2009 QUARTER 4

San Francisco

PIPELINE REPORT

San Francisco Planning Department

February 2010

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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.

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. In addition, when a project is issued a Certificate of Final Completion by the DBI, it is taken out of the pipeline.

Data sources for the pipeline are chiefly the project databases maintained by the Planning Department and the Department of Building Inspection, respectively, but data is also periodically obtained from the San Francisco Redevelopment Agency. Affordable housing projects sponsored by the Mayor's Office of Housing figure in the pipeline database only after an application has been filed with either the Planning Department or the Department of Building Inspection. Projects in the pre-development stages are not included in the *Pipeline Report*.

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

Time Frame and Certainty of Development

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

The Relevance of the Pipeline

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

Accuracy and Timeliness

The pipeline is compiled and consolidated from different data sources and is subject to errors due to varying accuracy and currency of original sources. The data in this report is pulled from original sources current through December 31, 2009. While we make an effort to consolidate multiple permits for different components of the same project from different agencies, it is not possible to validate the accuracy of all projects. Should you find inaccuracies and omissions, please e-mail your comments to *aksel.olsen@sfgov.org.*

Q4 2009 Pipeline at a Glance

- There are currently around 870 projects in the pipeline of varying sizes, complexities and stages.
- These projects, if completed, would add 46,600 net new housing units to the city's housing stock. This high figure remains so due to large development program applications under Planning review, including the Bayview Waterfront Project, Treasure Island, and a Park Merced expansion project.
- The Bayview Waterfront project, consisting of a number of sites along the southeastern waterfront, would account for 10,000 units and nearly 8 million sq. ft. of office, R&D, retail and community space, as well as a 10,000 seat arena at Candlestick Point.
- The pipeline would also add a net of 16.6 million commercial square footage. Within this total, office and retail space would see net gains of 11.7 million and 2.8 million sq. ft., respectively. While there is a projected loss of nearly 500,000 sq. ft. of light industrial or Production, Distribution and Repair (PDR) space because of conversion to commercial and residential space, there is a net addition from projects currently undergoing review.
- One in six projects (with approximately 1,300 units) are in the construction phase; other projects adding 2,100 units have received building permits approvals and an additional 6,200 units have received land use entitlements.
- One in six of all projects (with 32,300 units, or more than two thirds of all pipeline units, and 13.2 million commercial square feet) are still at the early stages of development, awaiting land use entitlements from the Planning Department.

The Pipeline by the Numbers

There are currently just under 900 projects in the pipeline. Around 35 of these are projects sponsored through the San Francisco Redevelopment Agency. The Planning Department makes an effort to track these projects to make the pipeline more inclusive even as the Department is not always the entitling entity.

Of the pipeline projects, two out of every three are exclusively residential and one in five are mixed-use projects with both residential and commercial components. Only about one in nine projects are commercial developments without a residential component.

A net total of 46,600 new housing units would be added to the city's housing stock according to the current pipeline. This is still high relative to historical numbers and is largely due to the filing of applications during the past two years for new large scale, long term development programs for Park Merced, Treasure Island and the Bayview Waterfront. The size of these projects notwithstanding, the vast majority of pipeline projects (but not the units) are in small projects consisting of one to three units.

Pipeline projects also comprise a net addition of 16.5 million sq. ft. of commercial development.

Project Status

Table 1 on the following page shows the following:

- Some 15 percent of all projects, representing 1,300 net added housing units and 450,000 sq. ft. of commercial space, are under construction.
- Around 20 percent of projects (with 2,100 net units) have received building permit approvals and may have already begun construction.
- Nearly four out of 10 projects (including 4,600 net new units and an addition of 1.6 million sq. ft. of commercial space) have filed building permit applications with the Department of Building Inspections. A number of these projects have already received Planning Department entitlements.

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	108	30,370	13,059,000	273,000	0	8,870,000	722,000	2,186,000	1,008,000
Approved by Planning	119	8,220	989,000	661,000	-33,000	406,000	-243,000	223,000	-25,000
BP Filed	328	4,620	1,551,000	21,000	38,000	1,662,000	-422,000	250,000	0
BP Approved/Issued/ Re-Instated	190	2,070	583,000	50,000	0	482,000	4,000	34,000	25,000
Construction	128	1,320	464,000	24,000	20,000	298,000	-15,000	133,000	0
Grand Total	873	46,600	16,648,000	1,029,000	25,000	11,718,000	47,000	2,827,000	1,008,000

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.

- Ten percent of the pipeline projects and 13 percent of the units have received Planning Department approvals. If and when constructed, these projects would add 8,200 new units to the city's housing stock, and one million sq. ft. of commercial space. These projects now must secure a building permit.
- Sixteen percent of projects, representing more than 2/3 of the units in the pipeline are under Planning Department review. Collectively, these projects represent some 30,400 net new units and 13.1 million sq. ft. of non-residential uses. The majority of units and uses are in this early stage of development.

Amount and Type of Net New Commercial Space

Projects in the current pipeline also represent a net addition of 16.5 million sq. ft. of commercial development that would result in the following land use inventory changes:

- 11.7 million sq. ft. of additional office space
- 2.8 million sq. ft. of additional retail space
- 1 million sq. ft. of additional visitor-serving uses, such as hotels or hostels.
- 1 million sq. ft. of additional cultural, institutional, educational (CIE) and medical space
- A small net gain of production, distribution, and repair space, although there is a substantial portion of space to be converted or demolished in the near term.[1]
- Office and retail uses remain the most commonly sought after non-residential projects.

Location of New Development

Table 2 on the following page shows the three most active areas for residential development include Bayview/Hunter's Point/Candlestick (where the Bayview Waterfront Project is predominantly located), Treasure Island and Park Merced. However, these projects are in the environmental review stages of development with possible realization more than 10 years in the future. (See Map 1 for area boundaries used.) These areas alone would account for around 25,800 net units or almost half of all net additional units in the pipeline.

Other areas with active residential development include Downtown, Transbay, Market & Octavia, and Showplace Square, totalling around 11,000 new units.

On the commercial side, nearly 90 percent of the 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.

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

TABLE 2: Residential and Commercial Pipeline, by Neighborhood

Neighborhood	Projects	Percent	Net Units	Percent	Avg Units / Project	Net Comm'l Sq. Ft.	Percent	Residential Rank	Commercial Rank
Balboa Park	5	0.6%	270	0.6%	54	4,800	0.0%	20	24
Bernal Heights	40	4.6%	70	0.2%	2	-800	-0.0%	26	26
Buena Vista	15	1.7%	80	0.2%	6	26,500	0.2%	25	18
BVHP Area A,B	33	3.8%	830	1.8%	28	325,200	2.0%	13	7
Candlestick	2	0.2%	11,580	24.8%	5,789	7,996,900	48.0%	1	2
Central	91	10.4%	110	0.2%	1	20,800	0.1%	22	19
Central Waterfront	11	1.3%	540	1.2%	49	-4,900	-0.0%	14	28
Downtown	52	6.0%	3,920	8.4%	83	1,231,400	7.4%	4	5
East SoMa	37	4.2%	2,060	4.4%	56	-199,100	-1.2%	8	31
Executive Park	1	0.1%	340	0.7%	340	14,000	0.1%	19	22
India Basin	3	0.3%	10	0.0%	3	-3,100	-0.0%	30	27
Ingleside, Other	34	3.9%	90	0.2%	3	16,500	0.1%	24	21
Inner Sunset	36	4.1%	70	0.2%	2	12,100	0.1%	27	23
Japantown	5	0.6%	240	0.5%	47	3,600	0.0%	21	25
Marina	31	3.6%	110	0.2%	4	35,000	0.2%	23	15
Market Octavia	38	4.4%	2,110	4.5%	57	85,600	0.5%	7	11
Mission	56	6.4%	530	1.1%	9	28,700	0.2%	16	16
Mission Bay	6	0.7%	0	0.0%	0	1,545,100	9.3%	31	4
Northeast	55	6.3%	1,020	2.2%	19	-248,700	-1.5%	12	32
Other South Bayshore	15	1.7%	520	1.1%	35	20,300	0.1%	17	20
Outer Sunset	26	3.0%	40	0.1%	1	36,700	0.2%	28	14
Park Merced	3	0.3%	6,000	12.9%	2,000	461,800	2.8%	3	6
Richmond	86	9.9%	460	1.0%	5	40,900	0.2%	18	13
Rincon Hill	7	0.8%	1,900	4.1%	272	-170,400	-1.0%	9	30
Showplace/Potrero	34	3.9%	2,440	5.2%	72	303,900	1.8%	6	8
South Central, Other	73	8.4%	1,060	2.3%	15	26,700	0.2%	11	17
Transbay Combo	20	2.3%	2,480	5.3%	124	4,617,800	27.7%	5	3
Treasure Island	1	0.1%	6,000	12.9%	6,000	250,000	1.5%	2	9
Visitacion Valley	4	0.5%	10	0.0%	3	-6,100	-0.0%	29	29
Western Addition	34	3.9%	1,180	2.5%	35	82,200	0.5%	10	12
West SoMa	19	2.2%	540	1.2%	28	94,300	0.6%	15	10
Grand Total	873	100.0%	46,610	100.0%	54	16,647,600	100.0%	0	0

