



San Francisco *PIPELINE* REPORT

San Francisco Planning Department

February 2014



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

San Francisco PIPELINE REPORT

Fourth Quarter 2013

San Francisco Planning Department

February 2014



Table of Contents

Contents

WHAT IS THE PIPELINE?	1
ACCURACY AND TIMELINESS	1
THE DEVELOPMENT PIPELINE	3
PROJECTS BY OVERALL STATUS	3
AMOUNT AND TYPE OF NET NEW COMMERCIAL SPACE	4
LOCATION OF NEW DEVELOPMENT	5
PIPELINE PROJECTS BY CURRENT ZONING CATEGORY	7
RESIDENTIAL PIPELINE BY PROJECT SIZE	9
RECENT ACTIVITY	13
PROJECT APPLICATION FILINGS DURING Q4 2013	13
COMPLETED PROJECTS DURING 2013	14
DATA DICTIONARY	18
ACKNOWLEDGEMENTS	27

List of Tables

RESIDENTIAL AND COMMERCIAL PIPELINE, BY PIPELINE STATUS AND LAND USE CATEGORY	3
RESIDENTIAL AND COMMERCIAL PIPELINE, BY NEIGHBORHOOD	4
RESIDENTIAL AND COMMERCIAL PIPELINE BY GENERALIZED ZONING CATEGORY	7
PROJECTS BY NEIGHBORHOOD AND BUILDING SIZE	9
PDR SPACE CONVERSION TO RESIDENTIAL USE, BY PLANNING DISTRICT	12
OFFICE SPACE CONVERSION TO RESIDENTIAL USE, BY PLANNING DISTRICT	12
PROJECTS COMPLETED PAST YEAR, BY USE TYPE	14

List of Figures

RESIDENTIAL PIPELINE SIZE DISTRIBUTION, BY ZONING CATEGORY	6
NON-RESIDENTIAL PIPELINE SIZE DISTRIBUTION, BY ZONING CATEGORY	6
RESIDENTIAL PIPELINE, BY STATUS & BUILDING SIZE	10
NON-RESIDENTIAL PIPELINE, BY STATUS & BUILDING SIZE	10
PIPELINE OVER TIME: A) PROJECTS FILED / APPROVED; B) UNITS FILED / APPROVED	13
MONTHS TO COMPLETION FROM FIRST FILING, BY USE TYPE AND PROJECT SIZE	14

List of Maps

GENERAL OVERVIEW OF MAGNITUDE AND LOCATION OF DEVELOPMENT, BY MAJOR LAND USE TYPE	2
MAGNITUDE AND LOCATION OF PAST YEAR'S COMPLETED DEVELOPMENT, BY MAJOR LAND USE TYPE	15
NEIGHBORHOOD DESIGNATION FOR PIPELINE REPORT	16
GENERALIZED ZONING DISTRICTS	17

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 December 31, 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 DEVELOPMENT PIPELINE

There are currently 857 projects in the pipeline. Of these, 74 percent are exclusively residential and 17 percent are mixed-use projects with both residential and commercial components. Only 8 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 50,400 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 five 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 new projects slowed down during the Great Recession of 2007-2009 and beyond, but has since recovered in earnest as evidenced by both new project applications as well as the construction of projects with "older" entitlements. The "hot spot" for much of this development is Market Street at various sections of it. While this may seem a response to the recent introduction of technology companies in the area, many projects here predate the last recession, during which they were idle.

Projects by Overall Status

Table 1 breaks down projects, housing units and non-residential space by planning stage. First are non-entitled projects. A number of projects file building permit applications even as their projects have not cleared planning entitlements. The second major group include entitled projects; those which have completed the planning process and obtained necessary approvals. These are then divided into different stages of the building permitting process. Table 1 shows the following:

- Around 18 percent of all projects, representing 6,000 net added housing units and 2,750,000 sq. ft. of commercial space, are under construction.
- Around 20 percent of projects (with another 4,200 net units and 3,8 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 3,100 net new units and an addition of 860,000 sq ft of commercial space) have filed building permit applications with the Department of Building Inspections. A small number of projects have filed applications but have yet to receive planning approvals.
- One in eight projects and 54 percent of the units and 42 percent of the non-residential space have received Planning Department approvals. These projects now must secure building permits.

Table 1. Residential and Commercial Pipeline, by Pipeline Status and Land Use Category

Entitlement Status	Status	Total No. of Projects	Net Housing Units	Net Comm'l Sq. Ft.	Net Commercial Gross Square Footage					
					CIE	Medical	Office	PDR	Retail	Visitor
Under Planning Review	Planning Filed	92	7,400	2,593,500	9,800	-	2,709,900	(415,500)	488,600	(197,800)
	BP Filed	276	3,100	864,800	897,100	20,000	181,700	(65,800)	(47,400)	(120,800)
	Total, Not Entitled	368	10,500	3,458,300	906,900	20,000	2,891,600	(481,400)	441,300	(318,600)
Approved by Planning	PL Approved	106	27,300	5,943,800	160,300	-	3,067,800	309,000	1,942,100	458,600
	BP Filed	40	2,400	162,400	4,500	-	85,900	(26,800)	98,800	-
	BP Approved/ Issued/ Re-Instated	176	4,200	3,820,700	67,600	(45,100)	3,722,000	22,900	63,700	(10,300)
	Construction	167	6,000	2,755,500	458,600	1,800,500	520,200	(159,700)	62,700	63,300
	Total, Entitled	489	39,900	12,682,400	691,000	1,755,400	7,395,900	145,300	2,167,300	511,500
Total		857	50,400	16,140,700	1,597,900	1,775,400	10,287,500	(335,900)	2,608,500	193,000

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	27	19
Bernal Heights	37	4%	110	0%	3	165,930	24	12
Buena Vista	18	2%	60	0%	3	-150	28	26
BVHP Area A,B	31	4%	330	1%	11	415,670	19	10
Candlestick	3	0%	10,430	21%	3,477	4,110,000	1	1
Central	78	9%	120	0%	2	11,880	22	17
Central Waterfront	16	2%	1,370	3%	85	-332,020	10	32
Downtown	43	5%	3,710	7%	93	1,666,620	4	5
East SoMa	35	4%	1,520	3%	43	574,580	9	8
Executive Park	1	0%	110	0%	107	0	25	24
HP Shipyard	3	0%	40	0%	12	0	30	24
India Basin	5	1%	40	0%	8	-2,560	29	28
Ingleside, Other	32	4%	110	0%	3	24,300	23	14
Inner Sunset	37	4%	100	0%	3	5,250	26	22
Japantown	2	0%	0	0%	0	13,400	33	16
Marina	36	4%	350	1%	10	-7,840	18	29
Market Octavia	41	5%	2,790	6%	68	-462,660	6	33
Mission	70	8%	1,070	2%	15	3,610	14	23
Mission Bay	8	1%	1,210	2%	173	2,445,500	11	3
Northeast	40	5%	850	2%	21	-253,080	15	31
Other S Bayshore	20	2%	190	0%	9	5,840	21	21
Outer Sunset	20	2%	30	0%	2	8,300	31	20
Park Merced	2	0%	5,860	12%	2,930	478,380	3	9
Richmond	76	9%	220	0%	3	18,090	20	15
Rincon Hill	9	1%	2,400	5%	267	-124,950	7	30
Showpl/Potrero	47	6%	3,590	7%	76	588,680	5	7
South Central, Other	58	7%	1,100	2%	19	105,500	13	13
South of Market, Other	5	1%	2,040	4%	409	2,050,560	8	4
TB Combo	9	1%	1,150	2%	128	3,468,630	12	2
Treasure Island	1	0%	7,800	16%	7,800	381,000	2	11
VisVal	4	0%	20	0%	5	-1,250	32	27
Western Addition	38	5%	820	2%	22	11,180	16	18
WSoMa	27	3%	750	2%	28	762,860	17	6
Grand Total	857	100%	50,290	101%	15,834	16,131,250		

- Ten percent of projects, representing 7,400 units and 2.6 million commercial square feet are under initial Planning Department review.

