2012 QUARTER 1

San Francisco
PIPELINE REPORT

San Francisco Planning Department

April 2012

Cover Photo: Former Transbay Terminal Site. source: Aksel Olsen

San Francisco

PIPELINE REPORT

Quarter 1 2012

Errata: Document was re-issued on 4/16/2012 with updates to

- Jamestown Project (132 units remaining to be completed)
- 1169 Market St (Removed; Duplicate of 1190 Mission)
- 220 Golden Gate (Status set to Under Construction)
- 701 Golden Gate (Status set to Under Construction)

San Francisco Planning Department

April 2012

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 March 31, 2012. 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.*

Q1 2012 Pipeline at a Glance

- There are currently just below 750 projects in the pipeline of varying sizes, complexities and stages.
- These projects, if completed, would add 43,000 net new housing units to the city's housing stock.
- Thee large projects, Parkmerced, Treasure Island and Candlestick/Hunters Point Shipyard, would together add more than 25,000 units and several million square feet of commercial space over the next decades. These projects are now entitled by the City.
- The pipeline would also add a net of 16.4 million sq. ft. of non-residential uses. Within this total, office and retail space would see net gains of 11.3 million and 3.1 million sq. ft., respectively. There is an expected loss of 326,000 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 4,200 units) are in the construction phase; other projects adding 1,600 units have received building permits approvals and an additional 28,000 units have received land use entitlements.

The Development Pipeline

There are currently just below 750 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, 69 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 42,900 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 and entitlement of applications during the past three years for new large scale, long term development programs for Parkmerced, Treasure Island and the Bayview Waterfront. The vast majority of pipeline projects, however, are small scale consisting of one to three units. The number of filings have been much lower since the economic slowdown began in earnest, with signs of conditions returning, if slowly, to "normal".

Pipeline projects could also bring a net addition of 16 million sq ft of commercial development.

Projects by Overall Status

Table 1 on the following page shows the following:

- Around 18 percent of all projects, representing 4,200 net added housing units and 840,000 sq ft of commercial space, are under construction.
- Around 24 percent of projects (with 3,300 net units and 840,000 sq. ft. commercial space) have received building permit approvals. As of the time of writing, some may have already begun construction.
- Around one in three projects (including 3,100 net new units and an addition of 1.7 million sq ft of commercial space) have filed building

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	84	6,180	4,828,000	1,000,000	0	3,382,000	36,000	845,000	-435,000
Approved by Planning	109	27,670	7,613,000	199,000	5,000	5,063,000	-79,000	1,926,000	493,000
BP Filed	236	3,100	1,688,000	-15,000	0	1,726,000	-96,000	73,000	0
BP Approved/ Issued/Re-Instated	177	1,580	1,028,000	62,000	0	872,000	-57,000	53,000	88,000
Construction	136	3,990	777,000	403,000	0	544,000	-130,000	26,000	-66,000
Grand Total	**742**	**42,520**	**15,934,000**	**1,649,000**	**5,000**	**11,587,000**	**-326,000**	**2,924,000**	**80,000**

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.

permit applications with the Department of Building Inspections. Some of these may not yet be entitled by the Planning Department.

- Fifteen percent of the pipeline projects and 65 percent of the units have received Planning Department approvals. If and when constructed, these projects would add some 28,000 new units to the city's housing stock, and up to 7.6 million sq ft of commercial space. These projects now must secure building permits.
- Thirteen percent of projects, representing 6,200 units and 4.8 million commercial square feet are under initial Planning Department review.

Amount and Type of Net New Commercial Space

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

- 11.6 million sq ft of office space
- 3 million sq ft of retail space
- 80,000 sq ft of visitor-serving uses, such as hotels or hostels.
- 1.7 million sq ft of cultural, institutional, educational (CIE) and medical space
- An overall loss of around 300,000 sq ft of space for production, distribution and repair (PDR).

Location of New Development

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

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

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

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

TABLE 2: Residential and Commercial Pipeline, by Neighborhood

Neighborhood	Projects	Percent	Net Units	Percent	Avg Units / Project	Net Comm'l Sq. Ft.	Percent	Residential Rank	Commercial Rank
Balboa Park	4	0.5%	90	0.2%	23	9,180	0.1%	23	22
Bernal Heights	33	4.4%	50	0.1%	2	164,620	1.0%	28	10
Buena Vista	15	2.0%	80	0.2%	5	10,800	0.1%	25	21
BVHP Area A,B	27	3.6%	50	0.1%	2	286,840	1.8%	28	9
Candlestick	2	0.3%	10,440	24.6%	5,218	6,120,000	38.4%	1	1
Central	74	10.0%	120	0.3%	2	15,540	0.1%	21	19
Central Waterfront	9	1.2%	440	1.0%	49	2,870	0.0%	18	24
Downtown	43	5.8%	3,390	8.0%	89	1,770,450	11.1%	4	4
East SoMa	27	3.6%	1,170	2.8%	43	-29,390	-0.2%	9	28
Executive Park	1	0.1%	110	0.3%	107	0	0.0%	22	25
India Basin	1	0.1%	0	0.0%	4	-2,560	-0.0%	31	27
Ingleside, Other	27	3.6%	60	0.1%	2	42,640	0.3%	26	14
Inner Sunset	29	3.9%	60	0.1%	2	14,960	0.1%	27	20
Japantown	3	0.4%	0	0.0%	1	3,550	0.0%	32	23
Marina	23	3.1%	150	0.4%	7	23,470	0.1%	20	18
Market Octavia	38	5.1%	2,530	6.0%	67	-420,780	-2.6%	5	32
Mission	52	7.0%	600	1.4%	12	-95,950	-0.6%	14	30
Mission Bay	6	0.8%	460	1.1%	77	2,274,940	14.3%	16	3
Northeast	43	5.8%	1,000	2.4%	23	-161,790	-1.0%	11	31
Other S Bayshore	16	2.2%	460	1.1%	31	42,900	0.3%	17	13
Outer Sunset	26	3.5%	80	0.2%	3	31,670	0.2%	24	17
Park Merced	2	0.3%	5,860	13.8%	2,930	478,380	3.0%	3	7
Richmond	77	10.4%	260	0.6%	3	35,990	0.2%	19	16
Rincon Hill	6	0.8%	1,490	3.5%	248	-51,880	-0.3%	7	29
Showpl/Potrero	29	3.9%	1,690	4.0%	58	540,800	3.4%	6	6
South Central, Other	57	7.7%	1,210	2.8%	21	122,900	0.8%	8	11
South of Market, Other	5	0.7%	640	1.5%	161	687,190	4.3%	13	5
TB Combo	11	1.5%	650	1.5%	59	3,514,980	22.1%	12	2
Treasure Island	1	0.1%	7,800	18.4%	7,800	381,000	2.4%	2	8
VisVal	3	0.4%	10	0.0%	4	-1,250	-0.0%	30	26
Western Addition	30	4.0%	1,050	2.5%	35	39,010	0.2%	10	15
WSoMa	22	3.0%	500	1.2%	23	83,360	0.5%	15	12
Grand Total	**742**	**100.0%**	**42,500**	**100.0%**	**17,110**	**15,934,440**	**100.0%**		

Pipeline Projects by Current Zoning Category

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

Residential Pipeline

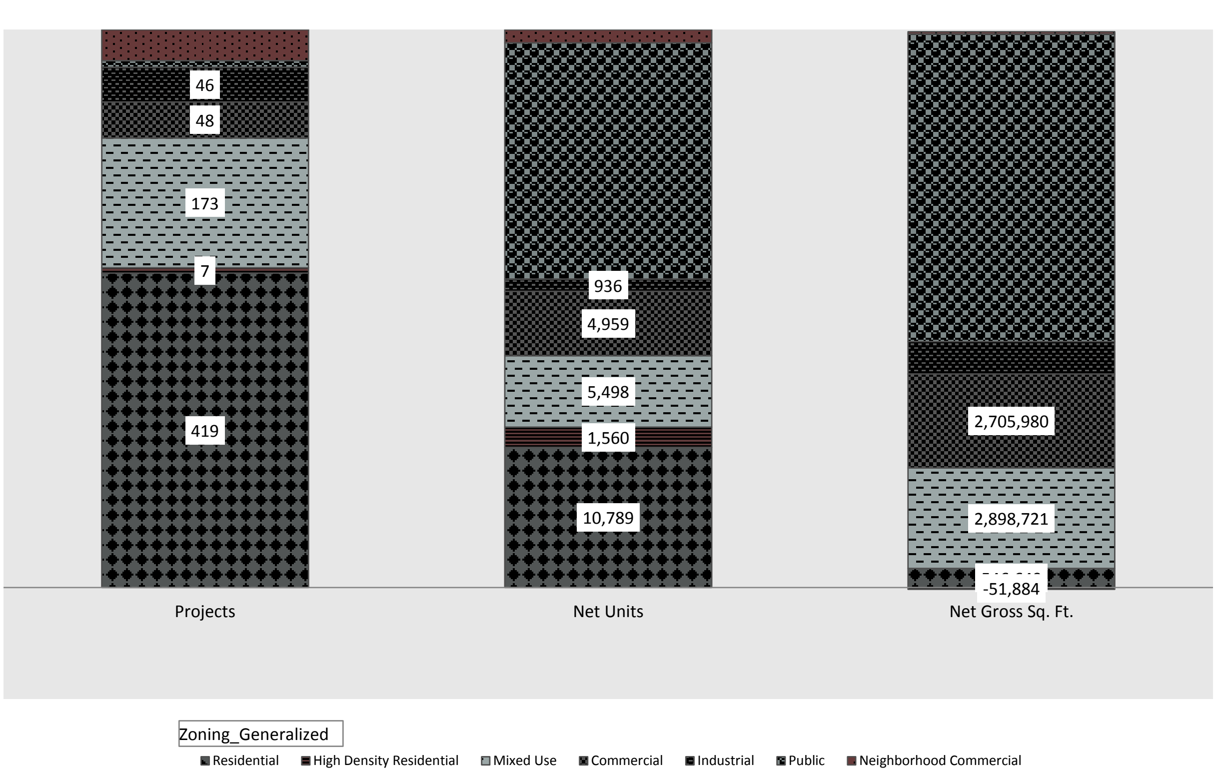
Figure 1a shows the share of the total pipeline by zoning district type for number of projects, units and non-residential square feet, respectively. This chart indirectly measures project sizes. While most projects (around 55 percent as per the left-most column) fall in residential districts, these same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

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

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

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

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



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

Table 3 similarly shows the overall pipeline distribution by general zoning categories. The vast majority of the residential pipeline falls on four land zoning classes: Public, Residential, Mixed Use, and Commercial. Two large projects are situated on parcels classified as "Public Land": the Bayview Waterfront project, most of which is at Candlestick Point, and the Treasure Island redevelopment project.[2] These projects could add more than 18,200 units.

