Third Quarter 2013

San Francisco PIPELINE REPORT

San Francisco Planning Department

December 2013

Cover Photo: Intersection, at Market at Buchanan and Dolores. Source: Aksel Olsen

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WHAT IS THE PIPELINE?

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

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. This report counts *net change*, or new space or units minus existing space lost through conversion or demolition.

Time Frame and Certainty of Development

As the pipeline spans the entire project development life cycle for small and large projects ranging from addition of an extra unit in the rear yard to multi-structure complexes of residential and commercial development needing environmental impact reports and transportation studies, it follows that the entitlement and ultimate actualization of some projects is several years and occasionally decades into the future, while some projects are abandoned altogether prior to receiving a permit or completion. The pipeline, then, represents a particular scenario that assumes that all proposed development projects are eventually entitled and all entitled development projects eventually built. In reality, this is not the case.

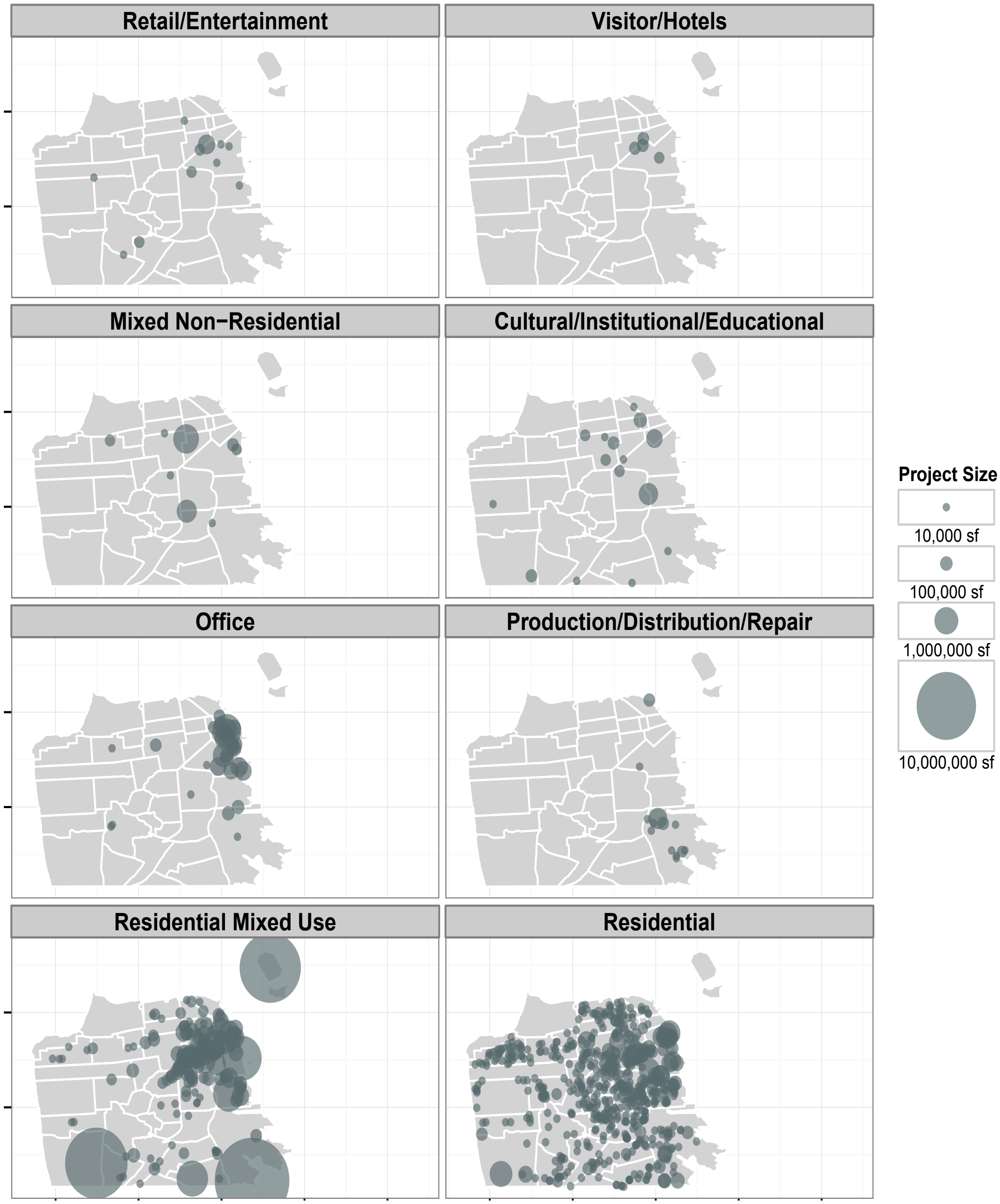
The Relevance of the Pipeline

The pipeline serves as a barometer of development trends in the medium to long term time horizon. It illustrates the location and scale of current and proposed future construction and reveals where new land uses are being established; it also records demolition and a partial listing of conversion of existing land uses. In sum, the pipeline provides a short- to medium-term picture of changing land uses, specifically tracking the changes to the city's housing stock and commercial uses. This report is meant to be a short overview.

Accuracy and Timeliness

The pipeline is compiled and consolidated from different data sources and is subject to errors due to varying accuracy and currency of original sources. The data in this report is pulled from original sources current through September 30, 2013. 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.*

Map 1. General Overview of Magnitude and Location of Development, by Major Land Use Type



The discovery of a processing error related to changes in the parcel keys in the base map has led to the inclusion of more projects from the Department of Building Inspection's database since the last quarter. This has led to extra projects primarily in the building permiting stage (1,300 new units) and an additional 110 units undergoing construction. Geographically, these units are predominantly in Mission Bay (623 extra units) and Transbay (280 extra units). This should be taken into account when comparing this report to earlier releaases. We apologize for the omission.

THE DEVELOPMENT PIPELINE

There are currently just below 900 projects in the pipeline. Of these, 73 percent are exclusively residential and 18 percent are mixed-use projects with both residential and commercial components. Only 9 percent of projects are non-residential developments. Map 1 (left) gives the general location and magnitude of this development across is many stages.

A net total of 50,600 new housing units would be added to the city's housing stock according to current data. This is 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. These projects, as well as their expected development over the course of decades must be kept in mind when considering the overall totals. The vast majority of pipeline projects, however, are small scale consisting of one to three units. The number of filings for new projects slowed down during the Great Recession of 2007-2009 and beyond, but has since revovered in earnest as evidenced by both new project applications as well as the construction of projects with dated entitlements. The "hot spot" for much of this development remains in the Mid Market area. While this may seem a response to the recent introduction of technology comanies in the area, most projects here predate the last recession.

Projects by Overall Status

Table 1 shows the following:

- Around 18 percent of all projects, representing 6,100 net added housing units and 900,000 sq ft of commercial space, are under construction.
- Around 23 percent of projects (with another 4,700 net units and 3,1 million sq. ft. of commercial space) have received building permit approvals. As of the time of writing, some may have moved to the construction phase.
- Around one in three projects (including 4,700 net new units and an addition of 2 million sq ft of commercial space) have filed building permit applications with the Department of Building Inspections. These projects have predominantly received entitlements by the Planning Department.
- Thirteen percent of the pipeline projects and 54 percent of the units have received Planning Department approvals. If built as proposed over time, these projects would add some 27,300 new units to the city's housing stock, and up to 6 million sq ft of commercial space. These projects now must secure building permits.
- Thirteen percent of projects, representing 7,100 units and 3.7 million commercial square feet are under initial Planning Department review.

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	107	7,650	2,512,000	0	0	2,885,000	-426,000	397,000	-350,000
Approved by Planning	116	27,280	6,034,000	185,000	12,000	3,029,000	337,000	2,023,000	442,000
BP Filed	300	4,750	1,964,000	962,000	0	961,000	31,000	131,000	-121,000
BP Approved/ Issued/Re-Instated	205	4,740	3,120,000	21,000	-45,000	3,044,000	14,000	97,000	-10,000
Construction	172	6,180	911,000	454,000	0	507,000	-191,000	67,000	63,000
Grand Total	**900**	**50,600**	**14,541,000**	**1,622,000**	**-33,000**	**10,427,000**	**-235,000**	**2,715,000**	**24,000**

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.

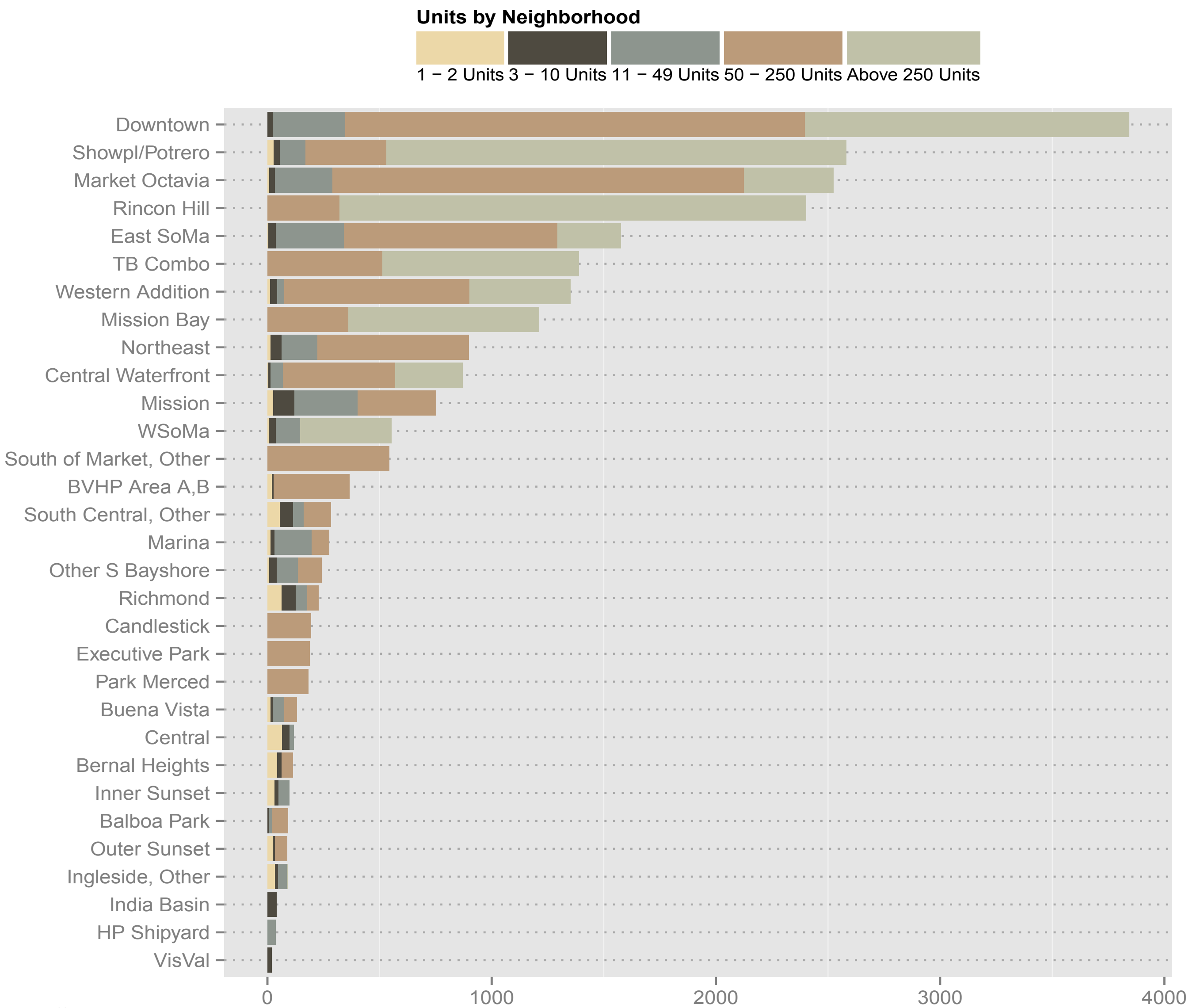
Table 2. Residential and Commercial Pipeline, by Neighborhood