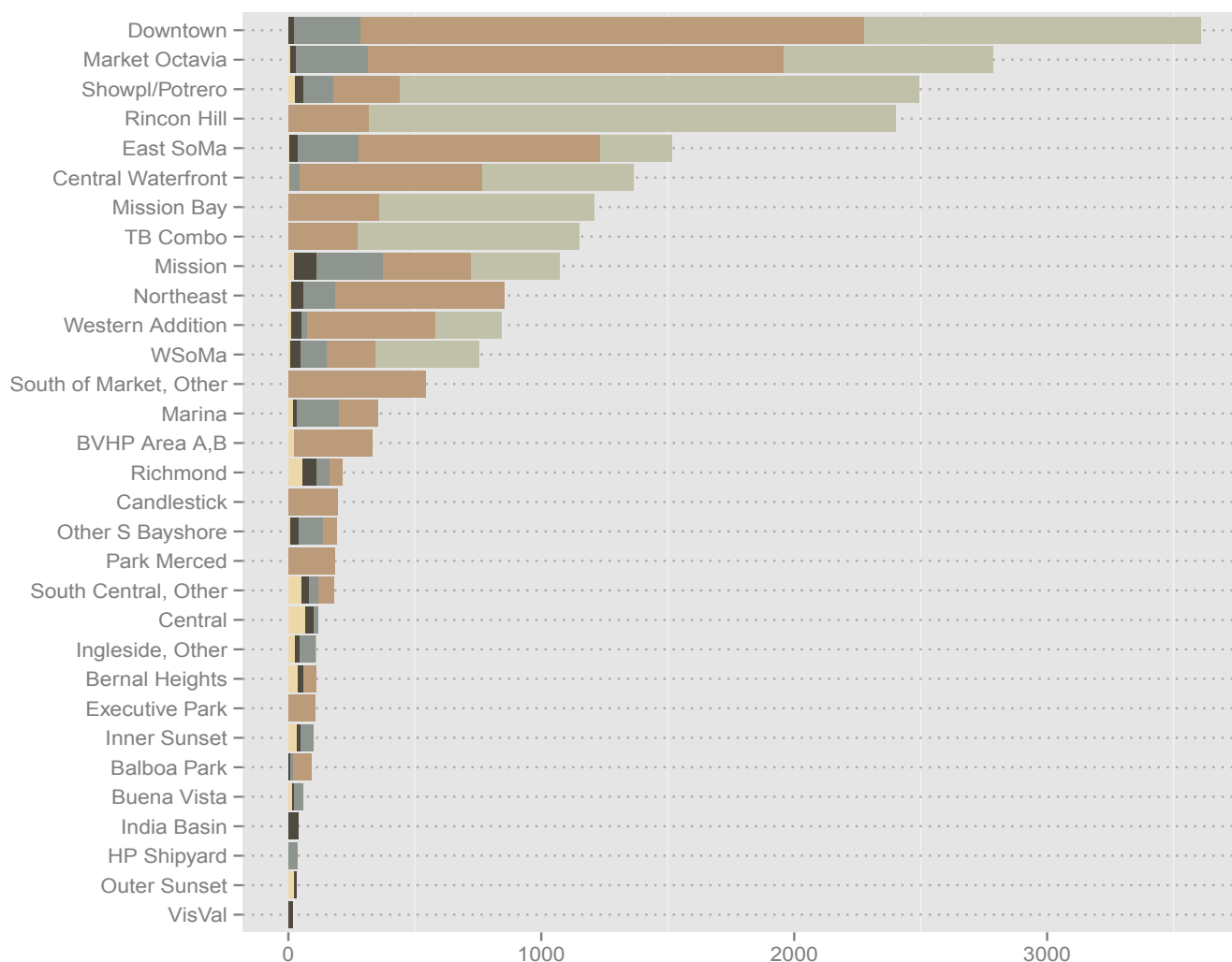
Amount and Type of Net New Commercial Space

Projects in the current pipeline as noted also represent a potential net addition of 14.1 million sq ft of commercial development that would result in the

following land use inventory *changes*:

- 10 million sq ft of office space
- 2.6 million sq ft of retail space
- 200,000 sq ft of visitor-serving uses, such as hotels or hostels.
- 1.6 million sq ft of cultural, institutional, educational (CIE), and 1.8 million sq ft of medical space

Units by Neighborhood



Note:

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

- An overall loss of around 230,000 sq ft of space for production, distribution and repair (PDR).

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

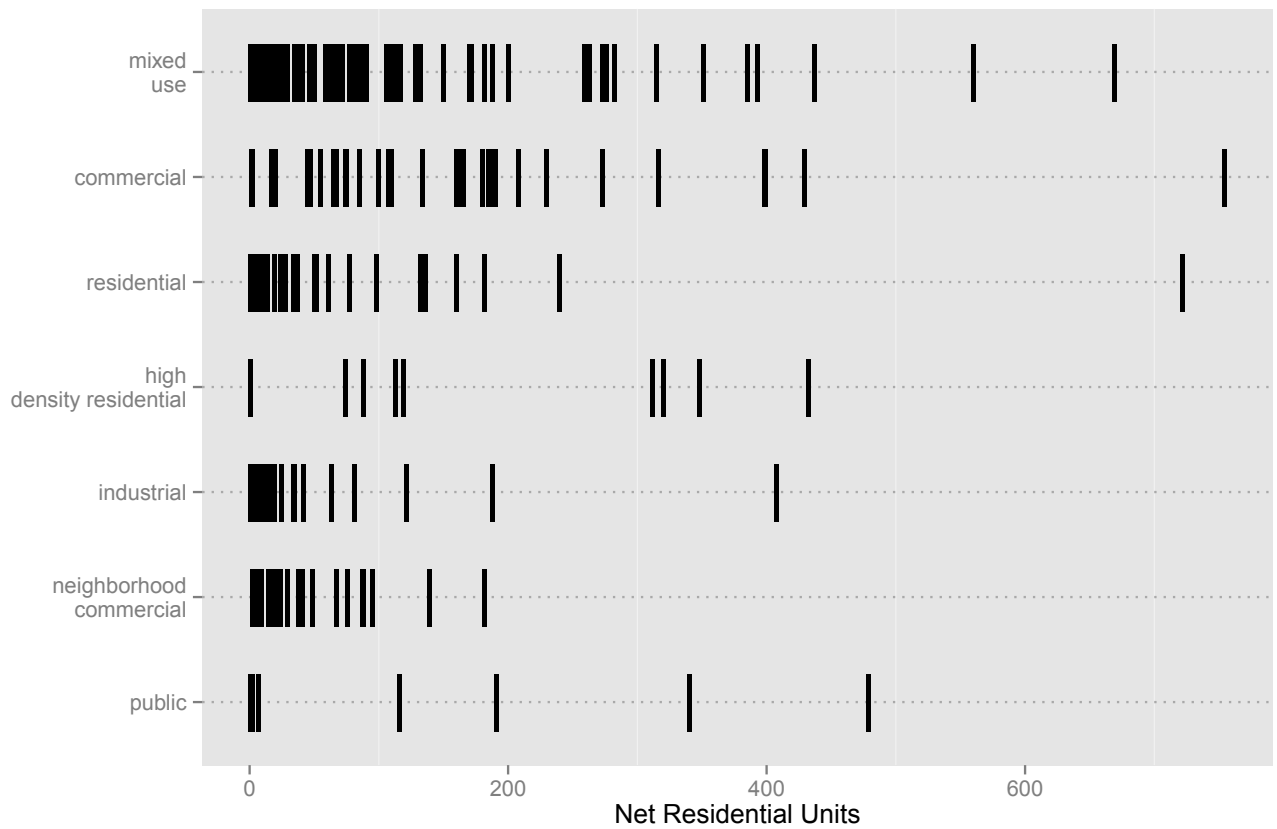
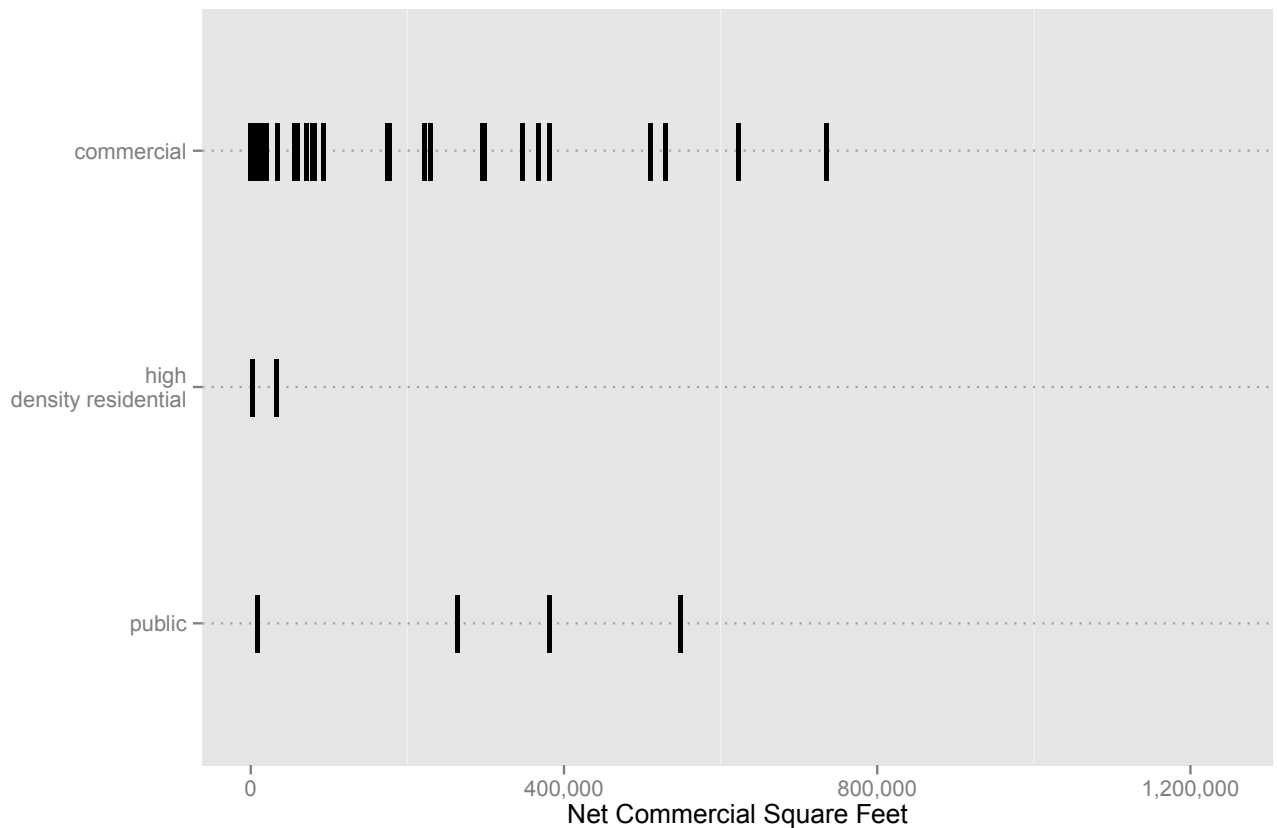