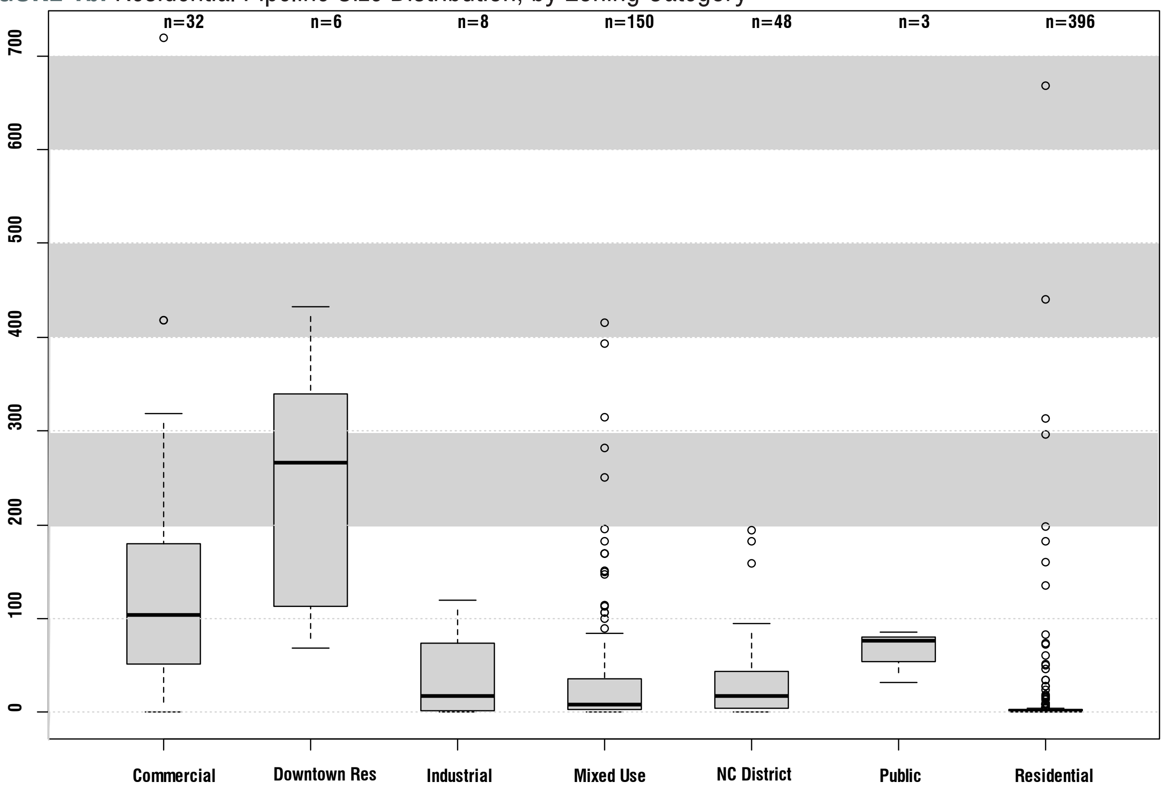
Residential projects on *residentially* zoned lots, representing the largest number of projects, account for 10,700 units, or the second largest class. Two thirds of these units, however, are in the Parkmerced redesign project and a couple of

2 Both the Bayview Waterfront and Treasure Island projects entail reclassification of zoning to new categories; however for the purposes of this report, they are still counted in the "Public" category they were predominantly located in as the entitlement proceedings began.

Table 3: Residential and Commercial Pipeline by Generalized Zoning Category

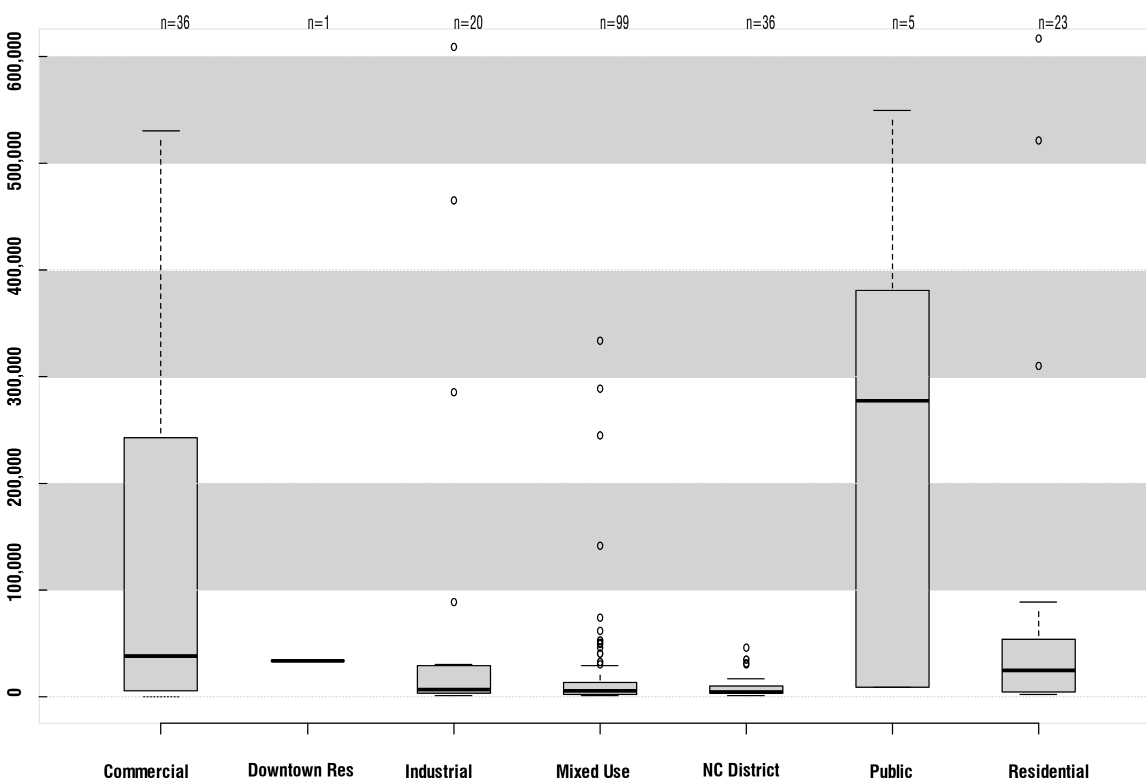
District Type	Simplified Zoning	Projects	Net Units	Net Gross Sq. Ft.	Cult., Inst., Educ.	Medical	Office	Prod., Dist., Repair	Retail	Visitor
Commercial	C-2	18	3,210	95,000	0	0	-239,000	-77,000	348,000	63,000
	C-3	29	1,330	2,577,000	137,000	0	2,241,000	2,000	27,000	170,000
Neighborhood Commercial	NC	21	340	-40,000	0	0	1,000	-42,000	1,000	0
	NCT	20	660	104,000	25,000	38,000	-4,000	0	39,000	5,000
Industrial	C-M	1	120	0	0	0	2,000	-4,000	2,000	0
	M	5	120	662,000	44,000	0	5,000	5,000	609,000	0
	PDR	17	a	300,000	0	0	142,000	144,000	14,000	0
	RSD	3	50	-1,000	0	0	0	-6,000	5,000	0
	SLI	4	90	-74,000	0	0	2,000	-78,000	2,000	0
	SLR	16	480	50,000	0	0	-7,000	-4,000	65,000	-4,000
Mixed Use	CRNC	1	0	68,000	68,000	0	0	0	0	0
	CVR	1	20	-9,000	4,000	0	0	0	-14,000	0
	MUG	3	50	0	0	0	0	0	0	0
	MUO	4	10	100,000	0	0	66,000	-29,000	7,000	50,000
	MUR	9	820	-52,000	0	0	-9,000	-60,000	17,000	0
	NC	79	850	123,000	29,000	-45,000	97,000	-19,000	37,000	24,000
	NCT	18	870	-55,000	12,000	0	5,000	-65,000	-17,000	0
	RC	24	1,150	711,000	924,000	0	-25,000	50,000	56,000	-294,000
	RED	5	40	-10,000	0	0	0	-10,000	0	0
	SPD	2	0	1,000	0	0	0	0	1,000	0
	SSO	1	0	33,000	0	0	-14,000	0	5,000	41,000
	UMU	20	1,070	95,000	0	0	68,000	-33,000	60,000	0
	MB	6	610	1,894,000	6,000	0	1,822,000	0	66,000	0
Public	P	9	18,200	8,867,000	356,000	0	7,127,000	0	1,043,000	341,000
Residential	RH	333	810	204,000	-17,000	0	215,000	-10,000	32,000	-16,000
	RM	65	9,760	367,000	69,000	12,000	102,000	0	485,000	-300,000
	RTO	21	230	-25,000	-8,000	0	-21,000	-19,000	24,000	0
High Density Residential	DTR	7	1,560	-52,000	0	0	10,000	-71,000	10,000	0
Grand Total		742	42,520	15,934,000	1,649,000	5,000	11,587,000	-326,000	2,924,000	80,000

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



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

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



Includes projects where commercial sq ft>0 and commercial sq ft <1,000,000 sq ft, removing the largest outliers and non-commercial projects large San Francisco Housing Authority projects (one in the Potrero Hill area, the other on Sunnydale Ave as part of the Hope SF program). The remainder of projects on residentially zoned parcels are relatively small with about a quarter of projects being single family housing projects. Small scale projects of one to nine units account for more than 90 percent of the residential projects. Only a handful are larger and thus account for the majority of units.

The mixed use districts, a diverse group ranging from Eastern Neighborhoods districts to chinatown, account for 5,500 units in 173 projects.

Residential projects on downtown commercial zoned lots would add 5,000 new units in 48 projects, although some of these may be commercial only projects.

Another 900 units are pending on industrially zoned lands. About a third of these projects are mixed use projects with a commercial component. The added residential units in industrial areas are accompanied by loss of PDR space and addition of retail space (see Table 3).

Projects in neighborhood commercial districts would add 1,000 units in 41 projects.

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

In contrast, residential projects in the low-density residential (RH) districts are by per zoning requirements relatively small scaled, in-fill developments, accounting for some 45 percent of proposed projects but just 2 percent of the total units (or 810 net units) in the pipeline. Projects on RM-zoned lots, in turn, account for 9 percent of projects and 23 percent of units, again largely because of a large project, the Parkmerced Redesign project. In terms of land area, residential zoning districts form the largest group, comprising 46 percent of the city land area.

Commercial Pipeline

Non-residential development is predominantly allowed in commercial and mixed use districts[3]; thus the majority of commercial space are proposed to be added in these land classes.

The commercial pipeline in general is characterized by 76 projects, but also 151 mixed use projects which contain both residential and non-residential components. The commercial component in the 151 mixed use district projects are, in general also small, with half of projects being smaller than 5,000 gross square feet, respectively. (Some of these projects in mixed use districts are exclusively residential.)

The largest concentration of potential commercial development is in a small number of projects in areas currently zoned public[4]. Development here would add some net 8.9 million square feet, or more than half of all proposed commercial development, in just 11 projects. The largest of these proposed developments is the Bayview Waterfront Project which would add more than six million commercial square feet as currently proposed; however, there were several variants with less development analyzed as a part of the environmental review.

Downtown Commercial districts account for a sizable concentration of non-residential development, with 2.7 million square feet 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 2.9 million square feet. The remaining districts account for only a minor portion of non-residential development.

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

3 Some institutional uses are allowed in residential districts, such as day care and residential care. Further, P-zoned properties are occasionally developed.
4 See footnote 2.