Neighborhood	Projects	Percent	Net Units	Percent	Avg Units / Project	Net Comm'l Sq. Ft.	Residential Rank	Commercial Rank
Balboa Park	5	1%	90	0%	18	9,480	28	19
Bernal Heights	38	4%	110	0%	3	165,930	25	12
Buena Vista	19	2%	130	0%	7	-20,010	23	29
BVHP Area A,B	35	4%	370	1%	11	421,440	18	10
Candlestick	3	0%	10,430	21%	3,477	4,110,000	1	1
Central	77	9%	120	0%	2	11,880	24	18
Central Waterfront	15	2%	870	2%	58	-218,410	15	31
Downtown	45	5%	3,940	8%	94	1,124,070	4	4
East SoMa	37	4%	1,580	3%	43	577,330	9	7
Executive Park	2	0%	190	0%	94	0	22	22
HP Shipyard	3	0%	40	0%	12	0	31	22
India Basin	5	1%	40	0%	8	-2,560	30	25
Ingleside, Other	36	4%	110	0%	3	40,280	25	14
Inner Sunset	36	4%	100	0%	3	5,250	27	21
Japantown	2	0%	0	0%	0	13,400	33	17
Marina	33	4%	270	1%	8	-13,590	19	27
Market Octavia	45	5%	2,530	5%	56	-309,420	6	33
Mission	72	8%	750	1%	10	-15,650	16	28
Mission Bay	8	1%	1,210	2%	151	959,940	12	5
Northeast	45	5%	900	2%	20	-237,960	14	32
Other S Bayshore	20	2%	240	0%	12	6,460	20	20
Outer Sunset	24	3%	90	0%	4	18,780	29	16
Park Merced	2	0%	5,860	12%	2,930	478,380	3	9
Richmond	83	9%	230	0%	3	26,690	21	15
Rincon Hill	9	1%	2,400	5%	267	-124,950	7	30
Showpl/Potrero	46	5%	3,680	7%	80	555,910	5	8
South Central, Other	69	8%	1,200	2%	17	115,910	13	13
South of Market, Other	5	1%	2,040	4%	409	2,050,560	8	3
TB Combo	12	1%	1,390	3%	116	3,635,760	10	2
Treasure Island	1	0%	7,800	16%	7,800	381,000	2	11
VisVal	4	0%	20	0%	5	-1,250	32	24
Western Addition	39	4%	1,330	3%	34	-7,580	11	26
WSoMa	25	3%	550	1%	22	783,600	17	6
Grand Total	**900**	**100%**	**50,520**	**101%**	**15,758**	**14,531,190**		

Amount and Type of Net New Commercial Space

Projects in the current pipeline as noted also represent a potential net addition of 14.5 million sq ft of commercial development that would result in the following land use inventory *changes*:

- 10.4 million sq ft of office space
- 2.7 million sq ft of retail space
- 20,000 sq ft of visitor-serving uses, such as hotels or hostels.
- 1.6 million sq ft of cultural, institutional, educational (CIE) and medical space
- An overall loss of around 230,000 sq ft of space for production, distribution and repair (PDR).



Note:
The three largest projects (Candlestick, Parkmerced, Treasure Island) are not included in the data behind this chart for readability.

Location of New Development

Table 2 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 about half of all net additional units in the pipeline. (See Map 3 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.

Figure 2. Residential Pipeline Size Distribution, by Zoning Category

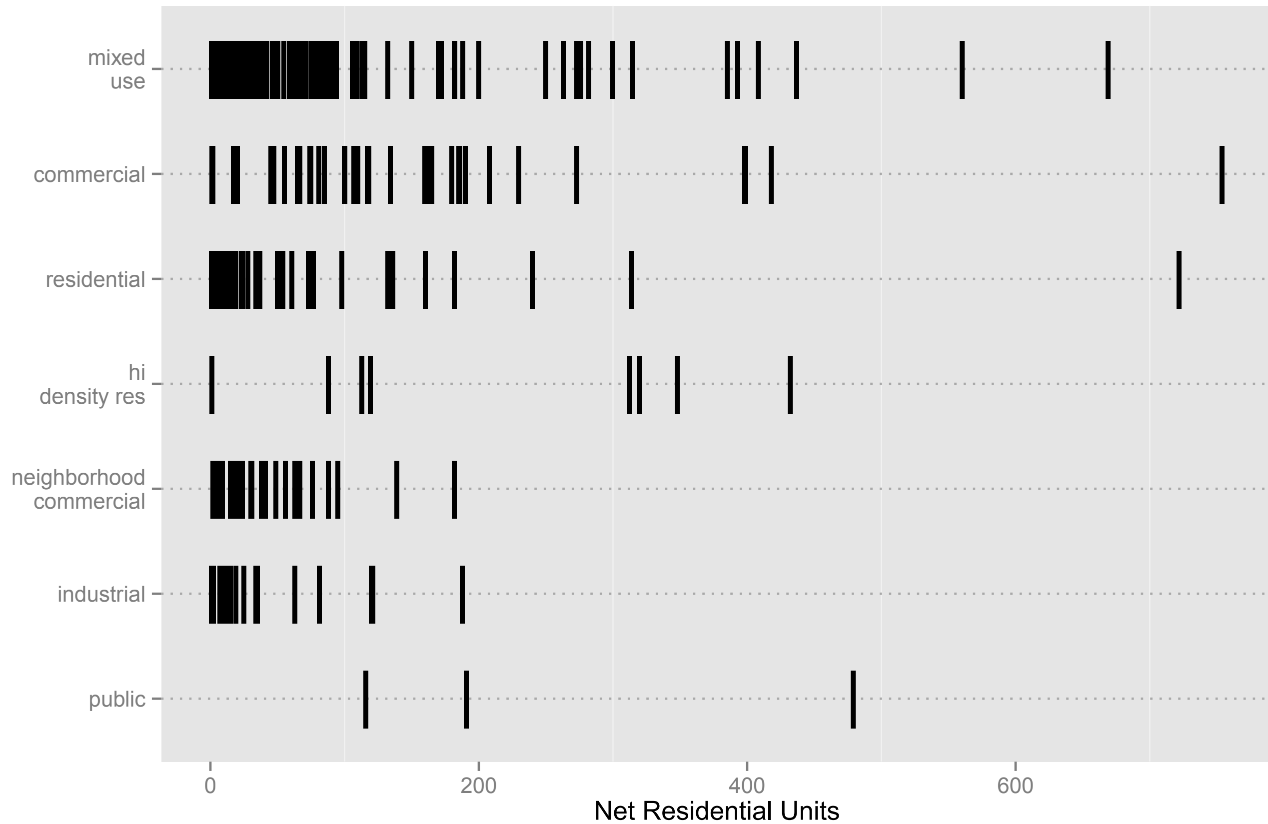
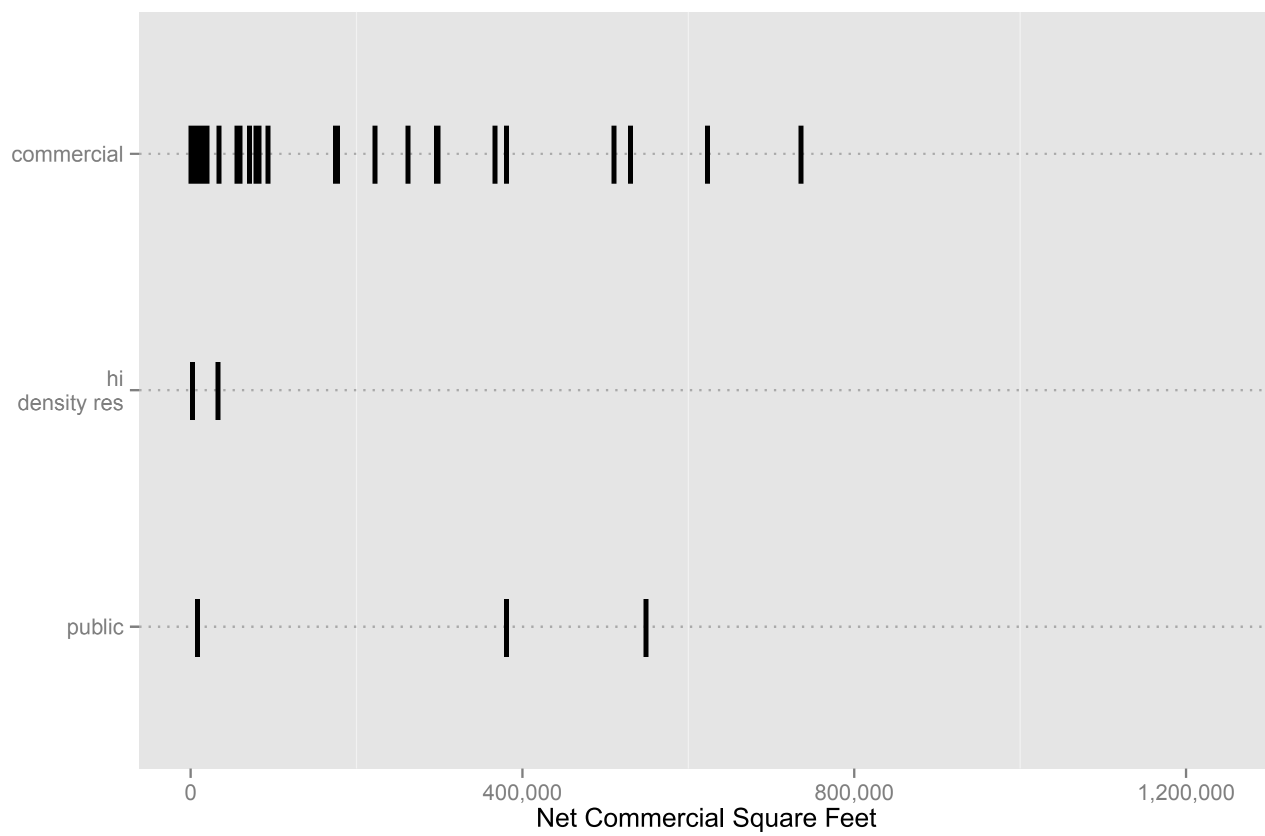


Figure 3. Non-Residential Pipeline Size Distribution, by Zoning Category



Note: Figure 2 and Figure 3 show each project plotted along an axis showing project size, by general zoning type. Projects plotted are truncated to the 99th percentile for readability.