Figure 3. Non-Residential Pipeline Size Distribution, by Zoning Category



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 mixed use, commercial and residential zone classes. While these projects have large projects, there is tremendous variation *within* these districts as well,

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	3,729	-21,170	0	0	-362,000	-77,000	407,000	11,000
	C-3	29	2,024	2,697,090	102,000	0	2,100,000	0	173,000	322,000
Neighborhood Commercial	NC	20	238	-43,240	0	0	4,000	-42,000	-5,000	0
	NCT	18	823	51,380	13,000	0	1,000	0	32,000	5,000
Industrial	M	6	1,822	1,970,500	8,000	0	1,700,000	13,000	250,000	0
	PDR	17	90	388,560	0	0	246,000	129,000	14,000	0
	SLI	5	19	669,674	0	0	695,000	-34,000	10,000	0
	SLR	13	523	80,440	0	0	16,000	1,000	59,000	0
	SPD	2	2	3,720	0	0	4,000	-1,000	1,000	0
	HP-RA	13	247	0	0	0	0	0	0	0
Mixed Use	C-M	1	117	300	0	0	2,000	-4,000	2,000	0
	CRNC	1	0	68,010	68,000	0	0	0	0	0
	MUG	5	71	-31,090	0	0	0	0	1,000	-32,000
	MUO	10	209	636,880	0	0	613,000	-75,000	43,000	50,000
	MUR	14	1,063	-90,540	0	0	-16,000	-99,000	24,000	0
	NC	77	677	63,770	5,000	-25,000	86,000	-9,000	13,000	0
	NCT	24	1,095	64,000	73,000	0	7,000	-12,000	-14,000	0
	RC	19	1,457	699,730	924,000	0	-26,000	38,000	-8,000	-228,000
	RED	8	57	-9,380	0	0	0	-9,000	0	0
	RSD	2	23	-6,120	0	0	0	-6,000	0	0
	SSO	1	0	32,500	0	0	-14,000	0	5,000	41,000
	UMU	39	3,721	-42,630	0	0	302,000	-364,000	19,000	0
	MB	8	1,361	2,064,500	0	1,801,000	264,000	0	0	0
	CCB	1	1	0	0	0	0	0	0	0
Public	P	13	19,168	6,583,280	428,000	0	4,456,000	316,000	1,043,000	341,000
Residential	RH	374	843	168,570	-54,000	0	215,000	1,000	22,000	-16,000
	RM	73	8,924	291,730	40,000	0	79,000	-9,000	481,000	-300,000
	RTO	31	245	-24,820	-8,000	0	-21,000	-19,000	24,000	0
High Density Residential	DTR	9	1,807	-124,950	0	0	-66,000	-71,000	12,000	0
Grand Total		857	50,356	16,140,710	1,598,000	1,775,000	10,288,000	-336,000	2,609,000	193,000

as seen by the distance between the vertical lines. Projects in residential districts, on the other hand, are far more evenly sized, 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 10,100 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 Sunnyside 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 9,900 units in 208 projects.

Residential projects on downtown commercial zoned lots would add 5,800 new units in 53 projects, although the count here also includes commercial only projects.

Another 2,700 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 24 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 would add 1,800 units.

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 897 net units) in the pipeline. Projects on RM-zoned (multi-family) lots, in turn, account for 9 percent of projects and 18 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 districts²; 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 72 projects, but also 150 mixed use projects which contain both residential and non-residential components. The commercial component in the 150 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 zoning³. Development here would add some net 6.6 million square feet, or 47 percent of all proposed commercial development, in just eight projects. The largest of these proposed devel-

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.

opments 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

Also of note the UCSF hospital project in Mission Bay is currently undergoing construction, expected to be done early 2015.⁴

Residential Pipeline by Project Size

Table 4 shows the residential pipeline by neighbor-

Table 4. Projects by Neighborhood and Building Size

Neighborhood	Project Size						Above 250	Grand Total	Rank
	Single Family	2-9 Units	10-19 Units	20-49 Units	50-99 Units	100-249 Units			
Balboa Park	0	8	13	0	71	0	0	92	27
Bernal Heights	14	55	0	0	50	0	0	119	24
Buena Vista	3	32	12	24	0	0	0	71	28
BVHP Area A,B	5	24	0	0	0	309	0	338	20
Candlestick	0	0	0	0	63	132	10,500	10,695	1
Central	16	147	18	0	0	0	0	181	23
Central Waterfront	2	5	0	39	297	436	599	1,378	11
Downtown	0	28	17	263	412	1,623	1,343	3,686	5
East SoMa	3	28	42	153	381	611	282	1,500	10
Executive Park	0	0	0	0	0	107	0	107	26
HP Shipyard	0	0	36	0	0	0	0	36	31
India Basin	0	40	0	0	0	0	0	40	29
Ingleside, Other	11	41	11	53	0	0	722	838	17
Inner Sunset	14	39	25	34	0	0	0	112	25
Marina	8	54	25	142	154	0	0	383	19
Market Octavia	0	54	45	261	244	1,399	828	2,831	6
Mission	4	151	100	201	233	114	351	1,154	13
Mission Bay	0	0	0	0	0	360	851	1,211	12
Northeast	1	86	18	130	232	437	0	904	15
Other S Bayshore	5	43	0	94	52	0	0	194	22
Outer Sunset	4	36	0	0	0	0	0	40	29
Park Merced	0	0	0	0	0	182	8,898	9,080	2
Richmond	7	171	13	39	50	0	0	280	21
Rincon Hill	1	0	0	0	88	232	2,081	2,402	7
Showpl/Potrero	2	83	27	89	65	200	3,751	4,217	4
South Central, Other	25	72	10	35	61	0	1,700	1,903	9
South of Market, Other	0	0	0	0	0	544	1,500	2,044	8
TB Combo	0	0	0	0	140	134	877	1,151	14
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	75	19	0	277	240	260	877	16
WSoMa	3	42	68	64	65	128	408	778	18
Grand Total	134	1,338	499	1,621	2,935	7,188	43,570	57,285	