FIGURE 2: Residential Pipeline, by Status & Building Size

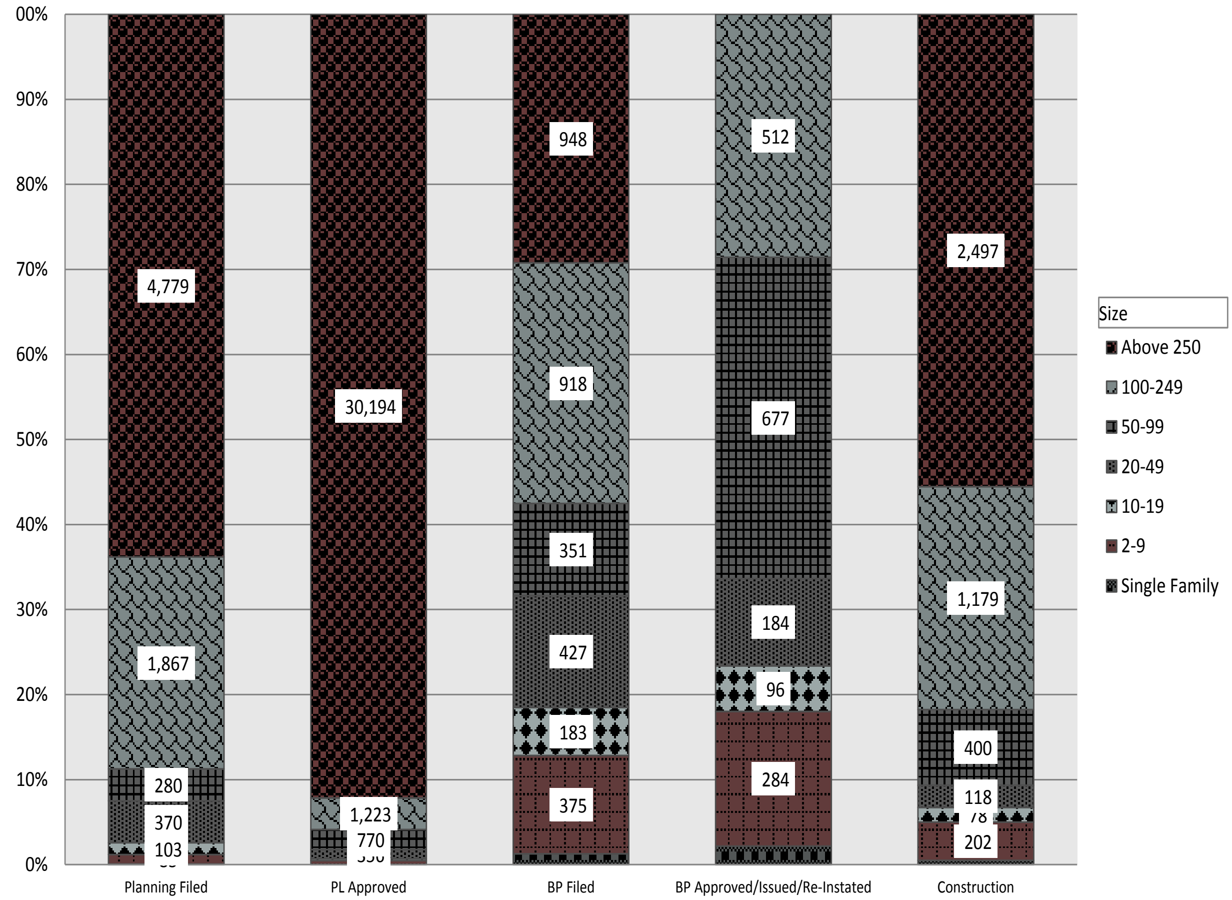
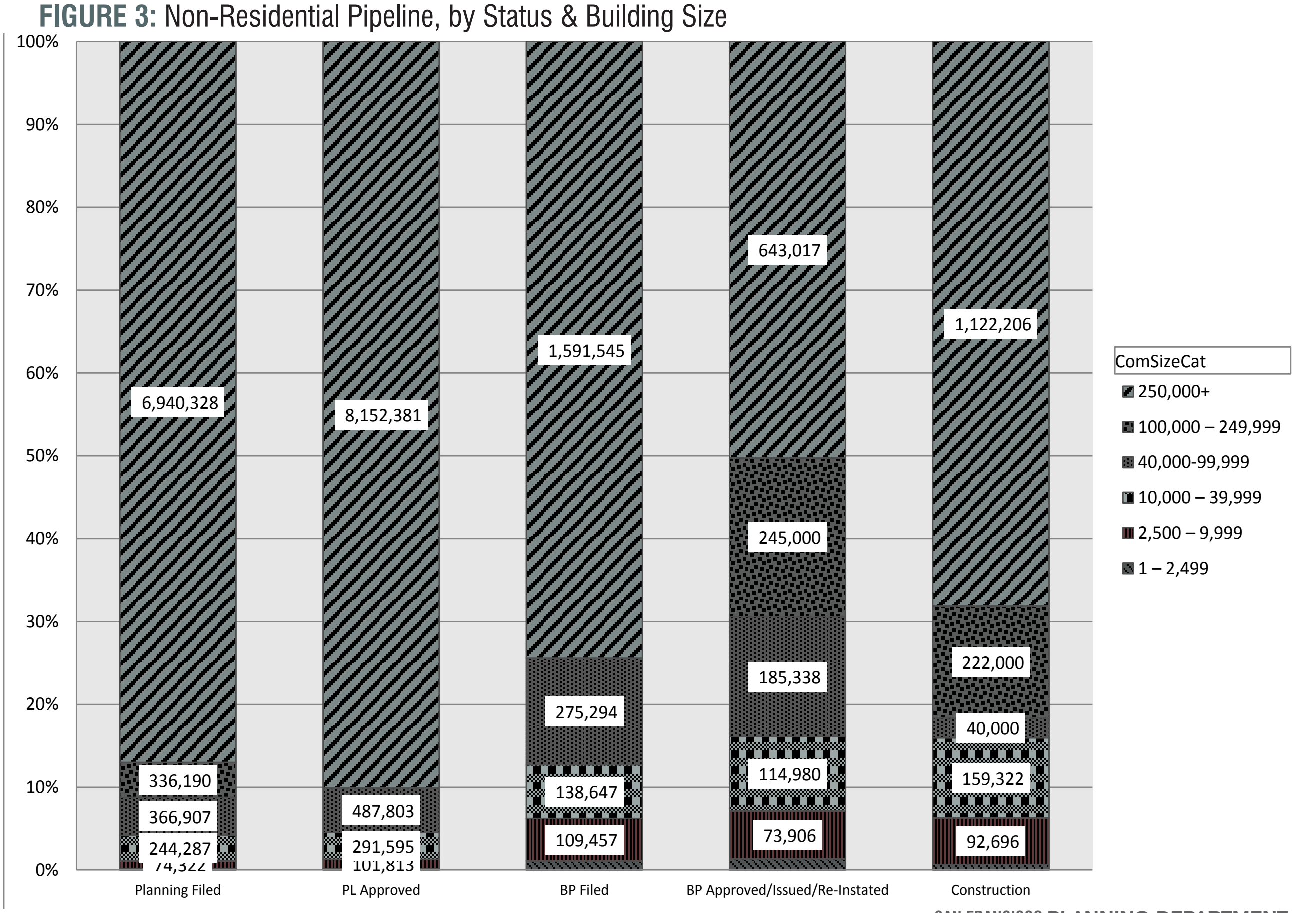


FIGURE 3: Non-Residential Pipeline, by Status & Building Size



Residential Pipeline by Project Size

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

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

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

TABLE 4: Projects by Neighborhood and Building Size

Neighborhood	Project Size							Grand Total	Rank
	Single Family	2-9	10-19	20-49	50-99	100-249	Above 250		
Balboa Park	0	8	13	0	71	0	0	92	26
Bernal Heights	11	51	0	0	0	0	0	62	29
Buena Vista	0	39	0	0	56	0	0	95	24
BVHP Area A,B	4	28	0	0	73	0	0	105	23
Candlestick	0	0	0	0	0	198	10,500	10,698	1
Central	19	136	18	0	0	0	0	173	20
Central Waterfront	1	13	16	40	81	302	0	453	18
Downtown	0	28	17	283	397	1,484	1,410	3,619	4
East SoMa	1	29	70	126	321	364	282	1,193	9
Executive Park	0	0	0	0	0	107	0	107	22
India Basin	0	4	0	0	0	0	0	4	32
Ingleside, Other	11	33	0	28	0	0	0	72	27
Inner Sunset	11	32	25	0	0	0	0	68	28
Japantown	0	5	0	0	0	0	0	5	31
Marina	3	39	14	116	0	0	0	172	21
Market Octavia	1	39	61	275	311	1,056	839	2,582	5
Mission	4	107	106	112	136	194	0	659	13
Mission Bay	0	0	0	0	0	147	315	462	17
Northeast	1	64	51	214	232	500	0	1,062	11
Other S Bayshore	7	4	0	0	102	0	668	781	12
Outer Sunset	6	33	0	0	55	0	0	94	25
Park Merced	0	0	0	0	0	182	8,898	9,080	2
Richmond	7	169	31	39	83	0	0	329	19
Rincon Hill	0	0	0	0	69	337	1,080	1,486	8
Showpl/Potrero	2	45	15	89	65	0	2,093	2,309	6
South Central, Other	16	106	22	55	122	0	1,700	2,021	7
South of Market, Other	0	0	0	0	0	325	319	644	15
TB Combo	0	0	0	0	151	503	0	654	14
Treasure Island	0	0	0	0	0	0	8,619	8,619	3
VisVal	0	16	0	0	0	0	0	16	30
Western Addition	3	37	61	32	153	0	861	1,147	10
WSoMa	5	30	10	46	0	0	416	507	16
Grand Total	**113**	**1,095**	**530**	**1,455**	**2,478**	**5,699**	**38,000**	**49,370**	

Notes:
/1/ Housing unit counts are not rounded.
/2/ As the table categorizes by building size, numbers here represent total units as opposed to net units (subtracting replaced units), for which reason the unit count is higher than in other summary tables.

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

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

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

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

- Of the 1,600 units with building permits approved, two thirds of the 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 seven out of ten projects are residential. Another 22 percent are mixed use projects with residential and non-residential components. Only the remaining 4 percent or so of the projects are distributed among the commercial categories, with office, institutional and retail being the most frequent. There are also a few PDR and hotel projects.

The office (listed as MIPS) projects are the largest in the pipeline, with a median size of 209,000 square feet. No other use type comes close to that, with the nearest follow-up being visitor-related uses, with a median size of 47,800 square feet.

