

Cover Photo: Octavia Court, source: Aksel Olsen

San Francisco PIPELINE REPORT

Quarter 1 2011

Table of Contents

Contents

WHAT IS THE PIPELINE?	1
TIME FRAME AND CERTAINTY OF DEVELOPMENT	1
ACCURACY AND TIMELINESS	1
Q1 2011 PIPELINE AT A GLANCE	2
THE DEVELOPMENT PIPELINE	2
PROJECTS BY OVERALL STATUS	2
AMOUNT AND TYPE OF NET NEW COMMERCIAL SPACE	3
LOCATION OF NEW DEVELOPMENT	3
PIPELINE PROJECTS BY CURRENT ZONING CATEGORY	5
RESIDENTIAL PIPELINE BY PROJECT SIZE	11
PROJECT SIZE BY PROPOSED USE	11
CONVERSION OF COMMERCIAL SPACE TO RESIDENTIAL USE	12
PROJECTS UNDER PLANNING REVIEW	14
PROJECT APPLICATION FILINGS	14
OTHER PROJECT ACTIVITY	14
DATA DICTIONARY	21
LIST OF PROJECTS	23
ACKNOWLEDGEMENTS	30
List of Figures, Tables and Maps	-
TABLE 1: RESIDENTIAL AND COMMERCIAL PIPELINE, BY PIPELINE STATUS AND LAND USE CATEGORY	3
TABLE 2: RESIDENTIAL AND COMMERCIAL PIPELINE, BY NEIGHBORHOOD	4
FIGURE 1A: PIPELINE SHARE OF TOTAL, BY ZONING CATEGORY	5
FIGURE 1B: RESIDENTIAL PIPELINE SIZE DISTRIBUTION, BY ZONING CATEGORY	6
FIGURE 1C: NON-RESIDENTIAL PIPELINE SIZE DISTRIBUTION, BY ZONING CATEGORY	6
TABLE 3: RESIDENTIAL AND COMMERCIAL PIPELINE BY GENERALIZED ZONING CATEGORY	7
FIGURE 2: RESIDENTIAL PIPELINE, BY STATUS & BUILDING SIZE	8
FIGURE 3: NON-RESIDENTIAL PIPELINE, BY STATUS & BUILDING SIZE	9
TABLE 4: PROJECTS BY NEIGHBORHOOD AND BUILDING SIZE	10
TABLE 5: PIPELINE PROJECT SIZE, BY PROPOSED LAND USE	11
TABLE 6: PDR SPACE CONVERSION TO RESIDENTIAL USE, BY PLANNING DISTRICT	12
TABLE 7: OFFICE SPACE CONVERSION TO RESIDENTIAL USE, BY PLANNING DISTRICT	13
TABLE 8: PIPELINE PROJECTS FILED WITH AND APPROVED BY THE PLANNING DEPARTMENT	15
FIGURE 4: PIPELINE PROJECT APPLICATIONS FILED AND APPROVED WITH THE PLANNING DEPARTMENT, BY QUARTER	16
FIGURE 5: PIPELINE UNITS FILED AND APPROVED BY THE PLANNING DEPARTMENT, BY QUARTER	16
MAP 1: NEIGHBORHOODS HIGHLIGHTED IN THE PIPELINE REPORT	17
MAP 2: RESIDENTIAL PIPELINE	
MAP 3: COMMERCIAL PIPELINE	
MAP 4: GENERALIZED ZONING DISTRICTS	20

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. 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 multistructure 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, 2011. While we make an effort to consolidate multiple permits for different components of the same project from different agencies, it is not possible to validate the accuracy of all projects. Should you find inaccuracies and omissions, please e-mail your comments to <code>aksel.olsen@sfgov.org</code>.

Q1 2011 Pipeline at a Glance

- There are currently around 800 projects in the pipeline of varying sizes, complexities and stages.
- These projects, if completed, would add 45,800 net new housing units to the city's housing stock. This high figure remains so due to large development program applications under Planning review, including the Bayview Waterfront Project, Treasure Island, and a Park Merced expansion project.
- The Bayview Waterfront project, consisting
 of a number of sites along the southeastern
 waterfront, would account for 10,000 units
 and up to 6 million sq. ft. of office, R&D,
 retail and community space. One alternative
 would include a 70,000-seat football stadium
 at Candlestick Point, reducing the office/R&D
 component to 2 million sq. ft. The project and
 its EIR have been approved by the Planning
 Commission. This project is now entitled.
- The Parkmerced project, which would transform the area and add 5,600 units, is now also entitled.
- The pipeline would also add a net of 15.7 million sq. ft. of non-residential uses. Within this total, office and retail space would see net gains of 10.9 million and 3.2 million sq. ft., respectively. There is an expected loss of nearly 375,000 sq. ft. of light industrial or Production, Distribution and Repair (PDR) space because of conversion to commercial and residential space. Several hospital projects are also underway, including San Francisco General Hospital and California Pacific Medical Center.
- One in six projects (with approximately 1,200 units) are in the construction phase; other projects adding 2,200 units have received building permits approvals and an additional 16,700 units have received land use entitlements.
- Overall, there has been a slight uptick in units and commercial space filings in the quarter, reflecting primarily larger projects rather than a larger number of applications.

The Development Pipeline

There are currently just under 800 projects in the pipeline. Around 35 of these are projects sponsored through the San Francisco Redevelopment Agency. The Planning Department makes an effort to track these projects to make the pipeline more inclusive even as the Department is not always the entitling entity.

Of the pipeline projects, 77 percent are exclusively residential and 13 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 45,800 new housing units would be added to the city's housing stock according to current data. This is still high relative to historical numbers and is largely due to the filing of applications during the past three years for new large scale, long term development programs for Parkmerced, Treasure Island and the Bayview Waterfront. The vast majority of pipeline projects, however, are small scale consisting of one to three units. The number of filings have been much lower since the economic slowdown began in earnest.

Pipeline projects will also bring a net addition of 15.9 million sq ft of commercial development.

Projects by Overall Status

Table 1 on the following page shows the following:

- Around 15 percent of all projects, representing 1,700 net added housing units and 800,000 sq ft of commercial space, are under construction.
- Around 25 percent of projects (with 2,700 net units and almost 700,000 sq. ft. commercial space) have received building permit approvals and may have already begun construction.
- Around one in three projects (including 3,200 net new units and an addition of 1.5 million sq ft of commercial space) have filed building permit applications with the Department of Building Inspections. Some of these may not yet be entitled by the Planning Department.

TABLE 1: Residential and Commercial Pipeline, by Pipeline Status and Land Use Category

Pipeline Status					Net C	Commercial Gro	oss Square Fo	otage	
/ Stage in the Development Process	Total No. of Projects	Net Housing Units	Net Comm'l Sq. Ft.	CIE	Medical	Office	PDR	Retail	Visitor
Filed with Planning	109	15,610	5,683,000	1,042,000	0	3,170,000	-107,000	1,250,000	322,000
Approved by Planning	108	22,590	7,194,000	172,000	-33,000	5,248,000	-227,000	1,725,000	309,000
BP Filed	264	3,170	1,461,000	45,000	0	1,486,000	-150,000	79,000	0
BP Approved/ Issued/Re-Instated	200	2,720	694,000	-34,000	0	754,000	-132,000	81,000	25,000
Construction	120	1,730	798,000	455,000	0	360,000	-30,000	13,000	0
Grand Total	801	45,820	15,829,000	1,680,000	-33,000	11,018,000	-645,000	3,149,000	655,000

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.
- Thirrteen percent of the pipeline projects and 49 percent of the units have received Planning Department approvals. If and when constructed, these projects would add some 22,600 new units to the city's housing stock, and up to 7.1 million sq ft of commercial space. These projects now must secure a building permit.
- Fourteen percent of projects, representing a third of the units in the pipeline are under Planning Department review. Collectively, these projects represent some 15,600 net new units and 5.7 million sq ft of non-residential uses.

Amount and Type of Net New Commercial Space

Projects in the current pipeline as noted also represent a potential net addition of 15.7 million sq ft of commercial development that would result in the following land use inventory changes:

- 11 million sq ft of office space
- 3.1 million sq ft of retail space
- 650,000 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 600,000 sq ft of space for production, distribution and repair (PDR).
- Office and retail uses remain the most common non-residential projects.

Location of New Development

Table 2 on the 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. As of March 31, both Parkmerced and the Bayview Waterfront project were fully entitled, with Treasure Island sheduled for adoption during spring of 2011. 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; altogether, these areas will total around 9,400 new units.

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

¹ Treasure Island was adopted between the processing of the data and the time of writing of this report.

