SoMa	0	50	Resident	--N/A--	9/1/2010
3534069	25 DOLORES ST	Market Octavia	-19,037	47	Resident	--N/A--	8/28/2008
3753008	374 5TH ST	East SoMa	0	47	Resident	--N/A--	2/22/2010
1450008	5400 GEARY BL	Richmond	-10,748	39	Mixres	Retail/Ent	4/18/2007

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3115043	625 MONTEREY BL	Ingleside, Other	21,378	0	Retail/Ent	Retail/Ent	5/26/2010
1101007	1301 DIVISADERO ST	Western Addition	-13,264	32	Resident	--N/A--	9/1/2010
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
0853021	102-104 OCTAVIA STREET	Market Octavia	0	30	Resident	--N/A--	6/8/2007
3639002	2652 HARRISON ST	Mission	-7,250	30	Resident	--N/A--	1/11/2006
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
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
3721019	562 HOWARD ST	TB Combo	0	19	Mixres	Retail/Ent	10/3/2007
5457037	2895 SAN BRUNO AV	South Central, Other	10,978	10	Mixres	MIPS	7/29/2010
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
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
3617008	1050 VALENCIA ST	Mission	400	16	Mixres	Retail/Ent	12/20/2007
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

Acknowledgements

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The 1939 Transbay Terminal Building currently being demolished, by Aksel K Olsen.