Projects by Age

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

Figure 1 below shows the average[2] time in weeks projects have spent in their current status of entitlement, by residential size. Two observations can be gleaned from this figure. First, planning review and DBI review, respectively, are as expected where the bulk of the processing time is spent (with construction time consuming the balance). Second, once a project encompasses more than one unit, the review time goes up significantly. For projects classified as under construction, there is a clear association between project size and time in status, with the exception that smaller projects seem to in some cases take more time than their size would otherwise suggest.

2 Averages lend themselves to distortion in the event of outliers.

The data also shows that half the residential projects in the current pipeline are older than 140 weeks (regardless of size). The average age, however, is 150 weeks, suggesting a somewhat skewed distribution where a relatively small number of projects with disproportionately long life spans drive up the overall average. The data doesn't directly reveal the reason for these project life spans. Reasons will include review times for complex projects needing environmental impact reports. Some projects are subject to approval actions by the Planning Commission, where changes to the project may be proposed. At other times, project sponsors, after receiving entitlements, may not immediately proceed with filing for a building permit, or wait for financing to materialize for complex projects.

Looking at how long the projects have been in their *current* entitlement stage, half the projects have been in its current status for 77 weeks or less, with an average of 90 weeks, again suggesting that a relatively small number of projects contribute disproportionately to this average.

FIGURE 1: Project Age, by Residential Size

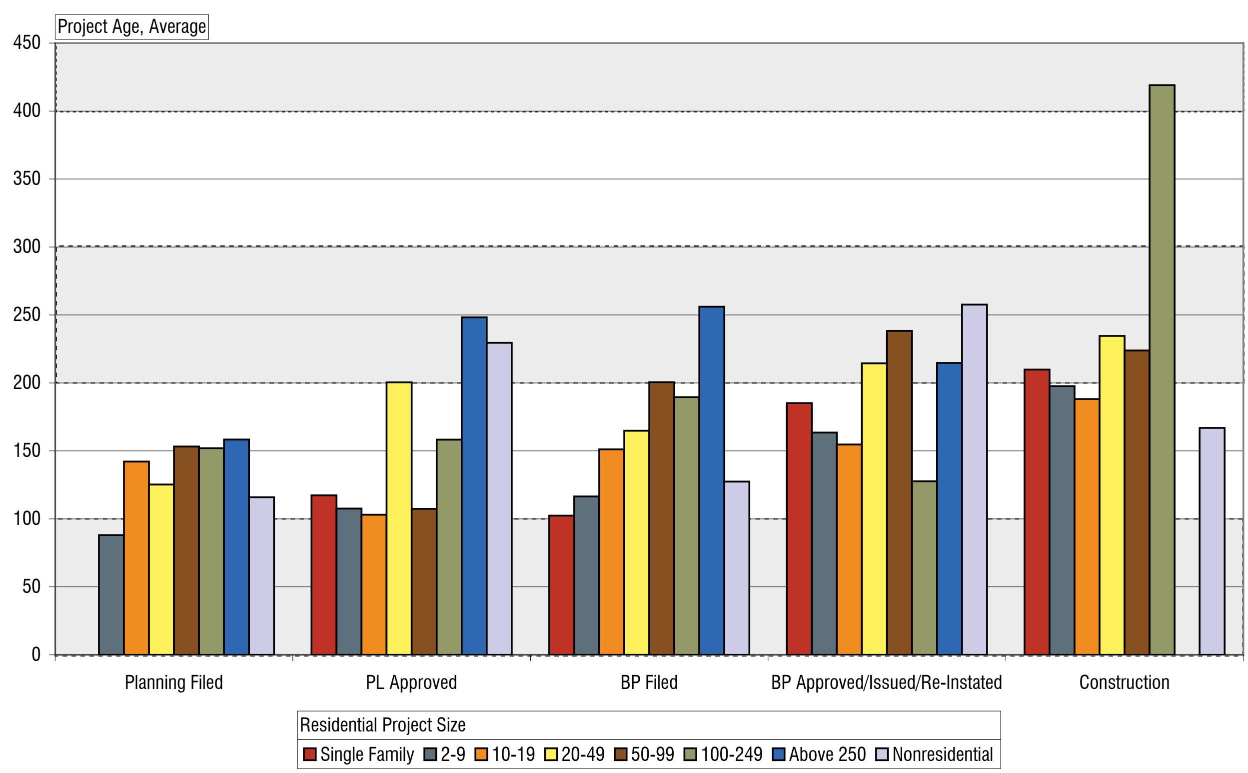


TABLE 3: Residential and Commercial Pipeline by Generalized Zoning Category

District Type	Simplified Zoning	Projects	Net Units	Net Gross Sq. Ft.	Cult., Inst., Educ.	Medical	Office	Prod., Dist., Repair	Retail	Visitor
Commercial	C-2	20	2,570	786,000	0	0	415,000	-59,000	379,000	63,000
	C-3	36	2,590	3,691,000	156,000	0	2,566,000	1,000	282,000	687,000
	C-M	1	120	0	0	0	2,000	-4,000	2,000	0
Commercial Total		**57**	**5,280**	**4,478,000**	**156,000**	**0**	**2,983,000**	**-62,000**	**663,000**	**750,000**
Hi Density Res	DTR	8	1,900	-134,000	0	0	-81,000	-71,000	18,000	0
Hi Density Res Total		**8**	**1,900**	**-134,000**	**0**	**0**	**-81,000**	**-71,000**	**18,000**	**0**
Industrial	M	9	460	90,000	8,000	0	11,000	-93,000	164,000	0
	PDR	19	570	206,000	4,000	0	112,000	25,000	63,000	0
	SLI	7	780	-50,000	0	0	2,000	-99,000	47,000	0
Industrial Total		**35**	**1,800**	**246,000**	**11,000**	**0**	**125,000**	**-167,000**	**274,000**	**0**
Mixed Use	CCB	1	0	2,000	0	0	0	0	0	2,000
	CRNC	2	0	88,000	88,000	0	0	0	0	0
	CVR	1	20	-9,000	4,000	0	0	0	-14,000	0
	MUG	3	10	-2,000	0	0	0	-2,000	0	0
	MUO	4	70	-80,000	0	0	-78,000	-3,000	1,000	0
	MUR	12	860	-81,000	0	0	-9,000	-88,000	16,000	0
	NC	125	1,880	-1,000	49,000	-45,000	120,000	-78,000	-87,000	40,000
	NCT	48	1,790	120,000	111,000	38,000	-11,000	-95,000	77,000	0
	RC	27	2,220	15,000	0	0	142,000	-37,000	47,000	-136,000
	RSD	4	50	-2,000	0	0	0	-6,000	4,000	0
	SLR	12	510	62,000	0	0	-12,000	-2,000	76,000	0
	SPD	2	0	2,000	0	0	4,000	-1,000	0	0
	SSO	1	0	33,000	0	0	-14,000	0	5,000	41,000
	UMU	21	1,950	-76,000	0	0	-15,000	-168,000	107,000	0
	MB	5	0	1,164,000	0	0	1,097,000	50,000	17,000	0
Mixed Use Total		**268**	**9,360**	**1,236,000**	**252,000**	**-7,000**	**1,225,000**	**-430,000**	**248,000**	**-52,000**
Public	P	13	18,060	10,465,000	448,000	12,000	7,403,000	812,000	1,179,000	610,000
Public Total		**13**	**18,060**	**10,465,000**	**448,000**	**12,000**	**7,403,000**	**812,000**	**1,179,000**	**610,000**
Residential	DTR	1	70	0	0	0	0	0	0	0
	RED	6	90	6,000	0	20,000	-4,000	-10,000	0	0
	RH	391	600	118,000	105,000	0	-4,000	-7,000	20,000	0
	RM	73	9,190	257,000	64,000	0	92,000	0	401,000	-300,000
	RTO	21	230	-25,000	-8,000	0	-21,000	-19,000	24,000	0
Residential Total		492	10,190	356,000	161,000	20,000	62,000	-35,000	444,000	-300,000
Grand Total		**873**	**46,600**	**16,648,000**	**1,029,000**	**25,000**	**11,718,000**	**47,000**	**2,827,000**	**1,008,000**

Pipeline Projects by Current Zoning Category

Residential Pipeline

Table 3 shows the pipeline distribution by general zoning categories. The vast majority of the residential pipeline falls on four land zoning classes: Residential, Mixed Use, Commercial and Public. The largest of these is the Public Land category. The Bayview Waterfront project, most of which is at Candlestick Point, is classified under this heading.[3] Also found in this category is the Treasure Island redevelopment project. These two projects alone could add more than 15,000 units, and thus make up the bulk of units in this category.