 TABLE 2: Residential and Commercial Pipeline, by Neighborhood

Neighborhood	Projects	Percent	Net Units	Percent	Avg Units / Project	Net Comm'l Sq. Ft.	Percent	Residential Rank	Commercial Rank
Balboa Park	6	0.7%	280	0.6%	47	4,800	0.0%	19	23
Bernal Heights	36	4.5%	60	0.1%	2	164,930	1.0%	28	10
Buena Vista	17	2.1%	100	0.2%	7	12,940	0.1%	25	22
BVHP Area A,B	30	3.7%	410	0.9%	15	199,010	1.3%	18	9
Candlestick	2	0.2%	10,440	22.8%	5,218	6,120,000	38.7%	1	1
Central	75	9.4%	120	0.3%	2	15,540	0.1%	23	19
Central Waterfront	10	1.2%	570	1.2%	57	-126,390	-0.8%	14	31
Downtown	48	6.0%	4,740	10.3%	105	1,406,670	8.9%	4	3
East SoMa	30	3.7%	1,260	2.7%	42	-102,460	-0.6%	10	30
Executive Park	2	0.2%	260	0.6%	128	14,000	0.1%	20	21
India Basin	3	0.4%	10	0.0%	3	-3,120	-0.0%	31	26
Ingleside, Other	31	3.9%	70	0.2%	2	42,640	0.3%	27	15
Inner Sunset	30	3.7%	60	0.1%	2	14,960	0.1%	28	20
Japantown	3	0.4%	0	0.0%	1	3,550	0.0%	32	24
Marina	21	2.6%	120	0.3%	5	25,660	0.2%	24	18
Market Octavia	39	4.9%	2,020	4.4%	52	-43,330	-0.3%	6	27
Mission	58	7.2%	580	1.3%	10	-97,070	-0.6%	13	29
Mission Bay	5	0.6%	130	0.3%	27	1,272,880	8.0%	22	4
Northeast	47	5.9%	840	1.8%	18	-191,240	-1.2%	12	32
Other S Bayshore	16	2.0%	470	1.0%	29	42,160	0.3%	16	16
Outer Sunset	26	3.2%	90	0.2%	4	32,870	0.2%	26	17
Park Merced	2	0.2%	5,860	12.8%	2,930	478,380	3.0%	3	6
Richmond	82	10.2%	440	1.0%	5	51,280	0.3%	17	13
Rincon Hill	8	1.0%	2,680	5.8%	335	-94,530	-0.6%	5	28
Showpl/Potrero	28	3.5%	1,740	3.8%	62	426,750	2.7%	7	7
South Central, Other	69	8.6%	1,270	2.8%	18	118,140	0.7%	9	11
South of Market, Other	3	0.4%	150	0.3%	75	681,350	4.3%	21	5
TB Combo	16	2.0%	1,630	3.6%	102	4,845,900	30.6%	8	2
Treasure Island	1	0.1%	7,800	17.0%	7,800	381,000	2.4%	2	8
VisVal	3	0.4%	10	0.0%	4	-1,250	-0.0%	30	25
Western Addition	31	3.9%	1,080	2.4%	35	45,470	0.3%	11	14
WSoMa	23	2.9%	530	1.2%	23	88,000	0.6%	15	12
Grand Total	801	100.0%	45,820	100.0%	17,164	15,829,490	100.0%	0	0

would take place in Bayview and Downtown C-3 districts.

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

Pipeline Projects by Current Zoning Category

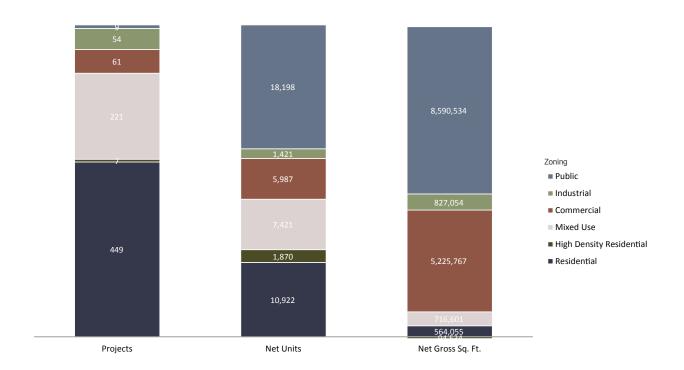
There is considerable variation in project size distributions as a function of the generalized zoning category. Some zoning districts display similarly typed and sized projects, while others will be host to a great variety of project sizes and types. First let us turn to the residential pipeline.

Residential Pipeline

Figure 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 57 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 High Density Residential and Commercial zone classes. Projects in these districts are fairly diverse in size. Projects in residential districts, on the other hand, are far

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



more homogenous, with the vast majority of projects counting fewer than 5 units.

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: High Density Residential, Mixed Use, Commercial and Public. Two large projects are parcels zoned "Public Land": the Bayview Waterfront project, most of which is

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	20	4,000	506,000	0	0	136,000	-77,000	384,000	63,000
	C-3	36	2,000	3,828,000	162,000	0	2,609,000	2,000	275,000	780,000
	MB	5	0	892,000	0	0	875,000	0	17,000	0
Industrial	C-M	1	0	0	0	0	2,000	-4,000	2,000	0
	М	7	0	572,000	44,000	0	5,000	-98,000	622,000	0
	PDR	19	0	271,000	0	0	119,000	114,000	37,000	0
	RSD	3	0	-1,000	0	0	0	-6,000	5,000	0
	SLI	4	0	-74,000	0	0	2,000	-78,000	2,000	0
	SLR	17	1,000	55,000	0	0	-7,000	-10,000	72,000	0
	SPD	3	0	4,000	0	0	4,000	-1,000	1,000	0
Mixed Use	CRNC	1	0	68,000	68,000	0	0	0	0	0
	CVR	1	0	-9,000	4,000	0	0	0	-14,000	0
	MUG	3	0	0	0	0	0	0	0	0
	MUO	4	0	54,000	0	0	66,000	-25,000	7,000	0
	MUR	9	1,000	-78,000	0	0	-9,000	-85,000	16,000	0
	NC	115	1,000	90,000	29,000	-45,000	152,000	-55,000	-15,000	24,000
	NCT	45	2,000	-27,000	37,000	0	-5,000	-86,000	28,000	0
	Р	1	0	0	0	0	0	0	0	0
	RC	24	2,000	700,000	924,000	0	-16,000	43,000	43,000	-294,000
	SSO	1	0	33,000	0	0	-14,000	0	5,000	41,000
	UMU	17	1,000	-114,000	0	0	-15,000	-167,000	68,000	0
Public	Р	9	18,000	8,591,000	357,000	0	6,850,000	0	1,043,000	341,000
Residential	DTR	1	0	0	0	0	0	0	0	0
	NCT	1	0	0	0	0	0	0	0	0
	RED	5	0	-10,000	0	0	0	-10,000	0	0
	RH	351	1,000	220,000	-17,000	0	218,000	-10,000	29,000	0
	RM	68	10,000	385,000	86,000	12,000	102,000	0	485,000	-300,000
	RTO	23	0	-31,000	-14,000	0	-21,000	-19,000	24,000	0
High Density Residential	DTR	7	2,000	-95,000	0	0	-36,000	-71,000	12,000	0
Grand Total		801	46,000	15,829,000	1,680,000	-33,000	11,018,000	-645,000	3,149,000	655,000

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

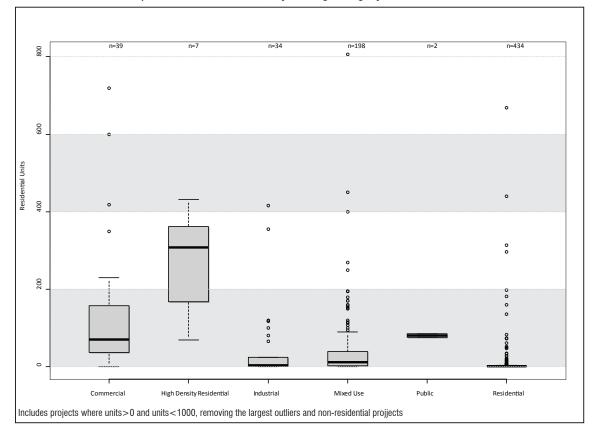
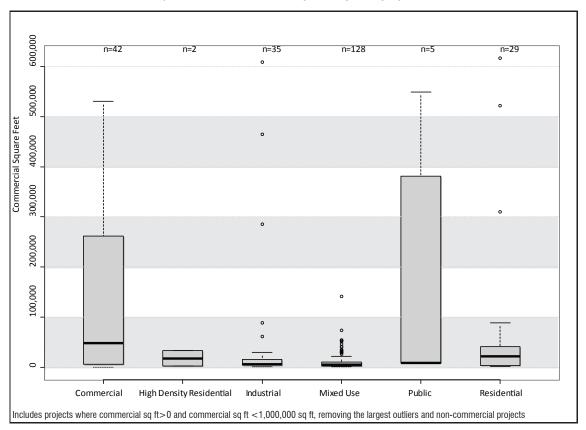


FIGURE 1c: Non-Residential Pipeline Size Distribution, by Zoning Category



at Candlestick Point² and the Treasure Island redevelopment project. These projects could add more than 17,000 units.

The second largest share is found on residentially zoned lots, accounting for 12,800 units in 450 projects. Two thirds of these units, however, are in the Parkmerced redesign project and a couple of large San Francisco Housing Authority projects (one in the Potrero Hill area, the other on Sunnydale Ave as part of the Hope SF program). The remainder of projects on residentially zoned parcels are relatively small with about a quarter of projects being single family housing projects. Small scale projects of one to nine units account for 93 percent of the residential projects. Only a handful are larger, with a few mentioned above.