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

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

TABLE 5: Pipeline Project Size, by Proposed Land Use

Proposed Use	Projects	Percent	Mean	Standard Deviation	Percentile				
					0	25	50 (Median)	75	100
CIE	19	3%	90,718	145,552	2,420	8,600	32,000	71,702	548,776
MIPS	25	3%	253,622	366,742	4,000	53,980	208,600	324,566	1,743,000
Mixed	7	1%	277,417	481,027	5,566	9,990	21,886	325,743	1,243,002
Mixres	162	22%	392,944	1,968,686	2,540	13,566	33,576	128,058	18,720,000
PDR	12	2%	62,975	143,272	1,496	3,044	6,750	29,470	464,553
Resident	530	72%	18,584	60,535	1,200	2,400	2,400	3,600	501,600
Retail/Ent	9	1%	157,559	236,740	8,681	12,412	40,722	210,000	608,688
Visitor	4	1%	53,731	17,296	40,370	44,593	47,750	56,889	79,054
Total	**735**	**100%**	**108,879**	**908,218**	**1,200**	**2,400**	**3,600**	**26,178**	**18,720,000**

components, includes the Bayview Waterfront project, helping explain both the high average size in the group as well as the substantial 100th percentile measuring some 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 33,600 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 small median. Seventy-five percent of projects are three units or less.[6]

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

Conversion of Commercial Space to Residential Use[7]

There are 37 projects in the current pipeline database proposing demolition or conversion of existing production, distribution and repair-use (PDR) buildings to residential use.[8] The corresponding figure for the conversion of office space is 29 projects. These projects represent approximately ten percent with or 1,900 units and 2,100 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 500,000 sq ft of PDR space would be

7 Numbers represented here differ from those reported in Table 1. Table 1 represents the net change of all projects whereas numbers here are limited to the specific projects representing conversions or demolitions resulting in a net loss of PDR space (Table 6) and office space (Table 7).
8 This pipeline only accounts for PDR built space. Hence, the conversion of undeveloped or vacant lands currently in PDR uses, such as construction or open storage yards are not accounted for in this report.

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

Neighborhood	Projects	Percent	Net Units	Percent	PDR Net	Percent	Avg Units / Project	Avg Loss / New Unit
BVHP Area A,B	1	2.7%	10	0.5%	-3,900	0.8%	10	-490
Central Waterfront	2	5.4%	180	9.3%	-23,300	4.5%	90	-130
Downtown	3	8.1%	230	11.9%	-64,100	12.5%	77	-280
East SoMa	7	18.9%	370	19.1%	-149,000	29.1%	53	-400
India Basin	1	2.7%	0	0.0%	-2,600	0.5%	0	-650
Market Octavia	2	5.4%	130	6.7%	-20,900	4.1%	65	-160
Mission	11	29.7%	370	19.1%	-124,200	24.3%	34	-340
Northeast	1	2.7%	40	2.1%	-27,300	5.3%	40	-720
Richmond	2	5.4%	10	0.5%	-3,000	0.6%	5	-330
Rincon Hill	2	5.4%	550	28.4%	-70,900	13.8%	275	-130
Western Addition	1	2.7%	30	1.5%	-9,100	1.8%	30	-280
WSoMa	4	10.8%	30	1.5%	-13,900	2.7%	8	-510
Grand Total	37	100.0%	1,940	100.0%	-512,100	100.0%	52	-260

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 / New Unit
Downtown	6	20.7%	390	18.9%	-132,200	16.6%	65	-300
East SoMa	2	6.9%	60	2.9%	-8,800	1.1%	30	-100
Inner Sunset	1	3.4%	20	1.0%	-2,200	0.3%	20	-100
Market Octavia	7	24.1%	1,140	55.3%	-475,900	59.8%	163	-400
Northeast	2	6.9%	20	1.0%	-17,000	2.1%	10	-900
Rincon Hill	1	3.4%	220	10.7%	-15,000	1.9%	220	-100
Showpl/Potrero	1	3.4%	40	1.9%	-18,200	2.3%	40	-500
South Central, Other	2	6.9%	10	0.5%	-3,900	0.5%	5	-400
TB Combo	1	3.4%	120	5.8%	-89,800	11.3%	120	-700
Western Addition	3	10.3%	30	1.5%	-11,900	1.5%	10	-400
WSoMa	3	10.3%	10	0.5%	-21,400	2.7%	3	-2,100
Grand Total	29	100.0%	2,060	100.0%	-796,200	100.0%	71	-400

lost to conversion or demolition.[9] It would be replaced with residential units (1,900) and/or other commercial uses.

- Most of the PDR to residential conversions are found in Central Waterfront, East SoMa and Mission districts, accounting together for more than two thirds of the overall loss. The loss of PDR space in these neighborhoods would in turn bring in 900 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 Market Octavia could see a loss of nearly 500,000 square feet of office. This is predominantly due to one particularly large conversion of the Triple A building to residential use. For the neighborhood as a whole, 1,100 new units could result from conversion.

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

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

9 Table 6 shows only projects that include the conversion or loss of PDR space to residential use. Other, separate projects proposing to add PDR space not involving conversion or demolition of PDR space are not counted in this table. Table 1 shows a net loss of 325,000 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 shows that a total of 24 planning applications[10] were filed in the first quarter of 2012, down from 12 projects in the previous quarter. Corresponding to these 9 projects are 1,600 residential units and 1.3 million square feet of commercial development. The quarter's filings are now below the six quarter moving average, perhaps suggesting a slight slowdown in applications overall. Taken as a whole since 2001 (Figures 4 and 5), numbers are still below the mid-decade boom years, and will probably remain so in the foreseeable future. Still, the average size of projects has ticked up a bit since recent decade lows. There is, as seen in this report, still a significant reservoir of projects in the pipeline from before the recession. As the completion of many of the larger projects are many years in the future, they may be less prone to short term economic stresses. Still, some sponsors will undoubtedly find it much harder to secure financing for their projects, the relative strength of the San Francisco market in this downturn notwithstanding.

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

A few of the projects filed during the first quarter of 2012 include:

- At 218 Buchanan Street, a proposal is to modify the project previously entitled. The revised proposal would alter the site layout, building form and architecture. The project is residential over podium garage, with approximately 182 apartment units, a 126-space parking garage, and 3,900 square feet of corner retail space.
- At 100 Van Ness, the project sponsor proposes to convert the largely vacant 29-story tall Triple A office building to 399 residential units and and re-skin the exterior of the building.
- At 800 Indiana Street, the proposed project would entail the demolition of the existing Opera Warehouse and the construction of a new 340-unit multi-family unit building with 294 parking spaces. The project would be comprise six buildings with a semi-subterranean parking garage.
- At 75 Howard, there is a proposal to demolish the existing 8 -story, 550 space parking garage. The project would construct a residential building containing 175 residential units and a below-grade parking garage. The parking garage would contain accessory parking spaces for the residential units as well as approximately 100 non-accessory parking spaces to serve retail uses in the surrounding area that currently rely upon the 550 spaces within the existing garage.
- At 1727 Lombard, a project would feature a new mixed-use building with approximately 49 residential units, 2,000 square feet of commercial space, and 25 off-street parking spaces plus one car-share space. The proposed building would be a total of 70,153 square feet and would be 75 feet tall.

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

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

Quarter Filed	Filed				Approved			
	Projects	Net Units	Avg Units/Project	Net Sq. Ft	Projects	Net Units	Avg Units/ Project	Net Sq. Ft
2001 Q2	72	450	6	370,000	54	200	4	619,000
2001 Q3	54	510	9	791,000	44	1,000	23	279,000
2001 Q4	41	320	8	328,000	43	640	15	1,838,000
2002 Q1	74	820	11	932,000	34	250	7	341,000
2002 Q2	55	1,020	19	1,346,000	39	210	5	1,141,000
2002 Q3	63	990	16	1,282,000	26	240	9	79,000
2002 Q4	67	2,700	40	215,000	31	470	15	700,000
2003 Q1	78	3,690	47	1,751,000	48	810	17	217,000
2003 Q2	86	2,620	30	395,000	55	500	9	273,000
2003 Q3	57	550	10	310,000	46	1,270	28	1,169,000
2003 Q4	55	1,330	24	261,000	40	1,890	47	206,000
2004 Q1	61	1,130	19	73,000	32	460	14	369,000
2004 Q2	81	2,090	26	289,000	50	440	9	223,000
2004 Q3	103	3,130	30	490,000	39	280	7	105,000
2004 Q4	83	2,480	30	403,000	30	470	16	46,000
2005 Q1	75	1,370	18	471,000	47	400	9	46,000
2005 Q2	75	850	11	317,000	49	1,590	32	76,000
2005 Q3	73	2,130	29	401,000	50	1,300	26	713,000
2005 Q4	78	1,660	21	1,256,000	41	890	22	468,000
2006 Q1	45	2,820	63	480,000	48	1,570	33	90,000
2006 Q2	27	1,840	68	82,000	35	640	18	178,000
2006 Q3	53	2,330	44	1,155,000	31	1,580	51	352,000
2006 Q4	40	1,210	30	2,139,000	27	560	21	930,000
2007 Q1	32	800	25	137,000	20	840	42	168,000
2007 Q2	28	310	11	1,014,000	21	190	9	47,000
2007 Q3	52	19,910	383	4,124,000	16	170	11	1,061,000
2007 Q4	45	1,040	23	89,000	18	310	17	59,000
2008 Q1	37	6,040	163	1,106,000	26	1,520	58	93,000
2008 Q2	32	380	12	760,000	25	350	14	277,000
2008 Q3	32	750	23	1,791,000	23	310	13	4,000
2008 Q4	24	300	13	25,000	33	980	30	876,000
2009 Q1	23	260	11	195,000	24	620	26	30,000
2009 Q2	25	330	13	100,000	21	480	23	82,000
2009 Q3	29	230	8	10,000	10	540	54	42,000
2009 Q4	21	340	16	169,000	15	560	37	89,000
2010 Q1	19	280	15	13,000	12	180	15	147,000
2010 Q2	22	950	43	1,630,000	19	10,590	557	3,630,000
2010 Q3	26	70	3	17,000	15	170	11	39,000
2010 Q4	19	30	2	10,000	16	200	13	771,000
2011 Q1	24	620	26	58,000	13	5,770	444	472,000
2011 Q2	18	20	1	7,000	18	7,960	442	634,000
2011 Q3	12	560	47	49,000	16	670	42	36,000
2011 Q4	12	60	5	1,449,000	14	270	19	43,000
2012 Q1	24	1,590	66	1,311,000	11	120	11	15,000

