2009 QUARTER 2

San Francisco

PIPELINE REPORT

San Francisco Planning Department

July 2009

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Table of Contents

What is the Pipeline?

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

To filter inactive projects, the current pipeline only includes projects filed during the last five years, projects approved in the last four years, and projects 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 occasionally obtained from the San Francisco Redevelopment Agency. Affordable housing projects sponsored by the Redevelopment Agency and the Mayor's Office of Housing figure in the pipeline database only after an application has been filed with either the Planning Department or the Department of Building Inspection. Projects in the pre-development stages, as well as projects currently under the review of the Redevelopment Commission, are generally not included in the Pipeline Report, unless a building permit application has been filed.[1]

The Pipeline Report measures housing production in terms of housing units. Non-residential development, on the other hand, is measured in terms of building square footage. Depending on the proposed development project, square footage can be added with new construction or expansion, reduced with demolition or alteration, or re-allocated with conversion to other uses. Note that this report counts *net change*, or new space or units minus existing space lost through conversion or demolition.

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

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, 2009. 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 2009 Pipeline at a Glance

- There are currently around 960 projects in the pipeline of varying sizes and complexities.
- These projects, if completed, would add some 54,600 net new housing units to the city's housing stock. Representing a peak due to large development program applications, including Bayview Waterfront Project, Treasure Island, and a Park Merced expansion project, the number has been relatively stable the past year as applications are leveling off.
- The Bayview Waterfront project, consisting of a number of sites along the southeastern waterfront, would account for 11,400 units and nearly 8 million sq. ft. of office, R&D, retail and community space, as well as a 10,000 seat arena at Candlestick Point.
- The pipeline would also add a net of 19.1 million commercial square footage. Within this total, office and retail space would see net gains of 13.5 million and 4 million sq. ft., respectively. There is a projected net loss of 500,000 sq. ft. of light industrial or Production, Distribution and Repair (PDR) space because of conversion to commercial and residential space.
- Nearly one in six projects (with approximately 6,700 units) are in the construction phase, while projects adding just over 2,850 units have received building permits approvals or land use entitlements
- Two thirds of all projects (with 35,200 units, or two thirds of all pipeline units, and 14 million commercial square feet) are still at the early stages of development, with permit applications filed with the Planning Department or the Department of Building Inspection.

The Pipeline by The Numbers

There are currently around 1,000 projects in the pipeline. Around 35 of these are projects sponsored through the San Francisco Redevelopment Agency. The Planning Department makes an effort to track these projects to make the pipeline more inclusive.

Of these projects, three out of every four are exclusively residential and one in eight are mixed-use projects with both residential and commercial components. Only about one in 10 projects are commercial developments without a residential component.

A net total of nearly 55,000 new housing units would be added to the city's housing stock according to the current pipeline. This is up more than 80 percent from the first quarter of 2007, largely due to the filing of applications for new large scale, long term development programs for Park Merced, Treasure Island, and the Bayview Waterfront during the past 18 months. Beyond these major projects, there are another 32,500 net new units in the pipeline. Pipeline projects also comprise a net addition of 19.3 million sq. ft. of commercial development.

Project Status

Table 1 on the following page shows the following:

- Some 18 percent of all projects, representing 6,700 net added housing units and 1,4 million sq. ft. of commercial space, are under construction.
- A similar proportion of projects (with 2,900 net units) have received building permit approvals and may have already begun construction.
- These projects (with a total of 9,600 net new units) are expected to be online in the next six to 36 months.
- About a third of all projects (including 4,500 net new units and an addition of 1.1 million sq. ft. of commercial space) have filed building permit applications with the Department of Building Inspections. A number of these projects

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	152	34,570	13,663,000	280,000	0	8,822,000	418,000	2,946,000	1,164,000
Approved by Planning	121	6,200	2,222,000	635,000	-33,000	1,489,000	-263,000	511,000	-117,000
BP Filed	335	4,480	1,127,000	-12,000	38,000	1,318,000	-435,000	217,000	0
BP Approved/Issued/ Re-Instated	184	2,850	911,000	20,000	20,000	793,000	11,000	41,000	25,000
Construction	168	6,510	1,374,000	55,000	0	1,108,000	-150,000	346,000	0
Grand Total	960	54,610	19,298,000	979,000	25,000	13,529,000	-418,000	4,061,000	1,071,000

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.

have already received Planning Department entitlements.

- Thirteen percent of the pipeline projects and eleven percent of the units have received Planning Department approvals. If and when constructed, these projects would add 6,200 new units to the city's housing stock and over 2.2 million sq. ft. of commercial space. These projects now must secure a building permit.
- Sixteen percent of projects, representing nearly 2/3 of the units in the pipeline are under Planning Department review. Collectively, these projects represent some 35,200 net new units and 13 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 also represent a net addition of 19.2 million sq. ft. of commercial development that would result in the following land use inventory changes:

- 13.5 million sq. ft. of additional office space
- 4.1 million sq. ft. of additional retail space
- 1 million sq. ft. of additional visitor-serving uses, such as hotels.
- 1 million sq. ft. of additional cultural, institutional, educational (CIE) and medical space
- A net loss of 400,000 sq. ft. of production, distribution, and repair space, a large portion of which would go to housing use.[2]

Office and retail uses remain the most commonly sought after non-residential projects.

Location of New Development

Table 2 below shows that most of the proposed new residential construction in the pipeline are in Bayview/Hunter's Point (Mainly the Candlestick area), Treasure Island and Park Merced. (See Map 1 for area boundaries used.) These areas 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, Rincon Hill, and Showplace Square, totalling around 12,000 new units.

Small scale, in-fill projects make up the bulk of pipeline projects, but account for a minority of units: Half the residential projects are three units or less. Adding this bottom half of all pipeline projects would contribute just over 700 net new units, or just over 1 percent of the total number of pipeline units. Areas where these small projects are typical include areas like Richmond, Ingleside, Inner Sunset, and Central

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

TABLE 2: Residential and Commercial Pipeline, by Neighborhood

Neighborhood	Projects	Percent	Net Units	Percent	Avg Units / Project	Net Comm'l Sq. Ft.	Percent	Residential Rank	Commercial Rank
Balboa Park	5	0.5%	230	0.4%	45	1,300	0.0%	23	22
Bernal Heights	48	5.0%	550	1.0%	11	320	0.0%	20	23
Buena Vista	12	1.3%	100	0.2%	8	12,700	0.1%	29	20
BVHP Area A,B	33	3.4%	1,070	2.0%	32	-25,780	-0.1%	13	27
Candlestick	2	0.2%	11,580	21.2%	5,789	7,996,870	41.4%	1	1
Central	84	8.8%	110	0.2%	1	7,700	0.0%	27	21
Central Waterfront	14	1.5%	740	1.4%	53	-126,370	-0.7%	18	30
Downtown	62	6.5%	5,560	10.2%	90	1,630,690	8.5%	4	4
East SoMa	38	4.0%	2,150	3.9%	57	-176,540	-0.9%	9	32
Executive Park	3	0.3%	1,060	1.9%	353	-30,040	-0.2%	14	28
India Basin	3	0.3%	10	0.0%	3	-3,120	-0.0%	32	24
Ingleside, Other	31	3.2%	90	0.2%	3	16,510	0.1%	30	19
Inner Sunset	43	4.5%	110	0.2%	3	20,990	0.1%	26	18
Japantown	7	0.7%	260	0.5%	38	-4,000	-0.0%	22	25
Marina	27	2.8%	160	0.3%	6	38,670	0.2%	24	16
Market Octavia	39	4.1%	2,170	4.0%	56	120,980	0.6%	8	10
Mission	65	6.8%	920	1.7%	14	-67,970	-0.4%	15	29
Mission Bay	10	1.0%	130	0.2%	13	2,232,710	11.6%	25	3
Northeast	64	6.7%	1,210	2.2%	19	603,590	3.1%	12	6
Other S Bayshore	20	2.1%	600	1.1%	30	34,140	0.2%	19	17
Outer Sunset	30	3.1%	100	0.2%	3	53,870	0.3%	28	12
Park Merced	3	0.3%	6,000	11.0%	2,000	461,840	2.4%	3	7
Richmond	99	10.3%	490	0.9%	5	42,630	0.2%	21	14
Rincon Hill	8	0.8%	3,110	5.7%	389	-134,350	-0.7%	5	31
Showpl/Potrero	36	3.8%	2,610	4.8%	72	338,900	1.8%	7	8
South Central, Other	83	8.6%	1,660	3.0%	20	45,830	0.2%	10	13
South of Market, Other	3	0.3%	740	1.4%	246	685,180	3.6%	17	5
TB Combo	22	2.3%	2,860	5.2%	130	5,126,110	26.6%	6	2
Treasure Island	1	0.1%	6,000	11.0%	6,000	250,000	1.3%	2	9
VisVal	5	0.5%	20	0.0%	4	-6,080	-0.0%	31	26
Western Addition	36	3.8%	1,450	2.7%	40	40,040	0.2%	11	15
WSoMa	24	2.5%	800	1.5%	33	110,730	0.6%	16	11
Grand Total	960	100.0%	54,607	99.9%	57	19,298,042	100.0%		

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

Projects by Age

By recording the year of the initial filing of either the application for planning entitlements or the building permit application one can provide a measure of how long projects spend in the entitlement system.

Figure 1 below shows the average age in weeks of projects in the pipeline by residential size and project entitlement status. Two observations can be gleaned from this figure. First, the further along a project is in the entitlement process, the older the project. Second, the larger the project, the longer it takes from conception to completion.While both findings are intuitive in nature, it is perhaps of note how relatively long it takes for even the smallest projects to reach the construction phase.

The data also show that half the residential projects in the current pipeline are older than 136 weeks (regardless of size). The average age, however, is 152 weeks, suggesting a somewhat skewed distribution where a relatively small number of projects with disproportionately long life spans drive up the overall average. The data doesn't directly reveal the reason for these life spans. Reasons will include review times for complex projects needing environmental impact reports. At other times, project sponsors, after receiving entitlements, may not immediately proceed with filing for a building permit.

Looking at how long the projects have been in the current entitlement stage, half the projects have been in its current status for 67 weeks or less.