Thirdly, the mixed use districts, ranging from neighborhood commercial to Eastern

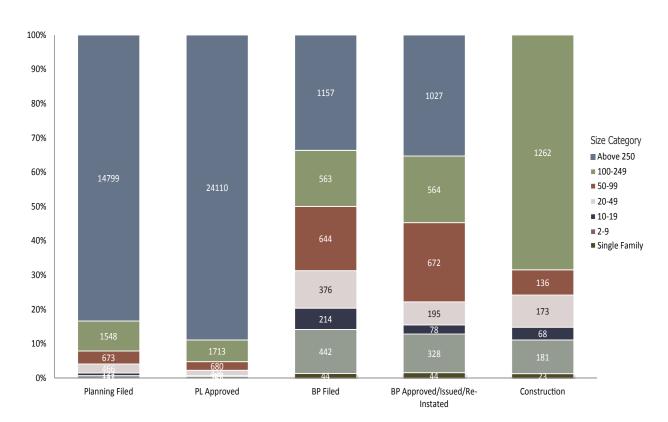
Neighborhoods mixed use districts, account for 7,400 units in 221 projects.

The fourth largest of these shares is on commercially zoned parcels, accounting for 6,000 units in just 61 projects, which, as noted above, thus tend to be large.

Another 1,400 units are pending on industrially zoned lands. A third of these projects are mixed use projects with a commercial component. The added residential units in industrial areas are accompanied by loss of PDR space and addition of retail space (see Table 3).

Also of note, the high-density, transit-accessible downtown neighborhoods of Rincon Hill and Transbay which account for a fraction of one 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.





² Technically, the Bayview Waterfront project spans multiple zoning districts, but has been accounted for here exclusively in the "Public" category where the majority of its units are located, somewhat skewing the distribution.

Residential projects in the most restrictive residential (RH) districts, on the other hand, tend to be small scaled, in-fill developments, accounting for some 44 percent of proposed projects but just 2 percent of the total units (or 800 net units) in the pipeline. Projects on RM-zoned lots, in turn, account for 8 percent of projects and 21 percent of units, again largely because of a large project, the Parkmerced Redesign project. In terms of land area, residential zoning districts form the largest group, comprising 46 percent of the city land area.

Commercial Pipeline

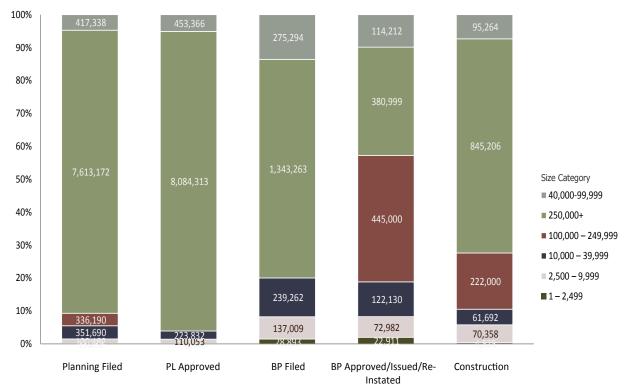
Non-residential development is almost exclusively found in commercial and mixed use districts; thus the vast majority of the net commercial space are proposed to be added in these land classes. The commercial pipeline in general is characterized by 81 projects, but also 100 mixed use projects which contain both residential and non-residential components. The commercial component in the 221 mixed use district projects are, in general

also small, with half of projects being smaller than 5,000 gross square feet, respectively. (Some of these projects in mixed use districts are exclusively residential.)

The largest concentration of potential commercial development is in a few areas currently zoned public³. Development here would add some net 8.5 million square feet, or more than half of all proposed commercial development, in just 9 projects. The largest of these proposed development is the Bayview Waterfront Project which would add more than six million commercial square feet as currently proposed; however, there were several variants with less development analyzed as a part of the environmental review.

Commercial districts account for the second largest concentration of non-residential development, with 33 percent of the total in 61 projects. The mixed use districts account for a larger *number* of projects (even if this count may include projects that are exclusively residential) totalling 717,000 square 3 See footnote 2.

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



feet. The remaining districts account for only a minor amount of non-residential development.

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

TABLE 4: Projects by Neighborhood and Building Size

				Proje	ct Size				
Neighborhood	Single Family	2-9	10-19	20-49	50-99	100-249	Above 250	Grand Total	Rank
Balboa Park	0	8	13	31	71	159	0	282	19
Bernal Heights	13	52	0	0	0	0	0	65	29
Buena Vista	0	42	0	24	56	0	0	122	25
BVHP Area A,B	5	27	0	0	73	0	355	460	18
Candlestick	0	0	0	0	0	198	10,500	10,698	1
Central	18	139	18	0	0	0	0	175	21
Central Waterfront	1	14	16	40	151	356	0	578	15
Downtown	0	35	17	327	673	1,304	2,997	5,353	4
East SoMa	2	25	70	212	372	333	269	1,283	10
Executive Park	0	0	0	30	0	226	0	256	20
India Basin	0	10	0	0	0	0	0	10	31
Ingleside, Other	11	45	0	28	0	0	0	84	27
Inner Sunset	12	32	25	0	0	0	0	69	28
Japantown	0	5	0	0	0	0	0	5	32
Marina	2	39	0	103	0	0	0	144	23
Market Octavia	2	42	61	251	281	994	440	2,071	8
Mission	4	118	78	104	136	194	0	634	14
Mission Bay	0	0	0	0	0	134	0	134	24
Northeast	3	73	66	152	257	330	0	881	12
Other S Bayshore	8	9	0	0	102	0	668	787	13
Outer Sunset	5	34	10	0	55	0	0	104	26
Park Merced	0	0	0	0	0	182	8,898	9,080	2
Richmond	6	171	31	60	83	150	0	501	17
Rincon Hill	0	0	0	0	69	337	2,270	2,676	5
Showpl/Potrero	3	42	0	69	0	100	2,150	2,364	6
South Central, Other	20	137	57	55	122	0	1,700	2,091	7
South of Market, Other	0	0	0	0	0	150	0	150	22
TB Combo	0	5	19	0	151	503	950	1,628	9
Treasure Island	0	0	0	0	0	0	8,619	8,619	3
VisVal	0	16	0	0	0	0	0	16	30
Western Addition	2	36	61	64	153	0	861	1,177	11
WSoMa	5	32	0	86	0	0	416	539	16
Grand Total	122	1,188	542	1,636	2,805	5,650	41,093	53,036	

Notes

^{/1/} Housing unit counts are not rounded.

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

Residential Pipeline by Project Size

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

Different areas exhibit different project size distributions. Thus we see that, for instance, Downtown will get the bulk of its units in large projects (50-99 units, 100-249 units, above 249 units). This is also the case for areas like Market Octavia, Showplace Square, and in particular Transbay and Rincon Hill. Conversely, for Inner Sunset, the largest addition come in projects of two to nine units and single family projects. For 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 2,800 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. Accordingly, of the total 31 projects with 72 units in Ingleside and 30 projects with 58 units in Ingleside, only a handful of projects are sized at nine units or less and 23 are single-unit projects.

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

- Of the 2,900 units with building permits approved, 1,600 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 three quarters of all projects are residential. Another 13 percent are mixed use projects with residential and non-residential components. The remaining 10 percent or so of the projects are distributed among the commercial

TABLE 5: Pipeline Project Size, by Proposed Land Use

				Standard	Percentile					
Proposed Use	Projects	Percent	Mean	Deviation	0	25	50 (Median)	75	100	
CIE	21	3%	80,576	136,714	2,420	8,870	26,000	65,282	548,776	
MIPS	24	3%	242,567	354,396	4,000	42,838	197,600	318,185	1,743,000	
Mixed	7	1%	277,417	481,027	5,566	9,990	21,886	325,743	1,243,002	
Mixres	164	21%	391,115	1,898,718	2,540	12,478	31,050	130,836	18,720,000	
PDR	12	2%	52,813	131,750	1,000	2,175	5,825	28,410	464,553	
Resident	556	70%	18,240	66,234	1,200	2,400	2,400	3,600	967,200	
Retail/Ent	9	1%	124,690	215,171	3,300	10,265	16,000	53,000	608,688	
Visitor	4	1%	59,138	18,843	40,370	44,593	58,563	73,108	79,054	
All	797	100%	107,569	877,989	1,000	2,400	3,600	27,150	18,720,000	

 $^{4\} ln$ 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.

categories, with office, institutional and retail being the most frequent. There are also a few PDR and hotel projects.

The office projects are the largest in the pipeline, with a median size of 198,000 square feet. No other use type comes close to that, with the nearest follow-up being visitor-related uses, with a median size of 58,900 square feet.

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

The Mixres category, which refers to projects with both residential and non-residential components, includes the Bayview Waterfront project, helping explain both the high average size in the group as well as the 100th percentile at 18.7 million square feet. However, the group also includes a number of small and mid-sized projects with residential

uses and ground floor retail. The median project size, at 33,300 square feet, gives a sense of the size.