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

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

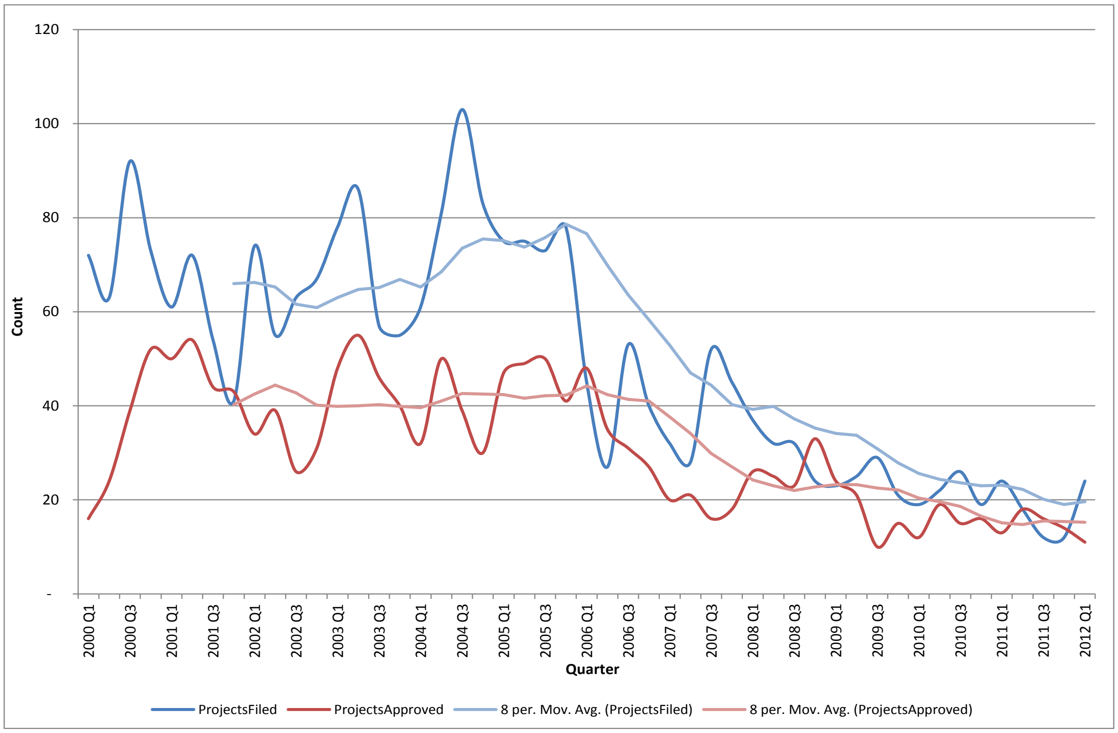
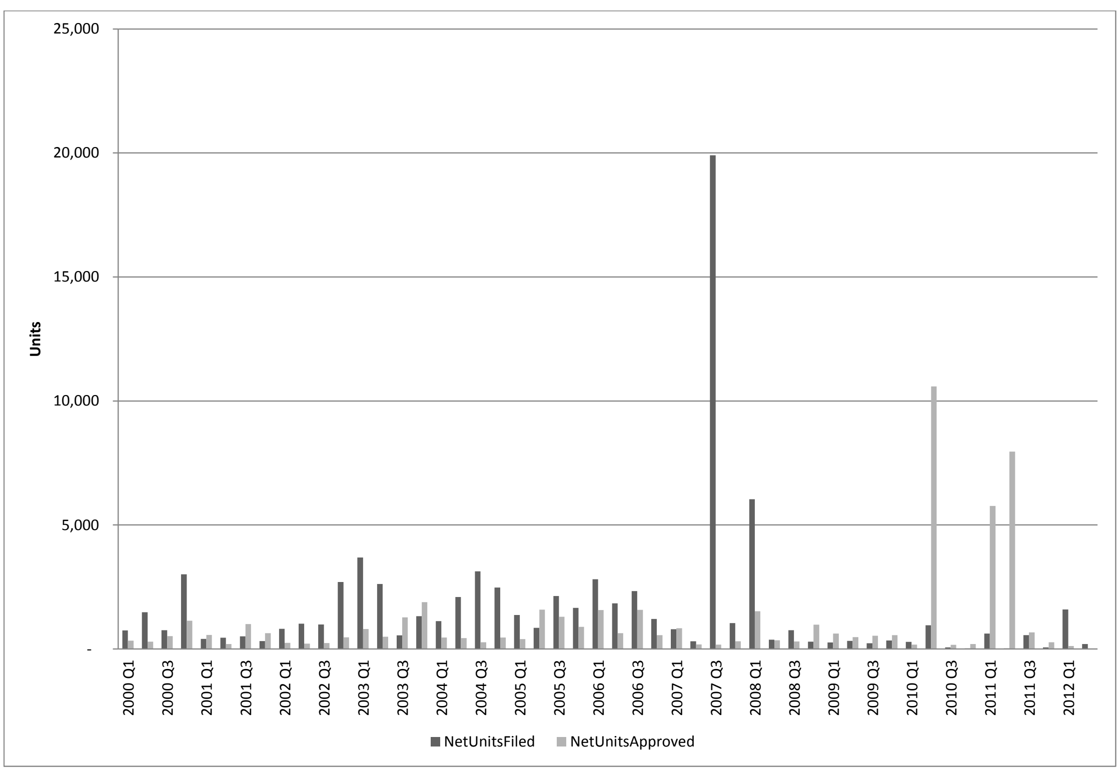
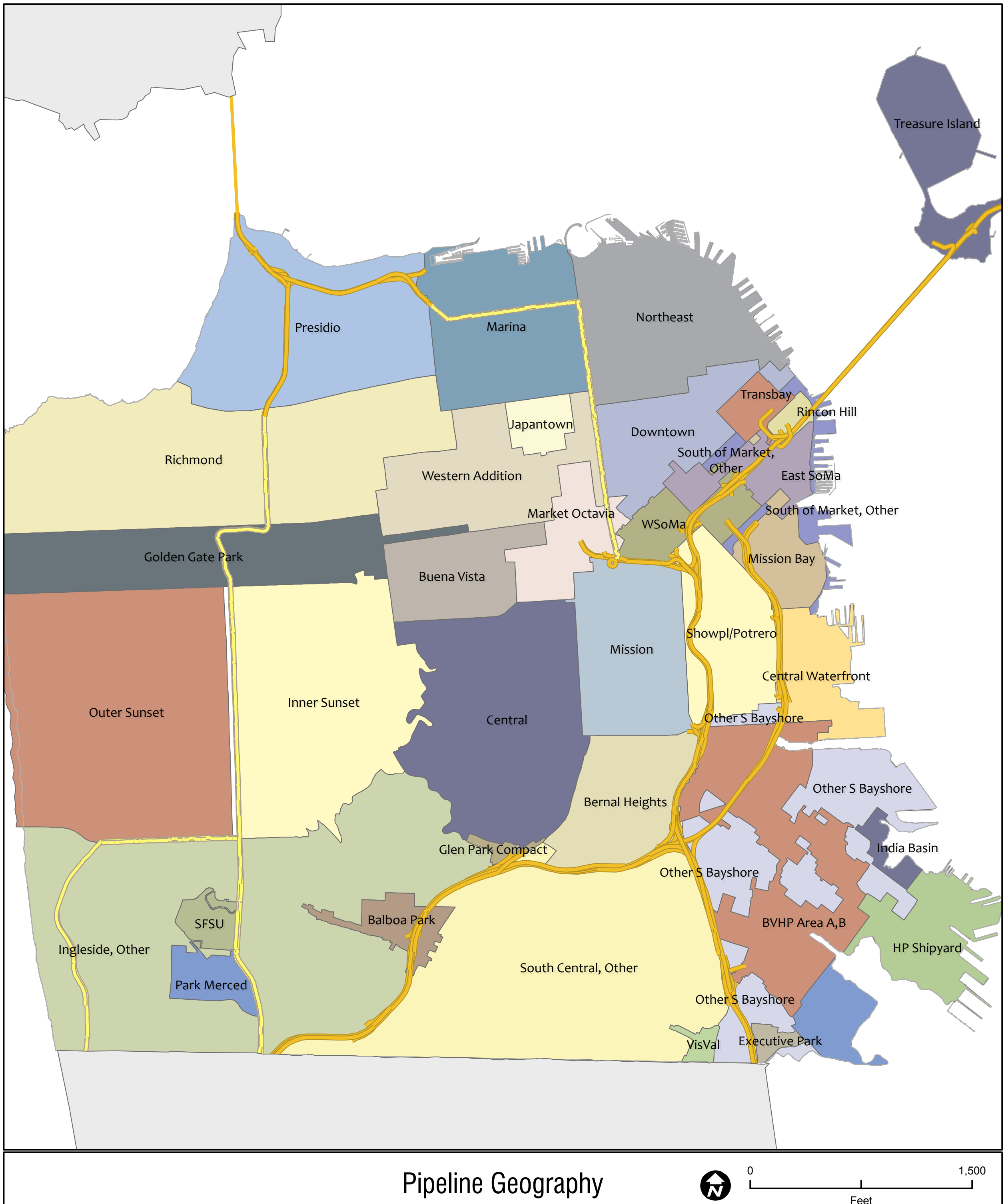


FIGURE 5: Pipeline Units Filed and Approved by the Planning Department, by Quarter