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

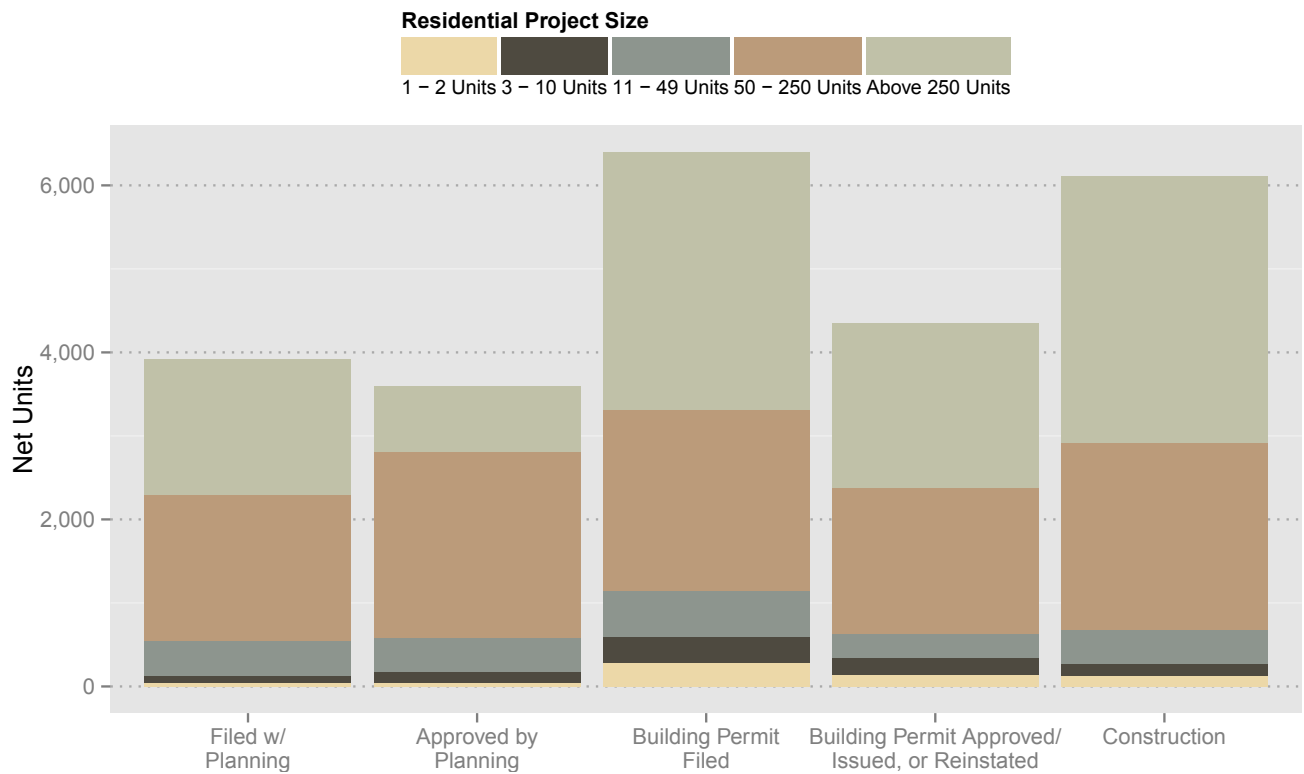
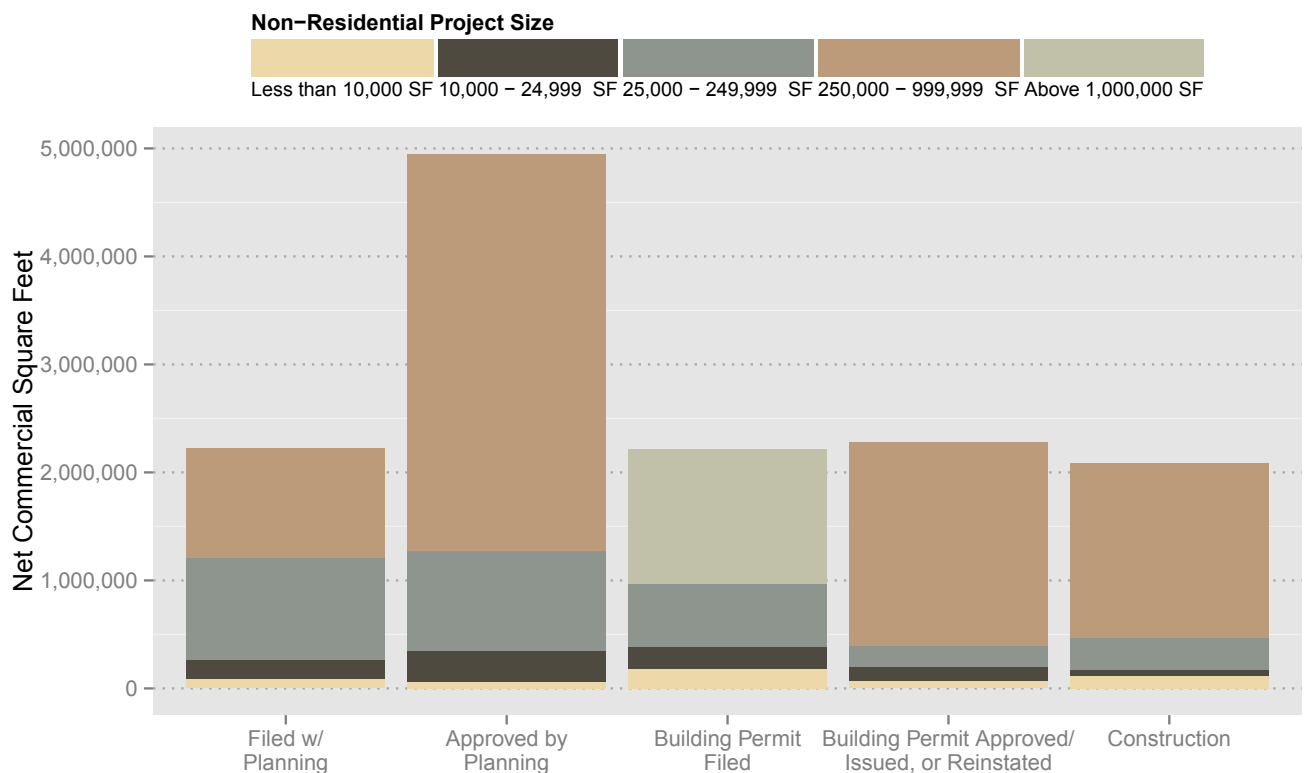


Figure 5. Non-Residential Pipeline, by Status & Building Size



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.

hood, and offers detail on the project size. In most cases this measures the number of units in the building. However, a handful of projects include more than one building thus making this accounting an approximation.

Project sizes vary by area. 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 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 3,500 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 Use⁵

There are 50 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 31 projects. These projects, adding up to 3,600 units and 3,500 units, respectively, comprise about one in seven of the total number of 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 800,000 sq ft of PDR space would be lost to conversion or demolition.⁶ It would be replaced with residential units (3,600) 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 nearly three out of four converted square feet. The loss of PDR space in these neighborhoods would in turn bring in 2,500 net new housing units.

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 336,000 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
Central Waterfront	10	20%	1,180	33%	-301,600	36%
Downtown	3	6%	230	6%	-64,100	8%
East SoMa	13	26%	640	18%	-104,500	12%
India Basin	1	2%	0	0%	-2,600	0%
Market Octavia	1	2%	40	1%	-19,000	2%
Mission	9	18%	190	5%	-47,200	6%
Northeast	3	6%	150	4%	-48,000	6%
Richmond	1	2%	0	0%	-2,100	0%
Rincon Hill	2	4%	550	15%	-70,900	8%
Showpl/Potrero	4	8%	490	14%	-168,900	20%
WSoMa	3	6%	100	3%	-16,800	2%
Grand Total	50	100%	3,580	100%	-845,700	100%

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

Neighborhood	Projects	Percent	Net Units	Percent	Office Net	Percent
Downtown	6	19%	430	12%	-221,300	19%
East SoMa	2	6%	150	4%	-6,700	1%
Inner Sunset	1	3%	20	1%	-2,200	0%
Market Octavia	6	19%	1,380	39%	-611,200	53%
Northeast	4	13%	140	4%	-33,500	3%
Rincon Hill	3	10%	760	22%	-90,400	8%
Showpl/Potrero	2	6%	50	1%	-28,200	2%
South Central, Other	1	3%	0	0%	-1,900	0%
South of Market, Other	1	3%	210	6%	-20,800	2%
TB Combo	1	3%	130	4%	-102,500	9%
Western Addition	2	6%	230	7%	-26,200	2%
WSoMa	2	6%	10	0%	-2,400	0%
Grand Total	31	100%	3,500	100%	-1,147,300	100%

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 600,000 square feet of office. This is predominantly due to the conversion of the Triple-A buildings to residential use. For the neighborhood as a whole, 1,400 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 10.3 million sq. ft. citywide.