Residential use-projects are the most numerous category, with 7 out of ten projects falling under this heading. They are fairly small, commonly two units as evidenced by the median. Seventy-five percent of projects are three units or less.⁵

Conversion of Commercial Space to Residential Use⁶

There are 50 projects in the current pipeline database proposing demolition or conversion of existing production, distribution and repairuse (PDR) buildings to residential use. The

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

Neighborhood	Projects	Percent	Net Units	Percent	PDR Net	Percent	Avg Units / Project	Avg PDR Loss / Project
Balboa Park	1	2.0%	30	0.9%	-3,700	0.5%	30	-3,700
BVHP Area A,B	2	4.0%	360	11.4%	-106,900	13.0%	180	-53,450
Central Waterfront	3	6.0%	300	9.5%	-167,600	20.4%	100	-55,870
Downtown	3	6.0%	230	7.3%	-64,100	7.8%	77	-21,370
East SoMa	12	24.0%	580	18.4%	-180,700	22.0%	48	-15,060
India Basin	2	4.0%	10	0.3%	-5,100	0.6%	5	-2,550
Marina	1	2.0%	30	0.9%	-7,000	0.9%	30	-7,000
Market Octavia	2	4.0%	130	4.1%	-20,900	2.5%	65	-10,450
Mission	9	18.0%	330	10.4%	-109,400	13.3%	37	-12,160
Northeast	2	4.0%	70	2.2%	-33,300	4.1%	35	-16,650
Richmond	2	4.0%	10	0.3%	-3,000	0.4%	5	-1,500
Rincon Hill	2	4.0%	550	17.4%	-70,900	8.6%	275	-35,450
Showpl/Potrero	1	2.0%	100	3.2%	-15,500	1.9%	100	-15,500
TB Combo	2	4.0%	370	11.7%	-3,700	0.5%	185	-1,850
Western Addition	1	2.0%	30	0.9%	-9,100	1.1%	30	-9,100
WSoMa	5	10.0%	50	1.6%	-19,700	2.4%	10	-3,940
Grand Total	50	100.0%	3,160	100.0%	-820,500	100.0%	63	-16,410

⁵ 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.

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

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

Neighborhood	Projects	Percent	Net Units	Percent	Office Net	Percent	Avg Units / Project	Avg Loss / Project
Balboa Park	1	2.9%	30	1.3%	-6,200	1.0%	30	-6,200
Downtown	10	28.6%	580	24.5%	-300,800	48.2%	58	-30,100
East SoMa	2	5.7%	60	2.5%	-8,800	1.4%	30	-4,400
Inner Sunset	1	2.9%	20	0.8%	-2,200	0.4%	20	-2,200
Market Octavia	6	17.1%	740	31.2%	-54,900	8.8%	123	-9,200
Northeast	1	2.9%	20	0.8%	-15,900	2.5%	20	-15,900
Rincon Hill	2	5.7%	610	25.7%	-60,000	9.6%	305	-30,000
Showpl/Potrero	2	5.7%	140	5.9%	-46,800	7.5%	70	-23,400
South Central, Other	2	5.7%	10	0.4%	-3,900	0.6%	5	-2,000
TB Combo	2	5.7%	120	5.1%	-91,500	14.7%	60	-45,800
Western Addition	2	5.7%	20	0.8%	-9,400	1.5%	10	-4,700
WSoMa	3	8.6%	10	0.4%	-21,400	3.4%	3	-7,100
Richmond	1	2.9%	0	0.0%	-2,000	0.3%	0	-2,000
Grand Total	35	100.0%	2,370	100.0%	-623,700	100.0%	68	-17,800

corresponding figure for the conversion of office space is 35 projects. These projects represent approximately seven percent (or 3,200 units) and five percent (or 2,400 units), respectively, of the residential units in the pipeline.

Conversion of PDR Space

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

- If the pipeline were developed as proposed, about 821,000 sq ft of PDR space would be lost to conversion or demolition.⁸ It would be replaced with residential units (3,200) and/or other commercial uses.
- Most of the PDR to residential conversions are found in Bayview Hunters Point, Central Waterfront, East SoMa and Mission districts, accounting together for more than two thirds of the overall loss. The loss of PDR space in these neighborhoods would in turn bring in 1,600 net new housing units.

Conversion of Office Space

- Approximately 600,000 sq ft of office space is proposed to be converted to residential and/or other commercial use. This loss of office space is mainly taking place in the northeastern part of the city where most office space is located. Table 7 shows that the Downtown and Transbay districts would lose the most office space around 400,000 square feet, or five out of eight converted square feet.
- A total of 2,400 units are proposed to be built replacing the lost office space.

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

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

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 375,000 sq ft as it is a net tally of all projects that add, convert or demolish PDR space while this table only counts loss.

Projects Under Planning Review

Project Application Filings

Table 8 below shows that a total of 25 planning applications9 were filed in the first quarter of 2011, up from 20 projects in the previous quarter. Corresponding to these 25 projects are 890 residential units and 64,000 square feet of commercial development. The quarter's filings are now above the six quarter moving average. If this were to continue, it would suggest a slight normalization in filing volume and the real estate market to the extent that new project filings serve as an indicator for that. Future quarters will show. Taken as a whole since 2000 (Figures 4 and 5), numbers are still way below the mid-decade boom years, and will probably remain so. Still, the average size of projects has ticked up a bit since recent decade lows. There are, however as seen in this report, still a large reservoir of projects in the pipeline from before the recession. As the completion of many of the larger projects are many years in the future, they may be less prone to short term economic stresses. Still, some sponsors will undoubtfully find it much harder to secure financing for their projects, the relative strength of the San Francisco market in this downturn notwithstanding.

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

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

 On 200-214 Sixth St (Hugo Hotel), the proposed project is the demolition of an existing 144 room hotel building and construction of a new mixed use building with 56 affordable dwelling

9 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 for the same property, and that numbers may thus include a measure of overlap....

- units, approximately 3,074 sq.ft. of retail, and 15 off-street parking spaces.
- At 1731 15th St; seismic retrofit and building rehabilitation of existing residential hotel. The project would increase number of rooms from 27 to 52.
- At 1001 17Th St, a proposal entails the demolition of a two-story commercial warehouse and new construction of a five-story, 50-foot-tall, mixed-use building with 4,380 s.f. of groundfloor commercial, 44 residential units, and 33 off-street parking spaces.
- Sampling the commercial side, on 2700
 Jackson St, there is a proposed renovation and expansion of the existing K-8 school (Town School for Boys).
- On 300 Grant Avenue, applicant has requested extension of entitlements for a previously approved project to demolish 272 and 292 Sutter Street containing 35,600 gsf retail and construct a 12-story, 113,526 gsf residential mixed-use structure in the Kearny-Market-Mason-Sutter Conservation District with 66 residential units, ground floor retail, and 25 underground parking spaces.

Other Project Activity

As noted, the largest three residential projects are now entitled. These include the Treasure Island Redevelopment Project, with 7,000 new housing units, the Bayview Waterfront project with 11,000 units, and several million non-resdidential square feet, and Parkmerced with 5,600 new units.ority Board. Full realization of these projects is decades into the future, just as has been the case with the development of Mission Bay.a

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

			Filed			App	proved	
Quarter Filed	Projects	Net Units	Avg Units/Project	Net Sq. Ft	Projects	Net Units	Avg Units/ Project	Net Sq. Ft
2000 Q1	73	750	10	2,826,000	16	330	21	417,000
2000 Q2	64	1,490	23	2,037,000	25	290	12	1,348,000
2000 Q3	97	770	8	1,724,000	42	520	12	462,000
2000 Q4	76	3,010	40	3,351,000	53	1,140	22	525,000
2001 Q1	63	410	7	444,000	53	570	11	1,207,000
2001 Q2	78	460	6	375,000	56	210	4	619,000
2001 Q3	55	510	9	791,000	46	1,000	22	298,000
2001 Q4	44	320	7	328,000	45	640	14	1,839,000
2002 Q1	78	820	11	951,000	35	250	7	341,000
2002 Q2	56	1,020	18	1,357,000	41	220	5	1,141,000
2002 Q3	66	1,000	15	1,288,000	29	240	8	96,000
2002 Q4	66	2,690	41	215,000	32	470	15	700,000
2003 Q1	82	3,800	46	1,751,000	49	810	17	217,000
2003 Q2	87	2,510	29	412,000	56	440	8	263,000
2003 Q3	57	550	10	310,000	47	1,270	27	1,169,000
2003 Q4	57	1,330	23	402,000	40	1,890	47	206,000
2004 Q1	63	1,130	18	73,000	32	460	14	369,000
2004 Q2	81	2,090	26	289,000	52	440	8	364,000
2004 Q3	104	3,130	30	474,000	39	280	7	105,000
2004 Q4	84	2,480	30	403,000	30	470	16	46,000
2005 Q1	77	1,380	18	471,000	47	400	9	46,000
2005 Q2	75	850	11	317,000	50	1,590	32	76,000
2005 Q3	74	2,140	29	401,000	50	1,300	26	713,000
2005 Q4	81	1,800	22	1,282,000	41	890	22	468,000
2006 Q1	45	2,820	63	480,000	49	1,570	32	116,000
2006 Q2	28	1,840	66	85,000	36	640	18	178,000
2006 Q3	55	2,600	47	1,157,000	30	1,580	53	119,000
2006 Q4	39	950	24	2,136,000	27	500	19	1,157,000
2007 Q1	32	800	25	137,000	20	840	42	168,000
2007 Q2	28	310	11	1,014,000	20	180	9	47,000
2007 Q3	53	20,020	378	4,089,000	16	170	11	1,061,000
2007 Q4	46	930	20	125,000	18	310	17	59,000
2008 Q1	37	6,040	163	1,106,000	26	2,690	103	275,000
2008 Q2	33	830	25	760,000	26	350	13	281,000
2008 Q3	32	750	23	1,791,000	25	760	30	2,000
2008 Q3 2008 Q4	25	300	12	25,000	35	1,080	31	876,000
2009 Q1	23	260	11	195,000	28	630	23	24,000
2009 Q1 2009 Q2	25	330	13	100,000	22	490	23	82,000
2009 Q2 2009 Q3	29	230	8	10,000	10	540	54	42,000
2009 Q3 2009 Q4	29	340	15	171,000	15	560	37	89,000
2019 Q4 2010 Q1	-	280	15	13,000		180	14	149,000
	19				13			
2010 Q2	22	950	43	1,630,000	18	340	19	-21,000
2010 Q3	26	70	3	17,000	15	10,420	695	3,756,000
2010 Q4	20	930	47	10,000	20	730	37	799,000
2011 Q1 Notes:	25	890	36	64,000	13	5,700	438	480,000