The second largest share is found on residentially zoned lots, accounting for 10,200 units in 490 projects, with an average size of 21 units. Two thirds of these units is comprised of the Park Merced redesign project currently undergoing environmental review as well as a couple of large San Francisco Housing Authority projects, one in the Potrero Hill area, and one on Sunnydale Ave as part of the Hope SF program. The remainder of projects on residentially zoned parcels are relatively small, with most of the projects being two to nine unit projects.

Thirdly, the mixed use districts, ranging from neighborhood commercial to eastern neighborhoods districts, account for 8,300 units in 247 projects, or around 34 units per project.

The fourth largest of these shares is on commercially zoned parcels, accounting for 5,500 units in 60 projects, averaging 96 units per project.

Another 2,600 units are pending on industrially zoned lands. A third of these projects are mixed use projects with a commercial component. The added residential units in industrial areas are accompanied by loss of PDR space and addition of retail space (see Table 3).

Also of note, the high-density, transit-accessible downtown neighborhoods of Rincon Hill and Transbay account for a fraction of one percent of the city's land area, but 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 200 net added units per project.

Conversely, residential projects in the Residential (R) districts tend to be small scaled, in-fill developments, accounting for some 54 percent of proposed projects but just 21 percent of the total units (or 11,600 net units) in the pipeline. Half of these units, in turn, would be the result of just one project, the Park Merced Redesign project. In terms of land area, residential zoning districts form the largest group, comprising 46 percent of the city area.

Commercial Pipeline

Commercial development is proposed chiefly in public, commercial and mixed use districts, with 92 percent of the net commercial space proposed to be added in these land classes. The commercial pipeline in general is characterized by, as noted earlier, just less than 100 projects, but also 188 mixed use projects which also contain a residential component. Looking at the exclusively commercial projects, half are smaller than 23,000 gross square feet while two thirds are smaller than 61,000 gross square feet. The bulk of the square footage is thus comprised by a relatively small number of projects.

The commercial component in the 247 mixed use district projects are, in general also small, with half of projects being smaller than 5,000 gross square feet, respectively.

The largest concentration of potential commercial development is in a few areas currently zoned public[4]. Development here would add some net 10.4 million square feet, or more than half of all proposed commercial development, in just 13 projects. This chiefly reflects the large scale Bayview Waterfront Project, which would itself add more than eight million commercial square feet as currently proposed.

Commercial districts account for the second largest concentration of non-residential development,

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

4 See footnote 3.

with 26 percent of the total in 60 projects. The mixed use districts account for a larger number of projects (even if this count may include projects that are exclusively residential) totalling 1.2 million net new square feet. Other districts account for only a minor amount of non-residential development.

Breaking down commercial space into subcategories, the three largest types land-use classes of commercial development for the city as a whole are office space (11.6 million sq. ft.), retail (3.3 million sq. ft.), and visitor-related (960,000 sq. ft.) uses.

TABLE 4: Project by Neighborhood and Building Size

Neighborhood	Project Size							Grand Total	Rank
	Single Family	2-9	10-19	20-49	50-99	100-249	Above 250		
Balboa Park	0	6	13	31	60	159	0	269	21
Bernal Heights	15	55	10	0	0	0	0	80	28
Buena Vista	0	41	0	0	56	0	0	97	26
BVHP Area A,B	5	21	0	24	80	0	746	876	14
Candlestick	0	0	0	0	0	198	11,642	11,840	2
Central	22	162	18	0	0	0	0	202	23
Central Waterfront	1	11	28	24	289	196	0	549	17
Downtown	2	43	31	232	616	1,446	2,089	4,459	5
East SoMa	4	29	73	273	459	497	810	2,145	8
Executive Park	0	0	0	0	0	0	340	340	20
India Basin	0	10	0	0	0	0	0	10	31
Ingleside, Other	13	45	18	28	0	0	0	104	25
Inner Sunset	14	42	25	0	0	0	0	81	27
Japantown	0	7	0	0	0	231	0	238	22
Marina	9	42	12	103	0	0	0	166	24
Market Octavia	1	33	76	247	292	1,001	491	2,141	9
Mission	2	119	93	105	173	125	0	617	16
Northeast	3	81	61	180	246	495	0	1,066	13
Other South Bayshore	7	9	0	0	102	0	668	786	15
Outer Sunset	4	37	10	0	0	0	0	51	29
Park Merced	0	0	0	0	0	322	8,898	9,220	3
Richmond	6	176	31	80	83	150	0	526	19
Rincon Hill	0	0	0	0	70	113	1,720	1,903	10
Showplace/Potrero	3	48	0	69	0	466	2,507	3,093	6
South Central, Other	22	145	47	42	117	0	1,500	1,873	11
Transbay Combo	0	5	19	0	202	851	1,406	2,483	7
Treasure Island	0	0	0	0	0	0	6,000	6,000	4
Visitacion Valley	0	16	0	0	0	0	0	16	30
Western Addition	2	33	73	100	211	0	861	1,280	12
West SoMa	3	17	0	106	0	0	416	542	18
Grand Total	138	1,233	638	1,644	3,056	6,250	40,094	53,053	1

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.

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

Residential Pipeline by Project Size

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

Different areas exhibit different project size distributions. Thus we see that, for instance, Downtown will get the bulk of its units in large projects (50-99 units, 100-249 units, above 249 units). This is also the case for areas like Market Octavia, Showplace Square, and in particular Transbay and Rincon Hill. Conversely, for Inner Sunset, the largest addition come in projects of two to nine units and single family projects. For the city as a whole, three out of every four units could come in a relative small number of projects larger than 250 units, while the overwhelming majority of areas have a size distribution that is leaning more on the smaller end of the spectrum, suggesting the relative geographic concentration of proposed development.

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

Small scale, in-fill projects make up the bulk of pipeline projects, but account for a minority of units: More than two thirds of the residential projects would make buildings with 10 units or less, while half the projects include threeunits or less. Adding this bottom half of all pipeline projects would contribute just 630 units, or one percent of the total number of pipeline units. Areas where these small projects are typical include areas like Richmond, Ingleside, Inner Sunset, and Central

Except for Park Merced, development in residentially zoned areas in the western part of the city is limited in scope and consists chiefly of small-scale in-fill projects. Accordingly, of the total 32 projects with 68 units in the Inner Sunset and 94 in Ingleside, all but three projects are sized at nine units or less and 27 are single-unit projects.