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.

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.

Residential Pipeline

Figures 2 and 3 give details on the size distribution for residential and non-residential projects, respectively, using plots where the position of each vertical bar represents the size of a development project, measured in square feet (a more rightward position means a larger project).

Per the top panel, the largest projects are found in

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	24	3,608	106,680	0	0	-222,000	-77,000	395,000	11,000
	C-3	31	1,918	2,360,080	102,000	0	1,899,000	2,000	187,000	170,000
	C-M	1	117	300	0	0	2,000	-4,000	2,000	0
Neighborhood Commercial	NC	22	294	-31,930	0	0	4,000	-42,000	6,000	0
	NCT	20	831	59,380	13,000	0	1,000	-2,000	42,000	5,000
Industrial	M	7	1,942	1,970,500	8,000	0	1,700,000	13,000	250,000	0
	PDR	19	89	398,233	0	0	247,000	137,000	14,000	0
	SLI	6	19	671,170	0	0	695,000	-33,000	10,000	0
	HP-RA	13	247	0	0	0	0	0	0	0
Mixed Use	CRNC	1	0	68,010	68,000	0	0	0	0	0
	MUG	2	42	-29,610	0	0	0	0	3,000	-32,000
	MUO	10	209	636,880	0	0	613,000	-75,000	43,000	50,000
	MUR	14	1,151	-90,540	0	0	-16,000	-99,000	24,000	0
	NC	86	900	55,730	5,000	-45,000	104,000	-9,000	17,000	-16,000
	NCT	23	732	61,910	72,000	0	5,000	-8,000	-17,000	0
	RC	23	1,622	678,950	924,000	0	-50,000	38,000	-4,000	-228,000
	RSD	2	23	-6,120	0	0	0	-6,000	0	0
	SLR	15	544	83,420	0	0	16,000	-2,000	65,000	0
	SPD	2	2	3,720	0	0	4,000	-1,000	1,000	0
	SSO	1	0	32,500	0	0	-14,000	0	5,000	41,000
	UMU	39	3,584	-54,790	0	0	212,000	-343,000	76,000	0
	MB	8	1,361	578,950	0	0	562,000	0	17,000	0
	CCB	1	1	0	0	0	0	0	0	0
Public	P	8	18,823	6,661,520	428,000	0	4,456,000	394,000	1,043,000	341,000
Residential	DTR	1	74	0	0	0	0	0	0	0
	NCT	1	25	3,650	0	0	0	0	4,000	0
	RED	8	57	-9,380	0	0	0	-9,000	0	0
	RH	397	936	176,050	-42,000	0	215,000	-9,000	28,000	-16,000
	RM	76	9,472	305,150	54,000	12,000	79,000	-9,000	469,000	-300,000
	RTO	31	245	-24,820	-8,000	0	-21,000	-19,000	24,000	0
Hi Density Res	DTR	8	1,733	-124,950	0	0	-66,000	-71,000	12,000	0
Grand Total		**900**	**50,601**	**14,540,660**	**1,622,000**	**-33,000**	**10,427,000**	**-235,000**	**2,715,000**	**24,000**

mixed use, commercial and resizential zone classes. While these projects have large projects, there is tremendous variation *within* these districts as well, as seen by the distance between the vertical lines. Projects in residential districts, on the other hand, are far more homogenous, with the vast majority of projects consisting of fewer than 5 units. In the residential districts, there are a number of projects substantially larger than the rest, as seen from the outliers.

The lower panel analogously shows the size distribution for commercial projects, with lands zoned "public" accounting for the largest sizes, but note that this includes only a handful of projects.

Table 3 also shows the overall pipeline distribution by zoning categories, but with more detail. 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.[1] These projects could add more than 18,200 units.

Residential projects on *residentially* zoned lots, representing the largest number of projects, account for 10,200 units, or the second largest class. 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 some 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 10,200 units in 223 projects.

Residential projects on downtown commercial zoned lots would add 5,600 new units in 53 projects, although some of these may be commercial only projects.

Another 2,300 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 typically accompanied by loss of PDR space and addition of retail space (see Table 5).

Projects in neighborhood commercial districts would add 1,100 units in 42 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 44 percent of proposed projects but just 2 percent of the total units (or 748 net units) in the pipeline. Projects on RM-zoned (multi-family) lots, in turn, account for 8 percent of projects and 19 percent of units, again largely because of a large project, the Parkmerced re-design 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[2]; thus the majority of commercial space are proposed to be added in these land classes.

The commercial pipeline (counting by project type, not zoning district) 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 100 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 classified under public zoning[3]. Development here would add some net 6.7 million square feet, or 42 percent

1 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.

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

3 See Footnote 1.

of all proposed commercial development, in just eight projects. The largest of these proposed developments is the Bayview Waterfront Project which would add millions of commercial square feet..

Downtown Commercial districts account for a sizable concentration of non-residential development, with 3 million square feet in 56 projects. The mixed use districts account for a larger *number* of projects (even if this count may include projects that are exclusively residential) totalling 1.9 million square feet. 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.

Residential Pipeline by Project Size

Table 4 shows the residential pipeline by neighborhood, and offers detail on the project size.[4]

Project sizes vary by area. Thus we see that, for

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

Table 4. Projects by Neighborhood and Building Size

	Project Size								
Neighborhood	*Single Family*	*2-9 Units*	*10-19 Units*	*20-49 Units*	*50-99 Units*	*100-249 Units*	*Above 250*	*Grand Total*	*Rank*
Balboa Park	0	8	13	0	71	0	0	92	29
Bernal Heights	11	63	0	0	50	0	0	124	26
Buena Vista	3	33	28	24	56	0	0	144	25
BVHP Area A,B	6	30	0	0	73	309	0	418	19
Candlestick	0	0	0	0	63	132	10,500	10,695	1
Central	19	139	18	0	0	0	0	176	24
Central Waterfront	2	13	16	39	297	215	300	882	15
Downtown	0	28	17	322	477	1,621	1,445	3,910	5
East SoMa	3	28	42	214	381	610	282	1,560	10
Executive Park	0	0	0	0	81	107	0	188	23
HP Shipyard	0	0	36	0	0	0	0	36	31
India Basin	0	40	0	0	0	0	0	40	30
Ingleside, Other	13	43	11	53	0	0	722	842	16
Inner Sunset	14	37	25	34	0	0	0	110	27
Marina	6	54	25	142	77	0	0	304	20
Market Octavia	0	63	45	232	302	1,535	399	2,576	6
Mission	5	153	100	221	236	114	0	829	17
Mission Bay	0	0	0	0	0	360	851	1,211	13
Northeast	1	91	18	165	232	443	0	950	14
Other S Bayshore	5	41	0	94	106	0	0	246	22
Outer Sunset	5	40	0	0	55	0	0	100	28
Park Merced	0	0	0	0	0	182	8,898	9,080	2
Richmond	7	187	13	39	50	0	0	296	21
Rincon Hill	1	0	0	0	88	232	2,081	2,402	7
Showpl/Potrero	3	74	27	89	159	200	3,751	4,303	4
South Central, Other	25	106	22	35	122	0	1,700	2,010	9
South of Market, Other	0	0	0	0	0	544	1,500	2,044	8
TB Combo	0	0	0	0	140	372	877	1,389	11
Treasure Island	0	0	0	0	0	0	8,619	8,619	3
VisVal	0	24	0	0	0	0	0	24	32
Western Addition	6	64	31	0	346	240	564	1,251	12
WSoMa	4	28	53	84	0	0	408	577	18
Grand Total	**139**	**1,387**	**540**	**1,787**	**3,462**	**7,216**	**42,897**	**57,428**	

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.