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

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

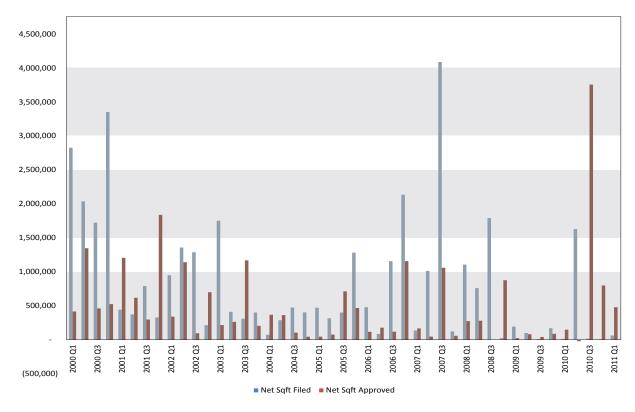
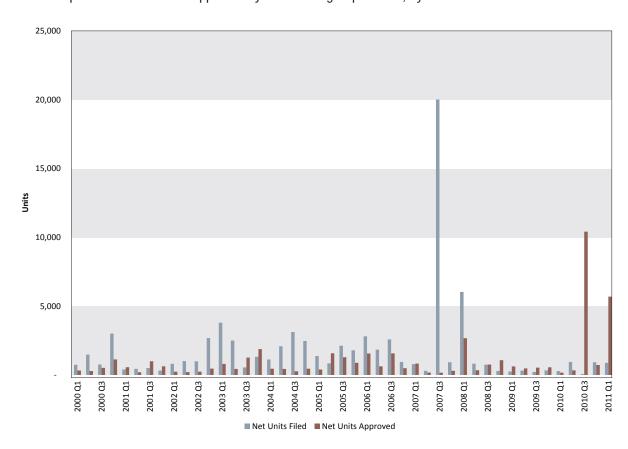
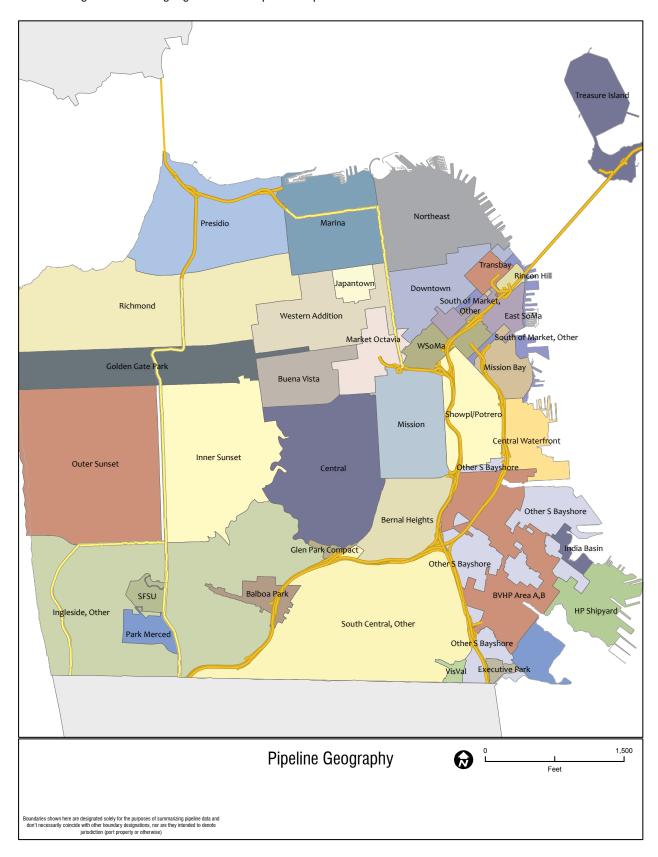


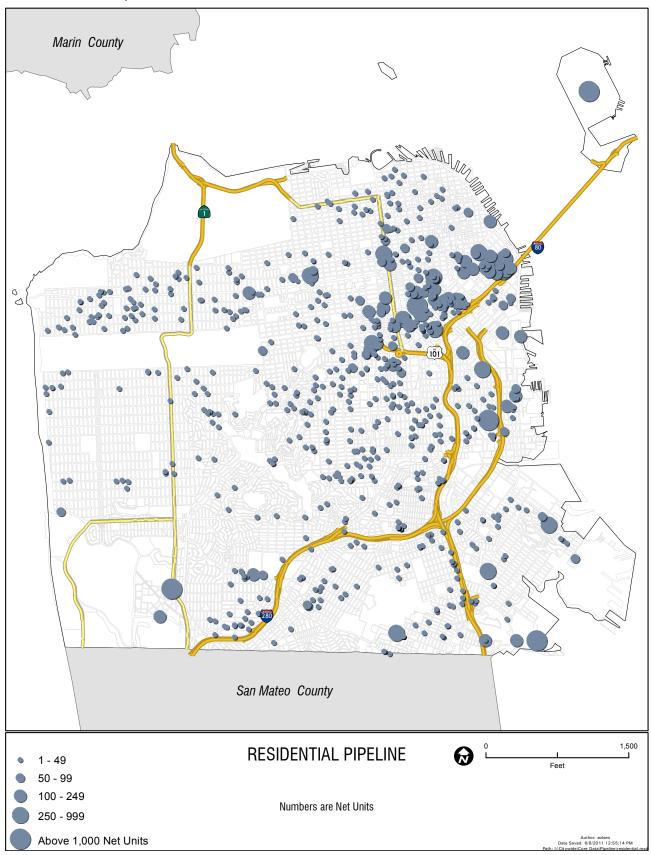
FIGURE 5: Pipeline Units Filed and Approved by the Planning Department, by Quarter



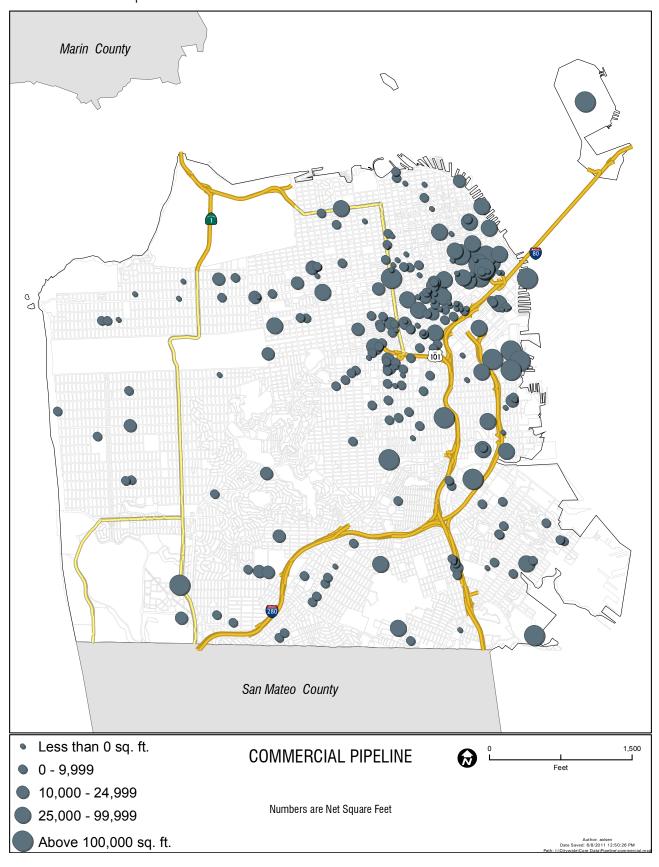
MAP 1: Neighborhoods Highlighted in the Pipeline Report