RECENT ACTIVITY

Project Application Filings During q4 2013

A total of 25 planning applications were filed in the last quarter of 2013, up from 14 the same quarter a year before. Corresponding to these 33 projects is a count of 1,272 residential units but a net loss 185,000 sq. ft. of non-residential commercial development associated with the properties in question. Filing activity remains fairly high, and projects are on average around 50 units.

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 fourth quarter of 2013 include:

- At 950 Market Street, the proposed project would demolish five existing structures and instead construct a mixed-use arts, education, residential, hotel, and retail mixed use complex. The proposed project includes approximately 75,000 sq. ft. of non-profit performing arts theaters,

classroom, rehearsal and administrative office space; up to 316 residential units; an up to 310 room hotel with banquet, meeting and sky lounge facilities; 24,000 sq.f.t of convention office space, and up to 15,000 sq.ft. of ground floor and mezzanine retail space including a restaurant/bar and other active retail uses.

- At 150 Van Ness Avenue, the proposed project is a 13 story, 429 unit residential building. The project would also contain 9,000 sq. ft. of retail on the Van Ness Ave street frontage. The project would require the demolition of an existing 13,410 sf surface parking lot, and a vacant Triple-A office building totalling approximately 149,049 sq. ft.
- At 800 Indiana Street, the proposed project is the demolition of the existing Opera Warehouse and construction of a new 340-unit multi-family complex in six buildings.
- At 888 Tennessee Street, the proposed project is the demolition of an existing two-story building and construction of two four-story residential-over-retail building containing 110 dwelling units, 2,155 sq. ft. of retail use, and 10,073 sq. ft. of court yard open space. The project would construct a 35,752 sq. ft. below grade parking garage with 93 off-street parking spaces.

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

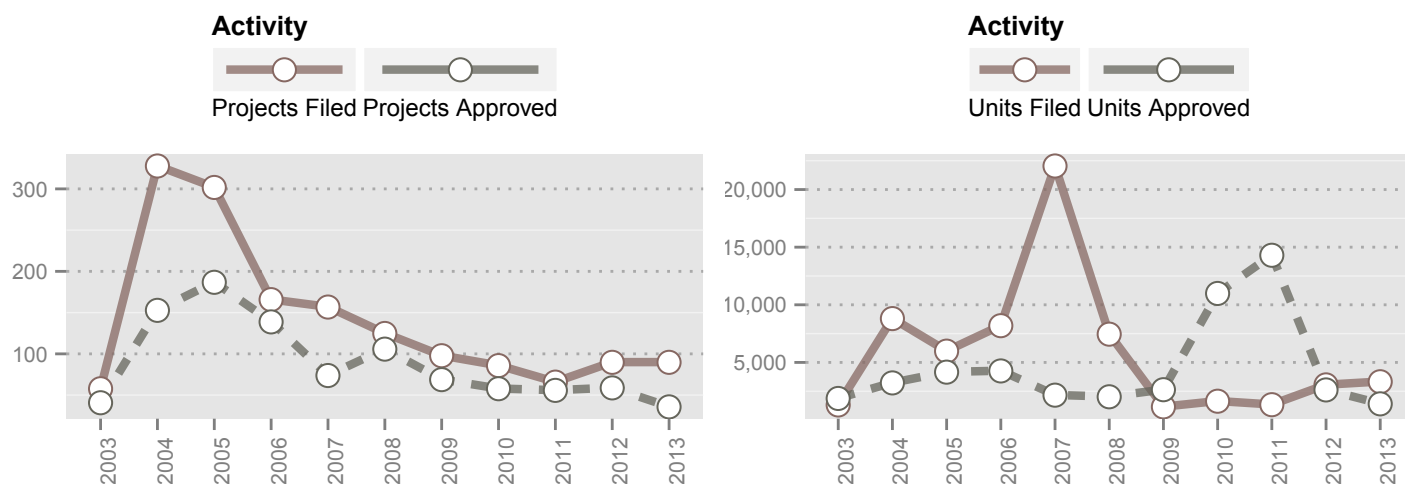


Figure 7. Months to Completion from First Filing, By Use Type and Project Size

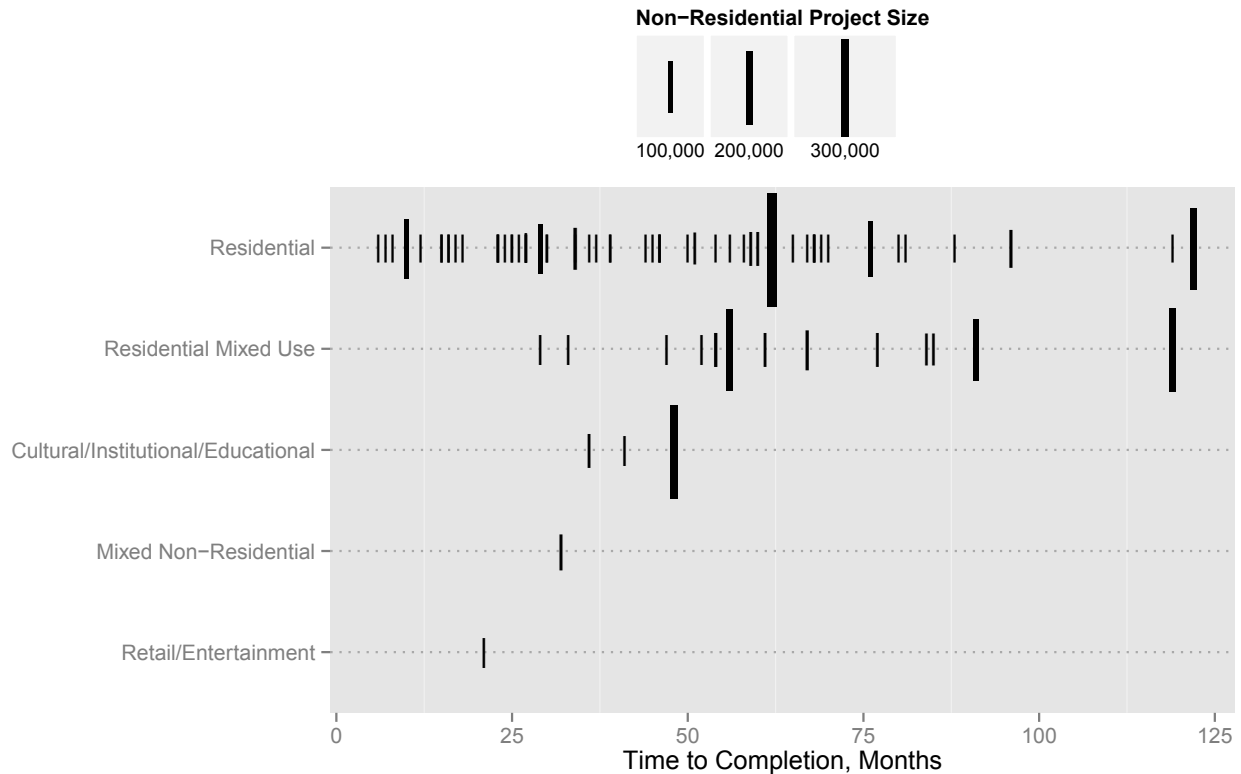


Table 7. Projects Completed Past Year, By Use Type

Land Use	Projects	Net Units	Net Comm'l Sq. Ft.
Mixres	15	470	-20,000
Resident	79	1,210	-165,000
CIE	3	0	71,000
MIPS	1	0	252,000
Grand Total	98	1,680	138,000

- At 1140 Folsom Street, the proposed project would remove the existing 14,600 sq. ft. building and surface parking lot and replace them with a new four to six story 128-unit residential building over 5,500 sq. ft. of ground floor commercial space. Design includes high efficiency parking and below market rate units on site. The project would rise up to 40 feet along Rausch Street and up to 65 feet along Folsom Street.
- At 1335-1339 Folsom Street, the proposed project would involve demolition of an existing one-story commercial building and the construction of a new seven-story, 65 single residential occupancy unit building of approximately 65 ft. in height.