Figure 4. Residential Pipeline, by Status & Building Size

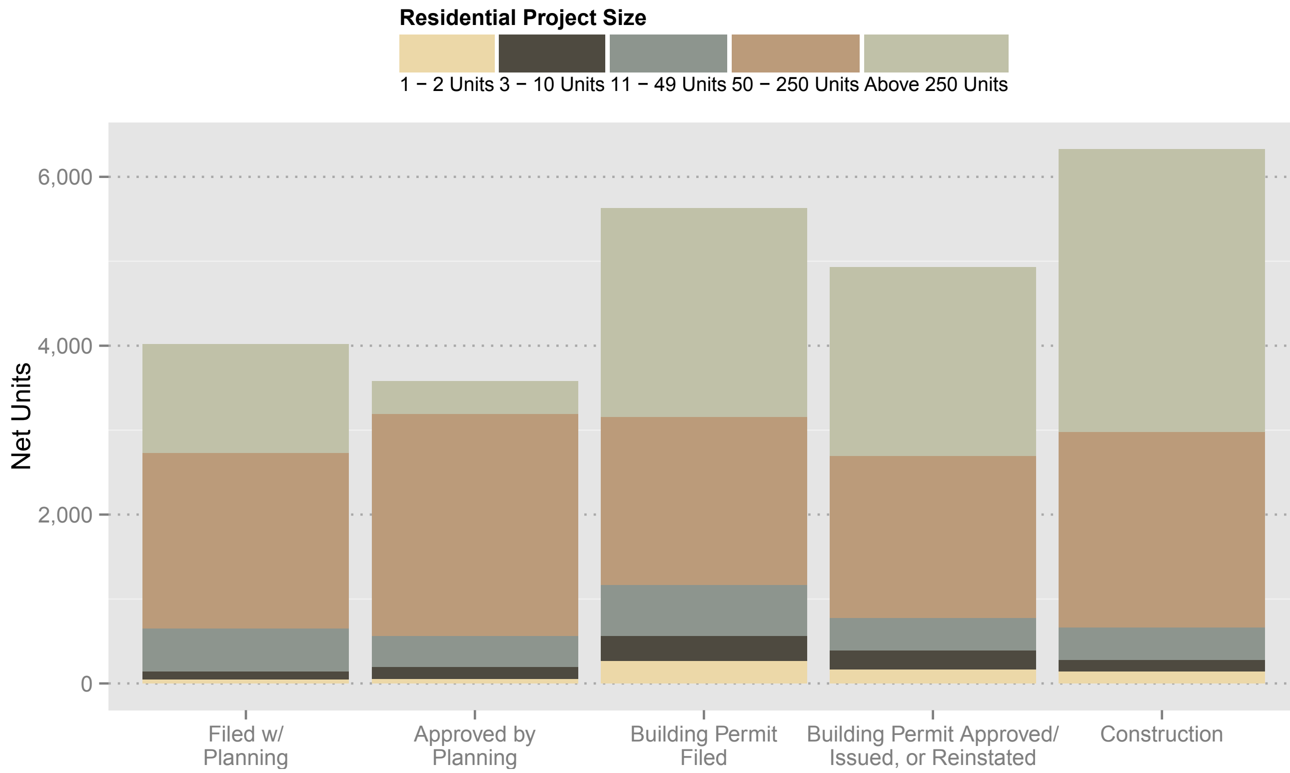
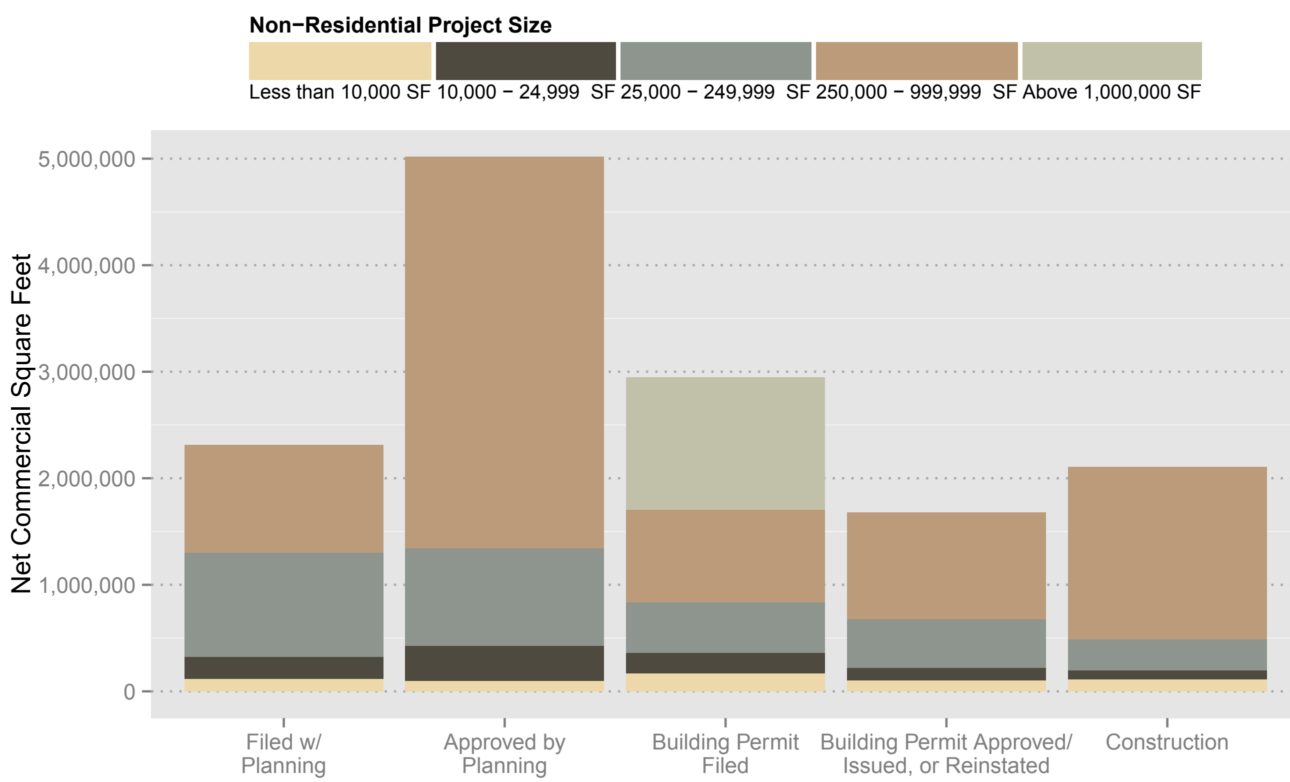


Figure 5. Non-Residential Pipeline, by Status & Building Size



Note: Figure 4 and Figure 5 show each project plotted along an axis showing project size, by general zoning type. Projects plotted are truncated to the 99th percentile for readability.

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 the Transbay area 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, roughly three out of every four units come in a relative small number of projects. This implies most areas of the city have 'modest' amounts of development, given its relative concentration.

By the same token, if we sum the units of the bottom half of all pipeline projects would contribute 3,400 units, or seven percent of the total number of pipeline units. Summing just the five neighborhoods with the biggest number of proposed units yields some 63 percent of all proposed development.

Perhaps 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 and Status of Development

Per Figure 4 and Figure 5, there is some variation in project size by stage of development. Currently, a sizeable share of residential construction falls in the largest size category, reflecting in part that a significant number of large projects have been entiled for years and construction deferred during the Great Recession. Once economic conditions improved, these projects entered construction. The pattern on the non-residential side is somewhat less "top heavy," with bigger projects found in earlier stages of development, likely attributable to the focus on residential rather than commercial development in recent years.

Conversion of Commercial Space to Residential Use[5]

There are 49 projects in the current pipeline database proposing demolition or conversion of existing production, distribution and repair-use (PDR) buildings to residential use. The corresponding figure for the conversion of office space is 34 projects. These projects represent approximately ten percent with or 3,000 units and 3,400 units, respectively, of the residential units in the pipeline.

Conversion of PDR Space

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

- If the pipeline were developed as proposed, about 750,000 sq ft of PDR space would be lost to conversion or demolition.[6] It would be replaced with residential units (3,300) and/or other commercial uses.
- Most of the PDR to residential conversions are found in Central Waterfront, Showplace/Potrero Hill and East SoMa districts, accounting together for more than six out of 10 converted square feet. The loss of PDR space in these neighborhoods would in turn bring in 2,000 net new housing units.

Conversion of Office Space

- Approximately 1.1 million 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 due to the concentration there. Table 6 shows that Market Octavia could see a loss of

5 Numbers represented here differ from those reported in Table 1. Table 1 represents the net change of all projects whereas numbers here are limited to the specific projects representing conversions or demolitions resulting in a net loss of PDR space (Table 6) and office space (Table 7).

6 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.

Table 5. PDR Space Conversion to Residential Use, by Planning District

Neighborhood	Projects	Percent	Net Units	Percent	PDR Net	Percent
BVHP Area A,B	1	2%	10	0%	-3,900	1%
Central Waterfront	8	15%	770	23%	-184,800	25%
Downtown	3	6%	230	7%	-64,100	9%
East SoMa	14	26%	670	20%	-106,700	14%
India Basin	1	2%	0	0%	-2,600	0%
Market Octavia	2	4%	120	4%	-20,900	3%
Mission	11	21%	220	7%	-65,900	9%
Northeast	3	6%	160	5%	-48,000	6%
Richmond	1	2%	0	0%	-2,100	0%
Rincon Hill	2	4%	550	16%	-70,900	9%
Showpl/Potrero	4	8%	580	17%	-168,900	22%
WSoMa	3	6%	40	1%	-13,800	2%
Grand Total	**53**	**100%**	**3,350**	**100%**	**-752,600**	**100%**

Table 6. Office Space Conversion to Residential Use, by Planning District

Neighborhood	Projects	Percent	Net Units	Percent	Office Net	Percent
Downtown	7	19%	500	14%	-245,600	22%
East SoMa	2	6%	150	4%	-6,700	1%
Inner Sunset	1	3%	20	1%	-2,200	0%
Market Octavia	7	19%	1,140	32%	-475,900	42%
Northeast	4	11%	140	4%	-33,500	3%
Rincon Hill	3	8%	760	21%	-90,400	8%
Showpl/Potrero	2	6%	140	4%	-28,200	2%
South Central, Other	2	6%	10	0%	-3,900	0%
South of Market, Other	1	3%	210	6%	-20,800	2%
TB Combo	2	6%	250	7%	-192,300	17%
Western Addition	3	8%	240	7%	-30,700	3%
WSoMa	2	6%	10	0%	-2,400	0%
Grand Total	**36**	**100%**	**3,560**	**100%**	**-1,132,700**	**100%**

nearly 500,000 square feet of office. This is predominantly due to the conversion of the Triple-A building to residential use. For the neighborhood as a whole, 1,000 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.

PAST YEAR ACTIVITY

Project Application Filings

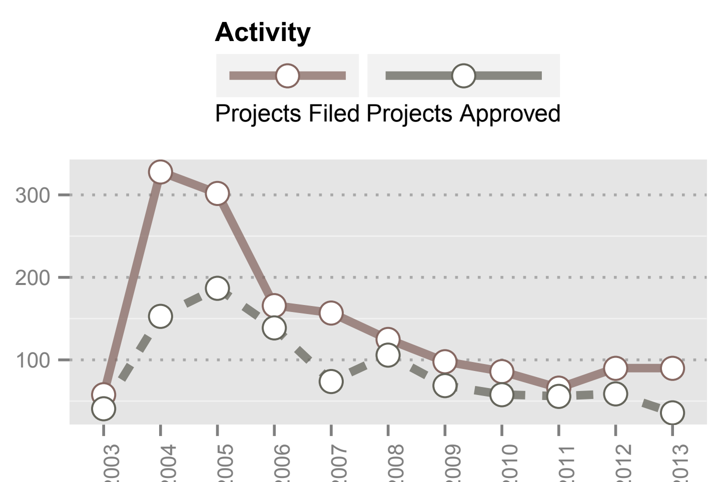
Table 7 shows that a total of 33 planning applications were filed in the last quarter of 2013, up from 25 a year before. Corresponding to these 33 projects is a count of 830 residential units but a net negative 100,000 sq. ft. of non-residential commercial development. While this represents a slowdown from the strong second quarter, it is not unusual for the third quarter to show less activity than the main summer quarter. There is still a sizeable reservoir of projects which can maintain high levels of construction for the foreseable future.

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 larger projects filed during the third quarter of 2013 include:

- At 1301 16th Street, the proposed project would involve demolition of an existing one-story warehouse and construction of a new 7-story, residential building. The building would consist of seven residential levels with 276 units, ground floor parking and mechanical spaces. The project would provide from 56 to 82 off-street parking spaces.
- At 103 Polk Street, sponsor would erect a 13 story building with 162 dwelling units, with on-site office space.
- At 750 Harrison Street, the proposed project would invove demolition of the existing one-story commercial building (constructed in 1954) and construction of a new eight-story, residential building. The building would consist of seven residential levels with 77 units over ground floor retail.
- At 901 Tennessee Street, the proposed project would include demolition of an existing one-story warehouse and construction of a new four-story, residential building. The building comprises four residential levels with 39 units over basement level with 30 parking spaces.