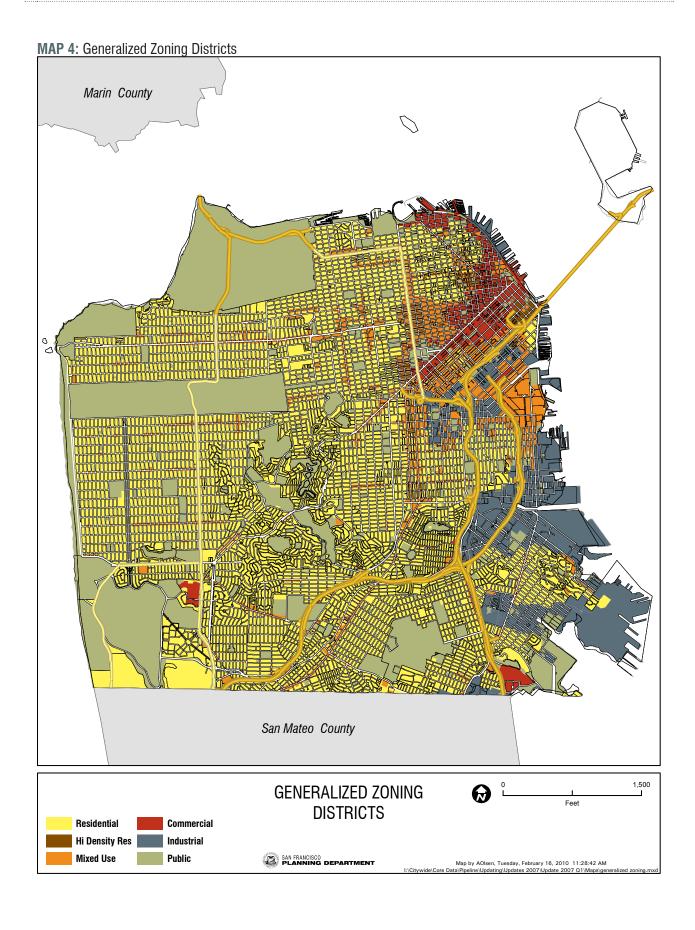


MAP 2: Residential Pipeline



MAP 3: Commercial Pipeline





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, 2011	
	Subset of pipeline where project adds either more than 10 units or 10,000 GSF

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

CONSTRUCTION

4154001	1001 POTRERO AV	Showpl/Potrero	419,070	0	CIE	CIE	12/15/2010
3721122	535 MISSION ST	TB Combo	296,430	0	MIPS	MIPS	3/9/2011
4991600	101 EXECUTIVE PARK BL	Executive Park	0	226	Resident	N/A	10/25/2010
3717019	120 HOWARD ST	Downtown	67,000	0	MIPS	MIPS	3/2/2011
1084010	3575 GEARY BL	Richmond	20,957	150	Mixres	MIPS	9/24/2010
4058010	2235 03RD ST	Central Waterfront	5,339	196	Mixres	Retail/Ent	3/3/2011
4991277	833-881 Jamestown	Candlestick	0	198	Resident	N/A	9/17/2007
3180003	1150 OCEAN AV	Balboa Park	15,100	159	Mixres	Retail/Ent	3/3/2011
0792028	365 FULTON STREET	Market Octavia	0	120	Resident	N/A	2/17/2011
0871016	1844 MARKET ST	Market Octavia	3,033	113	Mixres	Retail/Ent	7/17/2007
3704069	973 MARKET ST	Downtown	-52,750	100	Mixres	Retail/Ent	8/14/2008
4228158	1301 Indiana St	Central Waterfront	-9,800	71	Mixres	Retail/Ent	12/19/2007
3731074	A WOMANS PLACE	East SoMa	0	25	Resident	N/A	7/1/2008
3532014	299 VALENCIA ST	Market Octavia	3,940	44	Mixres	Retail/Ent	3/4/2011
1029095	2901 CALIFORNIA ST	Western Addition	14,800	0	CIE	CIE	1/10/2011
0756001	1345 TURK ST	Western Addition	0	32	Resident	N/A	2/10/2011
4991617	101 EXECUTIVE PARK BL	Executive Park	14,000	30	Resident	N/A	10/25/2010
0599008	1840 WASHINGTON ST	Marina	-7,000	26	Resident	N/A	2/22/2011
1460040	420 29TH AV	Richmond	-2,500	20	Mixres	Retail/Ent	6/29/2010
3728069	121 09TH ST	WSoMa	-4,975	20	Mixres	Retail/Ent	2/11/2011
3794002A	750 02ND ST	East SoMa	-2,710	14	Mixres	Retail/Ent	3/10/2011
1127007	1816 EDDY ST	Western Addition	0	19	Resident	N/A	10/8/2010
5868007	55 TRUMBULL ST	South Central, Other	0	18	Resident	N/A	9/21/2010
2018003	2400 NORIEGA ST	Outer Sunset	12,366	0	CIE	CIE	2/24/2011

BP ISSUED

3507041	1401 MARKET ST	Downtown	12,250	719	Mixres	Retail/Ent	4/25/2008
8720016	1455 03RD ST	Mission Bay	380,999	0	MIPS	MIPS	4/23/2010
Tuesday, Ju	une 07, 2011		Ouarter 1, 2011 List. Page 1 of 8				

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3766009	333 Harrison St	Rincon Hill	0	308	Resident	N/A	12/1/2010
8709004	1600 OWENS ST	Mission Bay	245,000	0	MIPS	MIPS	6/3/2008
8713001	555 MISSION ROCK ST	South of Market, Othe	er O	150	Resident	N/A	1/26/2011
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
3513008	150 OTIS ST	Market Octavia	-90,159	76	Resident	N/A	1/7/2011
7380038	655 BROTHERHOOD WY	Ingleside, Other	15,000	0	CIE	CIE	12/12/2008
5476009	6600 Third Street	BVHP Area A,B	0	30	Resident	N/A	2/22/2011
3747012	325 FREMONT ST	Rincon Hill	0	69	Resident	N/A	12/17/2010
3788012	166 TOWNSEND ST	East SoMa	-73,625	66	Mixres	Retail/Ent	8/12/2010
3725101	474 NATOMA STREET	Downtown	0	55	Resident	N/A	11/13/2009
4624004	Hunters View	Other S Bayshore	0	52	Resident	N/A	9/9/2010
0492025	2026 LOMBARD ST	Marina	40,370	0	Visitor	Visitor	4/11/2007
0619012	1860 VAN NESS AV	Northeast	1,625	35	Mixres	Retail/Ent	11/17/2008
4287018	1263 CONNECTICUT ST	Other S Bayshore	27,880	0	PDR	PDR	2/25/2011
1145003	2130 FULTON ST	Western Addition	26,000	0	CIE	CIE	1/10/2011
6473040	5735 MISSION ST	South Central, Other	5,240	20	Mixres	CIE	2/18/2011
1028028	2829 CALIFORNIA ST	Western Addition	112	12	Mixres	Retail/Ent	3/22/2011
1742043	1266 09TH AV	Inner Sunset	-3,000	15	Mixres	Retail/Ent	12/9/2010
BP REIN	STATED						
3721013	524 HOWARD ST	TB Combo	200,000	0	MIPS	MIPS	6/8/2007
0671006	1450 FRANKLIN ST	Western Addition	-24,000	69	Resident	N/A	6/25/2009
0343014	181 TURK ST	Downtown	3,060	32	Mixres	Retail/Ent	3/10/2009
0274008	850 BUSH ST	Northeast	0	23	Resident	N/A	4/10/2008
BP APPR	POVED						
3547002A	1880 MISSION ST	Mission	-63,512	194	Resident	N/A	8/20/2009
3749064	25 ESSEX ST	TB Combo	0	120	Resident	N/A	3/9/2011
3789003	72 TOWNSEND ST	East SoMa	0	74	Resident	N/A	12/11/2008
0668012	1465 PINE ST	Northeast	0	35	Resident	N/A	2/22/2011
Tuesday, Ju	ne 07, 2011				Q <u>uarter</u>	1, 2011 List, I	Page 2 of 8

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
5943008	268 MADISON ST	South Central, Other	25,000	1	Mixres	Retail/Ent	3/10/2011
4224015	1004 MISSISSIPPI ST	Showpl/Potrero	0	28	Resident	N/A	1/16/2009
3591024	793 SOUTH VAN NESS AV	Mission	5,829	22	Resident	Retail/Ent	8/4/2009
3554027	411 VALENCIA ST	Mission	1,400	16	Mixres	Retail/Ent	3/24/2011
BP Filed							
3702052	1190 MISSION ST	Downtown	0	418	Resident	N/A	12/16/2010
3735063	222 02ND ST	TB Combo	400,000	0	MIPS	MIPS	11/30/2007
3748006	340 FREMONT ST	Rincon Hill	-42,650	384	Mixres	Retail/Ent	9/19/2005
5431A001	5800 03RD ST	BVHP Area A,B	-90,000	355	Mixres	Retail/Ent	9/8/2010
0269028	350 BUSH ST	Downtown	347,300	0	MIPS	MIPS	8/7/2007
8721012	455 Mission Bay S Blvd	Mission Bay	333,945	0	MIPS	MIPS	6/26/2008
3736114	Foundry Square III	TB Combo	251,788	0	MIPS	MIPS	9/8/2008
3749059	45 LANSING ST	Rincon Hill	-14,000	224	Resident	N/A	9/14/2010
0872005	1960-1998 MARKET ST	Market Octavia	9,000	115	Mixres	Retail/Ent	12/21/2010
0691008	1285 SUTTER ST	Downtown	-8,308	107	Mixres	Retail/Ent	12/6/2007
3510001	1415 MISSION ST	Downtown	300	117	Mixres	MIPS	10/31/2008
3535001	2001 MARKET ST	Market Octavia	-14,517	82	Mixres	Retail/Ent	12/20/2010
0349001	101 GOLDEN GATE AV	Downtown	20,000	90	Mixres	CIE	12/15/2010
4352007	1301 CESAR CHAVEZ ST	BVHP Area A,B	81,979	0	MIPS	MIPS	10/15/2007
3553008	490 SOUTH VAN NESS AV	Mission	-689	84	Mixres	Retail/Ent	10/5/2010
3731003	226 06TH ST	East SoMa	0	37	Resident	N/A	6/16/2008
1098009	1401 DIVISADERO ST	Western Addition	57,000	-21	MIPS	MIPS	12/21/2006
0808036	401 Grove Street	Market Octavia	7,000	63	Mixres	Retail/Ent	1/28/2011
0346005	350 GOLDEN GATE AV	Downtown	0	19	Resident	N/A	11/1/2010
3736085	48 TEHAMA ST	TB Combo	0	66	Resident	N/A	7/12/2006
6969011	5050 MISSION ST	South Central, Other	0	61	Resident	N/A	6/10/2010
0165022	717 BATTERY ST	Northeast	27,870	0	MIPS	MIPS	12/1/2008
4059009	2298 03RD ST	Central Waterfront	14,000	40	Mixres	Retail/Ent	2/6/2006
3788039	345 BRANNAN ST	East SoMa	53,030	0	MIPS	MIPS	10/27/2008
3555056	1731 15TH ST	Mission	0	25	Resident	N/A	9/28/2010
3703086	570 JESSIE ST	Downtown	-15,000	47	Resident	N/A	2/2/2006
Tuesday, Ju	ine 07, 2011				Quarter	1, 2011 List, l	Page 3 of 8