FIGURE 1: Projects in Current Pipeline, by Year Filed

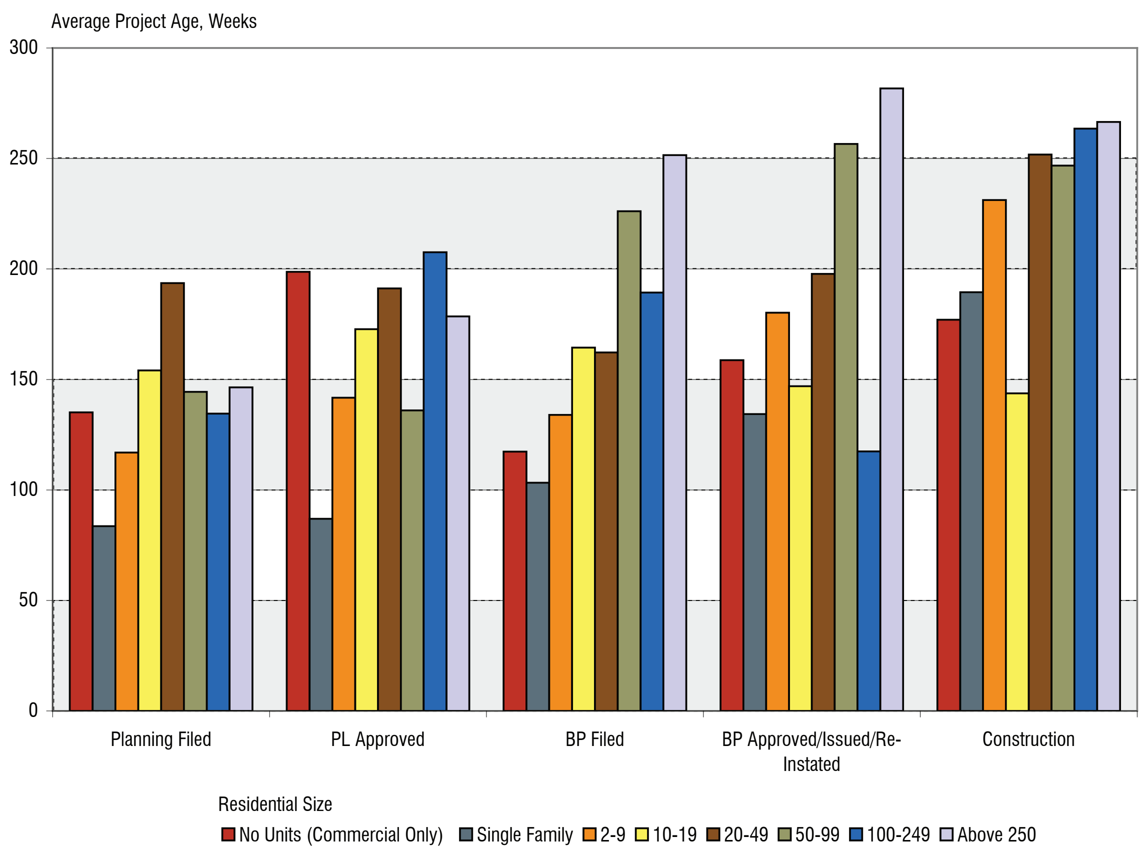


TABLE 3: Residential and Commercial Pipeline by Generalized Zoning Category

Generalized Zoning	Area, Pct	Projects	Net Units	Net Units, Avg	Net Comm'l Sq. Ft.	Cult., Inst., Educ.	Medical	Office	Prod., Dist., Repair	Retail	Visitor
Residential	46.5%	517	11,560	22	240,000	113,000	20,000	32,000	-42,000	445,000	-333,000
Hi Density Res	0.2%	9	2,390	265	-134,000	0	0	-81,000	-71,000	18,000	0
Mixed Use	7.7%	286	11,320	40	2,048,000	273,000	5,000	2,109,000	-706,000	389,000	-21,000
Commercial	2.8%	69	7,960	115	5,405,000	82,000	0	3,359,000	-70,000	1,167,000	868,000
Industrial	9.9%	63	3,510	56	1,345,000	73,000	0	753,000	-342,000	866,000	-52,000
Public	32.9%	16	17,880	1,117	10,394,000	438,000	0	7,358,000	812,000	1,176,000	610,000
Grand Total	100.0%	960	54,610	57	19,298,000	979,000	25,000	13,529,000	-418,000	4,061,000	1,071,000

Pipeline Projects by Current Zoning Category

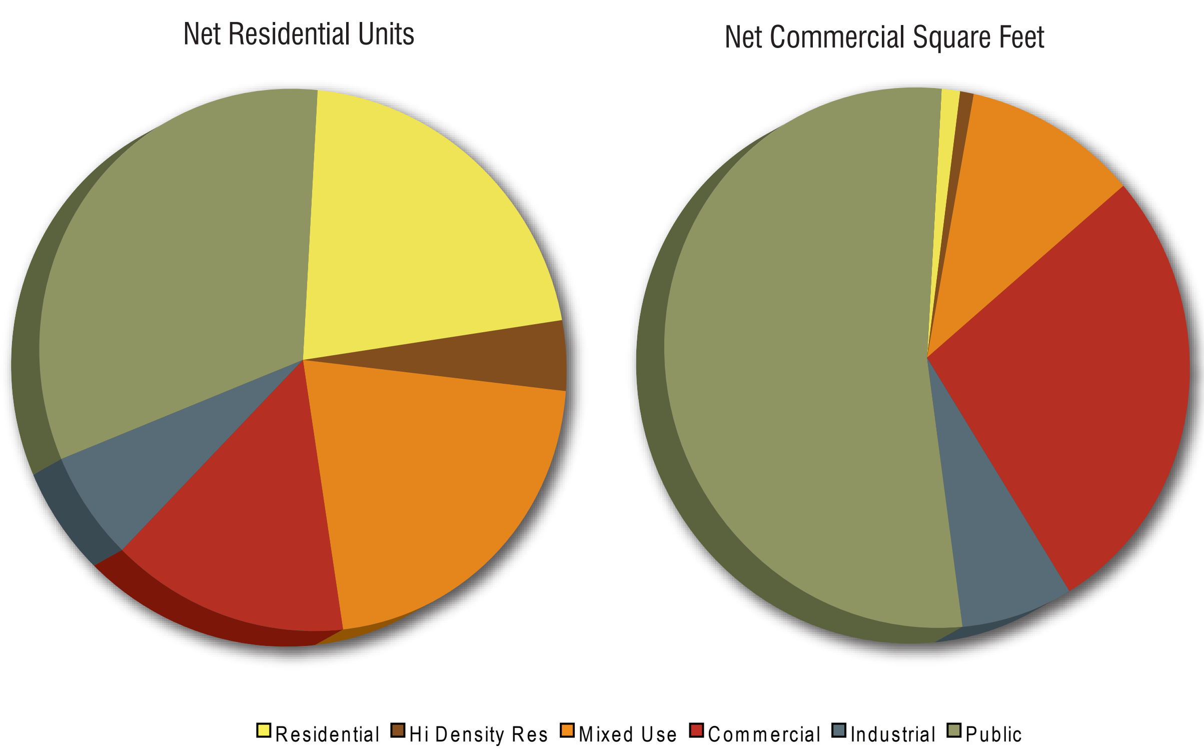
Table 3 and Figure 2 show the pipeline distribution by general zoning categories.

Residential Pipeline

The vast majority of residential pipeline falls mostly in four classes of land: Residential, Mixed Use, Commercial and Public. Another large group is lands with public zoning designation. The largest of these is the public land category. The Bayview Waterfront project, still in early stages of planning, most of which is at Candlestick Point, is classified under this heading.[3] Also found in this category is the Treasure Island redevelopment project. These two projects alone could add more than 15,000 units, and thus make up the bulk of units in this category.

3 Technically, the Bayview Waterfront project spans multiple zoning districts, but has been accounted for here exclusively in the "Public" category, somewhat skewing the distribution.

FIGURE 2: Distribution of Units by Zoning Category



Secondly, the mixed use districts, ranging from neighborhood commercial to eastern neighborhoods districts, account for 11,590 units in 287 projects, or around 40 units per project.

The third largest share is found on residentially zoned lots, accounting for 11,500 units in 517 projects, with an average size of 22 units. Two thirds of these units is comprised by 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. The remainder of projects on residentially zoned parcels are relatively small. with half the projects being one unit projects.

The fourth largest of these shares is on commercially zoned parcels, accounting for 8,000 units in 69 projects, averaging 115 units per project.

Another 3,500 units are pending on industrially zoned lands. Half 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 around four percent of all units in the pipeline in a handful of projects. These projects are thus large, averaging 260 net added 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 area.

Commercial Pipeline

Commercial development is proposed chiefly in public, commercial and mixed use districts, with 92 percent of the net commercial space proposed to be added in these land classes. The commercial pipeline in general is characterized by, as noted earlier, just over 100 projects, but also 114 mixed use projects which also contain a residential component. Looking at the exclusively commercial projects, half are smaller than 23,000 gross square feet while two thirds are smaller than 70,000 gross square feet. The bulk of the square footage is comprised by a relatively small number of projects.

The commercial component in the 114 mixed use projects are, in general also small, with one in four, half, and three out of four projects being smaller than 2,300, 5,000 and 11,000 gross square feet, respectively.

Turning to districts, the largest concentration of potential commercial development is in a few areas currently zoned public[4].as some of the major projects are categorized as being located in areas zoned Public, development here would add some net 10.4 million square feet, or more than half of all proposed commercial development, in 16 projects. This chiefly reflects the large scale Bayview Waterfront Project, which would itself add more than eight million commercial square feet as currently proposed.

Commercial districts account for the second largest concentration of non-residential development, with 28 percent of the total in 69 projects. The mixed use districts account for a larger number of projects (even if this count may include projects that are exclusively residential) totalling 2 million net square feet.

Other districts account for only a minor amount of non-residential development.

Breaking down commercial space into subcategories, the three largest types land-use classes of commercial development for the city as a whole are office space (13.7 million sq. ft.), retail (4.1 million sq. ft.), and visitor-related (1.1 million sq. ft.) uses.