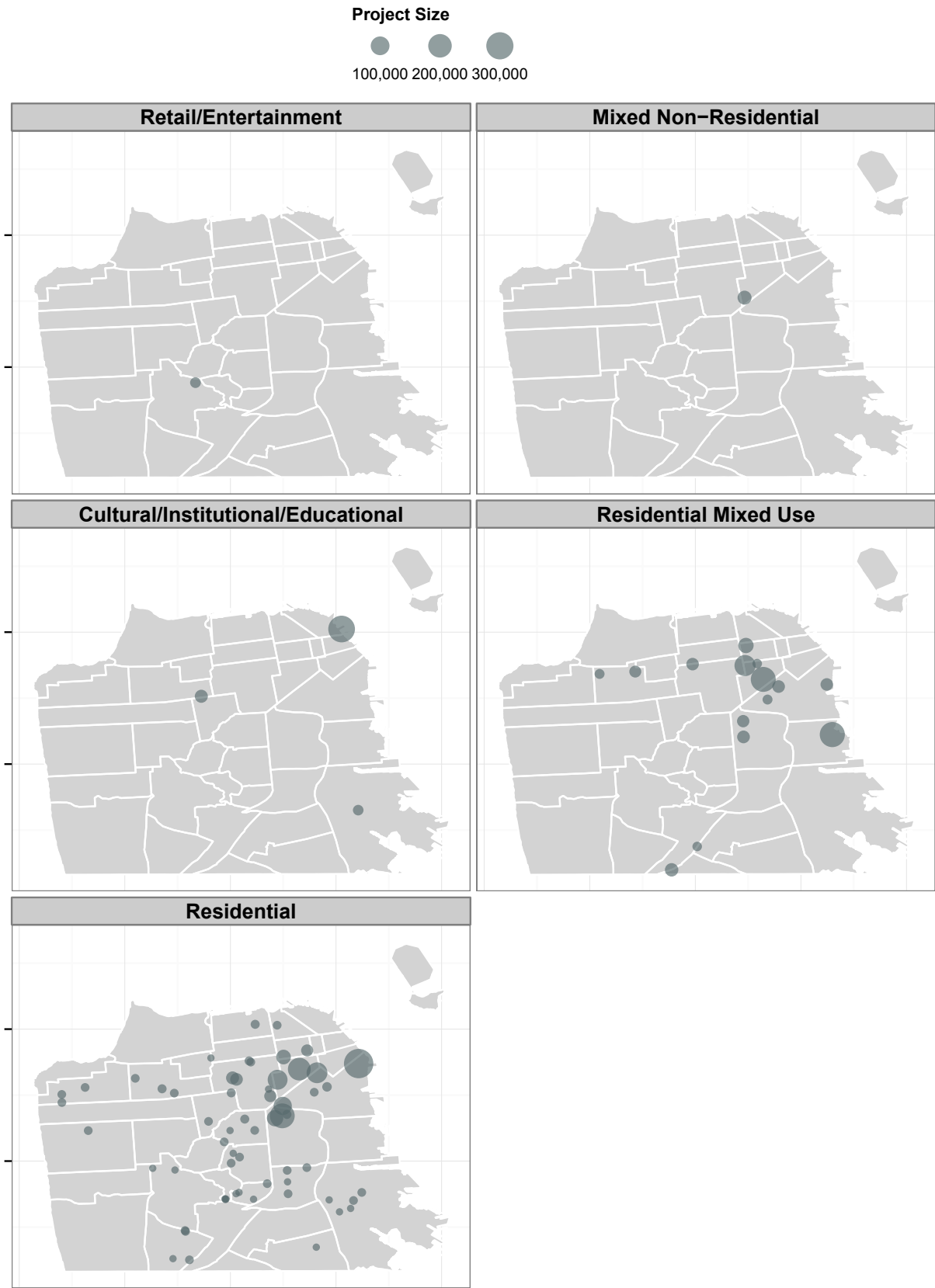
Completed Projects during 2013

Table 7 shows that the past four quarters resulted in a net addition of 1,680 units to the city's housing stock, while there was a slight addition of non-residential space. The median time to completion

for these projects from the first filing was 44 months. Projects less than 10,000 sq. ft. had a median completion time of 38 months; those between 10,000 sq. ft. and 24,999 sq. ft. took 59 months, essentially the same number for the group sized 25,000 sq. ft. to 249,999 sq. ft. The last group, above 250,000 sq. ft. took a median of 71 months from the initial filing to project completion.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.

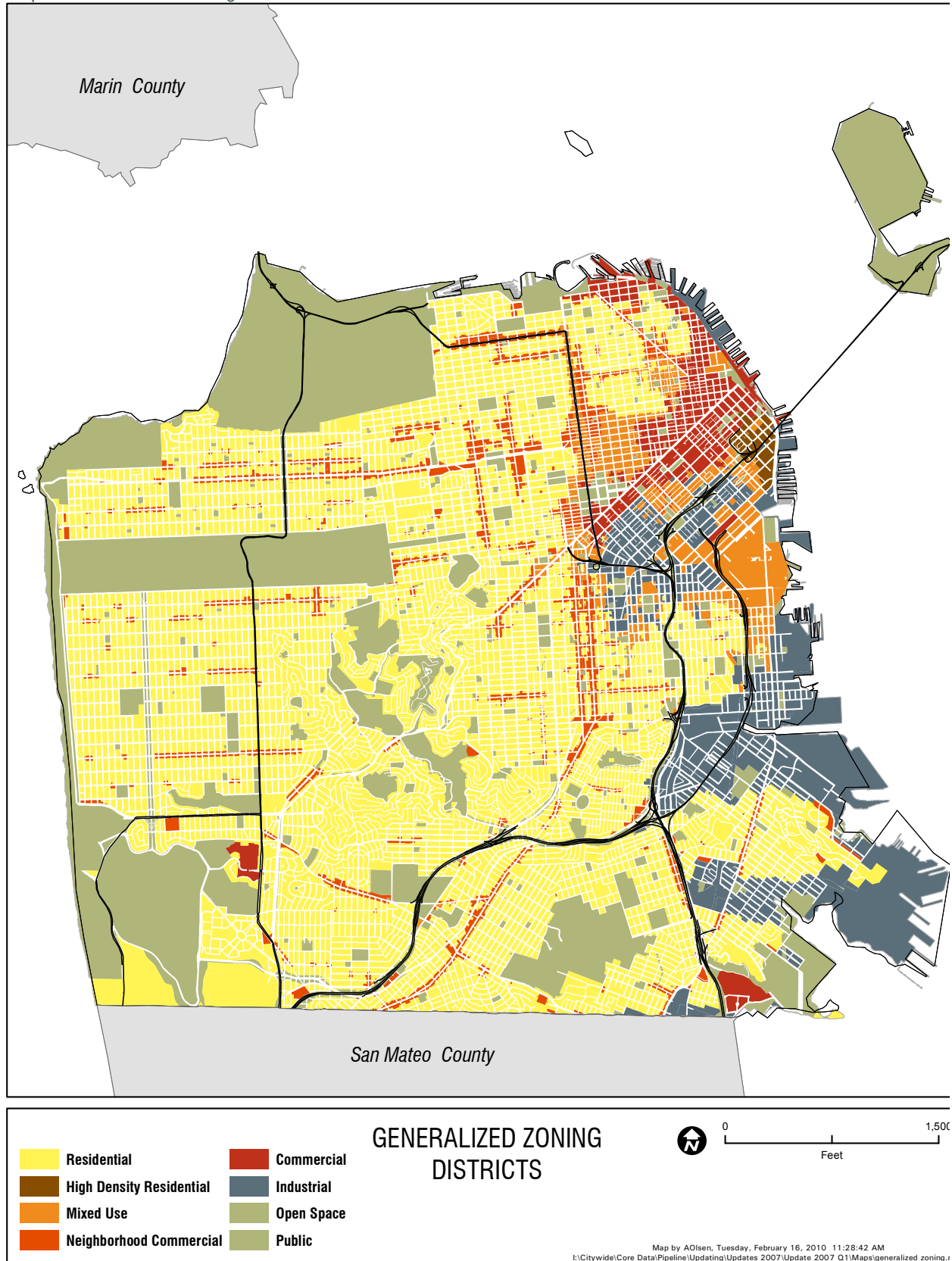
Map 2. Magnitude and Location of Past Year's Completed Development, by Major Land Use Type



Map 3. Neighborhood Designation for Pipeline Report



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	
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	Nonresidential 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	<p>This field summarizes in one word what type of project is being proposed. Apart from the commercial categories listed, this field includes</p> <ul style="list-style-type: none"> - 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 4, 2013