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
0837003	1 FRANKLIN ST	Market Octavia	2,384	35	Mixres	Retail/Ent	12/3/2009
0816003	205 FRANKLIN ST	Market Octavia	14,500	0	Mixed	Retail/Ent	4/13/2010
5992A060	495 CAMBRIDGE ST	South Central, Other	0	35	Resident	N/A	12/22/2010
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
3560001	2210 MARKET ST	Market Octavia	2,000	22	Mixres	Retail/Ent	10/2/2008
0512025	2353 LOMBARD ST	Marina	964	21	Mixres	Retail/Ent	7/29/2010
3548032	1875 MISSION ST	Mission	-34,895	23	Mixres	Retail/Ent	12/23/2010
3521005	340 11TH ST	WSoMa	5,682	20	Mixres	Retail/Ent	4/11/2005
3732071	468 CLEMENTINA ST	East SoMa	-500	25	Resident	N/A	7/20/2005
3752019	870 HARRISON ST	WSoMa	-6,120	22	Mixres	Retail/Ent	7/14/2006
1368049	4614 CALIFORNIA ST	Richmond	13,686	0	Mixed	MIPS	1/23/2007
0101004	1741 POWELL ST	Northeast	-11,795	18	Mixres	Retail/Ent	8/12/2009
3548039	1801 MISSION ST	Mission	2,600	18	Mixres	Retail/Ent	7/17/2006
3588012	3500 19TH ST	Mission	2,950	17	Mixres	Retail/Ent	5/1/2006
3547027	80 JULIAN AV	Mission	12,900	7	Mixres	CIE	11/30/2010
3726047	537 NATOMA ST	East SoMa	-5,425	14	Mixres	PDR	9/1/2005
3776092	246 RITCH ST	East SoMa	-4,130	19	Resident	N/A	1/5/2007
4058008	616 20TH ST	Central Waterfront	-1,000	16	Mixres	Retail/Ent	12/9/2010
0832026	360 OCTAVIA ST	Market Octavia	1,000	16	Mixres	Retail/Ent	10/1/2008
3617008	1050 VALENCIA ST	Mission	400	15	Mixres	Retail/Ent	12/27/2010
0832025	300 OCTAVIA ST	Market Octavia	0	16	Resident	N/A	10/1/2008
1084001B	1 Stanyan Street	Richmond	-1,807	13	Mixres	Retail/Ent	12/14/2007
3557062	200 DOLORES ST	Market Octavia	-8,463	13	Resident	N/A	8/19/2008
3197010	1446 OCEAN AV	Balboa Park	-2,500	13	Resident	N/A	10/31/2008
PL APPR	OVED						
4886008	Bayview Waterfront	Candlestick	6,120,0001	0,237	Mixres	MIPS	8/3/2010
7303001	Parkmerced	Park Merced	478,383	5,677	Mixres	Retail/Ent	5/25/2011
3702053	1169 MARKET ST	Downtown	33,540	1,083	Mixres	Retail/Ent	8/3/2006
Tuesday, Ju	ne 07, 2011				Quarter	1, 2011 List, I	Page 4 of 8

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3746001	390 Main St	Rincon Hill	0	806	Resident	N/A	11/18/2003
4624009	Hunters View	Other S Bayshore	620	349	Mixres	Retail/Ent	12/10/2008
3747320	The Californian	Rincon Hill	-2,256	432	Mixres	MIPS	8/4/2006
5262004	2095 Jerrold Ave	BVHP Area A,B	127,779		PDR	PDR	3/26/2010
0857001	55 Laguna Street	Market Octavia	28,090	440	Mixres	Retail/Ent	1/17/2008
3704071	949 Market Street	Downtown	237,300	0	Retail/Ent	Retail/Ent	11/8/2010
3765015	One Rincon Hill Phase II	Rincon Hill	0	340	Resident	N/A	8/16/2005
8722001	300 16TH ST	Mission Bay	312,932	0	MIPS	MIPS	10/2/2008
3722027	151 THIRD ST	Downtown	66,685		CIE	CIE	7/13/2010
0757025	1100 GOLDEN GATE AV	Western Addition	0	98	Resident	N/A	12/18/2008
3732009	900 FOLSOM ST	East SoMa	6,340	269	Mixres	Retail/Ent	5/20/2010
0813007	1390 MARKET ST	Market Octavia	-1,500	230	Mixres	Retail/Ent	5/28/2009
0345004	220 GOLDEN GATE AV	Downtown	-30,690	172	Mixres	MIPS	9/10/2008
0331010	168 EDDY ST	Downtown	15,000	170	Mixres	Retail/Ent	3/26/2009
3732008	260 05TH ST	East SoMa	-35,843	179	Mixres	Retail/Ent	5/20/2010
7331003	800 Brotherhood Way	Park Merced	0	182	Resident	N/A	12/10/2007
4106001A	900 MINNESOTA ST	Central Waterfront	-129,260	160	Mixres	Retail/Ent	1/5/2006
0794015	746 LAGUNA ST	Market Octavia	2,325	136	Mixres	MIPS	5/13/2010
0323015	472 ELLIS ST	Downtown	-65,926	60	Resident	N/A	12/12/2008
3722079	134-140 NEW MONTGO	TB Combo	-84,660	118	Mixres	Retail/Ent	12/11/2008
3767305	429 BEALE ST	Rincon Hill	-35,628	113	Resident	N/A	5/14/2009
3703079	1036-1040 MISSION ST	Downtown	1,256	100	Mixres	Retail/Ent	5/14/2009
1228005	690 STANYAN ST	Buena Vista	10,800	56	Mixres	Retail/Ent	10/23/2008
1052024	2655 BUSH ST	Western Addition	-40,617	84	Mixres	Retail/Ent	10/10/2008
3180001	50 PHELAN AV	Balboa Park	11,682	71	Mixres	Retail/Ent	7/12/2010
0331003	125 MASON ST	Downtown	0	81	Resident	N/A	10/30/2006
0327011	72 ELLIS ST	Downtown	79,054		Visitor	Visitor	3/25/2010
3704015	942 MISSION ST	Downtown	53,514	0	Visitor	Visitor	12/16/2010
6969001	5050 MISSION ST	South Central, Other	7,030	61	Mixres	Retail/Ent	8/14/2008
0711031	1100 ELLIS ST	Western Addition	11,513	0	CIE	CIE	8/6/2009
0336017	245 HYDE ST	Downtown	-26,640	65	Resident	N/A	4/10/2008
0258033	500 PINE ST	Downtown	56,830		MIPS	MIPS	3/15/2001
Tuesday, Ju	ine 07, 2011				Quarter	1, 2011 List,	Page 5 of 8