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

4 See footnote 3.

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	0	175	0	225	23
Bernal Heights	33	36	10	69	0	0	411	559	20
Buena Vista	6	20	0	24	56	0	0	106	29
BVHP Area A,B	12	15	18	104	0	228	746	1,123	13
Candlestick	0	0	0	0	0	198	11,642	11,840	1
Central	106	63	0	0	0	0	0	169	25
Central Waterfront	3	13	12	86	289	335	0	738	19
Downtown	4	89	32	369	1,027	1,772	2,784	6,077	3
East SoMa	4	29	73	298	481	497	810	2,192	10
Executive Park	0	0	0	0	0	110	949	1,059	14
India Basin	0	10	0	0	0	0	0	10	32
Ingleside, Other	29	23	18	28	0	0	0	98	30
Inner Sunset	41	40	10	34	0	0	0	125	27
Japantown	7	2	0	28	0	231	0	268	22
Marina	24	12	34	60	89	0	0	219	24
Market Octavia	6	38	72	247	342	1,001	491	2,197	9
Mission	38	109	103	52	182	470	0	954	15
Mission Bay	0	0	0	0	0	131	0	131	26
Northeast	33	61	62	231	481	382	0	1,250	12
Other S Bayshore	13	9	0	0	50	128	668	868	16
Outer Sunset	31	13	21	0	55	0	0	120	28
Park Merced	0	0	0	0	0	322	8,898	9,220	2
Richmond	113	97	31	80	83	150	0	554	21
Rincon Hill	0	0	0	0	70	113	2,928	3,111	6
Showpl/Potrero	36	12	12	69	0	614	2,507	3,250	5
South Central, Other	59	125	69	0	117	0	2,100	2,470	8
South of Market, Other	0	0	0	0	0	120	619	739	18
TB Combo	0	5	19	0	202	803	1,826	2,855	7
Treasure Island	0	0	0	0	0	0	6,000	6,000	4
VisVal	0	21	0	0	0	0	0	21	31
Western Addition	13	19	88	124	508	240	564	1,556	11
WSoMa	6	12	18	132	85	135	416	804	17
Grand Total	617	879	715	2,066	4,117	8,155	44,359	60,908	

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.

TABLE 5: Residential Project Size Distribution and Pipeline Status

Status	Project Size							Grand Total
	Single Family	2-9	10-19	20-49	50-99	100-249	Above 250	
Planning Filed	38	104	209	644	1,381	2,945	34,075	39,396
PL Approved	28	96	126	406	1,387	2,118	2,656	6,817
BP Filed	274	335	254	567	561	1,034	1,707	4,732
BP Approved/ Issued/Re-Instated	144	196	72	326	448	333	1,488	3,007
Construction	133	148	54	123	340	1,725	4,433	6,956
Grand Total	617	879	715	2,066	4,117	8,155	44,359	60,908

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, 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.[5]

5 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.

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 the 19th Avenue Area, location of Park Merced. However, these projects are in the environmental review stages of development with possible realization more than 10 years in the future.

Projects differ in size depending on which area they are in. 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

FIGURE 3: Residential Pipeline, by Status & Building Size

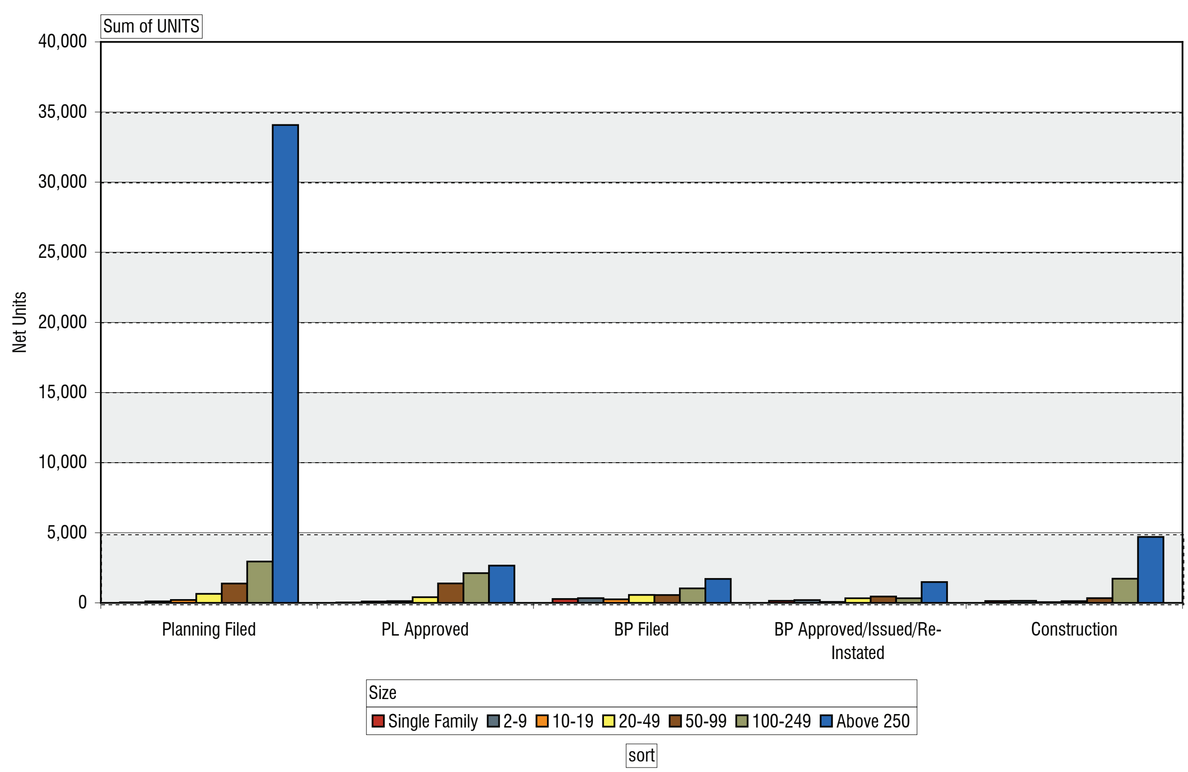


TABLE 6: PDR Space Conversion to Residential Use, by Planning District

Neighborhood	Projects	Percent	Net Units	Percent	PDR Net	Percent	Avg Units / Project	Avg PDR Loss / Project
Balboa Park	1	1.4%	31	0.5%	-3,700	0.3%	31	-3,700
BVHP Area A,B	5	7.2%	982	17.4%	-284,000	23.6%	196	-56,800
Central Waterfront	5	7.2%	490	8.7%	-196,600	16.4%	98	-39,300
Downtown	2	2.9%	284	5.0%	-41,000	3.4%	142	-20,500
East SoMa	17	24.6%	1,321	23.4%	-153,900	12.8%	78	-9,100
India Basin	2	2.9%	7	0.1%	-5,100	0.4%	4	-2,600
Marina	2	2.9%	38	0.7%	-8,700	0.7%	19	-4,400
Market Octavia	2	2.9%	115	2.0%	-20,900	1.7%	58	-10,500
Mission	11	15.9%	342	6.1%	-118,500	9.9%	31	-10,800
Northeast	4	5.8%	202	3.6%	-70,100	5.8%	51	-17,500
Richmond	3	4.3%	17	0.3%	-8,800	0.7%	6	-2,900
Rincon Hill	2	2.9%	545	9.7%	-70,900	5.9%	273	-35,500
Showpl/Potrero	3	4.3%	869	15.4%	-157,600	13.1%	290	-52,500
South Central, Other	2	2.9%	22	0.4%	-10,600	0.9%	11	-5,300
TB Combo	2	2.9%	195	3.5%	-3,700	0.3%	98	-1,900
Western Addition	1	1.4%	12	0.2%	-9,100	0.8%	12	-9,100
WSoMa	5	7.2%	171	3.0%	-38,400	3.2%	34	-7,700
Grand Total	69	100.0%	5,643	100.0%	-1,201,500	100.0%	82	-17,400

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	2.0%	31	0.6%	-6,200	0.3%	31	-6,200
Central	1	2.0%	1	0.0%	-2,000	0.1%	1	-2,000
Downtown	11	22.4%	542	11.0%	-287,200	16.2%	49	-26,100
East SoMa	4	8.2%	153	3.1%	-140,000	7.9%	38	-35,000
Executive Park	1	2.0%	499	10.2%	-100,000	5.6%	499	-100,000
Ingleside, Other	1	2.0%	18	0.4%	-7,500	0.4%	18	-7,500
Inner Sunset	1	2.0%	6	0.1%	-2,200	0.1%	6	-2,200
Japantown	1	2.0%	28	0.6%	-7,600	0.4%	28	-7,600
Market Octavia	7	14.3%	771	15.7%	-59,100	3.3%	110	-8,400
Northeast	3	6.1%	127	2.6%	-82,100	4.6%	42	-27,400
Rincon Hill	3	6.1%	1,411	28.7%	-135,800	7.7%	470	-45,300
Showpl/Potrero	2	4.1%	141	2.9%	-46,800	2.6%	71	-23,400
South Central, Other	2	4.1%	6	0.1%	-3,900	0.2%	3	-2,000
TB Combo	6	12.2%	863	17.6%	-845,800	47.7%	144	-141,000
Western Addition	4	8.2%	312	6.4%	-34,900	2.0%	78	-8,700
WSoMa	1	2.0%	3	0.1%	-11,600	0.7%	3	-11,600
Grand Total	49	100.0%	4,912	100.0%	-1,772,700	100.0%	100	-36,200

Square, and in particular Transbay and Rincon Hill. Conversely, for Inner Sunset, the largest addition come in single family projects.. For the city as a whole, 73 percent of units could come in projects larger 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 in a couple of areas of proposed development.

Except for Park Merced, in residentially zoned areas in western part of the city, development is limited in scope and consists chiefly of small-scale in-fill projects. Thus, of the total 74 projects with 125 units in the Inner Sunset and 98 in Ingleside, all but four projects areh sized at 9 units or less and 70 are single-unit projects.

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

- Of the 3,000 units with building permits approved, 1,800 units, or six out of 10, are in buildings of 100 units and above.
- Only two percent of the residential pipeline will be in buildings with nine units or less.
- Single family homes constitute one percent of the total units in the pipeline.

Conversion of Commercial Space to Residential Use[6]

There are 69 projects in the current pipeline database proposing demolition or conversion of existing Production, distribution and Repair-use buildings to residential use.[7] The corresponding figure for the conversion of office space is 49 projects. These projects represent approximately 10 percent (or 5,600 units) and nine percent (or 4,900 units), respectively, of the residential units in the pipeline.