FIGURE 2: Residential Pipeline, by Status & Building Size

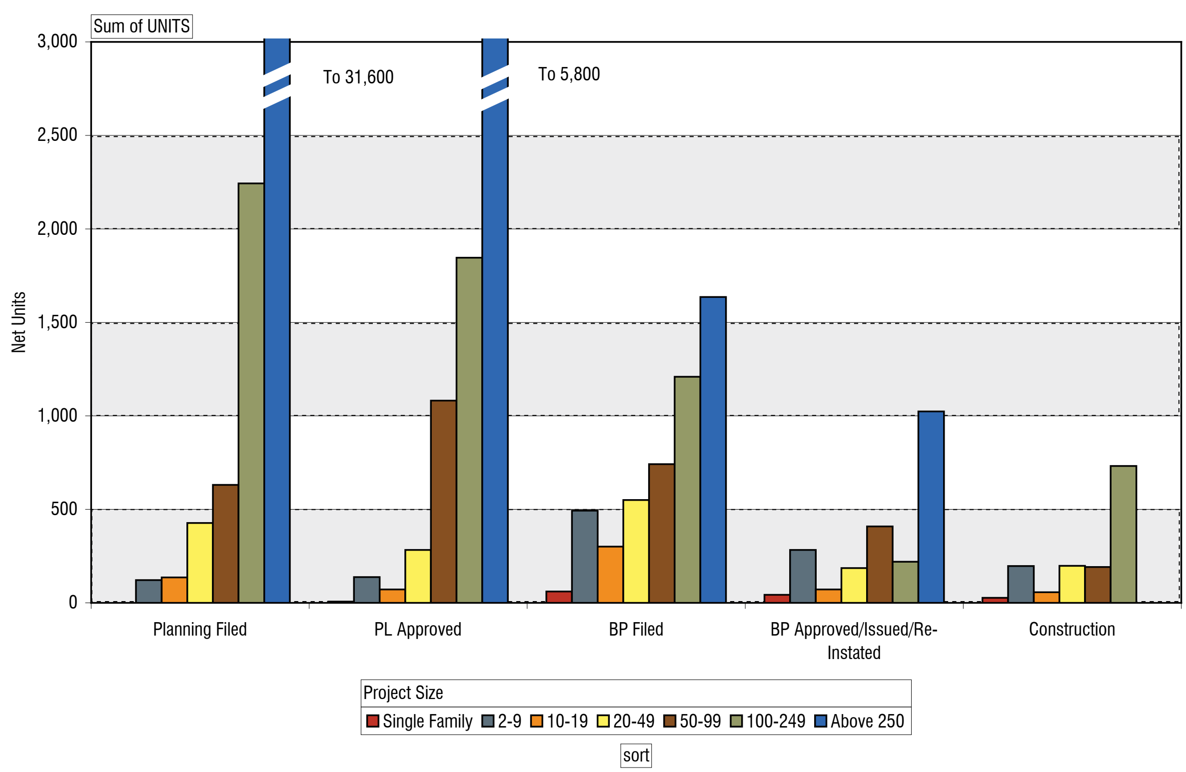


Figure 2 shows the residential pipeline by building size and pipeline status. The residential pipeline shows that:

- Of the 2,200 units with building permits approved, 1,200 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.

Conversion of Commercial Space to Residential Use[6]

There are 54 projects in the current pipeline database proposing demolition or conversion of existing production, distribution and repair-use (PDR) buildings to residential use.[7] The corresponding figure for the conversion of office space is 43 projects. These projects represent approximately 10 percent (or 4,600 units) and seven percent (or 3,300 units), respectively, of the residential units in the pipeline.

Conversion of PDR Space

Table 5 above 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.[8] It would be replaced with residential units (4,500) and/or other commercial uses.
- Most of the PDR loss will be in Bayview Hunters Point, Showplace Square & Potrero Hill, East SoMa and Northeast districts, accounting together for more than two thirds of the overall loss. The loss of PDR space in these neighborhoods would in turn bring in 3,100 net new housing units.
- In addition to residential uses, the net loss of PDR space will be replaced chiefly by retail use adding up to 170,000 sq. ft, with the largest shares falling in Bayview Hunters Point and East SoMa.

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 where most office space is located. Table 6 shows that the Downtown and Transbay districts would lose the most office space – around 500,000 square feet, or a little more than half of the total conversion loss.
- A total of 3,300 units are proposed to be built replacing the lost office space.
- In addition to housing, around 70,000 square feet of net new retail space are being proposed in the converted offices.

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 notwithstanding, taken together with other commercial developments in the pipeline counted in Table 1, the overall result would still be a net addition of office space. As reported in Table 1, the net addition of office amounts to 11.7 million square feet citywide.

6 Numbers represented here differ from those reported in Table 1. Table 1 represents the net change of all projects whereas numbers here are limited to the specific projects representing conversions or demolitions resulting in a net loss of PDR space (Table 5) and office space (Table 6).
7 This pipeline only accounts for PDR built space. Hence, the conversion of undeveloped or vacant lands currently in PDR uses, such as construction or open storage yards are not accounted for in this report.
8 Table 5 shows only projects that include the conversion or loss of PDR space to residential use. Other, separate projects proposing to add PDR space not involving conversion or demolition of PDR space are not counted in this table. Table 1 shows a net loss of 400,000 sq. ft. as it is a net tally of all projects that add, convert or demolish PDR space while this table only counts loss.

TABLE 5: PDR Space Conversion to Residential Use, by Planning District

Neighborhood	Projects	Percent	Net Units	Percent	PDR Net	Percent	Avg Units / Project	Avg PDR Loss / Project
Balboa Park	1	1.9%	31	0.7%	-3,700	0.5%	31	-3,700
BVHP Area A,B	3	5.6%	754	16.3%	-163,700	20.8%	251	-54,600
Central Waterfront	3	5.6%	145	3.1%	-36,100	4.6%	48	-12,000
Downtown	3	5.6%	300	6.5%	-45,500	5.8%	100	-15,200
East SoMa	15	27.8%	1,189	25.7%	-131,600	16.7%	79	-8,800
India Basin	2	3.7%	7	0.2%	-5,100	0.6%	4	-2,600
Marina	2	3.7%	38	0.8%	-8,700	1.1%	19	-4,400
Market Octavia	2	3.7%	115	2.5%	-20,900	2.7%	58	-10,500
Mission	6	11.1%	60	1.3%	-31,900	4.0%	10	-5,300
Northeast	4	7.4%	300	6.5%	-76,100	9.7%	75	-19,000
Richmond	2	3.7%	9	0.2%	-3,000	0.4%	5	-1,500
Rincon Hill	2	3.7%	545	11.8%	-70,900	9.0%	273	-35,500
Showplace/Potrero	3	5.6%	869	18.8%	-157,600	20.0%	290	-52,500
South Central, Other	1	1.9%	16	0.3%	-8,500	1.1%	16	-8,500
Transbay Combo	2	3.7%	195	4.2%	-3,700	0.5%	98	-1,900
Western Addition	1	1.9%	12	0.3%	-9,100	1.2%	12	-9,100
West SoMa	2	3.7%	42	0.9%	-11,900	1.5%	21	-6,000
Grand Total	54	100.0%	4,627	100.0%	-787,800	100.0%	86	-14,600

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

Neighborhood	Projects	Percent	Net Units	Percent	Office Net	Percent	Avg Units / Project	Avg Loss / Project
Balboa Park	1	2.3%	31	0.9%	-6,200	0.6%	31	-6,200
Central	1	2.3%	1	0.0%	-2,000	0.2%	1	-2,000
Downtown	10	23.3%	540	16.4%	-233,600	22.2%	54	-23,400
East SoMa	4	9.3%	153	4.6%	-140,000	13.3%	38	-35,000
Ingleside, Other	1	2.3%	18	0.5%	-7,500	0.7%	18	-7,500
Inner Sunset	1	2.3%	15	0.5%	-2,200	0.2%	15	-2,200
Market Octavia	7	16.3%	771	23.4%	-59,100	5.6%	110	-8,400
Northeast	2	4.7%	133	4.0%	-31,900	3.0%	67	-16,000
Rincon Hill	3	7.0%	1,029	31.3%	-135,800	12.9%	343	-45,300
Showplace/Potrero	2	4.7%	141	4.3%	-46,800	4.5%	71	-23,400
South Central, Other	2	4.7%	6	0.2%	-3,900	0.4%	3	-2,000
Transbay Combo	4	9.3%	366	11.1%	-357,400	34.0%	92	-89,400
Western Addition	3	7.0%	82	2.5%	-11,300	1.1%	27	-3,800
West SoMa	1	2.3%	3	0.1%	-11,600	1.1%	3	-11,600
Richmond	1	2.3%	2	0.1%	-2,000	0.2%	2	-2,000
Grand Total	43	100.0%	3,291	100.0%	-1,051,200	100.0%	77	-24,400