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	11/13/2008
0165021	235 BROADWAY	Northeast	5,000	50	Mixres	Retail/Ent	7/22/2010
0347016	399 GOLDEN GATE AV	Downtown	53,000	0	Retail/Ent	Retail/Ent	11/27/2007
0293002	153 KEARNY ST	Downtown	-40,000	51	Resident	N/A	4/13/2006
0287013	300 Grant Ave.	Downtown	-1,250	45	Mixres	Retail/Ent	7/10/2008
0595013	1645-1661 PACIFIC AV	Northeast	-27,275	50	Resident	N/A	11/4/2010
3753008	374 5TH ST	East SoMa	0	47	Resident	N/A	12/20/2010
3785003	690 05TH ST	WSoMa	32,500	0	Visitor	Visitor	6/17/2009
3980008	1717 17TH ST	Showpl/Potrero	-13,369	41	Mixres	PDR	7/15/2010
1029003	2901 California St	Western Addition	15,604	-3	CIE	CIE	6/16/2009
0596024	1946 POLK ST	Northeast	-9,245	39	Mixres	Retail/Ent	11/24/2007
3753081	345 06TH ST	East SoMa	324	36	Mixres	Retail/Ent	4/2/2009
0828012	735 Fell St	Western Addition	16,000	0	CIE	CIE	2/2/2008
0279011	1080 SUTTER ST	Downtown	1,339	35	Mixres	Retail/Ent	5/28/2009
0570010	1622 BROADWAY	Marina	0	34	Resident	N/A	3/12/2009
3639002	2652 HARRISON ST	Mission	-7,250	30	Resident	N/A	12/16/2010
7148040	ONE CAPITOL AV	Ingleside, Other	0	28	Resident	N/A	5/13/2010
2623006	376 CASTRO ST	Buena Vista	1,900	24	Mixres	Retail/Ent	2/6/2006
3564091	2299 MARKET ST	Central	6,940	18	Mixres	Retail/Ent	8/16/2010
3731101	42 HARRIET ST	East SoMa	0	23	Resident	N/A	12/20/2010
1028003	2829 California Street	Western Addition	373	12	Mixres	Retail/Ent	1/17/2008
0668013	1461 PINE ST	Northeast	-5,416	15	Mixres	Retail/Ent	5/9/2006
PL Filed							
1939001	Treasure Island	Treasure Island	381,000	7,800	Mixres	Retail/Ent	3/15/2011
3708006	50 01ST ST	TB Combo	1,134,000	600	Mixres	Visitor	12/21/2006
6310001	1654 Sunnydale Ave	South Central, Other	59,424	915	Mixres	Retail/Ent	4/28/2010
3720001	TRANSBAY TOWER	TB Combo	1,742,950	0	MIPS	MIPS	7/1/2008
4167004	1 TURNER TR	Showpl/Potrero	30,000	1,094	Mixres	Retail/Ent	6/30/2010
0694005	CPMC HOSPITAL	Downtown	702,067	-25	Mixed	CIE	6/10/2010
Tuesday, Ju	ine 07, 2011				Quarter	1, 2011 List, I	Page 6 of 8

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3719010	181 FREMONT ST	TB Combo	492,866	140	Mixres	MIPS	5/15/2007
6575002	CPMC - ST. LUKE'S HOSPIT	Bernal Heights	164,617	0	Mixed	CIE	6/10/2010
9900030	America's Cup Pier 30/32	South of Market, Oth	ner 608,688	0	Retail/Ent	Retail/Ent	6/24/2010
3710017	350 MISSION ST	TB Combo	415,603	0	MIPS	MIPS	11/19/2008
3756003	350 08TH ST	WSoMa	56,700	416	Mixres	Retail/Ent	9/7/2007
3834001	1000 16TH ST	Showpl/Potrero	26,500	450	Mixres	Retail/Ent	10/11/2006
0244001	950 MASON STREET	Northeast	-295,000	160	Mixres	Visitor	2/11/2009
0331016	231 ELLIS ST	Downtown	22,000	400	Mixres	MIPS	1/24/2006
3736074	41 TEHAMA ST	TB Combo	-1,400	350	Resident	N/A	10/31/2006
1075001	Westside Courts Phas	Western Addition	0	450	Resident	N/A	12/31/2008
9900015	Pier 15	Northeast	36,248	0	CIE	CIE	8/11/2009
0647007	1634 PINE ST	Western Addition	448	250	Mixres	MIPS	11/5/2008
3706093	706 MISSION ST	Downtown	35,000	220	Mixres	CIE	9/11/2008
0836002	1540 MARKET ST	Market Octavia	-13,252	180	Mixres	Retail/Ent	2/27/2009
0201012	8 Washington Street	Northeast	32,100	170	Mixres	Retail/Ent	12/4/2007
0238002	300 CALIFORNIA ST	Downtown	61,600	0	MIPS	MIPS	12/19/2007
3507042	1400 MISSION ST	Downtown	3,640	165	Mixres	Retail/Ent	4/8/2009
3725015	938 HOWARD ST	East SoMa	-18,956	154	Mixres	Retail/Ent	3/27/2006
0192014	Chinese Hospital	Northeast	68,010	0	CIE	CIE	6/26/2008
8711014	1000 FOURTH STREET (BL	Mission Bay	0	134	Resident	N/A	9/1/2010
0250001	1401 CALIFORNIA ST	Northeast	-19,056	95	Mixres	Retail/Ent	10/20/2008
3707052	2 NEW MONTGOMERY ST	TB Combo	0	125	Resident	N/A	12/4/2007
3912001	1-25 Division Street	Showpl/Potrero	-35,453	100	Mixres	Retail/Ent	1/26/2006
1073013	800 PRESIDIO AV	Richmond	10,180	83	Mixres	CIE	3/16/2011
3740027	SPEAR STREET AND FOLS	TB Combo	0	85	Resident	N/A	6/8/2007
9900041H	1/2-PIER 33	Northeast	12,990	0	PDR	PDR	8/27/2008
4045002	740 ILLINOIS ST and 2121	Central Waterfront	-8,500	70	Resident	N/A	2/12/2010
3543011	2175 MARKET ST	Market Octavia	5,813	60	Mixres	Retail/Ent	8/31/2006
3703012	527 STEVENSON ST	Downtown	-44,390	67	Mixres	Retail/Ent	10/19/2010
0619009	1800 Van Ness Ave.	Northeast	-1,050	62	Mixres	Retail/Ent	2/1/2011
3753005	205 SHIPLEY ST	East SoMa	-11,000	51	Mixres	Retail/Ent	5/26/2006
3731001	200-214 6th St	East SoMa	3,074	50	Mixres	Retail/Ent	2/9/2011
Tuesday, Ju	ine 07, 2011				Quarter	1, 2011 List, I	Page 7 of 8

Block Lot	Address	District !	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
0855011	4 OCTAVIA ST	Market Octavia	3,530	49	Mixres	Retail/Ent	10/6/2008
0318020	651 GEARY ST	Downtown	-8,010	46	Mixres	Retail/Ent	8/15/2008
3532091	245 VALENCIA ST	Market Octavia	13,256	0	CIE	CIE	8/12/2010
4591A010	SHIPYARD PARCEL 54	Other S Bayshore	0	50	Resident	N/A	6/8/2007
3534069	25 DOLORES ST	Market Octavia	-19,037	47	Resident	N/A	8/28/2008
1450008	5400 GEARY BL	Richmond	-10,748	39	Mixres	Retail/Ent	4/18/2007
3115043	625 MONTEREY BL	Ingleside, Other	21,378	0	Retail/Ent	Retail/Ent	5/26/2010
1101007	1301 DIVISADERO ST	Western Addition	-13,264	32	Resident	N/A	9/1/2010
3576001	2100 MISSION ST	Mission	-4,987	29	Mixres	Retail/Ent	9/21/2009
6935001	1607-1649 Ocean Ave.	Balboa Park	-19,485	31	Resident	N/A	5/4/2006
0853021	102-104 OCTAVIA STREET	Market Octavia	0	30	Resident	N/A	6/8/2007
3752023	397 05TH ST	WSoMa	5,000	24	Mixres	Retail/Ent	9/24/2007
0670024	1433 BUSH ST	Downtown	-4,420	26	Mixres	Retail/Ent	11/17/2009
0281003	832 SUTTER ST	Downtown	1,176	27	Mixres	Retail/Ent	8/24/2008
0028014	1255- 1275 COLUMBUS A	Northeast	-9,352	20	Mixres	Retail/Ent	7/29/2009
3148001	4550 MISSION ST	South Central, Other	-3,250	17	Mixres	Retail/Ent	7/19/2006
0194009	740 WASHINGTON ST	Northeast	-9,050	18	Mixres	CIE	2/28/2007
0640010	1990 CALIFORNIA ST	Marina	0	11	Resident	N/A	5/15/2008
3721019	562 HOWARD ST	TB Combo	0	19	Mixres	Retail/Ent	10/3/2007
5457037	2895 SAN BRUNO AV	South Central, Other	10,978	10	Mixres	MIPS	7/29/2010
3732112	452 TEHAMA ST	East SoMa	-4,917	20	Mixres	Retail/Ent	6/22/2007
3965001	2401 16TH ST	Mission	1,722	12	Mixres	MIPS	10/9/2008
1018012	3657 SACRAMENTO ST	Richmond	0	18	Resident	N/A	11/20/2007
0729046	1210 SCOTT STREET	Western Addition	0	18	Resident	N/A	6/8/2007
3753140	935 FOLSOM ST	East SoMa	-13,808	69	Mixres	Retail/Ent	4/19/2010
3727004	150 07TH ST	WSoMa	10,808	0	Retail/Ent	Retail/Ent	4/2/2007
5869014	4199 MISSION ST	South Central, Other	600	12	Mixres	Retail/Ent	8/5/2008
2901C001	701 PORTOLA DR	Inner Sunset	10,265	0	Retail/Ent	Retail/Ent	1/28/2011
3733008	250 4TH ST	South of Market, Othe	r 72,660		Visitor	Visitor	1/14/2011

Tuesday, June 07, 2011 Quarter 1, 2011 List, Page 8 of 8

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

Ross Mirkarimi

Planning Commission

Christina Olague, President

Ron Miguel, Vice President

Michael Antonini

Gwyneth Borden

Rodney Fong

Kathrin Moore

Hisashi Sugaya

Planning Department

John Rahaim, Planning Director

Teresa Ojeda, Information and Analysis Group Manager

Aksel Olsen, Project Manager

Johnny Jaramillo

Michael Webster

Alton Chinn

Gary Chen

Scott Dowdee