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

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

CONSTRUCTION

3507041	Nema SF	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
0814020	100 VAN NESS AV	Market Octavia	-424k	399	Mixres	Retail/Ent	12/31/2013
3749059	45 LANSING ST	Rincon Hill	-14k	320	Resident	--N/A--	12/6/2013
8711023	185 CHANNEL ST	Mission Bay	0k	315	Resident	--N/A--	12/13/2013
3765015	One Rincon Hill Phase II	Rincon Hill	0k	312	Resident	--N/A--	12/19/2013
3721122	535 MISSION ST	TB Combo	296k	0	MIPS	MIPS	12/31/2013
3732009	900 FOLSOM ST	East SoMa	6k	282	Mixres	Retail/Ent	10/11/2013
3701064	55 9TH ST	Downtown	0k	273	Resident	--N/A--	12/9/2013
8713001	1155 04TH ST	Mission Bay	0k	273	Resident	--N/A--	12/23/2013
3717019	120 HOWARD ST	Downtown	67k	0	MIPS	MIPS	6/13/2012
0857001A	218 BUCHANAN ST	Market Octavia	0k	191	Resident	--N/A--	11/12/2013
3732008	260 05TH ST	East SoMa	-36k	182	Mixres	Retail/Ent	10/11/2013
0831023	MARKET OCTAVIA - PARC	Market Octavia	4k	182	Mixres	Retail/Ent	12/31/2013
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--	12/12/2013
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	12/19/2013
0870003	100 BUCHANAN ST	Market Octavia	0k	116	Resident	--N/A--	8/7/2013
3616007	2558 MISSION ST	Mission	0k	114	Resident	--N/A--	1/2/2014
4045002	740 ILLINOIS ST and 2121	Central Waterfront	-8k	106	Resident	--N/A--	12/31/2013
3704069	973 MARKET ST	Downtown	-53k	100	Mixres	Retail/Ent	8/14/2008
3543011	2175 MARKET ST	Market Octavia	6k	88	Mixres	Retail/Ent	12/13/2013
0349001	101 GOLDEN GATE AV	Downtown	12k	90	Resident	--N/A--	12/30/2013
3747019	333 FREMONT ST	Rincon Hill	-30k	88	Resident	--N/A--	12/12/2013
4228158	1301 Indiana St	Central Waterfront	-10k	71	Mixres	Retail/Ent	12/19/2013
0165021	235 BROADWAY	Northeast	5k	75	Mixres	Retail/Ent	1/2/2014

Monday, February 10, 2014

Quarter 4, 2013 List, Page 1 of 9

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3789003	72 TOWNSEND ST	East SoMa	0k	74	Resident	--N/A--	11/18/2013
3704015	942 MISSION ST	Downtown	54k	0	Visitor	Visitor	12/11/2013
3725101	474 NATOMA STREET	Downtown	0k	55	Resident	--N/A--	11/25/2013
0855011	4 OCTAVIA ST	Market Octavia	4k	49	Mixres	Retail/Ent	12/23/2013
4624004	Hunters View	Other S Bayshore	0k	52	Resident	--N/A--	4/9/2013
3553054	1501 15TH ST	Mission	8k	40	Mixres	Retail/Ent	12/3/2013
0595013	1645-1661 PACIFIC AV	Northeast	-27k	38	Resident	--N/A--	12/31/2013
3534069	25 DOLORES ST	Market Octavia	-19k	37	Resident	--N/A--	11/13/2013
0279011	1080 SUTTER ST	Downtown	1k	35	Mixres	Retail/Ent	4/24/2013
0854001	1600 MARKET ST	Market Octavia	17k	24	Mixres	Retail/Ent	12/30/2013
5943008	268 MADISON ST	South Central, Other	25k	1	Mixres	Retail/Ent	9/13/2013
7148040	ONE CAPITOL AV	Ingleside, Other	0k	28	Resident	--N/A--	9/17/2013
0527002	2559 VAN NESS AV	Marina	-2k	27	Resident	--N/A--	1/2/2014
3548032	1875 MISSION ST	Mission	-35k	23	Mixres	Retail/Ent	12/19/2013
3980007	1717 17TH ST	Showpl/Potrero	5k	20	Resident	--N/A--	12/23/2013
3965001	2401 16TH ST	Mission	2k	12	Mixres	MIPS	12/10/2013
3776092	246 RITCH ST	East SoMa	-4k	19	Resident	--N/A--	10/23/2013
1742043	1266 09TH Av	Inner Sunset	-3k	15	Mixres	Retail/Ent	11/14/2013
7332005	700 BROTHERHOOD WY	Ingleside, Other	0k	11	Resident	--N/A--	12/4/2013
8710007	718 LONG BRIDGE ST	Mission Bay	0k	263	Resident	--N/A--	12/12/2013
8719002	1351 03RD ST	Mission Bay	264k		MIPS	MIPS	8/22/2013
4591C042	101 DONAHUE ST	Candlestick	0k	63	Resident	--N/A--	12/31/2013
8724001	UCSF Medical Center	Mission Bay	1800k	0	MED	MED	10/13/2010
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--	12/5/2013

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
3719010	181 FREMONT ST	TB Combo	493k	74	Mixres	MIPS	12/26/2013
3738004	280 BEALE ST	TB Combo	0k	479	Resident	--N/A--	8/28/2013

Monday, February 10, 2014

Quarter 4, 2013 List, Page 2 of 9

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
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
8720016	1455 03RD ST	Mission Bay	381k	0	MIPS	MIPS	4/23/2010
3507039	1420 MISSION ST	Downtown	12k	190	Resident	--N/A--	5/22/2013
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
0785029	FWY PARCEL F	Market Octavia	64k	69	Mixres	CIE	11/26/2013
3510001	1415 MISSION ST	Downtown	0k	117	Mixres	MIPS	7/22/2013
5431A001	5800 03RD ST	BVHP Area A,B	13k	121	Resident	--N/A--	12/13/2013
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
1098009	1401 DIVISADERO ST	Western Addition	57k	-21	MIPS	MIPS	7/31/2013
5281003	901 RANKIN ST	BVHP Area A,B	58k	0	PDR	PDR	8/21/2013
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
3732071	468 CLEMENTINA ST	East SoMa	-0k	25	Resident	--N/A--	10/23/2013
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
3617008	1050 VALENCIA ST	Mission	0k	15	Mixres	Retail/Ent	7/17/2013
3979001	444 DE HARO ST	Showpl/Potrero	30k	0	Vacant	--N/A--	12/31/2013
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
4591C099	50 JERROLD AV	Other S Bayshore	0k	34	Resident	--N/A--	4/16/2013
4591C094	201 FRIEDEL ST	HP Shipyard	0k	12	Resident	--N/A--	1/25/2013
4591C098	200 COLEMAN ST	HP Shipyard	0k	12	Resident	--N/A--	11/26/2012
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
8711019	701 LONG BRIDGE ST	Mission Bay	0k	188	Resident	--N/A--	3/26/2012
0757027	1239 TURK ST	Western Addition	0k	98	Resident	--N/A--	6/26/2013

Monday, February 10, 2014

Quarter 4, 2013 List, Page 3 of 9

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

BP REINSTATED

0269028	350 BUSH ST	Downtown	347k	0	MIPS	MIPS	12/30/2013
1052024	2655 BUSH ST	Western Addition	-41k	81	Mixres	Retail/Ent	6/27/2013