Projects Under Planning Review

Project Application Filings

Table 7 below shows that a total of 51 planning applications were filed in the fourth quarter of 2009. This count represents 350 units and 165,000 square feet of commercial development. The past 18 months indicate a significant drop in permit filings consistent with the economic recession. Taken as a whole since 2000 (Figures 3 and 4), there has been a slight downward trend of the *number of projects* filed and approved, respectively. More recently in terms of number of *units* filed for, the downward trend has become evident. There are, however as seen in this report, still a large reservoir of projects in the pipeline. As the completion of many of the larger projects are many years in the future, they may be less prone to short term economic stresses. However, some sponsors will undoubtfully find it much harder to secure financing for their projects,

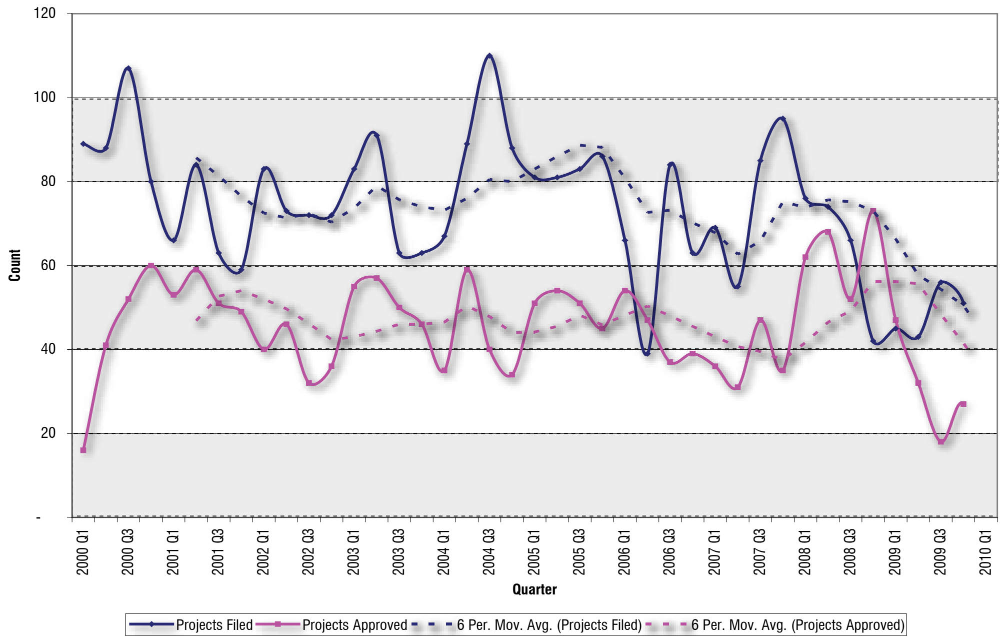
TABLE 7: Projects Filed With and Approved by the Planning Department

Quarter Filed	Filed				Approved			
	Projects	Net Units	Avg Units/Project	Net Sq. Ft	Projects	Net Units	Avg Units/ Project	Net Sq. Ft
2007 Q1	69	800	12	137,000	36	430	12	118,000
2007 Q2	55	320	6	1,012,000	31	210	7	48,000
2007 Q3	85	9,730	114	339,000	47	180	4	977,000
2007 Q4	95	3,790	40	128,000	35	310	9	53,000
2008 Q1	76	6,040	79	1,078,000	62	2,730	44	282,000
2008 Q2	74	830	11	761,000	68	360	5	297,000
2008 Q3	66	740	11	1,793,000	52	770	15	0
2008 Q4	42	220	5	3,000	73	1,080	15	865,000
2009 Q1	45	260	6	184,000	47	660	14	12,000
2009 Q2	43	330	8	97,000	32	60	2	-10,000
2009 Q3	56	230	4	-42,000	18	270	15	23,000
2009 Q4	51	350	7	165,000	27	680	25	84,000

TABLE 8: All Projects Under Planning Review, by Case Type

Suffix	Projects	Percent	Net Units	Percent	Net Comm'l Sq. Ft.	Percent
B	3	3.0%	0	0.0%	569,603	4.4%
C	33	33.3%	1,858	6.6%	-591	-0.0%
D	1	1.0%	-1	-0.0%	0	0.0%
E	54	54.5%	26,066	93.0%	12,353,766	94.6%
K	2	2.0%	4	0.0%	149,012	1.1%
V	5	5.1%	69	0.2%	-12,329	-0.1%
X	1	1.0%	19	0.1%	0	0.0%
Grand Total	99	100.0%	28,015	100.0%	13,059,461	100.0%

FIGURE 3: Pipeline Project Applications Filed and Approved with the Planning Department, by Quarter



the relative strength of the San Francisco market in this downturn notwithstanding.

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

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

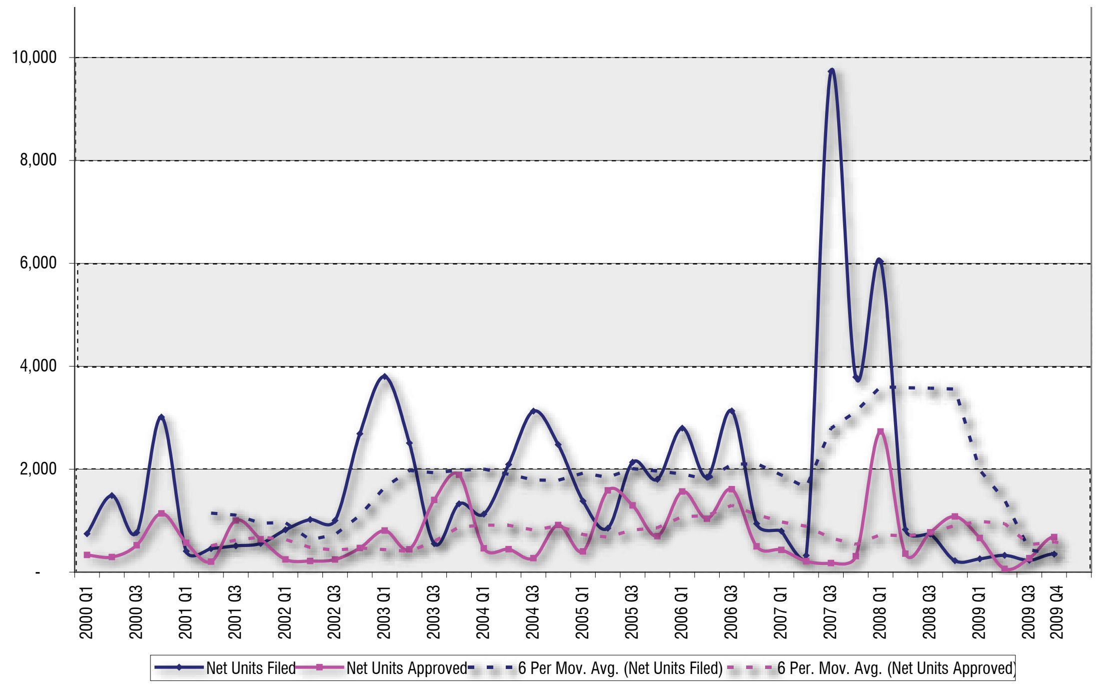
- A handful of new four story structures on West Point Road and Middle Point Road, totaling 52 new units.
- An expansion of the San Francisco Wholesale Produce Market on Jerrold Ave. This project will be implemented in phases.
- At Bush St at Polk, the demolition of a one-story building and construction of mixed-use building with 26 residential units, 2,100 square-feet of retail space, and 33 off-street parking spaces. The proposed buidling would be 112-feet in height and 63,130 square-feet, with 15,750 square-feet of parking.
- Development of a vacant lot with 34,477 sqft, 5-story, 50-foot high mixed-use building with ground floor retail, 18 residential units and a basement garage at Market and 16th Streets.