6 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).

7 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.

Nearly all units replacing office uses are in mid- to high-rise residential structures of 20 to 500 housing units. These projects are mostly concentrated in the eastern half of the city: Rincon Hill, East SoMa, Showplace Square & Potrero Hill, Transbay, Mission, Downtown, and Western SoMa.

Conversion of PDR Space

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

- If the pipeline is developed as proposed, some 1.2 million sq. ft. of PDR space will be lost to conversion or demolition.[8] It would be replaced with residential units (5,600) and/or other commercial uses.
- Most of the PDR loss will be in Central Waterfront, East SoMa, and Showplace Square & Potrero Hill amd Bayview Hunters Point, accounting together for more than 75 percent of the overall loss. The loss of PDR space in these neighborhoods would in turn bring in 4,000 net new housing units.
- In addition to residential uses, the net loss of PDR space will be replaced chiefly by retail use adding up to 205,000 sq. ft, with the largest shares falling in Bayview Hunters Point and East SoMa.

Conversion of Office Space

- Approximately 1.8 million sq. ft. of office space are proposed to be converted to residential and/or other commercial use. This loss of office space is mainly taking place in the northeastern part of the city where most office space is located. Table 7 shows that the Downtown and Transbay districts would lose the most office space – around 1.1 million square feet, or two thirds of the total conversion loss.
- A total of 4,900 units are proposed to be built replacing the lost office space.

8 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 400,000 sq. ft. as it is a net tally of all projects that add, convert or demolish PDR space while this table only counts loss.

- In addition to housing, around 120,000 square feet of retail space are being proposed in the converted offices.

These conversions of a number of individual office buildings notwithstanding, taken together with other commercial developments in the pipeline 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 13.5 million square feet citywide.

Projects Under Planning Review

Project Application Filings

Table 8 above shows that a total of 45 planning applications were filed in the second quarter of 2009. This count represents 160 units and 93,000 square feet of commercial development, and these past quarters thus indicate a significant drop in permit filings consistent with the economic recession.

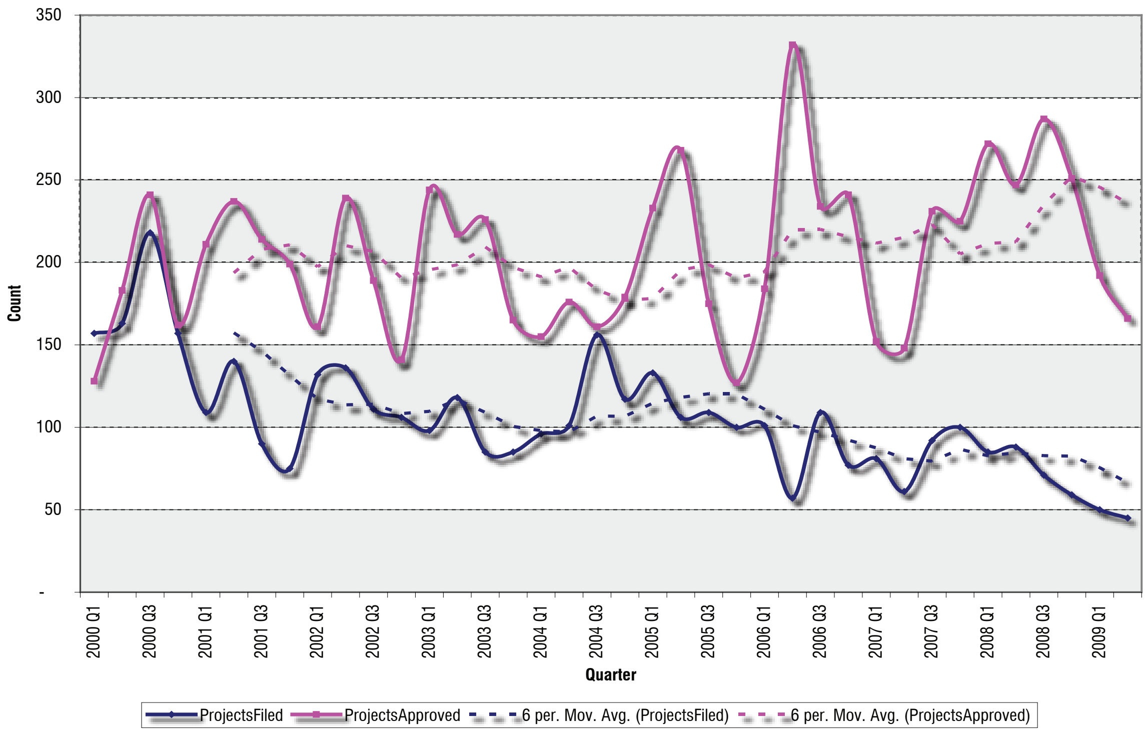
TABLE 8: Projects Filed With and Approved by the Planning Department

Quarter Filed	Filed				Approved			
	Projects	Net Units	Avg Units/Project	Net Sq. Ft	Projects	Net Units	Avg Units/ Project	Net Sq. Ft
2007 Q1	81	1,060	13	147,000	152	620	4	118,000
2007 Q2	61	570	9	1,013,000	148	440	3	31,000
2007 Q3	92	9,740	106	341,000	231	300	1	984,000
2007 Q4	100	4,460	45	128,000	225	320	1	54,000
2008 Q1	85	6,110	72	1,079,000	272	3,160	12	366,000
2008 Q2	88	860	10	761,000	247	1,070	4	298,000
2008 Q3	71	720	10	1,771,000	287	290	1	-9,000
2008 Q4	59	230	4	658,000	251	1,230	5	880,000
2009 Q1	50	340	7	194,000	192	750	4	82,000
2009 Q2	45	160	4	93,000	166	430	3	17,000

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

Suffix	Projects	Percent	Net Units	Percent	Net Comm'l Sq. Ft.	Percent
B	18	2.8%	66	0.1%	4,248,723	21.9%
C	175	26.9%	12,001	24.3%	402,282	2.1%
D	56	8.6%	176	0.4%	5,486	0.0%
E	170	26.2%	30,468	61.8%	14,074,746	72.7%
K	3	0.5%	104	0.2%	1,877	0.0%
Other	146	22.5%	1,543	3.1%	790,927	4.1%
Q	3	0.5%	187	0.4%	428,500	2.2%
V	70	10.8%	2,720	5.5%	-364,488	-1.9%
X	9	1.4%	2,047	4.2%	-225,024	-1.2%
Grand Total	650	100.0%	49,312	100.0%	19,363,029	100.0%

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



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, and more recently in terms of *number of units* filed for, the downward trend has become evident. There are, as seen in this report, still a large number 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 strenght 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.

A few of the projects filed during the second quarter of 2009 include:

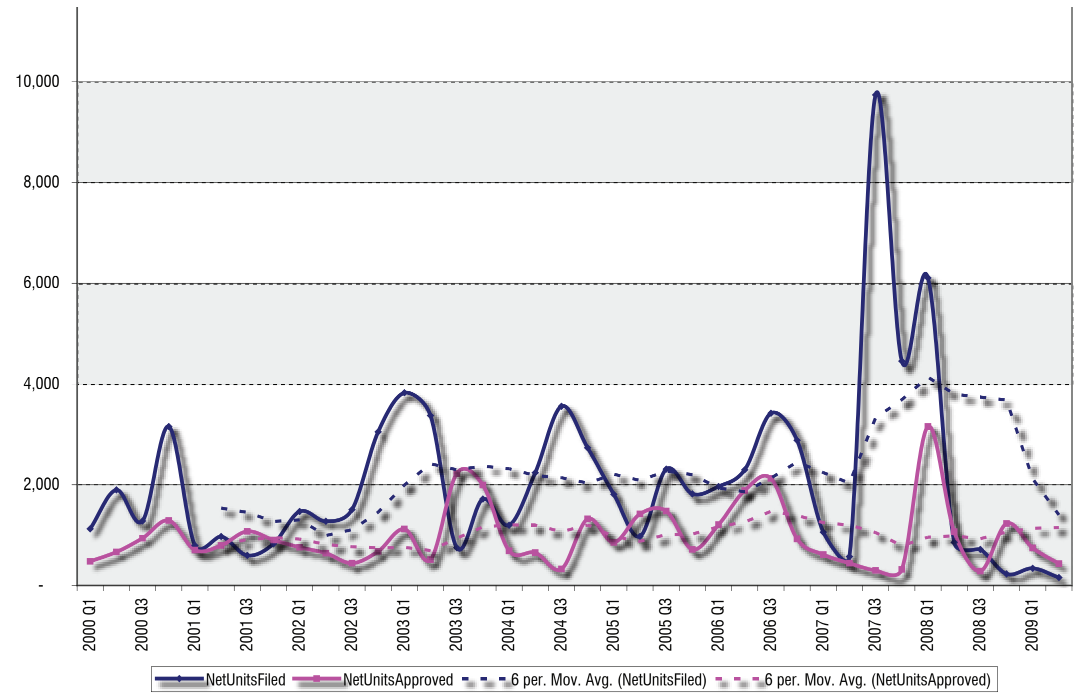
- An expansion of SFMOMA including a 40,000-square foot gallery wing as well as adding administrative space on Howard Street.
- On Filbert Street, the renovation and remodel of existing cottages and construction of a new three-story addition at the rear of the lot.
- On 5099 Third Street the construction of a new bay branch of the San Francisco Public Library.