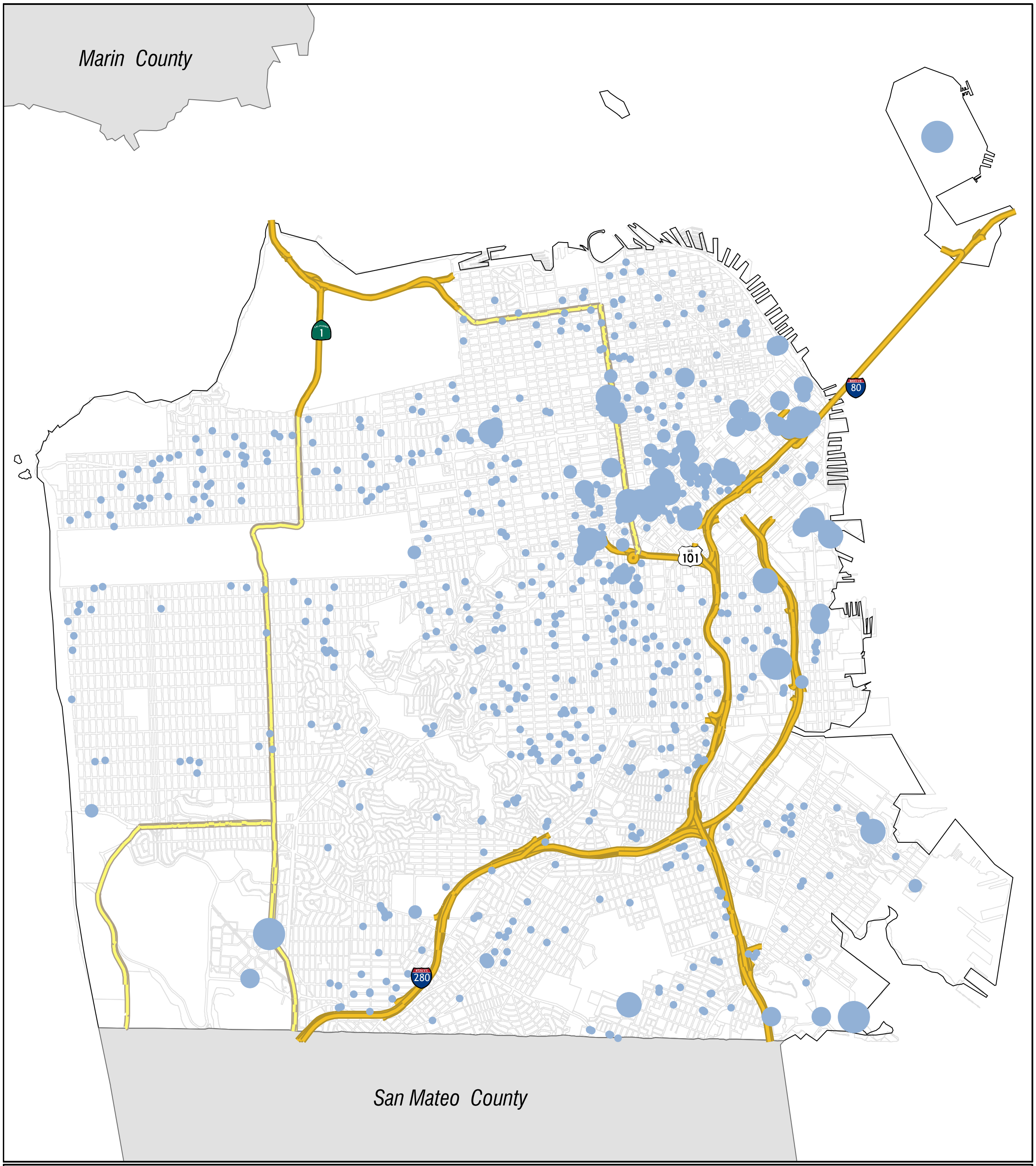


MAP 1: Neighborhoods Highlighted in the Pipeline Report



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



UNITSNET

- 1 - 49
- 50 - 99
- 100 - 249
- 250 - 999
- Above 1,000 Net Units

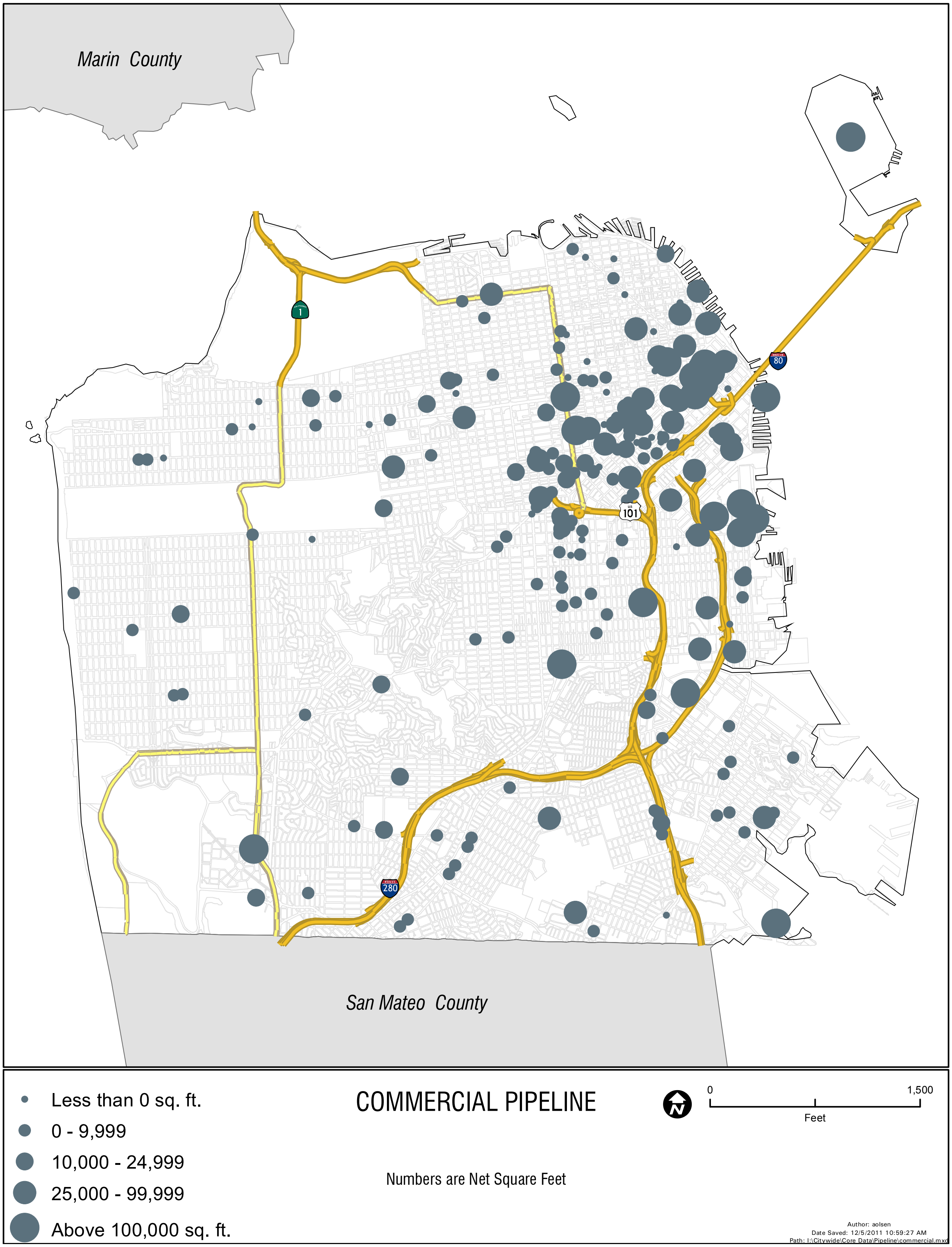
RESIDENTIAL PIPELINE

0 1,500
Feet

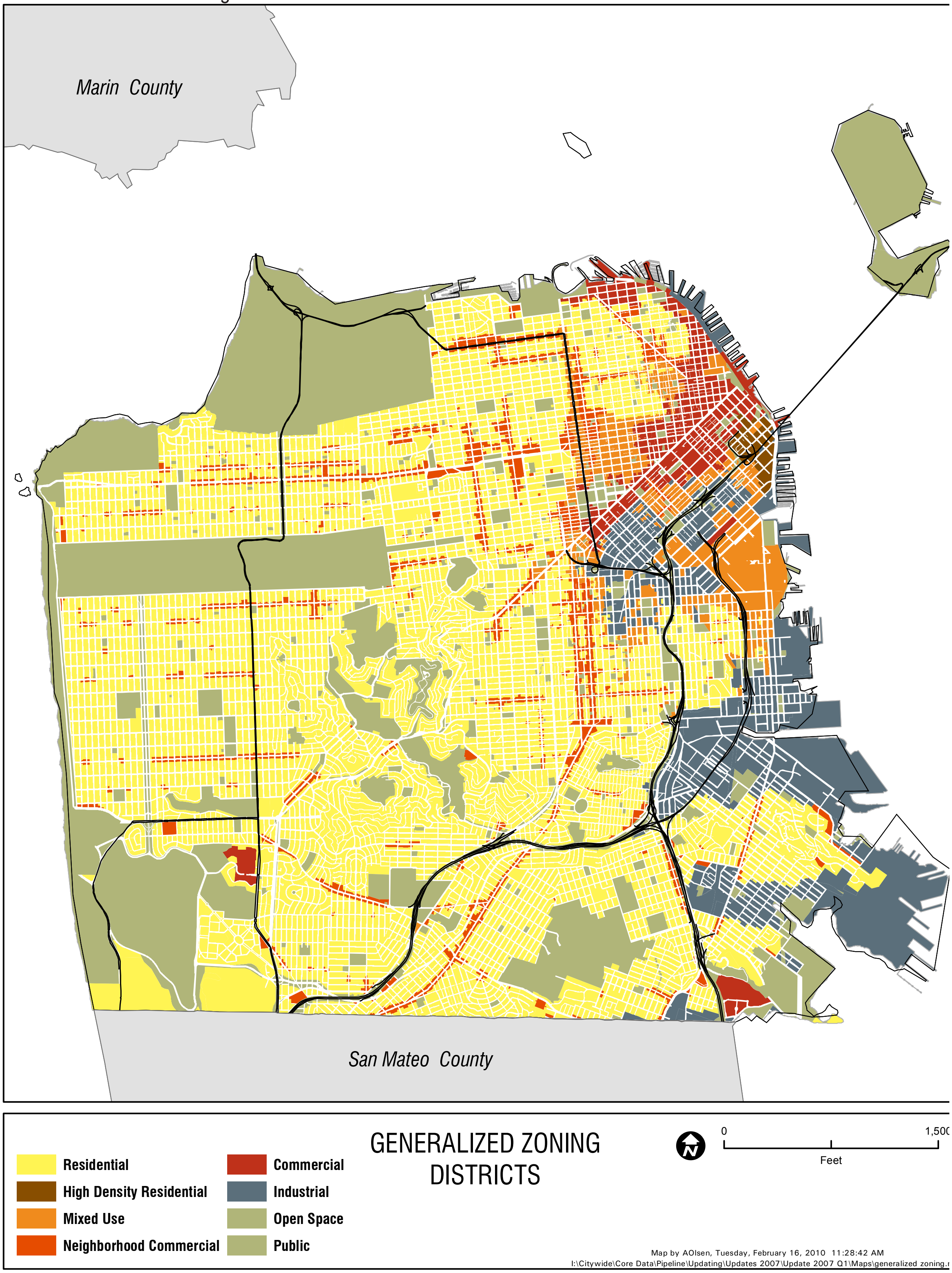
Numbers are Net Units

Author: aolsen
Date Saved: 4/9/2012 4:22:47 PM
Path: I:\Citywide\Core Data\Pipeline\residential.mxd

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 1, 2012

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
3507041	1401 MARKET ST	Downtown	12k	719	Mixres	Retail/Ent	2/23/2012
4154001	1001 POTRERO AV	Showpl/Potrero	419k	0	CIE	CIE	12/15/2010
3702052	1190 MISSION ST	Downtown	0k	418	Resident	--N/A--	3/8/2012
8720001	435 CHINA BASIN ST	South of Market, Other	0k	319	Resident	--N/A--	3/8/2012
8711023	185 CHANNEL ST	Mission Bay	0k	315	Resident	--N/A--	3/8/2012
3766009	333 Harrison St	Rincon Hill	0k	308	Resident	--N/A--	3/9/2012
3721122	535 MISSION ST	TB Combo	296k	0	MIPS	MIPS	2/23/2012
0766001	525 GOLDEN GATE AV	Downtown	277k		MIPS	MIPS	6/4/2010
3717019	120 HOWARD ST	Downtown	67k	0	MIPS	MIPS	3/7/2012
0345004	220 GOLDEN GATE AV	Downtown	-31k	172	Mixres	MIPS	3/6/2012
4058010	2235 03RD ST	Central Waterfront	5k	196	Mixres	Retail/Ent	3/8/2012
3547002A	1880 MISSION ST	Mission	-64k	194	Resident	--N/A--	3/9/2012
0323015	472 ELLIS ST	Downtown	-66k	60	Resident	--N/A--	3/9/2012
4991277	833-881 Jamestown	Candlestick	0k	132	Resident	--N/A--	9/17/2007
0691008	1285 SUTTER ST	Downtown	-8k	107	Mixres	Retail/Ent	2/9/2012
3749064	25 ESSEX ST	TB Combo	0k	120	Resident	--N/A--	3/9/2012
0871016	1844 MARKET ST	Market Octavia	3k	113	Mixres	Retail/Ent	7/17/2007
3704069	973 MARKET ST	Downtown	-53k	100	Mixres	Retail/Ent	8/14/2008
0768013	701 GOLDEN GATE AV	Market Octavia	0k	100	Resident	--N/A--	3/2/2012
4228158	1301 Indiana St	Central Waterfront	-10k	71	Mixres	Retail/Ent	12/19/2007
3513008	150 OTIS ST	Market Octavia	-90k	76	Resident	--N/A--	3/12/2012
0346005	350 GOLDEN GATE AV	Downtown	0k	19	Resident	--N/A--	2/13/2012
3788012	166 TOWNSEND ST	East SoMa	-74k	66	Mixres	Retail/Ent	10/6/2011
3731074	A WOMANS PLACE	East SoMa	0k	25	Resident	--N/A--	7/1/2008
4624004	Hunters View	Other S Bayshore	0k	52	Resident	--N/A--	2/29/2012
3532014	299 VALENCIA ST	Market Octavia	4k	44	Mixres	Retail/Ent	2/21/2012
0596024	1946 POLK ST	Northeast	-9k	39	Mixres	Retail/Ent	3/9/2012
0816003	205 FRANKLIN ST	Market Octavia	14k	0	Mixed	Retail/Ent	2/28/2012