Projects Under Planning Review

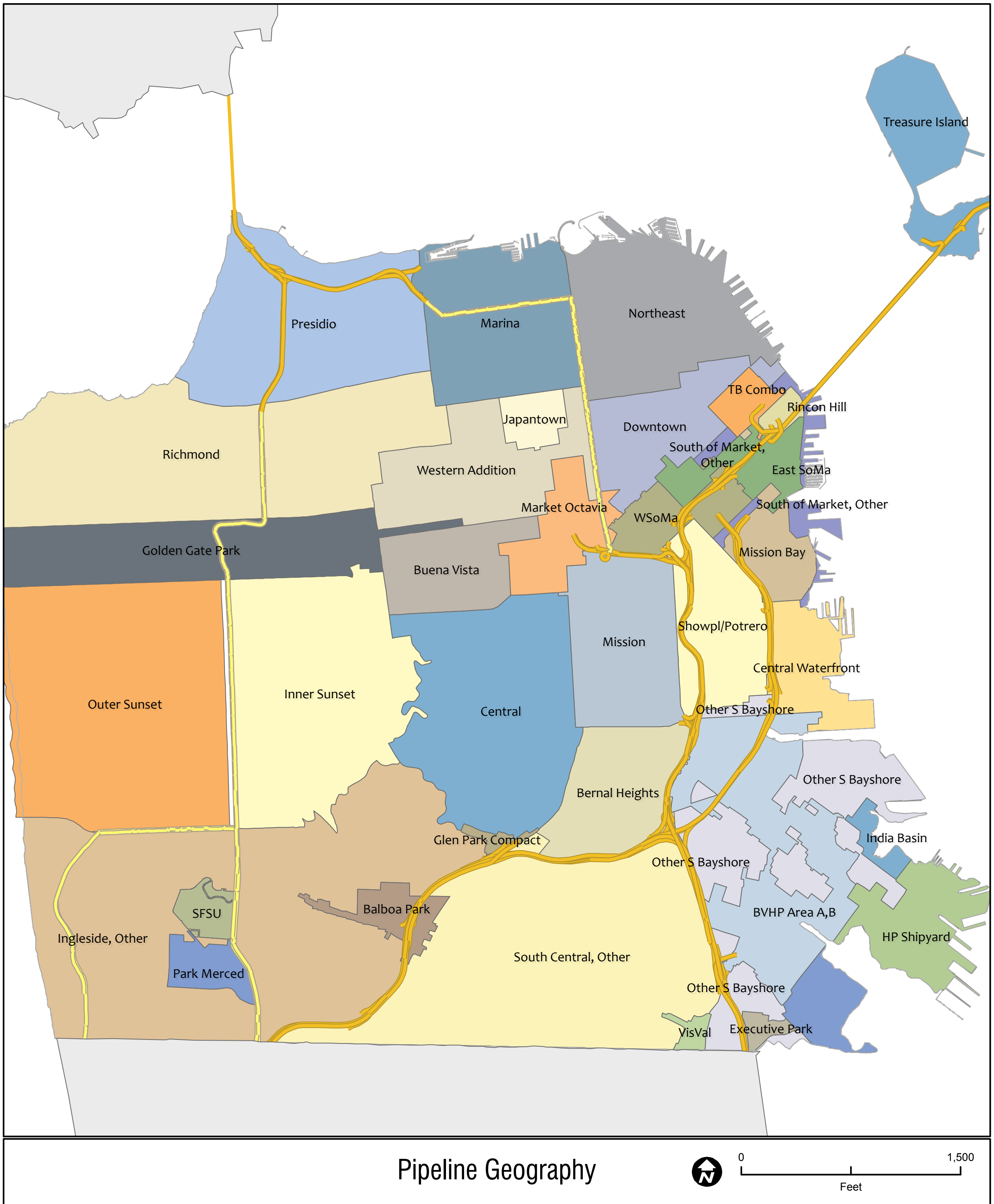
Project applications under Planning Department review total 134, representing 34,000 units and 13 million sq. ft. of commercial space (Table 8). Three projects are being reviewed subject to the Planning Code's §321 concerning the annual limit on office space ('Beauty Pageant'), 38 are awaiting conditional use hearings, while at least 83 projects are going through environmental review.[9] It is the environmental review cases that represent the most long range projects, and these cases also account for the largest amount of square footage and residential units.

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

FIGURE 4: Pipeline Units Filed and Approved by the Planning Department, by Quarter