Projects Under Planning Review

Project applications under Planning Department review total 650, representing nearly 50,000 units and 19 million sq. ft. of commercial space (Table 9). Eighteen projects are being reviewed subject to the Planning Code's §321 concerning the annual limit on office space ('Beauty Pageant'), 175 are awaiting conditional use hearings, while at least 170 projects are going through environmental review.[9] It is the environmental review cases that

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

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

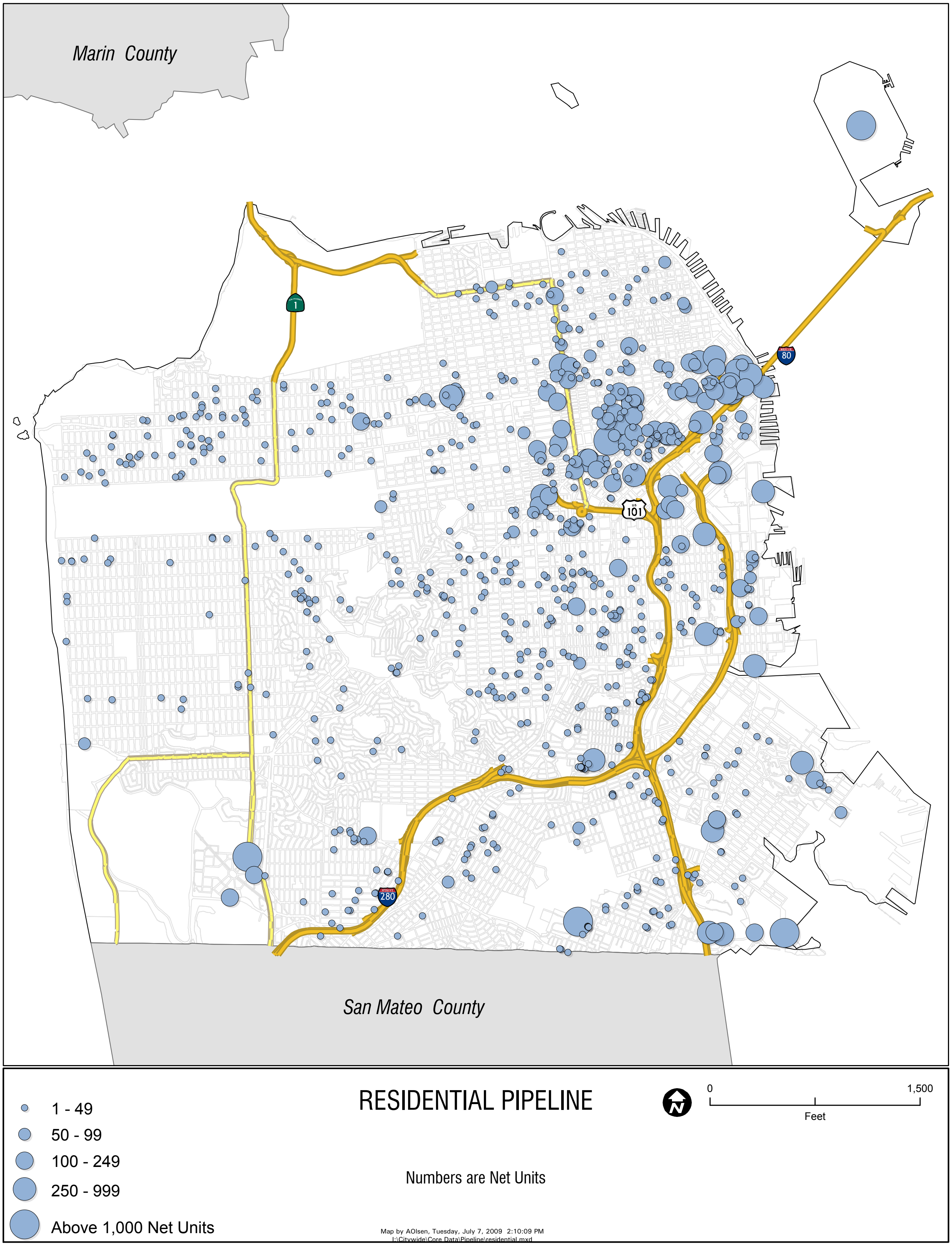


represent the most long range projects, and these cases also account for the largest amount of square footage and residential units. It is a matter of judgment whether these large-scale development programs should be included in the standard pipeline tally, or whether they should be accounted for separately. To the extent that they represent development programs as much as individual projects, it might make more sense to include them once a building permit would be sought down the line. That would entail that the pipeline would be more project oriented, and with a more short term focus. It was, in the end, decided to keep these plans in for now in the interest of being inclusive and represent a range of permit applications each representing tangible development interest.

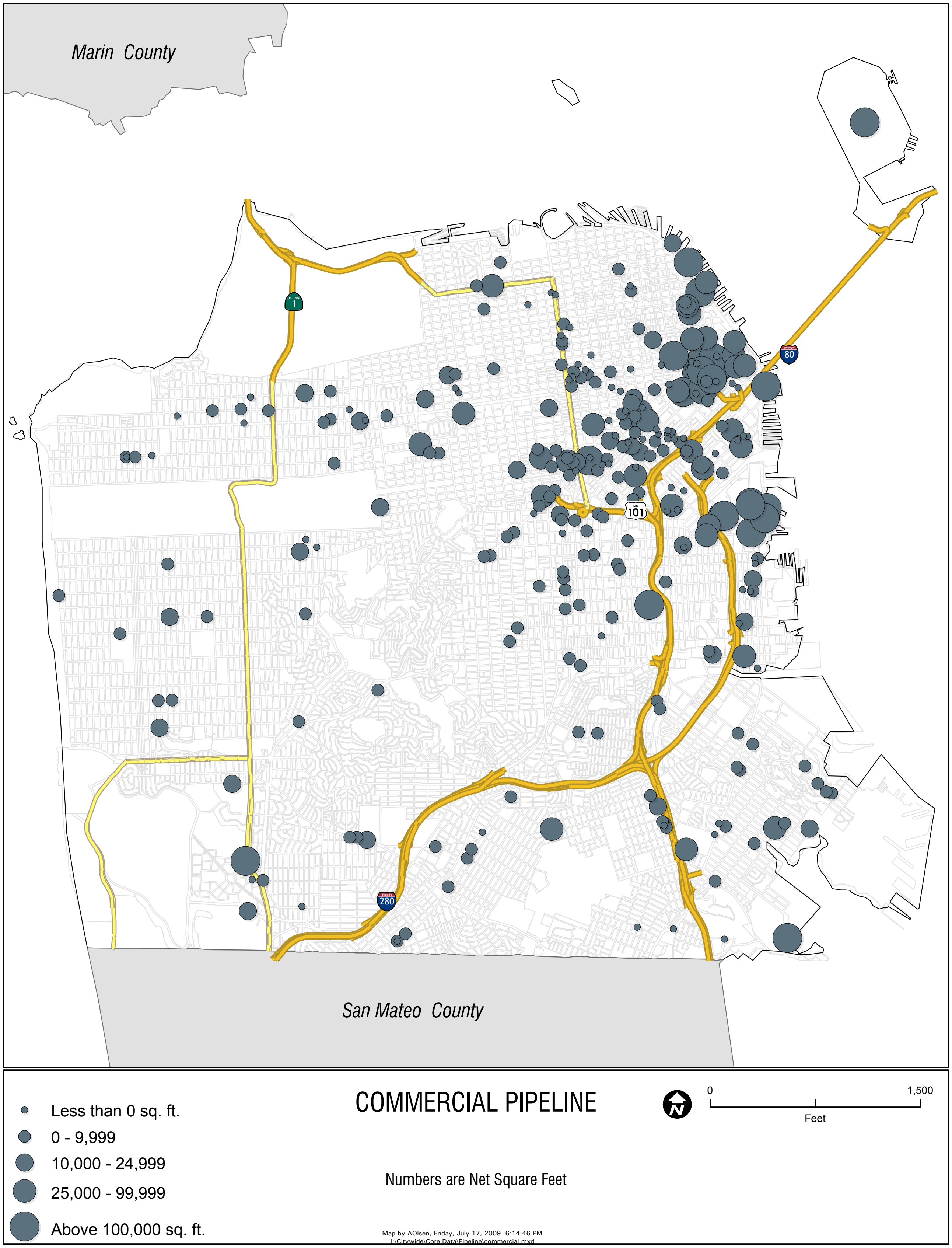
be listed in this table under 'Beauty Pageant', the category highest up in the table. This table is therefore a simplification of the review process.

MAP 1: Neighborhoods Highlighted in the Pipeline Report

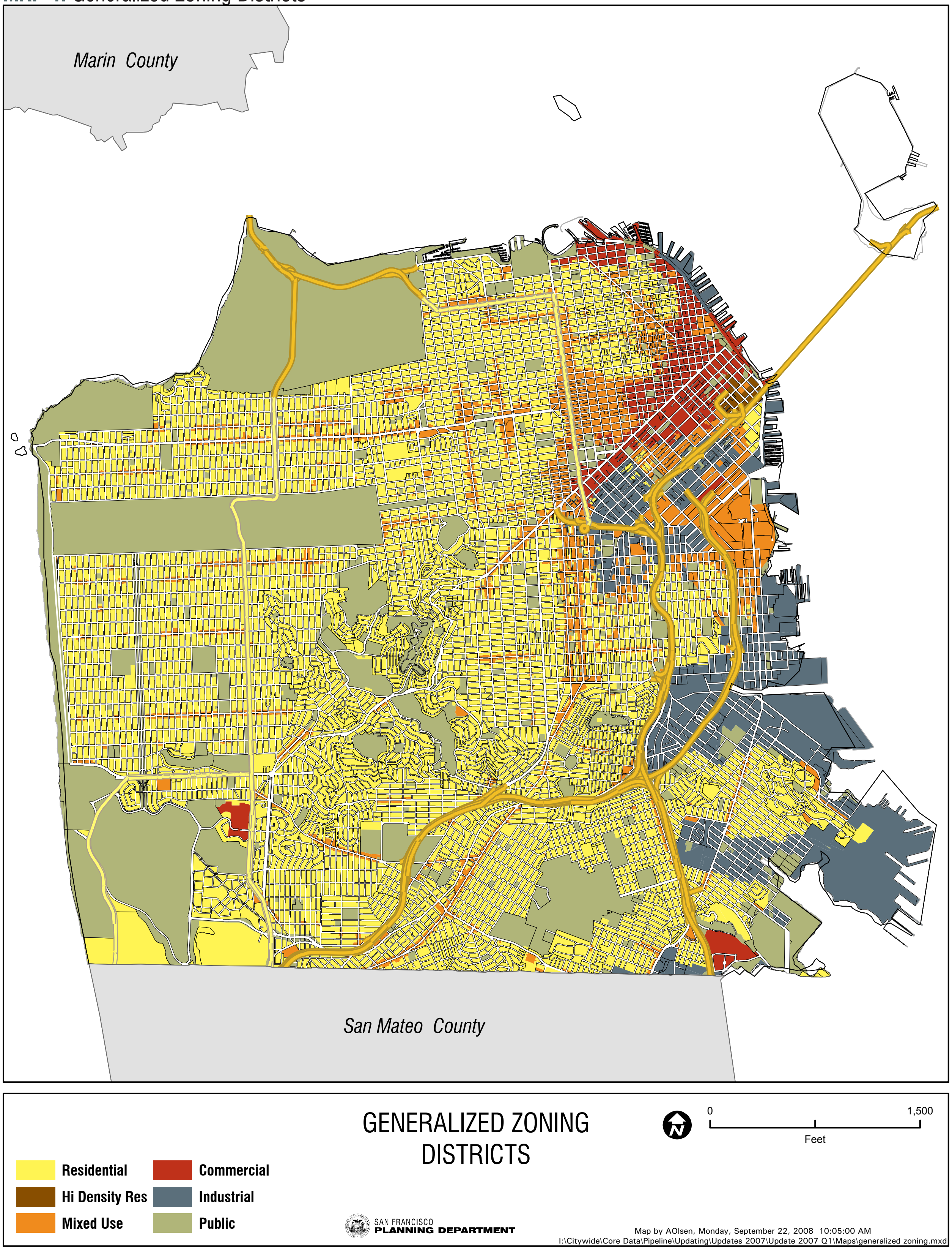
MAP 2: Residential Pipeline



MAP 3: Commercial Pipeline



MAP 4: Generalized Zoning Districts



APPENDIX 1: 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 BESTAT = 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 summarises 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.