Figure 6. Pipeline Over Time: a) Projects Filed / Approved; b) Units Filed / Approved



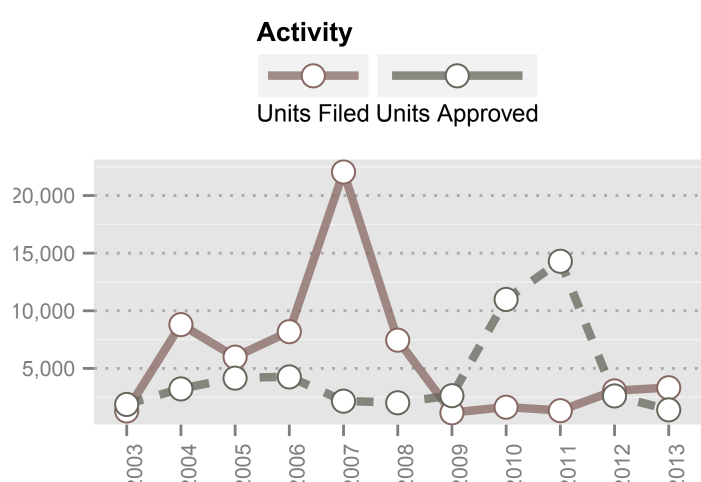


Table 7. Pipeline Projects Filed With and Approved by the Planning Department

	Filed				Approved			
Quarter Filed	*Projects*	*Net Units*	*Avg Units/Project*	*Net Sq. Ft*	*Projects*	*Net Units*	*Avg Units/Project*	*Net Sq. Ft*
2003 Q4	56	1,330	24	402,000	40	1,890	47	206,000
2004 Q1	61	1,130	19	73,000	33	2,060	62	669,000
2004 Q2	81	2,090	26	311,000	51	440	9	364,000
2004 Q3	103	3,130	30	492,000	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	840	11	291,000	48	1,500	31	76,000
2005 Q3	73	2,120	29	398,000	50	1,300	26	713,000
2005 Q4	79	1,660	21	1,241,000	41	890	22	468,000
2006 Q1	45	2,820	63	480,000	49	1,570	32	116,000
2006 Q2	28	1,850	66	85,000	35	640	18	178,000
2006 Q3	54	2,590	48	1,157,000	31	1,580	51	352,000
2006 Q4	39	950	24	2,136,000	24	500	21	347,000
2007 Q1	32	800	25	137,000	19	840	44	168,000
2007 Q2	28	310	11	1,063,000	22	910	41	47,000
2007 Q3	53	20,020	378	4,089,000	16	170	11	1,061,000
2007 Q4	44	930	21	125,000	17	270	16	59,000
2008 Q1	37	6,040	163	992,000	24	360	15	65,000
2008 Q2	32	380	12	760,000	25	350	14	277,000
2008 Q3	31	750	24	1,791,000	23	310	13	4,000
2008 Q4	25	300	12	25,000	34	1,030	30	876,000
2009 Q1	23	260	11	195,000	22	290	13	35,000
2009 Q2	25	330	13	100,000	20	480	24	82,000
2009 Q3	29	230	8	10,000	11	1,320	120	48,000
2009 Q4	21	340	16	166,000	15	550	37	87,000
2010 Q1	19	280	15	13,000	12	180	15	147,000
2010 Q2	21	950	45	790,000	19	10,590	557	3,630,000
2010 Q3	26	70	3	17,000	12	140	12	33,000
2010 Q4	20	350	18	7,000	14	100	7	662,000
2011 Q1	23	610	27	57,000	12	5,700	475	480,000
2011 Q2	18	20	1	7,000	18	8,280	460	656,000
2011 Q3	12	470	39	38,000	12	40	3	6,000
2011 Q4	13	250	19	1,462,000	13	220	17	27,000
2012 Q1	24	1,600	67	1,321,000	12	130	11	18,000
2012 Q2	27	1,230	46	79,000	14	670	48	150,000
2012 Q3	25	30	1	916,000	12	500	42	198,000
2012 Q4	14	210	15	175,000	20	1,330	67	87,000
2013 Q1	24	540	23	181,000	12	510	43	533,000
2013 Q2	33	1,980	60	2,587,000	16	680	43	442,000
2013 Q3	33	830	25	-108,000	18	460	26	335,000

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.

Notes:
2013 includes data for the the first two quarters.

Figure 7. Months to Completion from First Filing, By Use Type and Project Size

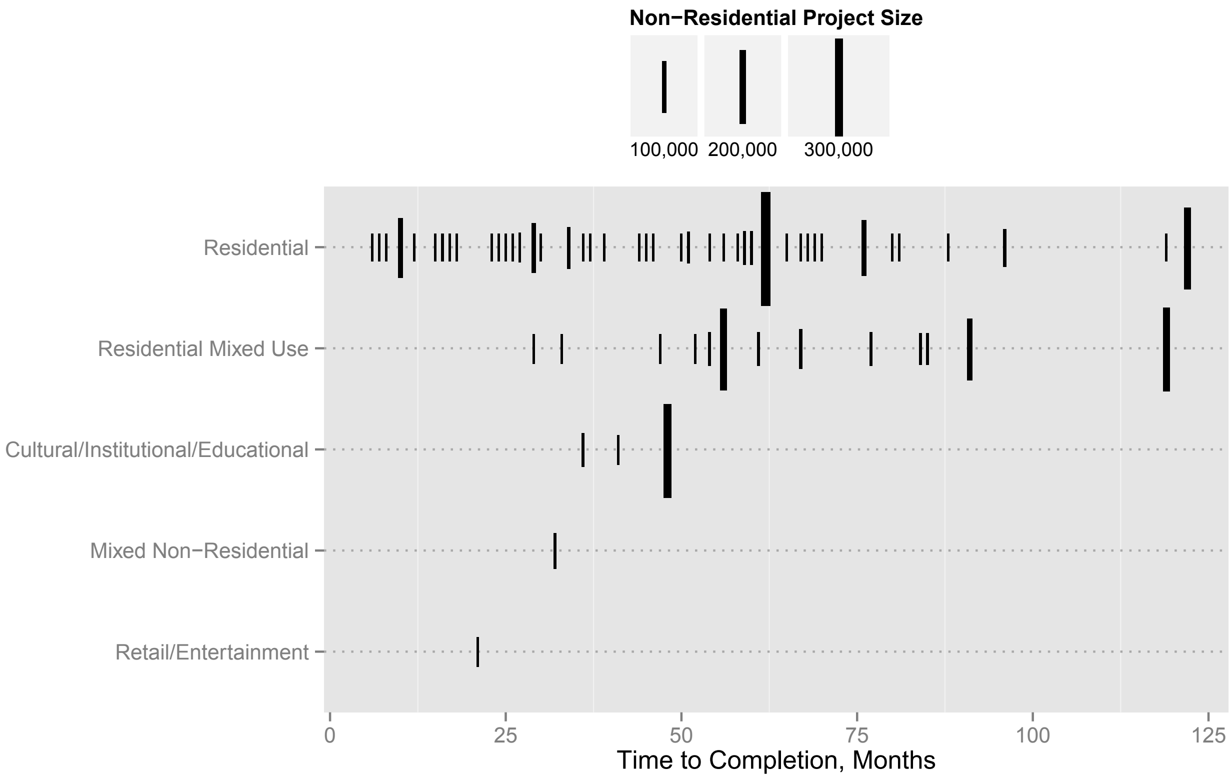


Table 8. Projects Completed Past Year, By Use Type

Land Use	*Projects*	*Net Units*	*Net Comm'l Sq. Ft.*
Mixres	15	620	-38,000
Resident	71	1,010	-241,000
CIE	3	0	71,000
Mixed	1	0	15,000
Retail/Ent	1	0	10,000
Grand Total	**91**	**1,630**	**-183,000**

Completed Projects

Table 8 shows that the past four quarters resulted in a net addition of 1,630 units to the city's housing stock, while there was a slight reduction in non-residential space. This change often came in the form of conversions, and was assocated with an overall loss of commercial space of around 180,000 non-residential space. The median time to completion for these projects from the first filing was 44 months. Smaller projects less than 10,000 sq ft had a median completion time of 36 months, while those larger than 250,000 sq. ft. took 72 months to completion. The largest median completion time was seen for projects comprising between 100 and 249 units, which was counted at 91 months.[7] These times may well reflect a strong recession effect on the current completion cohort. A project sponsor may well have delayed construction for several years due to market and/or financing considerations.

7 Certificate of Final Completions will occasionally lag the actual completion time and/or may be recorded on a different permit application finalizing work authorized per an older permit, so these figures should be taken as approximations.