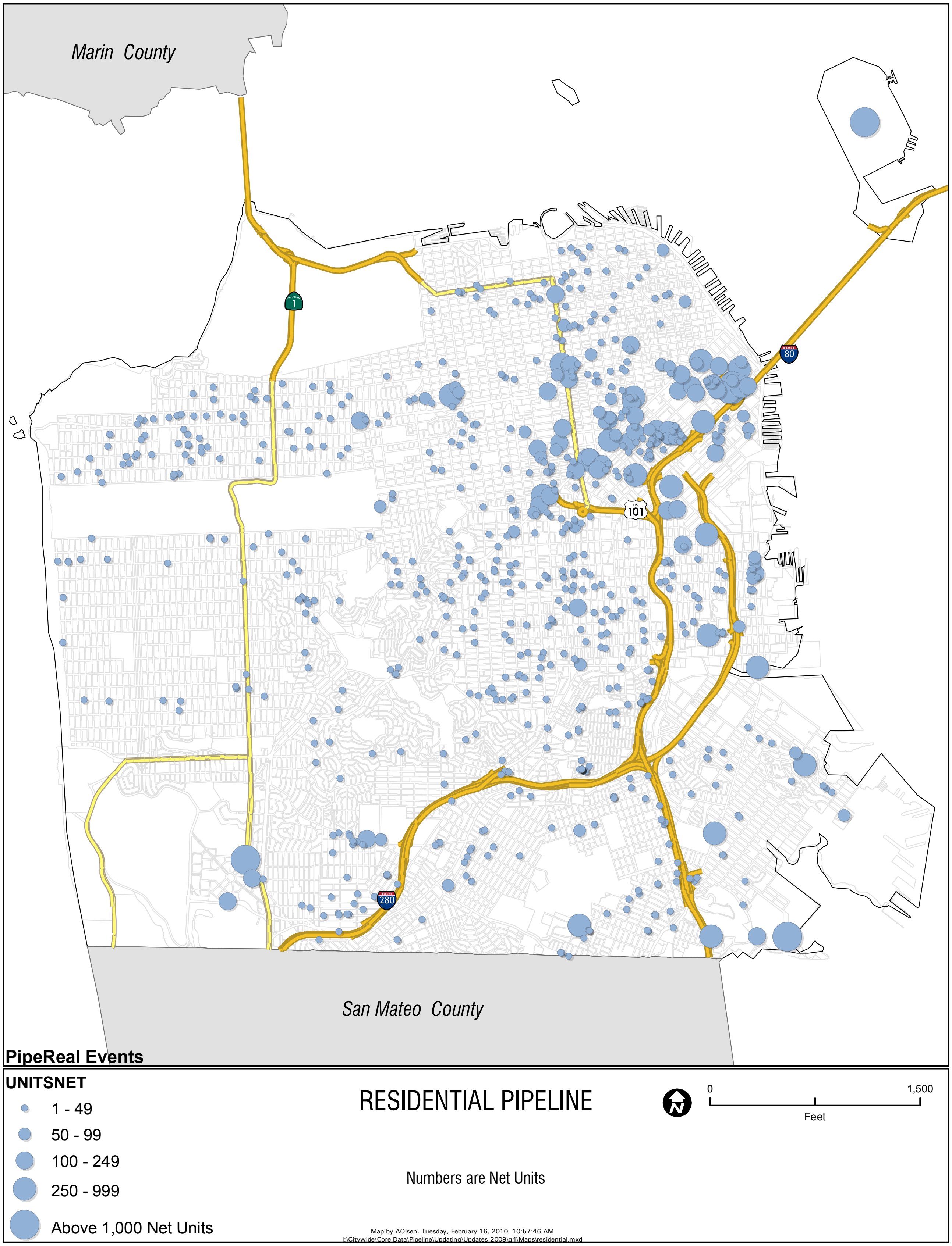


MAP 1: Neighborhoods Highlighted in the Pipeline Report

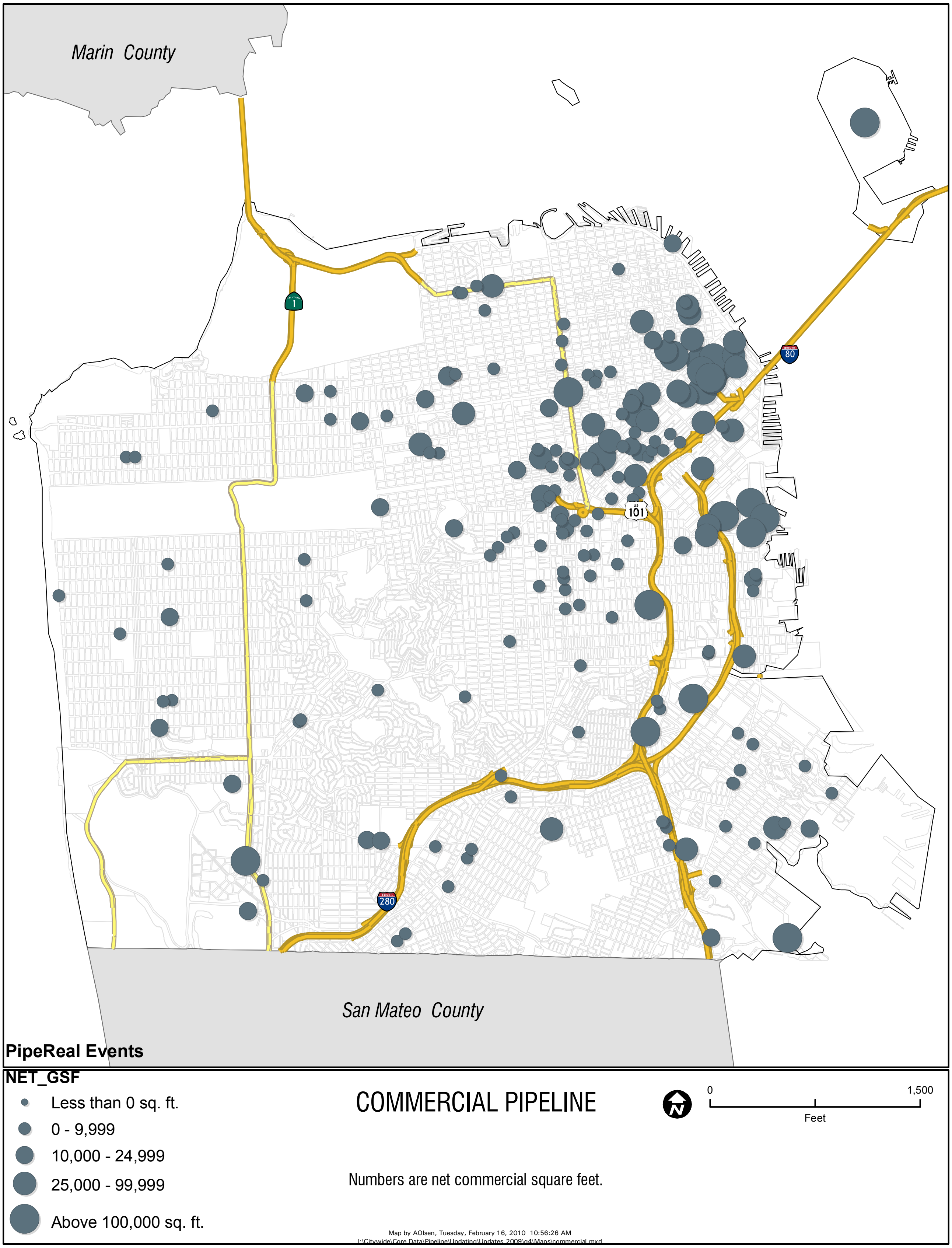


Boundaries shown here are designated solely for the purposes of summarizing pipeline data and don't necessarily coincide with other boundary designations, nor are they intended to denote jurisdiction (port property or otherwise)