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
0668012	1465 PINE ST	Northeast	0k	35	Resident	--N/A--	1/6/2012
4287018	1263 CONNECTICUT ST	Other S Bayshore	28k	0	PDR	PDR	2/3/2012
1145003	2130 FULTON ST	Western Addition	26k	0	CIE	CIE	2/21/2012
1028028	2829 CALIFORNIA ST	Western Addition	0k	12	Mixres	Retail/Ent	2/27/2012
3794002A	750 02ND ST	East SoMa	-3k	14	Mixres	Retail/Ent	3/12/2012
1127007	1816 EDDY ST	Western Addition	0k	19	Resident	--N/A--	10/8/2010
3554027	411 VALENCIA ST	Mission	1k	16	Mixres	Retail/Ent	3/6/2012
2018003	2400 NORIEGA ST	Outer Sunset	12k	0	CIE	CIE	3/5/2012

BP ISSUED

8720016	1455 03RD ST	Mission Bay	381k	0	MIPS	MIPS	4/23/2010
8709004	1600 OWENS ST	Mission Bay	245k	0	MIPS	MIPS	6/3/2008
8711014	1110 04TH ST	South of Market, Other	0k	150	Resident	--N/A--	1/26/2011
8713001	1155 04TH ST	Mission Bay	0k	147	Resident	--N/A--	12/21/2011
0872005	1960-1998 MARKET ST	Market Octavia	9k	115	Mixres	Retail/Ent	3/20/2012
3535001	2001 MARKET ST	Market Octavia	-15k	82	Mixres	Retail/Ent	12/14/2011
0349001	101 GOLDEN GATE AV	Downtown	20k	90	Mixres	CIE	8/24/2011
7380038	655 BROTHERHOOD WY	Ingleside, Other	15k	0	CIE	CIE	12/12/2008
5476009	6600 Third Street	BVHP Area A,B	0k	30	Resident	--N/A--	2/22/2011
3747012	325 FREMONT ST	Rincon Hill	0k	69	Resident	--N/A--	12/17/2010
0808036	401 Grove Street	Market Octavia	5k	63	Mixres	Retail/Ent	1/25/2012
3725101	474 NATOMA STREET	Downtown	0k	55	Resident	--N/A--	11/13/2009
0492025	2026 LOMBARD ST	Marina	40k	0	Visitor	Visitor	4/11/2007
0619012	1860 VAN NESS AV	Northeast	2k	35	Mixres	Retail/Ent	11/17/2008
0854001	1600 MARKET ST	Market Octavia	17k	24	Mixres	Retail/Ent	3/20/2012
5943008	268 MADISON ST	South Central, Other	25k	1	Mixres	Retail/Ent	6/6/2011
3560001	2210 MARKET ST	Market Octavia	2k	22	Mixres	Retail/Ent	3/14/2012
6473040	5735 MISSION ST	South Central, Other	5k	20	Mixres	CIE	2/18/2011
3547027	80 JULIAN AV	Mission	13k	7	Mixres	CIE	10/27/2011
3726047	537 NATOMA ST	East SoMa	-5k	14	Mixres	PDR	3/21/2012
4058008	616 20TH ST	Central Waterfront	-1k	16	Mixres	Retail/Ent	3/9/2012
1742043	1266 09TH AV	Inner Sunset	-3k	15	Mixres	Retail/Ent	12/9/2010

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
2901C001	701 PORTOLA DR	Inner Sunset	10k	0	Retail/Ent	Retail/Ent	11/22/2011
3704015	942 MISSION ST	Downtown	54k		Visitor	Visitor	11/9/2011

BP REINSTATED

0671006	1450 FRANKLIN ST	Western Addition	-24k	69	Resident	--N/A--	6/25/2009
3555056	1731 15TH ST	Mission	0k	25	Resident	--N/A--	12/23/2011
0343014	181 TURK ST	Downtown	3k	32	Mixres	Retail/Ent	3/10/2009
0274008	850 BUSH ST	Northeast	0k	23	Resident	--N/A--	4/10/2008

BP APPROVED

3736114	Foundry Square III	TB Combo	252k	0	MIPS	MIPS	12/16/2011
3789003	72 TOWNSEND ST	East SoMa	0k	74	Resident	--N/A--	9/23/2011
4224015	1004 MISSISSIPPI ST	Showpl/Potrero	0k	28	Resident	--N/A--	1/16/2009

BP Filed

3710017	350 MISSION ST	TB Combo	416k	0	MIPS	MIPS	8/1/2011
3735063	222 02ND ST	TB Combo	400k	0	MIPS	MIPS	11/30/2007
3833002	1006 16TH ST	Showpl/Potrero	0k	393	Resident	--N/A--	12/7/2011
0269028	350 BUSH ST	Downtown	347k	0	MIPS	MIPS	8/7/2007
8721012	455 Mission Bay S Blvd	Mission Bay	334k	0	MIPS	MIPS	6/26/2008
3732009	900 FOLSOM ST	East SoMa	6k	282	Mixres	Retail/Ent	6/1/2011
3701064	55 9TH ST	Downtown	0k	273	Resident	--N/A--	8/23/2011
3749059	45 LANSING ST	Rincon Hill	-14k	224	Resident	--N/A--	9/14/2010
3732008	260 05TH ST	East SoMa	-36k	182	Mixres	Retail/Ent	6/1/2011
3732150	240 05TH ST	East SoMa	0k	182	Resident	--N/A--	3/19/2012
3510001	1415 MISSION ST	Downtown	0k	117	Mixres	MIPS	10/31/2008
4991600	101 EXECUTIVE PARK BL	Executive Park	0k	107	Resident	--N/A--	10/25/2010
4045002	740 ILLINOIS ST and 2121	Central Waterfront	-8k	106	Resident	--N/A--	11/17/2011
3834001	1000 16TH ST	Showpl/Potrero	26k	65	Mixres	Retail/Ent	12/7/2011
4352007	1301 CESAR CHAVEZ ST	BVHP Area A,B	82k	0	MIPS	MIPS	10/15/2007
3553008	490 SOUTH VAN NESS AV	Mission	-1k	84	Mixres	Retail/Ent	10/5/2010

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
0165021	235 BROADWAY	Northeast	5k	75	Mixres	Retail/Ent	5/16/2011
1098009	1401 DIVISADERO ST	Western Addition	57k	-21	MIPS	MIPS	12/21/2006
3736085	48 TEHAMA ST	TB Combo	0k	66	Resident	--N/A--	7/12/2006
6969011	5050 MISSION ST	South Central, Other	0k	61	Resident	--N/A--	6/10/2010
0165022	717 BATTERY ST	Northeast	28k	0	MIPS	MIPS	12/1/2008
4059009	2298 03RD ST	Central Waterfront	14k	40	Mixres	Retail/Ent	2/6/2006
3788039	345 BRANNAN ST	East SoMa	53k	0	MIPS	MIPS	10/27/2008
3553054	1501 15TH ST	Mission	8k	40	Mixres	Retail/Ent	11/3/2011
3703086	570 JESSIE ST	Downtown	-15k	47	Resident	--N/A--	2/2/2006
0595013	1645-1661 PACIFIC AV	Northeast	-27k	38	Resident	--N/A--	10/14/2011
0837003	1 FRANKLIN ST	Market Octavia	2k	35	Mixres	Retail/Ent	12/3/2009
5992A060	495 CAMBRIDGE ST	South Central, Other	0k	35	Resident	--N/A--	12/22/2010
0570011	1650 BROADWAY *	Marina	0k	34	Resident	--N/A--	3/5/2012
3727168	1145 MISSION ST	Downtown	2k	25	Mixres	Retail/Ent	6/9/2006
4792029	1212 THOMAS AV	BVHP Area A,B	30k	0	PDR	PDR	7/23/2008
0527002	2559 VAN NESS AV	Marina	-2k	27	Resident	--N/A--	6/1/2011
0512025	2353 LOMBARD ST	Marina	1k	21	Mixres	Retail/Ent	7/29/2010
3548032	1875 MISSION ST	Mission	-35k	23	Mixres	Retail/Ent	12/23/2010
3752019	870 HARRISON ST	WSoMa	-6k	22	Mixres	Retail/Ent	7/14/2006
1368049	4614 CALIFORNIA ST	Richmond	14k	0	Mixed	MIPS	1/23/2007
0101004	1741 POWELL ST	Northeast	-12k	18	Mixres	Retail/Ent	8/12/2009
3548039	1801 MISSION ST	Mission	3k	18	Mixres	Retail/Ent	7/17/2006
3980007	1717 17TH ST	Showpl/Potrero	5k	20	Resident	--N/A--	2/15/2012
3639002	2652 HARRISON ST	Mission	-7k	20	Resident	--N/A--	11/3/2011
3588012	3500 19TH ST	Mission	3k	17	Mixres	Retail/Ent	5/1/2006
3776092	246 RITCH ST	East SoMa	-4k	19	Resident	--N/A--	1/5/2007
3617008	1050 VALENCIA ST	Mission	0k	15	Mixres	Retail/Ent	12/27/2010
0832026	360 OCTAVIA ST	Market Octavia	1k	16	Mixres	Retail/Ent	10/1/2008
3821007	1150 16th Street	Showpl/Potrero	1k	15	Mixres	Retail/Ent	7/22/2011
0832025	300 OCTAVIA ST	Market Octavia	0k	16	Resident	--N/A--	10/1/2008
1084001B	1 Stanyan Street	Richmond	-2k	13	Mixres	Retail/Ent	12/14/2007
3557062	200 DOLORES ST	Market Octavia	-8k	13	Resident	--N/A--	8/19/2008

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3197010	1446 OCEAN AV	Balboa Park	-2k	13	Resident	--N/A--	10/31/2008