APPENDIX 2: List of Projects

Quarter 2, 2009

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
3702053	1169 MARKET ST	Downtown	13,540	1033	Mixres	Retail/Ent	11/9/2007
9900032	Pier 30	South of Market, Other	681,500	300	Mixres	MIPS	11/8/2001
3745001	300 SPEAR ST	Rincon Hill	36,000	826	Mixres	Retail/Ent	12/28/2007
3765015	425 First Street	Rincon Hill	-75,816	722	Resident	--N/A--	12/12/2008
3721120	555 MISSION	TB Combo	549,000	0	MIPS	MIPS	12/31/2004
4991279	101 EXECUTIVE PARK BL	Executive Park	14,000	450	Resident	--N/A--	8/7/2008
3719001	301 MISSION ST	TB Combo	-102,057	420	Resident	Retail/Ent	5/19/2006
3749059	45 LANSING ST	Rincon Hill	-14,000	305	Resident	--N/A--	10/10/2007
3721068	535 MISSION ST	TB Combo	296,430	0	MIPS	MIPS	4/27/2009
3508053	1340-1390 MISSION ST	Downtown	-19,200	237	Mixres	Retail/Ent	4/1/2008
8709006	1500 OWENS ST	Mission Bay	222,181	0	MIPS	MIPS	12/2/2008
1083002	3575 GEARY BL	Richmond	20,957	150	Mixres	MIPS	6/16/2009
4991039	Jamestown Ave. PUD	Candlestick	0	198	Resident	--N/A--	10/1/2007
3799007	675 TOWNSEND ST	Showpl/Potrero	35,000	148	Mixres	Retail/Ent	8/16/2007
4021001	601 ALABAMA ST	Mission	2,995	151	Mixres	PDR	4/27/2009
3735047	1 HAWTHORNE ST	TB Combo	-25,279	135	Mixres	Retail/Ent	6/23/2009
3518017	275 10TH ST	WSoMa	0	135	Resident	--N/A--	5/8/2009
3750090	631 FOLSOM ST	South of Market, Other	3,677	120	Mixres	Retail/Ent	7/5/2007
5421003	5600 03RD ST	BVHP Area A,B	-6,819	112	Mixres	Retail/Ent	12/12/2008
5421011	5600 03RD ST	BVHP Area A,B	-103,453	116	Resident	--N/A--	5/26/2009
0338025	230 TURK ST	Downtown	3,000	113	Resident	--N/A--	11/15/2007
4991241	101 EXECUTIVE PARK BL	Executive Park	0	110	Resident	--N/A--	5/14/2009
3751153	766 HARRISON ST	East SoMa	-4,171	98	Resident	--N/A--	8/27/2008
3708056	1 ECKER ST	TB Combo	-238,920	51	Mixres	Retail/Ent	5/12/2009
4228010	1300 Indiana St.	Central Waterfront	-9,800	81	Mixres	Retail/Ent	12/19/2007
6569004	3400 CESAR CHAVEZ ST	Mission	2,147	60	Mixres	Retail/Ent	6/22/2009
0834022	77 VAN NESS AV	Market Octavia	21,200	50	Mixres	MIPS	9/10/2008
8709009	1301 07TH ST	Mission Bay	50,000	0	PDR	PDR	6/17/2009

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
1156023	850 BRODERICK ST	Western Addition	0	47	Resident	--N/A--	6/18/2009
0688020	1521 SUTTER ST	Japantown	-7,550	28	Resident	--N/A--	5/29/2008
4044030	2198 03RD ST	Central Waterfront	0	24	Resident	--N/A--	7/20/2007
0184031	1355 PACIFIC AV	Northeast	-18,632	24	Resident	--N/A--	6/16/2009
5981011	2574 SAN BRUNO AV	South Central, Other	16,600	0	CIE	CIE	6/11/2009
5322045	4800 03RD ST	BVHP Area A,B	669	18	Mixres	Retail/Ent	6/22/2009
0242027	855 SACRAMENTO ST	Northeast	20,000	0	CIE	CIE	6/17/2009
0512041	2395 Lombard Street	Marina	5,816	12	Resident	--N/A--	6/11/2009
1101007	1301 DIVISADERO ST	Western Addition	-13,264	12	Resident	--N/A--	6/8/2009
0196008	700 MONTGOMERY ST	Northeast	-22,655	12	Resident	--N/A--	7/16/2008
4287016	1250-1260 Missouri	Other S Bayshore	11,250	0	PDR	PDR	1/28/2009

BP ISSUED

3507039	1401 MARKET ST	Downtown	525,500	719	Mixres	MIPS	4/25/2008
3834001	1000 16TH ST	Showpl/Potrero	26,500	450	Mixres	Retail/Ent	9/6/2007
8720001	435 CHINA BASIN ST	South of Market, Other	0	319	Resident	--N/A--	4/3/2007
3786037	645 05TH ST	WSoMa	13,938	0	Retail/Ent	Retail/Ent	6/18/2009
8709004	1600 OWENS ST	Mission Bay	245,000	0	MIPS	MIPS	6/3/2008
0492025	2026 LOMBARD ST	Marina	40,370	61	Mixres	Visitor	4/11/2007
0871016	1844 MARKET ST	Market Octavia	3,033	113	Mixres	Retail/Ent	7/17/2007
0768013	701 GOLDEN GATE AV	Market Octavia	0	100	Resident	--N/A--	8/21/2007
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
3731126	229 07TH ST	East SoMa	16,196	49	Mixres	MED	4/4/2008
1052023	2420 SUTTER ST	Western Addition	-1,900	58	Mixres	MIPS	5/6/2008
0816002	231 FRANKLIN ST	Market Octavia	780	33	Mixres	Retail/Ent	11/1/2007
0619012	1860 VAN NESS AV	Northeast	1,625	35	Mixres	Retail/Ent	11/17/2008
3739006	272 MAIN ST	TB Combo	36,100	0	MIPS	MIPS	12/15/2008
0756001	1345 TURK ST	Western Addition	0	32	Resident	--N/A--	12/9/2008
0599008	1840 WASHINGTON ST	Marina	-7,000	26	Resident	--N/A--	8/29/2008
1101022	2139 OFARRELL	Western Addition	-14,712	21	Resident	--N/A--	10/2/2008

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
4755048	903 PALOU AV	BVHP Area A,B	20,000	0	PDR	PDR	3/26/2009
1127007	1816 EDDY ST	Western Addition	0	19	Resident	--N/A--	12/9/2008
0839029	261 OCTAVIA ST	Market Octavia	0	15	Resident	--N/A--	4/8/2009

BP REINSTATED

0792028	365 FULTON STREET	Market Octavia	0	120	Resident	--N/A--	4/16/2009
0671006	1450 FRANKLIN ST	Western Addition	-24,000	69	Resident	--N/A--	6/25/2009
5696036	992 PERALTA AV	Bernal Heights	0	47	Resident	--N/A--	7/21/2008
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
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
7088056	320 RANDOLPH ST	Ingleside, Other	-10,428	18	Mixres	Retail/Ent	4/30/2008

BP Filed

3783001	801 BRANNAN ST	Showpl/Potrero	-115,000	557	Mixres	Retail/Ent	8/17/2005
4991240	601 CRESCENT WY	Bernal Heights	0	411	Resident	--N/A--	1/14/2004
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
8720016	1455 03RD ST	Mission Bay	380,999	0	MIPS	MIPS	6/10/2008
5431A001	5800 03RD ST	BVHP Area A,B	-90,000	355	Mixres	Retail/Ent	9/28/2005
0269026	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
3736114	525 HOWARD ST	TB Combo	251,788	0	MIPS	MIPS	9/8/2008
3911001	1 HENRY ADAMS ST	Showpl/Potrero	-2,055	212	Mixres	Retail/Ent	8/17/2005
3787026	655 04TH ST	East SoMa	-2,356	192	Mixres	Retail/Ent	1/13/2006
4231002	1300 ILLINOIS ST	Central Waterfront	-16,300	175	Resident	--N/A--	3/3/2000
0807010	580 HAYES ST	Market Octavia	42,432	90	Mixres	MED	8/7/2008