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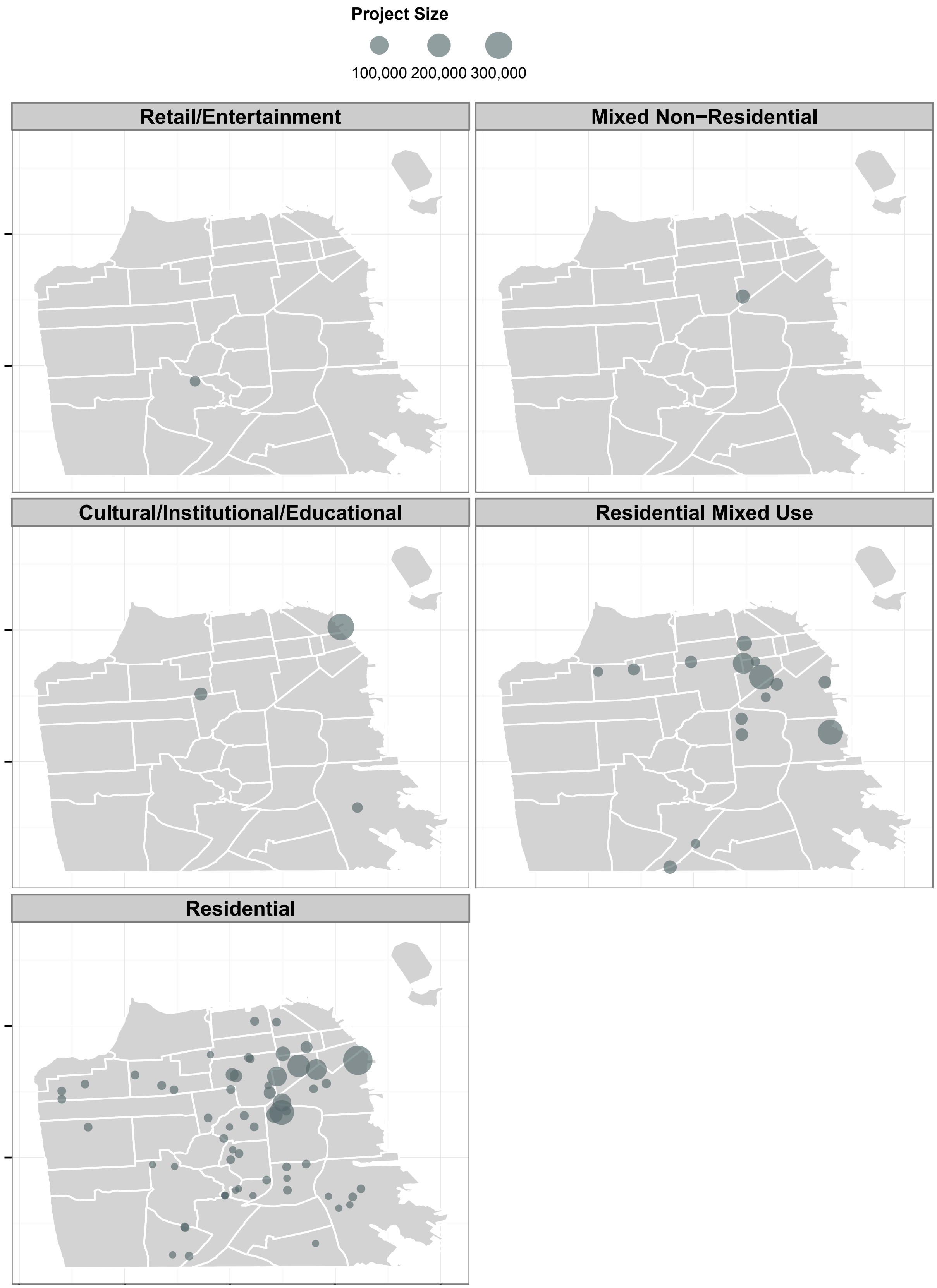
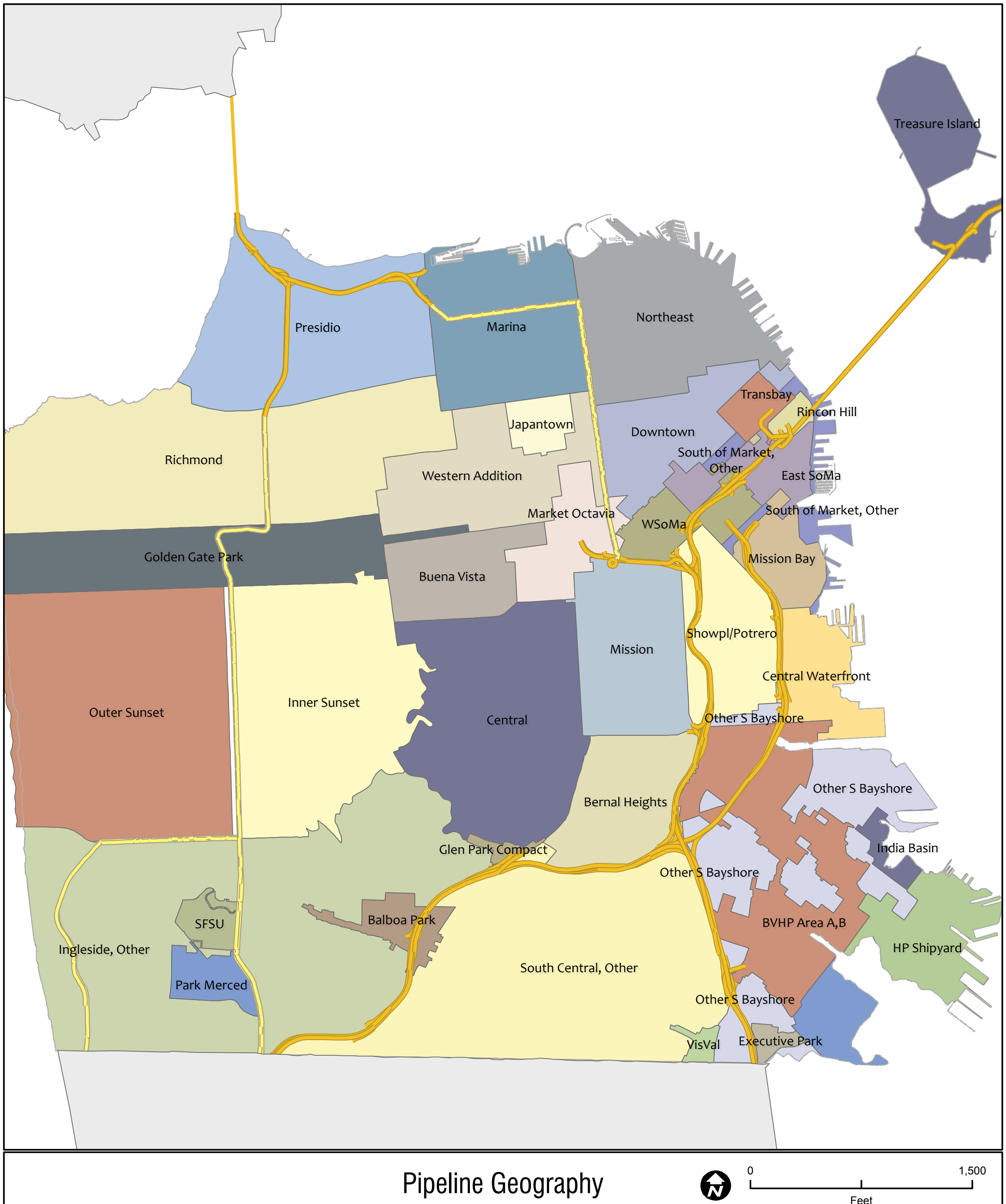
Map 2. Magnitude and Location of Past Year's Completed Development, by Major Land Use Type

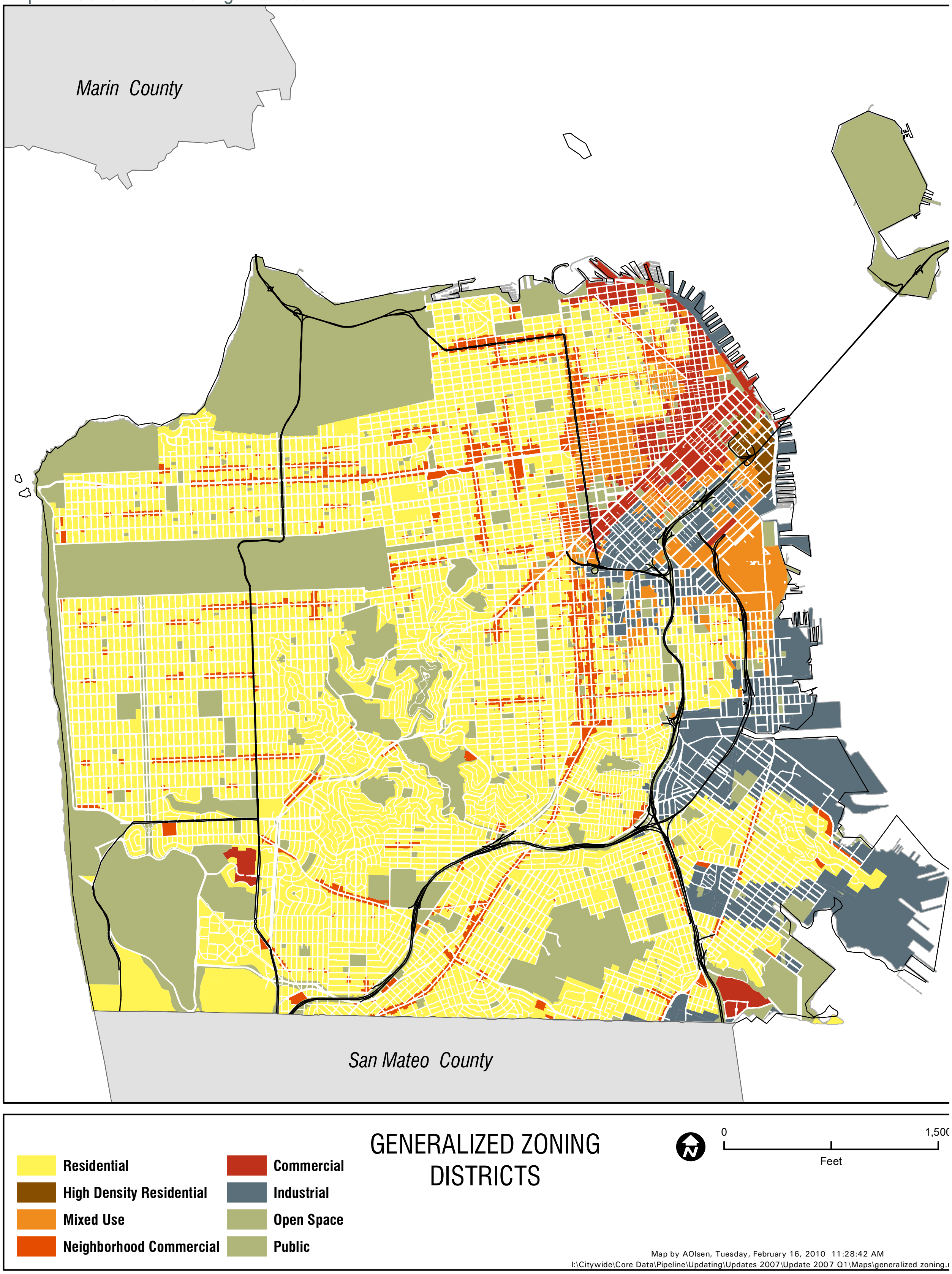


Map 3. Neighborhood Designation for Pipeline Report



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 4. Generalized Zoning Districts



DATA DICTIONARY

PROJECT LOCATION	
Block Lot	Concatenated 4-digit assessor block + 3-digit assessor's lot Numbers
Address	Name and address of project.
Planning Neighborhood	Areas related to current planning efforts and roughly to city neighborhoods.
PROJECT STATUS	Current pipeline status of a project application.
Under Construction	Project is under construction.
BP Approved	DBI approved building permit.
BP Issued	Project sponsor has picked up approved building permit (proxy measure of under construction)
BP Reinstated	DBI reinstates a lapsed building permit (lapses after 1 year with no activity).
BP Filed	Application for building permit filed with DBI.
PL Approved	All Planning actions approved.
PL Filed	Project application filed with the Planning Department
Bestdate	The date of the most recent action leading to the BESTSTAT value, I.e., a project's current pipeline status (e.g., date building permit application is filed if BESTSTAT = BP Filed).
DEVELOPMENT PROFILE	
Units	Net total dwelling units.
Net Comm'l Sq. Ft	Nonresdential gross square feet (GSF). Best interpreted as net new useable GSF with demolition of existing space subtracted (not total project gsf).
CIE	CIE or Cultural, Institutional, Educational includes educational services, social services, museums, zoos, and membership organizations.
MED	Medical includes health services offices and hospitals and laboratories throughout the City.
MIPS	MIPS is largely any activity where information is the chief commodity that is processed (managerial, information, professional, business services, multi-media).
PDR	PDR or Production, Distribution and Repair includes automobile and other repair services throughout the City, plus construction, transportation, communications, utilities, agriculture mining, manufacturing, wholesale trade, and motion picture production distribution, and services located outside of the downtown, transbay, and Northeast Districts. Does not include undeveloped or vacant land area used for PDR activities such as construction yards or open storage areas.
RETAIL/ENT	Retail Includes retail trade, amusement and recreation services, and personal services located throughout the City.
VISITOR	Visitor (or Hotel) includes hotels and other lodging located throughout the City.
Land Use	This field summarizes in one word what type of project is being proposed. Apart from the commcercial categories listed, this field includes - Mixres (when both commercial and residential uses are proposed - Mixed (when no residential use present and when multiple commercial uses are proposed and not one is dominating (>80% of commercial square feet) - Resident is used to denote any residential project where there is no commercial component.