PL APPROVED

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
4886008	Bayview Waterfront	Candlestick	6120k	10,237	Mixres	MIPS	8/3/2010
7303001	Parkmerced	Park Merced	478k	5,677	Mixres	Retail/Ent	5/25/2011
1939001	Treasure Island	Treasure Island	381k	7,800	Mixres	Retail/Ent	3/15/2011
4624009	Hunters View	Other S Bayshore	1k	349	Mixres	Retail/Ent	12/10/2008
3747320	The Californian	Rincon Hill	-2k	432	Mixres	MIPS	8/4/2006
5262004	2095 Jerrold Ave	BVHP Area A,B	128k		PDR	PDR	3/26/2010
0857001	55 Laguna Street	Market Octavia	28k	440	Mixres	Retail/Ent	1/17/2008
3704071	949 Market Street	Downtown	237k	0	Retail/Ent	Retail/Ent	11/8/2010
3765015	One Rincon Hill Phase II	Rincon Hill	0k	340	Resident	--N/A--	8/16/2005
3722027	151 THIRD ST	Downtown	67k		CIE	CIE	7/13/2010
0757025	1100 GOLDEN GATE AV	Western Addition	0k	98	Resident	--N/A--	12/18/2008
0813007	1390 MARKET ST	Market Octavia	-2k	230	Mixres	Retail/Ent	5/28/2009
0331010	168 EDDY ST	Downtown	15k	170	Mixres	Retail/Ent	3/26/2009
7331003	800 Brotherhood Way	Park Merced	0k	182	Resident	--N/A--	12/10/2007
0794015	746 LAGUNA ST	Market Octavia	2k	136	Mixres	MIPS	5/13/2010
0807010	580 HAYES ST	Market Octavia	42k	90	Mixres	MED	3/9/2011
3722079	134-140 NEW MONTGO	TB Combo	-85k	118	Mixres	Retail/Ent	12/11/2008
3767305	429 BEALE ST	Rincon Hill	-36k	113	Resident	--N/A--	5/14/2009
1073013	800 PRESIDIO AV	Richmond	10k	83	Mixres	CIE	4/28/2011
3703079	1036-1040 MISSION ST	Downtown	1k	100	Mixres	Retail/Ent	5/14/2009
3731003	226 06TH ST	East SoMa	5k	37	Mixres	Visitor	3/12/2012
1228005	690 STANYAN ST	Buena Vista	11k	56	Mixres	Retail/Ent	10/23/2008
1052024	2655 BUSH ST	Western Addition	-41k	84	Mixres	Retail/Ent	10/10/2008
3180001	50 PHELAN AV	Balboa Park	12k	71	Mixres	Retail/Ent	7/12/2010
0327011	72 ELLIS ST	Downtown	79k		Visitor	Visitor	3/25/2010
6969001	5050 MISSION ST	South Central, Other	7k	61	Mixres	Retail/Ent	8/14/2008
3703012	527 STEVENSON ST	Downtown	-44k	67	Mixres	Retail/Ent	2/3/2012
0619009	1800 Van Ness Ave.	Northeast	-1k	62	Mixres	Retail/Ent	10/20/2011
0711031	1100 ELLIS ST	Western Addition	12k	0	CIE	CIE	8/6/2009

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
0336017	245 HYDE ST	Downtown	-27k	65	Resident	--N/A--	4/10/2008
0287013	300 Grant Ave.	Downtown	-20k	45	Mixres	Retail/Ent	10/6/2011
0258033	500 PINE ST	Downtown	57k		MIPS	MIPS	3/15/2001
2515001	2800 SLOAT BL	Outer Sunset	10k	55	Resident	--N/A--	11/13/2008
0347016	399 GOLDEN GATE AV	Downtown	53k	0	Retail/Ent	Retail/Ent	11/27/2007
3532091	245 VALENCIA ST	Market Octavia	13k	0	CIE	CIE	9/22/2011
3794024	144 KING ST	East SoMa	44k	0	Visitor	Visitor	4/7/2011
3534069	25 DOLORES ST	Market Octavia	-19k	47	Resident	--N/A--	4/7/2011
3753008	374 5TH ST	East SoMa	0k	47	Resident	--N/A--	12/20/2010
3785003	690 05TH ST	WSoMa	32k	0	Visitor	Visitor	6/17/2009
3980008	1717 17TH ST	Showpl/Potrero	-13k	41	Mixres	PDR	7/15/2010
1029003	2901 California St	Western Addition	16k	-3	CIE	CIE	6/16/2009
3753081	345 06TH ST	East SoMa	0k	36	Mixres	Retail/Ent	4/2/2009
0828012	735 Fell St	Western Addition	16k	0	CIE	CIE	2/2/2008
0279011	1080 SUTTER ST	Downtown	1k	35	Mixres	Retail/Ent	5/28/2009
0570010	1622 BROADWAY	Marina	0k	34	Resident	--N/A--	3/12/2009
7148040	ONE CAPITOL AV	Ingleside, Other	0k	28	Resident	--N/A--	5/13/2010
0028014	1255- 1275 COLUMBUS A	Northeast	-9k	20	Mixres	Retail/Ent	6/8/2011
3564091	2299 MARKET ST	Central	7k	18	Mixres	Retail/Ent	8/16/2010
3731101	42 HARRIET ST	East SoMa	0k	23	Resident	--N/A--	12/20/2010
3596113	899 VALENCIA ST	Mission	5k	18	Mixres	Retail/Ent	5/26/2011
3965001	2401 16TH ST	Mission	2k	12	Mixres	MIPS	4/21/2011
1028003	2829 California Street	Western Addition	0k	12	Mixres	Retail/Ent	1/17/2008

PL Filed

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
6310001	1654 Sunnydale Ave	South Central, Other	59k	915	Mixres	Retail/Ent	4/28/2010
3720001	TRANSBAY TOWER	TB Combo	1743k	0	MIPS	MIPS	7/1/2008
4167004	1 TURNER TR	Showpl/Potrero	30k	1,094	Mixres	Retail/Ent	6/30/2010
0694005	CPMC HOSPITAL	Downtown	702k	-25	Mixed	CIE	6/10/2010
3719010	181 FREMONT ST	TB Combo	493k	140	Mixres	MIPS	5/15/2007
6575002	CPMC - ST. LUKE'S HOSPIT	Bernal Heights	165k	0	Mixed	CIE	6/10/2010
9900030	America's Cup Pier 30/32	South of Market, Other	609k	0	Retail/Ent	Retail/Ent	6/24/2010

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3756003	350 08TH ST	WSoMa	57k	416	Mixres	Retail/Ent	9/7/2007
0244001	950 MASON STREET	Northeast	-295k	160	Mixres	Visitor	2/11/2009
0814020	100 VAN NESS AV	Market Octavia	-424k	399	Mixres	Retail/Ent	3/30/2012
1075001	Westside Courts Phas	Western Addition	0k	450	Resident	--N/A--	12/31/2008
9900015	Pier 15	Northeast	36k	0	CIE	CIE	8/11/2009
0647007	1634 PINE ST	Western Addition	0k	250	Mixres	MIPS	11/5/2008
3706093	706 MISSION ST	Downtown	35k	220	Mixres	CIE	9/11/2008
0836002	1540 MARKET ST	Market Octavia	-13k	180	Mixres	Retail/Ent	2/27/2009
0168058	8 Washington Street	Northeast	28k	170	Mixres	Retail/Ent	8/5/2011
0201012	8 Washington Street	Northeast	32k	170	Mixres	Retail/Ent	12/4/2007
0238002	300 CALIFORNIA ST	Downtown	62k	0	MIPS	MIPS	12/19/2007
0831023	MARKET OCTAVIA - PARC	Market Octavia	4k	182	Mixres	Retail/Ent	8/3/2011
3509043	104 9th Street	Downtown	-8k	180	Mixres	Retail/Ent	9/29/2011
3741031	75 HOWARD ST	South of Market, Other	6k	175	Mixres	Retail/Ent	1/13/2012
3507042	1400 MISSION ST	Downtown	4k	165	Mixres	Retail/Ent	4/8/2009
0192014	Chinese Hospital	Northeast	68k	0	CIE	CIE	6/26/2008
0250001	1401 CALIFORNIA ST	Northeast	-19k	95	Mixres	Retail/Ent	10/20/2008
3707052	2 NEW MONTGOMERY ST	TB Combo	0k	125	Resident	--N/A--	12/4/2007
3740027	SPEAR STREET AND FOLS	TB Combo	0k	85	Resident	--N/A--	6/8/2007
9900041H	1/2-PIER 33	Northeast	13k	0	PDR	PDR	8/27/2008
3731001	200-214 6th St	East SoMa	3k	50	Mixres	Retail/Ent	2/9/2011
0855011	4 OCTAVIA ST	Market Octavia	4k	49	Mixres	Retail/Ent	10/6/2008
0318020	651 GEARY ST	Downtown	-8k	46	Mixres	Retail/Ent	8/15/2008
4591A010	SHIPYARD PARCEL 54	Other S Bayshore	0k	50	Resident	--N/A--	6/8/2007
1450008	5400 GEARY BL	Richmond	-11k	39	Mixres	Retail/Ent	4/18/2007
3115043	625 MONTEREY BL	Ingleside, Other	21k	0	Retail/Ent	Retail/Ent	5/26/2010
1101007	1301 DIVISADERO ST	Western Addition	-13k	32	Resident	--N/A--	9/1/2010
3576001	2100 MISSION ST	Mission	-5k	29	Mixres	Retail/Ent	9/21/2009
0853021	102-104 OCTAVIA STREET	Market Octavia	0k	30	Resident	--N/A--	6/8/2007
3752023	397 05TH ST	WSoMa	5k	24	Mixres	Retail/Ent	9/24/2007
0670024	1433 BUSH ST	Downtown	-4k	26	Mixres	Retail/Ent	11/17/2009
0281003	832 SUTTER ST	Downtown	1k	27	Mixres	Retail/Ent	8/24/2008

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
0194009	740 WASHINGTON ST	Northeast	-9k	18	Mixres	CIE	2/28/2007
5457037	2895 SAN BRUNO AV	South Central, Other	11k	10	Mixres	MIPS	7/29/2010
3732112	452 TEHAMA ST	East SoMa	-5k	20	Mixres	Retail/Ent	6/22/2007
0729046	1210 SCOTT STREET	Western Addition	0k	18	Resident	--N/A--	6/8/2007
1018012	3657 SACRAMENTO ST	Richmond	0k	18	Resident	--N/A--	11/20/2007
3753140	935 FOLSOM ST	East SoMa	-14k	69	Mixres	Retail/Ent	4/19/2010
3727004	150 07TH ST	WSoMa	11k	0	Retail/Ent	Retail/Ent	4/2/2007
5869014	4199 MISSION ST	South Central, Other	1k	12	Mixres	Retail/Ent	8/5/2008
0506036	1727 LOMBARD ST	Marina	-16k	14	Resident	--N/A--	1/31/2012
3799001	601 TOWNSEND ST	Showpl/Potrero	73k	0	MIPS	MIPS	10/13/2011
3733008	250 4TH ST	South of Market, Other	73k		Visitor	Visitor	1/14/2011
8722001	300 16TH ST	Mission Bay	1315k	0	MIPS	MIPS	12/20/2011

Acknowledgements

Mayor

Edwin M. Lee

Board of Supervisors

David Chiu, *President*
Mark Farrell
John Avalos
David Campos
Carmen Chu
Malia Cohen
Jane Kim
Sean Elsbernd
Eric Mar
Scott Wiener
Christina Olague

Planning Commission

Rodney Fong, *President*
Cindy Wu, *Vice President*
Michael Antonini
Gwyneth Borden
Ron Miguel
Kathrin Moore
Hisashi Sugaya

Planning Department

John Rahaim, *Planning Director*
Teresa Ojeda, *Information and Analysis Group Manager*
Aksel Olsen, *Project Manager*
Michael Webster
Alton Chinn
Gary Chen
Scott Dowdee -- *in memoriam*