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
0691008	1285 SUTTER ST	Downtown	-8,308	107	Mixres	Retail/Ent	12/6/2007
3510001	1415 MISSION ST	Downtown	300	117	Mixres	Retail/Ent	10/31/2008
3722008	140 NEW MONTGOMERY S	TB Combo	-365,778	118	Resident	--N/A--	4/8/2008
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
1228005	690 STANYAN ST	Buena Vista	10,800	56	Mixres	Retail/Ent	2/15/2006
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
1098009	1401 DIVISADERO ST	Western Addition	57,000	-21	MIPS	MIPS	12/21/2006
3736085	48 TEHAMA ST	TB Combo	0	66	Resident	--N/A--	7/12/2006
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
0287014	300 GRANT AV	Downtown	0	56	Resident	--N/A--	12/22/2006
3788039	345 BRANNAN ST	East SoMa	53,030	0	MIPS	MIPS	10/27/2008
0293002	153 KEARNY ST	Downtown	-40,000	51	Resident	--N/A--	3/28/2006
3774025	250 BRANNAN ST	East SoMa	-127,396	51	Resident	--N/A--	1/30/2007
0056006	1789 MONTGOMERY ST	Northeast	0	51	Resident	--N/A--	10/27/2005
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
0596024	1946 POLK ST	Northeast	-9,245	43	Mixres	Retail/Ent	11/14/2007
1450008	5400 GEARY BL	Richmond	-10,748	39	Mixres	Retail/Ent	6/27/2008
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
3754066	1091 FOLSOM ST	East SoMa	-2,250	30	Resident	--N/A--	6/10/2005
4792029	1212 THOMAS AV	BVHP Area A,B	30,000	0	PDR	PDR	7/23/2008
3730023	1174 FOLSOM ST	WSoMa	-5,200	26	Mixres	PDR	7/28/2004
3521005	340 11TH ST	WSoMa	5,682	20	Mixres	Retail/Ent	4/11/2005
3560001	2210 MARKET ST	Market Octavia	2,000	20	Mixres	Retail/Ent	10/2/2008
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

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3591024	793 SOUTH VAN NESS AV	Mission	5,829	22	Resident	Retail/Ent	2/10/2006
5817006	300 ALEMANY BL	Bernal Heights	0	22	Resident	--N/A--	7/7/2006
1368049	4614 CALIFORNIA ST	Richmond	13,686	0	Mixed	MIPS	1/23/2007
3548039	1801 MISSION ST	Mission	2,600	18	Mixres	Retail/Ent	7/17/2006
1460015	420 29TH AV	Richmond	-6,720	20	Resident	--N/A--	9/19/2008
3521007	350 11TH ST	WSoMa	0	20	Resident	--N/A--	4/11/2005
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
5868007	55 TRUMBULL ST	South Central, Other	0	18	Resident	--N/A--	12/13/2006
0832026	360 OCTAVIA ST	Market Octavia	1,000	16	Mixres	Retail/Ent	10/1/2008
0832025	300 OCTAVIA ST	Market Octavia	0	16	Resident	--N/A--	10/1/2008
0666006	1522 BUSH ST	Western Addition	0	15	Resident	--N/A--	1/15/2004
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
6520036	3135 24TH ST	Mission	-13,640	12	Mixres	Retail/Ent	11/13/2007
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
3732068	456 CLEMENTINA ST	East SoMa	0	12	Resident	--N/A--	7/11/2005
3987010	140 PENNSYLVANIA AV	Showpl/Potrero	0	12	Resident	--N/A--	8/4/2004

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8720007	South St	Mission Bay	145,750	0	MIPS	MIPS	3/8/2001
3708058	555 Market St	TB Combo	-102,515	134	Mixres	MIPS	12/5/2002
3746001	201 Folsom St	TB Combo	0	806	Resident	--N/A--	11/18/2003
4624009	227 West Point Road	Other S Bayshore	620	401	Mixres	Retail/Ent	6/12/2008
3708095	554 MISSION ST	TB Combo	645,000	0	MIPS	MIPS	6/8/2000
4154001	1001 POTRERO AV	Showpl/Potrero	419,070	0	CIE	CIE	12/2/2008
3722082	125 03rd st.	Downtown	430,000	95	Mixres	Retail/Ent	4/6/2004
0857001	55 Laguna Street	Market Octavia	28,090	491	Mixres	Retail/Ent	1/17/2008
3747001E	399 FREMONT ST	Rincon Hill	-2,256	432	Mixres	MIPS	8/4/2006

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
0236017	100 CALIFORNIA ST	Downtown	68,775	0	MIPS	MIPS	1/31/2008
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
3091003	550 Terry Francois Blvd	Mission Bay	280,000	0	MIPS	MIPS	3/9/2000
3839001	South St	Mission Bay	261,904	0	MIPS	MIPS	5/11/2000
3766009	105 HARRISON ST	Rincon Hill	0	259	Resident	--N/A--	3/19/2009
0813006	1390 MARKET ST	Market Octavia	-1,500	230	Mixres	Retail/Ent	5/28/2009
0720038	1101 OFARRELL ST	Western Addition	-27,321	230	Resident	--N/A--	9/13/2001
7324001	77 CAMBON DR	Park Merced	-16,540	195	Mixres	Retail/Ent	10/9/2008
0345004	220 GOLDEN GATE AV	Downtown	-30,690	178	Mixres	MIPS	9/10/2008
3180003	1150 OCEAN AV	Balboa Park	15,100	175	Mixres	Retail/Ent	5/21/2009
3547002A	1880 MISSION ST	Mission	-63,512	194	Resident	--N/A--	10/6/2005
0331010	168 EDDY ST	Downtown	15,000	170	Mixres	Retail/Ent	3/26/2009
4106001A	900 MINNESOTA ST	Central Waterfront	-129,260	160	Mixres	Retail/Ent	1/5/2006
0323015	472 ELLIS ST	Downtown	-65,926	60	Resident	--N/A--	12/12/2008
0283004A	620 SUTTER ST	Downtown	-46,435	78	Mixres	Visitor	1/23/2006
7331003	800 Brotherhood Way	Park Merced	0	127	Resident	--N/A--	12/10/2007
0250001	1401 CALIFORNIA ST	Northeast	-19,056	95	Mixres	Retail/Ent	10/20/2008
3767305	429 BEALE ST	Rincon Hill	-35,628	113	Resident	--N/A--	5/14/2009
3704069	973 MARKET ST	Downtown	8,372	100	Mixres	Retail/Ent	8/14/2008
3703079	1036-1040 MISSION ST	Downtown	6,000	100	Mixres	Retail/Ent	
1073013	800 PRESIDIO AV	Richmond	10,180	83	Mixres	CIE	1/25/2008
5431A015	320-350 PAUL AV	BVHP Area A,B	33,489	0	PDR	PDR	2/3/2009
1052024	2655 BUSH ST	Western Addition	-40,617	84	Mixres	Retail/Ent	10/10/2008
0331003	125 MASON ST	Downtown	0	81	Resident	--N/A--	10/30/2006
0287013	300 Grant Ave.	Downtown	-1,250	66	Mixres	Retail/Ent	7/10/2008
0619009	1800 Van Ness Ave.	Northeast	7,383	62	Mixres	Retail/Ent	4/4/2005
1149011	350 MASONIC AV	Western Addition	69,308	-1	CIE	CIE	8/8/2008
6969001	5050 MISSION ST	South Central, Other	7,030	61	Mixres	Retail/Ent	8/14/2008
0336017	245 HYDE ST	Downtown	-26,640	65	Resident	--N/A--	4/10/2008
3715002	115 Steuart Street	Downtown	46,748	0	MIPS	MIPS	2/15/2009
3725101	474 NATOMA STREET	Downtown	0	58	Resident	--N/A--	12/16/2008

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
0331002	149 MASON ST	Downtown	0	56	Resident	--N/A--	5/4/2006
3706063	721 MARKET ST	Downtown	-70,000	44	Mixres	MIPS	4/20/2006
2515001	2800 SLOAT BL	Outer Sunset	9,656	55	Resident	--N/A--	3/21/2006
0855011	4 OCTAVIA ST	Market Octavia	3,530	49	Mixres	Retail/Ent	10/6/2008
3794024	144 KING ST	East SoMa	43,845	0	Visitor	Visitor	10/17/2005
3994003	680 ILLINOIS ST	Central Waterfront	7,926	35	Mixres	Retail/Ent	12/1/2005
1029003	2901 California St	Western Addition	15,604	-3	CIE	CIE	6/16/2009
0837003	1 FRANKLIN ST	Market Octavia	2,378	35	Mixres	Retail/Ent	3/16/2009
0341005	938-942 MARKET ST	Downtown	-40,674	33	Mixres	Retail/Ent	4/6/2005
3753081	345 06TH ST	East SoMa	324	33	Mixres	Retail/Ent	4/2/2009
0570010	1622 BROADWAY	Marina	0	34	Resident	--N/A--	3/12/2009
0281003	832 SUTTER ST	Downtown	1,176	27	Mixres	Retail/Ent	
6473038	5735-5743 MISSION ST	South Central, Other	-7,153	16	Mixres	Retail/Ent	6/12/2008
1460014B	420 29TH AV	Richmond	-2,500	20	Mixres	Retail/Ent	12/18/2008
2623006	376 CASTRO ST	Buena Vista	1,900	24	Mixres	Retail/Ent	2/6/2006
3777047	695 BRYANT ST	WSoMa	25,600	0	CIE	CIE	4/14/2005
0334008	430 EDDY ST	Downtown	0	24	Resident	--N/A--	3/7/2005
0682010	2000 POST ST	Western Addition	0	24	Resident	--N/A--	1/5/2005
0256018	851 CALIFORNIA ST	Northeast	-33,000	23	Resident	--N/A--	4/19/2006
0640010	1990 CALIFORNIA ST	Marina	0	11	Resident	--N/A--	
0101004	1741 POWELL ST	Northeast	-11,795	17	Mixres	Retail/Ent	1/8/2009
1028003	2829 California Street	Western Addition	373	12	Mixres	Retail/Ent	1/17/2008
3728014	1234 HOWARD	WSoMa	-1,500	18	Resident	--N/A--	10/30/2006
2062031	1801 NORIEGA ST	Outer Sunset	6,400	11	Mixres	Retail/Ent	6/3/2005
2018003	2400 NORIEGA ST	Outer Sunset	12,366	0	CIE	CIE	7/17/2008
5869014	4199 MISSION ST	South Central, Other	600	12	Mixres	Retail/Ent	8/5/2008
3533024	85 BROSNAN ST	Market Octavia	0	11	Resident	--N/A--	3/14/2006
1764031	1348 10TH AV	Inner Sunset	11,900	0	CIE	CIE	2/11/2005

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4886008	Hunters Point Expy	Candlestick	7,996,866	11379	Mixres	MIPS	12/3/2007
7303001	3711 19th Ave	Park Merced	478,383	5677	Mixres	Retail/Ent	1/8/2008