Quarter 3, 2013

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	754	Mixres	Retail/Ent	2/23/2012
4154001	1001 POTRERO AV	Showpl/Potrero	419k	0	CIE	CIE	7/30/2013
3710017	350 MISSION ST	TB Combo	416k	0	MIPS	MIPS	9/27/2013
3702052	1190 MISSION ST	Downtown	0k	418	Resident	--N/A--	5/15/2013
0814020	100 VAN NESS AV	Market Octavia	-424k	399	Mixres	Retail/Ent	9/30/2013
8711023	185 CHANNEL ST	Mission Bay	0k	315	Resident	--N/A--	9/3/2013
3765015	One Rincon Hill Phase II	Rincon Hill	0k	312	Resident	--N/A--	9/27/2013
3721122	535 MISSION ST	TB Combo	296k	0	MIPS	MIPS	7/16/2013
3732009	900 FOLSOM ST	East SoMa	6k	282	Mixres	Retail/Ent	8/30/2013
3701064	55 9TH ST	Downtown	0k	273	Resident	--N/A--	9/6/2013
8713001	1155 04TH ST	Mission Bay	0k	273	Resident	--N/A--	8/12/2013
3736114	Foundry Square III	TB Combo	252k	0	MIPS	MIPS	9/26/2013
3749059	45 LANSING ST	Rincon Hill	-14k	224	Resident	--N/A--	8/14/2013
3717019	120 HOWARD ST	Downtown	67k	0	MIPS	MIPS	6/13/2012
0857001A	218 BUCHANAN ST	Market Octavia	0k	191	Resident	--N/A--	8/7/2013
3732008	260 05TH ST	East SoMa	-36k	182	Mixres	Retail/Ent	9/18/2013
7331003	800 Brotherhood Way	Park Merced	0k	182	Resident	--N/A--	9/11/2012
8711014	1110 04TH ST	South of Market, Other	0k	150	Resident	--N/A--	8/26/2013
4991277	833-881 Jamestown	Candlestick	0k	132	Resident	--N/A--	9/17/2007
0872005	1960-1998 MARKET ST	Market Octavia	9k	115	Mixres	Retail/Ent	9/9/2013
3749064	25 ESSEX ST	TB Combo	0k	120	Resident	--N/A--	9/19/2013
0871016	1844 MARKET ST	Market Octavia	3k	113	Mixres	Retail/Ent	8/26/2013
0870003	100 BUCHANAN ST	Market Octavia	0k	116	Resident	--N/A--	8/7/2013
3535001	2001 MARKET ST	Market Octavia	-15k	82	Mixres	Retail/Ent	8/12/2013
4045002	740 ILLINOIS ST and 2121	Central Waterfront	-8k	106	Resident	--N/A--	9/10/2013
3704069	973 MARKET ST	Downtown	-53k	100	Mixres	Retail/Ent	8/14/2008
3543011	2175 MARKET ST	Market Octavia	6k	88	Mixres	Retail/Ent	8/27/2013
0349001	101 GOLDEN GATE AV	Downtown	12k	90	Resident	--N/A--	9/18/2013

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3747019	333 FREMONT ST	Rincon Hill	-30k	88	Resident	--N/A--	9/17/2013
4228158	1301 Indiana St	Central Waterfront	-10k	71	Mixres	Retail/Ent	9/13/2013
0165021	235 BROADWAY	Northeast	5k	75	Mixres	Retail/Ent	9/13/2013
5476009	6600 Third Street	BVHP Area A,B	0k	30	Resident	--N/A--	8/29/2013
3704015	942 MISSION ST	Downtown	54k	0	Visitor	Visitor	9/30/2013
0808036	401 Grove Street	Market Octavia	5k	63	Mixres	Retail/Ent	9/12/2013
3725101	474 NATOMA STREET	Downtown	0k	55	Resident	--N/A--	5/7/2013
0855011	4 OCTAVIA ST	Market Octavia	4k	49	Mixres	Retail/Ent	8/9/2013
4624004	Hunters View	Other S Bayshore	0k	52	Resident	--N/A--	4/9/2013
3553054	1501 15TH ST	Mission	8k	40	Mixres	Retail/Ent	9/6/2013
0595013	1645-1661 PACIFIC AV	Northeast	-27k	38	Resident	--N/A--	9/26/2013
3534069	25 DOLORES ST	Market Octavia	-19k	37	Resident	--N/A--	9/23/2013
0854001	1600 MARKET ST	Market Octavia	17k	24	Mixres	Retail/Ent	8/23/2013
5943008	268 MADISON ST	South Central, Other	25k	1	Mixres	Retail/Ent	7/25/2013
7148040	ONE CAPITOL AV	Ingleside, Other	0k	28	Resident	--N/A--	9/17/2013
3548032	1875 MISSION ST	Mission	-35k	23	Mixres	Retail/Ent	7/15/2013
3980007	1717 17TH ST	Showpl/Potrero	5k	20	Resident	--N/A--	8/28/2013
3639002	2652 HARRISON ST	Mission	-7k	20	Resident	--N/A--	6/21/2013
3776092	246 RITCH ST	East SoMa	-4k	19	Resident	--N/A--	7/18/2013
1742043	1266 09TH Av	Inner Sunset	-3k	15	Mixres	Retail/Ent	9/27/2013
4058008	616 20TH ST	Central Waterfront	-1k	16	Mixres	Retail/Ent	7/16/2013
6529012	3418 26TH ST	Mission	0k	11	Resident	--N/A--	7/8/2013
4591C093	201 DONAHUE ST	Other S Bayshore	0k	25	Resident	--N/A--	8/5/2013
4591C042	101 DONAHUE ST	Candlestick	0k	63	Resident	--N/A--	8/22/2013

BP ISSUED

3720001	TRANSBAY TOWER	TB Combo	1743k	0	MIPS	MIPS	9/27/2013
3746001	390 Main St	Rincon Hill	0k	669	Resident	--N/A--	5/29/2013
3735063	222 02ND ST	TB Combo	623k	0	MIPS	MIPS	5/7/2013
3738004	280 BEALE ST	TB Combo	0k	479	Resident	--N/A--	8/28/2013
3747320	The Californian	Rincon Hill	-2k	432	Mixres	MIPS	6/14/2013
3833002	1006 16TH ST	Showpl/Potrero	0k	393	Resident	--N/A--	9/7/2012

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
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
3507039	1420 MISSION ST	Downtown	12k	190	Resident	--N/A--	5/22/2013
0831023	MARKET OCTAVIA - PARC	Market Octavia	4k	182	Mixres	Retail/Ent	4/5/2013
3732150	240 05TH ST	East SoMa	0k	182	Resident	--N/A--	8/27/2012
3509043	104 9th Street	Downtown	-8k	160	Mixres	Retail/Ent	8/29/2013
3510001	1415 MISSION ST	Downtown	0k	117	Mixres	MIPS	7/22/2013
3616007	2558 MISSION ST	Mission	0k	114	Resident	--N/A--	6/7/2013
0757025	1100 GOLDEN GATE AV	Western Addition	0k	98	Resident	--N/A--	6/26/2013
3731003	226 06TH ST	East SoMa	5k	37	Mixres	Visitor	12/10/2012
3834001	1000 16TH ST	Showpl/Potrero	26k	65	Mixres	Retail/Ent	9/7/2012
3789003	72 TOWNSEND ST	East SoMa	0k	74	Resident	--N/A--	12/6/2012
1098009	1401 DIVISADERO ST	Western Addition	57k	-21	MIPS	MIPS	7/31/2013
7380038	655 BROTHERHOOD WY	Ingleside, Other	15k	0	CIE	CIE	12/12/2008
5281003	901 RANKIN ST	BVHP Area A,B	58k	0	PDR	PDR	8/21/2013
0619012	1860 VAN NESS AV	Northeast	2k	35	Mixres	Retail/Ent	11/17/2008
0570011	1650 BROADWAY *	Marina	0k	34	Resident	--N/A--	12/10/2012
3560001	2210 MARKET ST	Market Octavia	2k	22	Mixres	Retail/Ent	3/14/2012
0527002	2559 VAN NESS AV	Marina	-2k	27	Resident	--N/A--	3/1/2013
3752019	870 HARRISON ST	WSoMa	-6k	22	Mixres	Retail/Ent	4/2/2013
3548001	300 South Van Ness Ave	Mission	20k	0	Retail/Ent	Retail/Ent	8/6/2013
3547027	80 JULIAN AV	Mission	13k	7	Mixres	CIE	10/27/2011
3965001	2401 16TH ST	Mission	2k	12	Mixres	MIPS	7/17/2013
3617008	1050 VALENCIA ST	Mission	0k	15	Mixres	Retail/Ent	7/17/2013
1127064	1816 EDDY ST	Western Addition	0k	19	Resident	--N/A--	7/23/2013
4591C095	401 INNES AV	Other S Bayshore	0k	35	Resident	--N/A--	4/16/2013
0757027	1239 TURK ST	Western Addition	0k	98	Resident	--N/A--	6/26/2013
8711019	701 LONG BRIDGE ST	Mission Bay	0k	188	Resident	--N/A--	3/26/2012
4591C099	50 JERROLD AV	Other S Bayshore	0k	34	Resident	--N/A--	4/16/2013
4591C069	198 COLEMAN ST	HP Shipyard	0k	12	Resident	--N/A--	11/26/2012
8711017	1200 04TH ST	Mission Bay	0k	172	Resident	--N/A--	3/26/2012
4591C094	201 FRIEDELL ST	HP Shipyard	0k	12	Resident	--N/A--	1/25/2013

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
4591C098	200 COLEMAN ST	HP Shipyard	0k	12	Resident	--N/A--	11/26/2012

BP REINSTATED

1052024	2655 BUSH ST	Western Addition	-41k	81	Mixres	Retail/Ent	6/27/2013
0671006	1450 FRANKLIN ST	Western Addition	-24k	69	Resident	--N/A--	6/25/2009
0343014	181 TURK ST	Downtown	3k	32	Mixres	Retail/Ent	3/10/2009

BP APPROVED

4224015	1004 MISSISSIPPI ST	Showpl/Potrero	0k	28	Resident	--N/A--	1/16/2009
0101004	1741 POWELL ST	Northeast	-12k	18	Mixres	Retail/Ent	11/2/2012
8710007	718 LONG BRIDGE ST	Mission Bay	0k	263	Resident	--N/A--	9/26/2013

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0694005	CPMC Hosp Van Ness	Downtown	702k	0	Mixed	CIE	4/20/2012
3719010	181 FREMONT ST	TB Combo	493k	74	Mixres	MIPS	5/1/2013
3911001	1 HENRY ADAMS ST	Showpl/Potrero	15k	560	Resident	--N/A--	6/25/2013
3756003	350 08TH ST	WSoMa	57k	408	Mixres	Retail/Ent	7/30/2013
3783001	801 BRANNAN ST	Showpl/Potrero	8k	437	Mixres	Retail/Ent	9/4/2013
3748006	340 FREMONT ST	Rincon Hill	-43k	348	Mixres	Retail/Ent	8/3/2012
8721012	455 Mission Bay S Blvd	Mission Bay	334k	0	MIPS	MIPS	6/26/2008
3733008	250 4TH ST	South of Market, Other	73k	208	Mixres	Visitor	6/28/2013
3794024	144 KING ST	East SoMa	44k	132	Mixres	Visitor	6/28/2013
0811002	101 POLK ST	Downtown	1k	162	Mixres	Retail/Ent	8/13/2013
0811003	103 POLK ST	Downtown	0k	162	Resident	--N/A--	7/5/2013
0794028	555 FULTON ST	Market Octavia	0k	139	Resident	--N/A--	5/3/2013
0785029	FWY PARCEL F	Market Octavia	64k	69	Mixres	CIE	3/27/2013
5431A001	5800 03RD ST	BVHP Area A,B	13k	121	Resident	--N/A--	11/7/2012
0283004A	620 SUTTER ST	Downtown	-46k	65	Mixres	Visitor	1/23/2013
4045003	2171 THIRD ST	Central Waterfront	-21k	109	Mixres	Retail/Ent	6/21/2013
4991600	101 EXECUTIVE PARK BL	Executive Park	0k	107	Resident	--N/A--	10/25/2010
0346003A	101 HYDE ST	Downtown	-1k	85	Mixres	Retail/Ent	6/27/2013