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

BP Filed

0694005	CPMC Hosp Van Ness	Downtown	702k	0	Mixed	CIE	4/20/2012
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
3553052	1979 MISSION ST	Mission	0k	351	Resident	--N/A--	12/17/2013
3748006	340 FREMONT ST	Rincon Hill	-43k	348	Mixres	Retail/Ent	8/3/2012
3733008	250 4TH ST	South of Market, Other	73k	208	Mixres	Visitor	6/28/2013
4172022	1201-1225 TENNESSEE ST	Central Waterfront	-140k	259	Mixres	Retail/Ent	12/23/2013
3794024	144 KING ST	East SoMa	44k	132	Mixres	Visitor	6/28/2013
3774026	270 BRANNAN ST	East SoMa	154k	0	MIPS	MIPS	12/17/2013
0811002	101 POLK ST	Downtown	1k	162	Mixres	Retail/Ent	8/13/2013
0794028	555 FULTON ST	Market Octavia	0k	139	Resident	--N/A--	5/3/2013
0283004A	620 SUTTER ST	Downtown	-46k	65	Mixres	Visitor	1/23/2013
3753106	923 FOLSOM STREET	East SoMa	-2k	115	Mixres	Retail/Ent	11/20/2013
0667016	1545 PINE ST	Northeast	-23k	107	Mixres	Retail/Ent	12/3/2013
4045003	2171 THIRD ST	Central Waterfront	-21k	109	Mixres	Retail/Ent	6/21/2013
4041009	630 INDIANA ST	Central Waterfront	0k	111	Resident	--N/A--	12/24/2013
0836007	1554 MARKET ST	Market Octavia	0k	110	Resident	--N/A--	11/22/2013
4991600	101 EXECUTIVE PARK BL	Executive Park	0k	107	Resident	--N/A--	10/25/2010
3542039	2198 MARKET ST	Market Octavia	5k	87	Mixres	Retail/Ent	12/13/2013
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
0629037	2155 WEBSTER ST	Marina	0k	77	Resident	--N/A--	11/22/2013
3973002C	480 POTRERO AV	Mission	0k	77	Resident	--N/A--	6/25/2013
3962008	346 POTRERO AVENUE	Mission	3k	72	Mixres	Retail/Ent	11/20/2013
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
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
3518006	248 - 252 09TH ST	WSoMa	5k	15	Mixres	MIPS	3/12/2013
0807010	580 HAYES ST	Market Octavia	0k	29	Resident	--N/A--	12/9/2013
6944044	270 BRIGHTON AV	Ingleside, Other	4k	25	Mixres	Retail/Ent	8/30/2013
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
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
1051034	2320 SUTTER ST	Western Addition	11k	0	MED	MED	10/3/2013
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

Monday, February 10, 2014

Quarter 4, 2013 List, Page 5 of 9

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3576090	3420 18TH ST	Mission	-4k	16	Resident	--N/A--	11/4/2013
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

PL APPROVED

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
3736074	41 TEHAMA ST	TB Combo	0k	398	Resident	--N/A--	11/14/2013
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
0238002	300 CALIFORNIA ST	Downtown	59k	0	MIPS	MIPS	12/5/2013
3788042	333 BRANNAN ST (aka 32	East SoMa	162k	0	MIPS	MIPS	8/15/2013
0794015	746 LAGUNA ST	Market Octavia	2k	136	Mixres	MIPS	5/13/2010
0192014	Chinese Hospital	Northeast	68k	0	CIE	CIE	7/12/2012
0250001	1401 CALIFORNIA ST	Northeast	-19k	95	Mixres	Retail/Ent	12/15/2011
3767305	429 BEALE ST	Rincon Hill	-36k	113	Resident	--N/A--	5/14/2009
4060001	888 TENNESSEE ST	Central Waterfront	-36k	110	Mixres	Retail/Ent	10/16/2013

Monday, February 10, 2014

Quarter 4, 2013 List, Page 6 of 9

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
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
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
0287013	300 Grant Ave.	Downtown	-20k	45	Mixres	Retail/Ent	10/6/2011
0258033	500 PINE ST	Downtown	57k		MIPS	MIPS	3/15/2001
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
0570010	1622 BROADWAY	Marina	0k	34	Resident	--N/A--	3/12/2009
2636025	Crestmont Drive	Inner Sunset	0k	34	Resident	--N/A--	3/7/2013
0620006	1601 LARKIN ST	Northeast	0k	28	Resident	--N/A--	11/15/2013
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

PL Filed

9900048	Seawall Lot 337	South of Market, Other	1950k	1,500	Mixres	MIPS	4/23/2013
6310001	Sunnydale Hope SF	South Central, Other	59k	915	Mixres	Retail/Ent	4/28/2010
4167004	Potrero Hope SF	Showpl/Potrero	30k	1,094	Mixres	Retail/Ent	6/30/2010
3777045	598 BRANNAN STREET	WSoMa	662k	0	MIPS	MIPS	8/23/2012
0342001	950 MARKET ST	Downtown	170k	305	Mixres	Visitor	11/19/2013
0244001	950 MASON STREET	Northeast	-295k	160	Mixres	Visitor	2/11/2009

Monday, February 10, 2014

Quarter 4, 2013 List, Page 7 of 9

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
0814001	150 VAN NESS AVE	Market Octavia	-128k	429	Mixres	Retail/Ent	10/25/2013
3949001	1200 17TH STREET	Showpl/Potrero	66k	200	Mixres	MIPS	4/4/2012
4105009	800 INDIANA STREET	Central Waterfront	-78k	340	Resident	--N/A--	10/10/2013
3954016	1301 - 16TH STREET	Showpl/Potrero	-39k	276	Resident	--N/A--	9/16/2013
0647007	1634-1690 PINE ST	Western Addition	0k	260	Mixres	Retail/Ent	7/17/2012
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
3507042	1400 MISSION ST	Downtown	4k	165	Mixres	Retail/Ent	4/8/2009
3702047	1125 MARKET ST	Downtown	3k	164	Mixres	Retail/Ent	12/18/2013
3786038	501-505 BRANNAN	East SoMa	134k	0	MIPS	MIPS	5/20/2013
3730015	1140 FOLSOM STREET	WSoMa	-9k	128	Mixres	Retail/Ent	10/16/2013
3747012	325 FREMONT ST	Rincon Hill	0k	119	Resident	--N/A--	5/2/2013
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
4059001A	815 TENNESSEE STREET	Central Waterfront	-32k	88	Resident	--N/A--	12/6/2013
3751029	750 HARRISON ST	East SoMa	-2k	77	Mixres	Retail/Ent	9/17/2013
3774071	77 & 85 FEDERAL STREET	East SoMa	55k	0	Mixed	MIPS	3/26/2013
3519063	1335 FOLSOM ST	WSoMa	-6k	65	Resident	--N/A--	12/3/2013
4044013	777 TENNESSEE STREET	Central Waterfront	-16k	59	Resident	--N/A--	5/30/2013
0318020	651 GEARY ST	Downtown	-8k	46	Mixres	Retail/Ent	2/25/2013
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
3726103	114 07th Street	Downtown	-30k	39	Mixres	Retail/Ent	8/14/2012
3115043	625 MONTEREY BL	Ingleside, Other	21k	0	Retail/Ent	Retail/Ent	5/26/2010
4108017	901 TENNESSEE STREET	Central Waterfront	-9k	39	Resident	--N/A--	9/12/2013
0522002A	2601 VAN NESS AV	Marina	7k	26	Mixres	Retail/Ent	8/28/2013
3576001	2100 MISSION ST	Mission	-5k	29	Mixres	Retail/Ent	9/21/2009
3575070	600 SOUTH VAN NESS AV	Mission	1k	27	Mixres	Retail/Ent	9/10/2013
0670024	1433 BUSH ST	Downtown	-4k	26	Mixres	Retail/Ent	11/17/2009
3753095	233-237 SHIPLEY ST	East SoMa	-2k	22	Resident	--N/A--	7/10/2013
3591024	793 SOUTH VAN NESS AV	Mission	6k	29	Resident	Retail/Ent	8/14/2012
0645003	1335 LARKIN ST	Northeast	0k	20	Resident	--N/A--	8/18/2013

ACKNOWLEDGEMENTS

Mayor

Edwin M. Lee

Board of Supervisors

David Chiu, President

John Avalos

London Breed

David Campos

Malia Cohen

Mark Farrell

Jane Kim

Eric Mar

Katy Tang

Scott Wiener

Norman Yee

Planning Commission

Rodney Fong, *President*

Cindy Wu, *Vice President*

Michael Antonini

Gwyneth Borden

Rich Hillis

Kathrin Moore

Hisashi Sugaya

Planning Department

John Rahaim, *Planning Director*

Joshua Switzky, *Acting Director of Chitywide Planning*

Teresa Ojeda, *Manager, Information and Analysis Group*

Aksel Olsen, *Project Manager*

Alton Chinn, *Programmer Analyst*

Gary Chen, *Graphic Design*

Department of Building Inspections

Hemalatha Nekkanti, *Development Division Manager*



**SAN FRANCISCO
PLANNING
DEPARTMENT**

FOR MORE INFORMATION ABOUT THIS REPORT, CONTACT:

Aksel Olsen
San Francisco
Planning Department
1650 Mission Street, Suite 400
San Francisco CA 94103-2475

E: aksel.olsen@sfgov.org
T: **415.558.6616**
F: **415.558.6409**
W: <http://www.sf-planning.org/index.aspx?page=1691>