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
1939001	Treasure Island	Treasure Island	250,000	6000	Mixres	Retail/Ent	12/4/2007
6310001	1654 Sunnydale Ave	South Central, Other	0	1333	Resident	--N/A--	12/31/2008
3708006	50 01ST ST	TB Combo	1,134,000	600	Mixres	Visitor	12/21/2006
3720001	425 MISSION ST	TB Combo	1,742,950	0	MIPS	MIPS	7/1/2008
4222A001	1095 Connecticut St	Showpl/Potrero	0	872	Resident	--N/A--	12/31/2008
3719010	181 FREMONT ST	TB Combo	492,866	140	Mixres	MIPS	5/15/2007
9900031	Piers 27-31	Northeast	665,000	0	Mixed	Retail/Ent	8/6/2002
4991075	5 THOMAS MELLON CR	Executive Park	-44,040	499	Mixres	Retail/Ent	3/9/2006
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
0244001	950 MASON STREET	Northeast	-295,000	160	Mixres	Visitor	2/11/2009
0331016	231 ELLIS ST	Downtown	22,000	400	Mixres	MIPS	10/15/2002
4355006	3240 Third Street	BVHP Area A,B	-32,969	391	Mixres	Retail/Ent	4/20/2006
3704071	949 Market Street	Downtown	367,000	0	Retail/Ent	Retail/Ent	2/22/2008
1075001	2501 Sutter St	Western Addition	0	450	Resident	--N/A--	12/31/2008
3732009	900 FOLSOM ST	East SoMa	6,340	300	Mixres	Retail/Ent	7/6/2007
9900015	Pier 15	Northeast	36,248	0	CIE	CIE	5/27/2009
0350003	1066 MARKET ST	Downtown	5,840	255	Mixres	Retail/Ent	7/19/2006
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
0138001	802 DAVIS ST	Northeast	245,400	0	Visitor	Visitor	10/22/2003
0697037	1333 GOUGH ST	Japantown	0	231	Resident	--N/A--	7/15/2005
0173001	600 BATTERY ST	Northeast	92,400	0	MIPS	MIPS	10/17/2007
0836002	1540 MARKET ST	Market Octavia	-13,252	180	Mixres	Retail/Ent	2/27/2009
0238002	300 CALIFORNIA ST	Downtown	61,600	0	MIPS	MIPS	12/19/2007
3955002	1740 17th Street	Showpl/Potrero	24,208	154	Mixres	Retail/Ent	8/31/2004
3736074	41 TEHAMA ST	TB Combo	-1,400	176	Resident	--N/A--	10/31/2006
3507042	1400 MISSION ST	Downtown	3,640	165	Mixres	Retail/Ent	4/8/2009
0317007	450 OFARRELL ST	Downtown	-11,000	144	Mixres	CIE	9/19/2007
0794015	746 LAGUNA ST	Market Octavia	2,325	143	Mixres	MIPS	8/29/2008
3725015	938 HOWARD ST	East SoMa	-18,956	154	Mixres	Retail/Ent	3/27/2006

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3533007	250 VALENCIA ST	Market Octavia	14,926	0	Mixed	CIE	9/13/2005
3732008	260 05TH ST	East SoMa	-35,843	151	Mixres	Retail/Ent	1/24/2008
3726103	114 07th Street	Downtown	-26,222	119	Mixres	Retail/Ent	3/28/2007
0192014	835-845 Jackson St	Northeast	68,010	0	CIE	CIE	6/26/2008
4646020	900 INNES AVE	Other S Bayshore	8,613	128	Mixres	Retail/Ent	9/17/2004
8704005	330-335 BERRY STREET (	Mission Bay	0	131	Resident	--N/A--	6/8/2007
0165006	717 BATTERY ST	Northeast	20,519	78	Mixres	MIPS	6/15/2007
3616007	2558 MISSION ST	Mission	0	125	Resident	--N/A--	12/21/2005
0872005	1960-1998 MARKET ST	Market Octavia	9,000	115	Mixres	Retail/Ent	5/29/2007
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
3702046	1127 MARKET ST	Downtown	-8,250	98	Mixres	Retail/Ent	3/6/2008
3535001	2001 MARKET ST	Market Octavia	-14,517	69	Mixres	Retail/Ent	6/13/2008
3749064	FOLSOM AND ESSEX	TB Combo	0	100	Resident	--N/A--	6/8/2007
0059003	1620 MONTGOMERY ST	Northeast	-39,796	95	Resident	--N/A--	1/27/2005
3784085	570 TOWNSEND ST	WSoMa	-17,729	85	Mixres	PDR	8/16/2007
3740027	SPEAR STREET AND FOLS	TB Combo	0	85	Resident	--N/A--	6/8/2007
3732074	251 06TH ST	East SoMa	1,450	83	Mixres	Retail/Ent	9/29/2004
0345002	145 LEAVENWORTH ST	Downtown	0	84	Resident	--N/A--	7/13/2006
9900041H	PIER 31	Northeast	12,990	0	PDR	PDR	8/27/2008
5476009	6600 Third Street	BVHP Area A,B	0	37	Resident	--N/A--	9/23/2008
0808036	401 Grove Street	Market Octavia	7,000	70	Mixres	Retail/Ent	5/23/2007
3753140	935 FOLSOM ST	East SoMa	-13,808	69	Mixres	Retail/Ent	5/25/2006
3704015	942 MISSION ST	Downtown	53,514	0	Visitor	Visitor	2/14/2008
4045006	2121 3rd Street	Central Waterfront	-5,000	66	Mixres	Retail/Ent	4/11/2006
3994001B	2065 03RD ST	Central Waterfront	-4,725	62	Mixres	Retail/Ent	6/7/2006
3543011	2175 MARKET ST	Market Octavia	5,813	60	Mixres	Retail/Ent	8/31/2006
0711031	1100 ELLIS ST	Western Addition	11,513	0	CIE	CIE	11/17/2008
3639004A	2660 HARRISON ST	Mission	-11,423	62	Resident	--N/A--	9/16/2004
3753005	205 SHIPLEY ST	East SoMa	-11,000	51	Mixres	Retail/Ent	5/26/2006
5992A060	495 CAMBRIDGE ST	South Central, Other	0	56	Resident	--N/A--	5/4/2006
0165021	235 BROADWAY	Northeast	5,000	50	Mixres	Retail/Ent	7/2/2008

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3776149	424 BRANNAN ST	East SoMa	0	55	Resident	--N/A--	12/22/2005
0347013	399 GOLDEN GATE AV	Downtown	53,000	0	Retail/Ent	Retail/Ent	12/28/2006
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
3785003	690 05TH ST	WSoMa	32,500	0	Visitor	Visitor	1/24/2006
3534069	25 DOLORES ST	Market Octavia	-19,037	46	Resident	--N/A--	7/17/2006
0318020	651 GEARY ST	Downtown	-8,010	40	Mixres	Retail/Ent	8/15/2008
3980007	1717 17TH ST	Showpl/Potrero	-13,369	41	Mixres	PDR	12/22/2005
3701020	1270 Mission Street	Downtown	4,258	36	Mixres	MIPS	5/12/2004
3794014	111 TOWNSEND ST	East SoMa	-13,136	34	Mixres	Retail/Ent	12/14/2004
0828012	735 Fell St	Western Addition	16,000	0	CIE	CIE	7/3/2007
4228015	1240 MINNESOTA ST	Central Waterfront	20,500	27	Mixres	PDR	9/29/2004
0279011	1080 SUTTER ST	Downtown	1,339	35	Mixres	Retail/Ent	10/25/2006
0816003	205 FRANKLIN ST	Market Octavia	28,643	0	Mixed	Retail/Ent	10/30/2008
2636025	Crestmont Drive	Inner Sunset	0	34	Resident	--N/A--	3/25/2004
6935001	1607-1649 Ocean Ave.	Balboa Park	-19,485	31	Resident	--N/A--	5/4/2006
0279014	1299 BUSH ST	Downtown	-5,532	26	Mixres	Retail/Ent	8/31/2004
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
0620006	1601 LARKIN ST	Northeast	-19,050	28	Resident	--N/A--	8/25/2004
7148040	ONE CAPITOL AV	Ingleside, Other	0	28	Resident	--N/A--	2/12/2009
0028014	1255-1275 COLUMBUS AV	Northeast	-15,564	20	Mixres	Retail/Ent	6/19/2008
4711118	Hudson Ave and Whitney Y	BVHP Area A,B	0	24	Resident	--N/A--	6/6/2007
3148001	4550 MISSION ST	South Central, Other	-3,250	17	Mixres	Retail/Ent	7/19/2006
3794002A	750 02ND ST	East SoMa	-2,710	18	Mixres	Retail/Ent	5/8/2008
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
3721019	562 HOWARD ST	TB Combo	0	19	Mixres	Retail/Ent	10/3/2007
3732112	452 TEHAMA ST	East SoMa	-4,917	20	Mixres	Retail/Ent	2/15/2007
3728069	121 09TH ST	WSoMa	-4,975	20	Mixres	Retail/Ent	3/31/2005
0853021	102-104 OCTAVIA STREET	Market Octavia	0	20	Resident	--N/A--	6/8/2007
3965001	2401 16TH ST	Mission	1,722	12	Mixres	MIPS	10/9/2008

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
0729046	1210 SCOTT STREET	Western Addition	0	18	Resident	--N/A--	6/8/2007
1018012	3657 SACRAMENTO ST	Richmond	0	18	Resident	--N/A--	11/20/2007
3617008	1050 VALENCIA ST	Mission	400	16	Mixres	Retail/Ent	12/20/2007
0303015	865 POST ST	Downtown	-4,658	18	Resident	--N/A--	5/11/2004
0668013	1461 PINE ST	Northeast	-5,416	15	Mixres	Retail/Ent	9/2/2004
4108003C	1025 TENNESSEE ST	Central Waterfront	-6,550	12	Mixres	Retail/Ent	9/9/2004
3727004	150 07TH ST	WSoMa	10,808	0	Retail/Ent	Retail/Ent	4/2/2007
2463A014	2233 VICENTE ST	Outer Sunset	13,469	0	Retail/Ent	Retail/Ent	4/14/2005

Acknowledgements

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Small infill project, Brady St, by Aksel K Olsen.