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
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
4059009	2298 03RD ST	Central Waterfront	14k	69	Mixres	Retail/Ent	9/25/2013
4991601	101 EXECUTIVE PARK BL	Executive Park	0k	81	Resident	--N/A--	6/16/2005
3973002C	480 POTRERO AV	Mission	0k	77	Resident	--N/A--	6/25/2013
1073013	800 PRESIDIO AV	Richmond	10k	50	Mixres	CIE	4/16/2012
3731001	200-214 6th St	East SoMa	3k	67	Mixres	Retail/Ent	11/29/2012
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
3788039	345 BRANNAN ST	East SoMa	53k	0	MIPS	MIPS	10/27/2008
3703086	570 JESSIE ST	Downtown	-15k	47	Resident	--N/A--	2/2/2006
0808039	450 HAYES STREET	Market Octavia	3k	41	Mixres	Retail/Ent	6/26/2013
3753081	345 06TH ST	East SoMa	0k	36	Mixres	Retail/Ent	7/16/2012
0837003	1 FRANKLIN ST	Market Octavia	2k	35	Mixres	Retail/Ent	12/3/2009
3774072	85 FEDERAL ST	East SoMa	26k	0	MIPS	MIPS	6/20/2013
5992A060	495 CAMBRIDGE ST	South Central, Other	0k	35	Resident	--N/A--	12/22/2010
3754039	1075 FOLSOM ST	East SoMa	5k	31	Resident	--N/A--	12/22/2005
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
3754066	1091 FOLSOM ST	East SoMa	-2k	30	Resident	--N/A--	6/10/2005
3518006	248 - 252 09TH ST	WSoMa	5k	15	Mixres	MIPS	3/12/2013
0028014	1255- 1275 COLUMBUS A	Northeast	-9k	20	Mixres	Retail/Ent	6/14/2013
0512025	2353 LOMBARD ST	Marina	1k	21	Mixres	Retail/Ent	7/29/2010
2623006	376 CASTRO ST	Buena Vista	2k	24	Mixres	Retail/Ent	5/17/2013
3521005	340 11TH ST	WSoMa	6k	20	Mixres	Retail/Ent	4/11/2005
3732071	468 CLEMENTINA ST	East SoMa	-0k	25	Resident	--N/A--	7/20/2005
3549064	1450 15TH ST	Mission	0k	23	Resident	--N/A--	6/28/2013
1368049	4614 CALIFORNIA ST	Richmond	14k	0	Mixed	MIPS	1/23/2007
3548039	1801 MISSION ST	Mission	3k	18	Mixres	Retail/Ent	7/17/2006
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

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
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
3197010	1446 OCEAN AV	Balboa Park	-2k	13	Resident	--N/A--	10/31/2008
0843016	690 PAGE ST	Buena Vista	-2k	12	Resident	--N/A--	5/21/2013
7332005	700 BROTHERHOOD WY	Ingleside, Other	0k	11	Resident	--N/A--	9/11/2012

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Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
4886008	Bayview Waterfront	Candlestick	4110k	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
3708058	Market Center	TB Combo	-103k	134	Mixres	MIPS	12/5/2002
6575001	CPMC - ST. LUKE'S HOSPI	Bernal Heights	165k	0	Mixed	CIE	7/11/2013
5262004	2095 Jerrold Ave	BVHP Area A,B	128k		PDR	PDR	3/26/2010
3833001	1000 16TH ST	Showpl/Potrero	0k	385	Resident	--N/A--	7/13/2012
3704071	949 Market Street	Downtown	237k	0	Retail/Ent	Retail/Ent	11/8/2010
3706093	706 MISSION ST	Downtown	26k	185	Mixres	Retail/Ent	7/31/2013
3722027	151 THIRD ST	Downtown	67k		CIE	CIE	7/13/2010
3799001	601 TOWNSEND ST	Showpl/Potrero	73k	0	MIPS	MIPS	5/10/2012
0813007	1390 MARKET ST	Market Octavia	-2k	230	Mixres	Retail/Ent	5/28/2009
0720038	1101 OFARRELL ST	Western Addition	-27k	230	Resident	--N/A--	9/13/2001
0201012	8 Washington Street	Northeast	32k	170	Mixres	Retail/Ent	6/19/2012
5431A043	5800 03RD ST	BVHP Area A,B	0k	188	Resident	--N/A--	10/25/2012
0331010	168 EDDY ST	Downtown	15k	170	Mixres	Retail/Ent	3/26/2009
3788042	333 BRANNAN ST (aka 32	East SoMa	162k	0	MIPS	MIPS	8/15/2013
3774026	270 BRANNAN ST	East SoMa	154k	0	MIPS	MIPS	8/19/2013
0794015	746 LAGUNA ST	Market Octavia	2k	136	Mixres	MIPS	5/13/2010
0192014	Chinese Hospital	Northeast	68k	0	CIE	CIE	7/12/2012
0857001	55 Laguna Street	Market Octavia	28k	133	Mixres	Retail/Ent	1/17/2008
3722079	134-140 NEW MONTGO	TB Combo	-85k	118	Mixres	Retail/Ent	12/11/2008
0667016	1545 PINE ST	Northeast	-23k	113	Mixres	Retail/Ent	10/22/2012
3767305	429 BEALE ST	Rincon Hill	-36k	113	Resident	--N/A--	5/14/2009

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3703079	1036-1040 MISSION ST	Downtown	1k	100	Mixres	Retail/Ent	5/14/2009
1228005	690 STANYAN ST	Buena Vista	11k	56	Mixres	Retail/Ent	10/23/2008
3753079	363 06TH ST	East SoMa	-10k	87	Mixres	Retail/Ent	10/3/2012
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
0629016	2155 Webster Street	Marina	0k	77	Resident	--N/A--	5/1/2013
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
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
3532091	245 VALENCIA ST	Market Octavia	13k	0	CIE	CIE	9/22/2011
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
1450008	5400 GEARY BL	Richmond	-11k	39	Mixres	Retail/Ent	4/25/2013
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
2636025	Crestmont Drive	Inner Sunset	0k	34	Resident	--N/A--	3/7/2013
0570010	1622 BROADWAY	Marina	0k	34	Resident	--N/A--	3/12/2009
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
5457037	2895 SAN BRUNO AV	South Central, Other	11k	10	Mixres	MIPS	1/17/2013
3702046	1127 MARKET ST	Downtown	8k	98	Retail/Ent	Retail/Ent	10/25/2012
1028003	2829 California Street	Western Addition	0k	12	Mixres	Retail/Ent	1/17/2008

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Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
9900048	Seawall Lot 337	South of Market, Other	1950k	1,500	Mixres	MIPS	4/23/2013
6310001	1654 Sunnydale Ave	South Central, Other	59k	915	Mixres	Retail/Ent	4/28/2010
4167004	1 TURNER TR	Showpl/Potrero	30k	1,094	Mixres	Retail/Ent	6/30/2010
3777045	598 BRANNAN STREET	WSoMa	662k	0	MIPS	MIPS	8/23/2012
0244001	950 MASON STREET	Northeast	-295k	160	Mixres	Visitor	2/11/2009
3736074	41 TEHAMA ST	TB Combo	0k	398	Resident	--N/A--	8/8/2013
3949001	1200 17TH STREET	Showpl/Potrero	66k	200	Mixres	MIPS	4/4/2012
1075001	Westside Courts Phas	Western Addition	0k	450	Resident	--N/A--	12/31/2008
4172022	1201-1225 TENNESSEE ST	Central Waterfront	-140k	300	Mixres	Retail/Ent	4/11/2013
3954016	1301 - 16TH STREET	Showpl/Potrero	-39k	276	Resident	--N/A--	9/16/2013
0647007	1634 PINE ST	Western Addition	0k	250	Mixres	MIPS	11/5/2008
0836002	1540 MARKET ST	Market Octavia	-13k	180	Mixres	Retail/Ent	2/27/2009
3741031	75 HOWARD ST	South of Market, Other	18k	186	Mixres	Retail/Ent	1/13/2012
0238002	300 CALIFORNIA ST	Downtown	59k	0	MIPS	MIPS	9/12/2012
3507042	1400 MISSION ST	Downtown	4k	165	Mixres	Retail/Ent	4/8/2009
3786038	501-505 BRANNAN	East SoMa	134k	0	MIPS	MIPS	5/20/2013
0250001	1401 CALIFORNIA ST	Northeast	-19k	95	Mixres	Retail/Ent	10/20/2008
3747012	325 FREMONT ST	Rincon Hill	0k	119	Resident	--N/A--	5/2/2013
3753106	923 FOLSOM STREET	East SoMa	-2k	114	Mixres	Retail/Ent	5/23/2013
0340002	19-25 MASON ST & 2-16	Downtown	3k	110	Mixres	Retail/Ent	8/14/2012
5231002B	1995 EVANS AV	BVHP Area A,B	65k	0	MIPS	MIPS	3/21/2013
4102026	1300 22nd Street	Showpl/Potrero	-30k	94	Resident	--N/A--	5/9/2013
4059001A	825 TENNESSEE STREET	Central Waterfront	-32k	88	Resident	--N/A--	5/16/2013
9900041H	1/2-PIER 33	Northeast	13k	0	PDR	PDR	8/27/2008
3751029	750 HARRISON ST	East SoMa	-2k	77	Mixres	Retail/Ent	9/17/2013
3962008	346 POTRERO AVENUE	Mission	3k	75	Mixres	Retail/Ent	10/12/2012
3774071	77 & 85 FEDERAL STREET	East SoMa	55k	0	Mixed	MIPS	3/26/2013
4624009	Hunters View	Other S Bayshore	1k	54	Mixres	Retail/Ent	6/26/2013
4044013	777 TENNESSEE STREET	Central Waterfront	-16k	59	Resident	--N/A--	5/30/2013
0318020	651 GEARY ST	Downtown	-8k	46	Mixres	Retail/Ent	8/15/2008
3730023	1174 FOLSOM ST	WSoMa	10k	42	Mixres	MIPS	7/29/2013
5696036	992 PERALTA AV	Bernal Heights	0k	50	Resident	--N/A--	6/20/2013

ACKNOWLEDGEMENTS

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