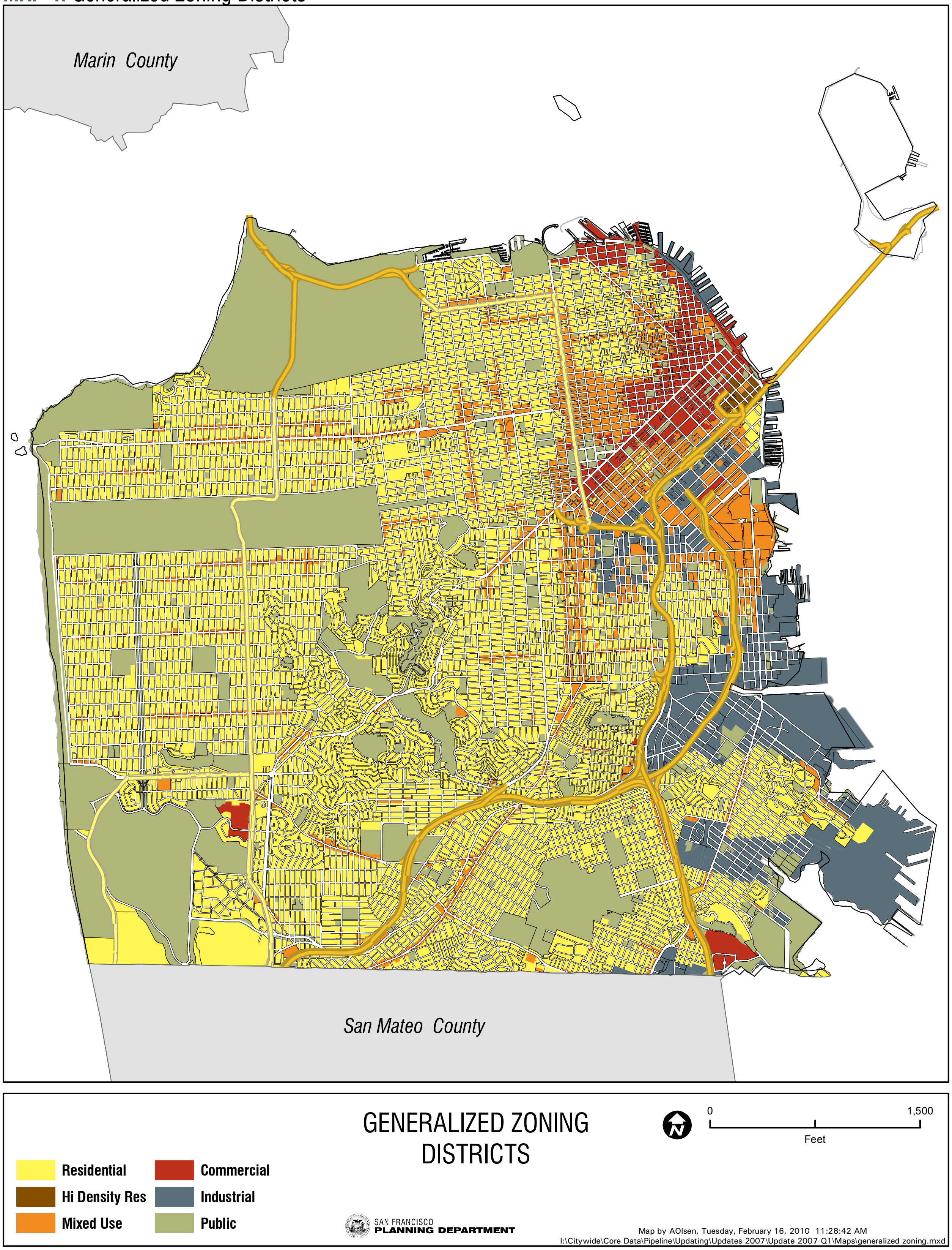
MAP 2: Residential Pipeline



MAP 3: Commercial Pipeline



MAP 4: Generalized Zoning Districts



Data Dictionary

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

List of Projects

Quarter 4, 2009

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							
3721068	535 MISSION ST	TB Combo	296,430	0	MIPS	MIPS	10/15/2009
8709006	1500 OWENS ST	Mission Bay	222,181	0	MIPS	MIPS	12/14/2009
1083002	3575 GEARY BL	Richmond	20,957	150	Mixres	MIPS	12/14/2009
4991277	833-881 Jamestown	Candlestick	0	198	Resident	--N/A--	9/17/2007
5598008	491 BAY SHORE BL	BVHP Area A,B	150,265	0	Retail/Ent	Retail/Ent	10/19/2009
3508053	1340-1390 MISSION ST	Downtown	-19,200	136	Mixres	Retail/Ent	4/1/2008
3735047	1 HAWTHORNE ST	TB Combo	-25,279	135	Mixres	Retail/Ent	12/9/2009
0871016	1844 MARKET ST	Market Octavia	3,033	113	Mixres	Retail/Ent	7/17/2007
3708056	1 ECKER ST	TB Combo	-238,920	51	Mixres	Retail/Ent	5/12/2009
4228010	1301 Indiana St.	Central Waterfront	-9,800	71	Mixres	Retail/Ent	12/19/2007
6569004	3400 CESAR CHAVEZ ST	Mission	2,147	60	Mixres	Retail/Ent	12/11/2009
3731126	229 07TH ST	East SoMa	16,196	49	Mixres	MED	12/9/2009
8709009	1301 07TH ST	Mission Bay	50,000	0	PDR	PDR	7/10/2009
1156023	850 BRODERICK ST	Western Addition	0	47	Resident	--N/A--	10/29/2009
0816002	231 FRANKLIN ST	Market Octavia	780	33	Mixres	Retail/Ent	9/14/2009
0184031	1355 PACIFIC AV	Northeast	-18,632	24	Resident	--N/A--	11/24/2009
4044030	2198 03RD ST	Central Waterfront	0	24	Resident	--N/A--	7/20/2007
1101022	2139 OFARRELL	Western Addition	-14,712	21	Resident	--N/A--	12/14/2009
0242027	855 SACRAMENTO ST	Northeast	20,000	0	CIE	CIE	12/10/2009
5868007	55 TRUMBULL ST	South Central, Other	0	18	Resident	--N/A--	12/14/2009
0839029	261 OCTAVIA ST	Market Octavia	0	15	Resident	--N/A--	12/4/2009
0512041	2395 Lombard Street	Marina	5,816	12	Resident	--N/A--	9/8/2009
1101007	1301 DIVISADERO ST	Western Addition	-13,264	12	Resident	--N/A--	6/8/2009
BP ISSUED							
3507039	1401 MARKET ST	Downtown	12,250	719	Mixres	MIPS	4/25/2008
3749059	45 LANSING ST	Rincon Hill	-14,000	305	Resident	--N/A--	7/31/2008
8709004	1600 OWENS ST	Mission Bay	245,000	0	MIPS	MIPS	6/3/2008

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
0768013	701 GOLDEN GATE AV	Market Octavia	0	100	Resident	--N/A--	8/21/2007
0348015	277 GOLDEN GATE AV	Downtown	-49,945	88	Resident	--N/A--	12/22/2008
7380038	655 BROTHERHOOD WY	Ingleside, Other	15,000	0	CIE	CIE	12/12/2008
3747012	325 FREMONT ST	Rincon Hill	0	70	Resident	--N/A--	3/27/2008
1052023	2420 SUTTER ST	Western Addition	-1,900	58	Mixres	MIPS	5/6/2008
1029095	2901 CALIFORNIA ST	Western Addition	14,800	0	CIE	CIE	10/26/2009
0492025	2026 LOMBARD ST	Marina	40,370	0	Visitor	Visitor	4/11/2007
0619012	1860 VAN NESS AV	Northeast	1,625	35	Mixres	Retail/Ent	11/17/2008
3739006	272 MAIN ST	TB Combo	36,100	0	MIPS	MIPS	12/15/2008
0599008	1840 WASHINGTON ST	Marina	-7,000	26	Resident	--N/A--	8/29/2008
4755048	903 PALOU AV	BVHP Area A,B	20,000	0	PDR	PDR	3/26/2009
1460015	420 29TH AV	Richmond	-6,720	20	Resident	--N/A--	9/25/2009
1127007	1816 EDDY ST	Western Addition	0	19	Resident	--N/A--	12/9/2008

BP REINSTATED

3721013	524 HOWARD ST	TB Combo	200,000	0	MIPS	MIPS	6/8/2007
0792028	365 FULTON STREET	Market Octavia	0	120	Resident	--N/A--	4/16/2009
0671006	1450 FRANKLIN ST	Western Addition	-24,000	69	Resident	--N/A--	6/25/2009
0343014	181 TURK ST	Downtown	3,060	32	Mixres	Retail/Ent	3/10/2009
0274008	850 BUSH ST	Northeast	0	23	Resident	--N/A--	4/10/2008

BP APPROVED

3717019	120 HOWARD ST	Downtown	67,000	0	MIPS	MIPS	9/15/2008
3789003	72 TOWNSEND ST	East SoMa	0	74	Resident	--N/A--	12/11/2008
4224015	1004 MISSISSIPPI ST	Showpl/Potrero	0	28	Resident	--N/A--	1/16/2009
7088056	320 RANDOLPH ST	Ingleside, Other	-10,428	18	Mixres	Retail/Ent	4/30/2008
3591024	793 SOUTH VAN NESS AV	Mission	5,829	22	Resident	Retail/Ent	8/4/2009
2607099	399 BUENA VISTA EAST A	Buena Vista	15,720		CIE	CIE	7/14/2005

BP Filed

3783001	801 BRANNAN ST	Showpl/Potrero	-115,000	557	Mixres	Retail/Ent	8/17/2005

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3735063	222 02ND ST	TB Combo	400,000	0	MIPS	MIPS	11/30/2007
3748006	340 FREMONT ST	Rincon Hill	-42,650	384	Mixres	Retail/Ent	9/19/2005
8720016	1455 03RD ST	Mission Bay	380,999	0	MIPS	MIPS	6/10/2008
5431A001	5800 03RD ST	BVHP Area A,B	-90,000	355	Mixres	Retail/Ent	9/28/2005
0269026	350 BUSH ST	Downtown	347,300	0	MIPS	MIPS	8/7/2007
4991617	101 EXECUTIVE PARK BL	Executive Park	14,000	340	Resident	--N/A--	8/13/2009
8721012	455 Mission Bay S Blvd	Mission Bay	333,945	0	MIPS	MIPS	6/26/2008
3736114	525 HOWARD ST	TB Combo	251,788	0	MIPS	MIPS	9/8/2008
3911001	1 HENRY ADAMS ST	Showpl/Potrero	-2,055	212	Mixres	Retail/Ent	8/17/2005
3787026	655 04TH ST	East SoMa	-2,356	192	Mixres	Retail/Ent	1/13/2006
4058010	2235 03RD ST	Central Waterfront	5,339	196	Mixres	Retail/Ent	7/9/2009
3180003	1150 OCEAN AV	Balboa Park	15,100	159	Mixres	Retail/Ent	10/16/2009
0807010	580 HAYES ST	Market Octavia	42,432	90	Mixres	MED	8/7/2008
0691008	1285 SUTTER ST	Downtown	-8,308	107	Mixres	Retail/Ent	12/6/2007
0667016	1545 PINE ST	Northeast	-18,000	113	Mixres	Retail/Ent	3/19/2007
3510001	1415 MISSION ST	Downtown	300	117	Mixres	MIPS	10/31/2008
0667018A	1529 PINE ST	Northeast	-8,176	113	Resident	--N/A--	3/19/2007
4059009	2298 03RD ST	Central Waterfront	14,000	80	Mixres	Retail/Ent	2/6/2006
1228005	690 STANYAN ST	Buena Vista	10,800	56	Mixres	Retail/Ent	2/15/2006
4352007	1301 CESAR CHAVEZ ST	BVHP Area A,B	81,979	0	MIPS	MIPS	10/15/2007
3731003	226 06TH ST	East SoMa	0	37	Resident	--N/A--	6/16/2008
1098009	1401 DIVISADERO ST	Western Addition	57,000	-21	MIPS	MIPS	12/21/2006
3736085	48 TEHAMA ST	TB Combo	0	66	Resident	--N/A--	7/12/2006
3548032	1875 MISSION ST	Mission	0	60	Resident	--N/A--	2/10/2006
0165022	717 BATTERY ST	Northeast	27,870	0	MIPS	MIPS	12/1/2008
0287014	300 GRANT AV	Downtown	0	56	Resident	--N/A--	12/22/2006
3788039	345 BRANNAN ST	East SoMa	53,030	0	MIPS	MIPS	10/27/2008
4624004	63 WEST POINT RD	Other S Bayshore	0	52	Resident	--N/A--	12/22/2009
3774025	250 BRANNAN ST	East SoMa	-127,396	51	Resident	--N/A--	1/30/2007
0056006	1789 MONTGOMERY ST	Northeast	0	51	Resident	--N/A--	10/27/2005
0293002	153 KEARNY ST	Downtown	-40,000	51	Resident	--N/A--	3/28/2006
3532014	299 VALENCIA ST	Market Octavia	3,940	44	Mixres	Retail/Ent	11/9/2006

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Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3703086	570 JESSIE ST	Downtown	-15,000	47	Resident	--N/A--	2/2/2006
0596024	1946 POLK ST	Northeast	-9,245	43	Mixres	Retail/Ent	11/14/2007
1450008	5400 GEARY BL	Richmond	-10,748	39	Mixres	Retail/Ent	6/27/2008
0837003	1 FRANKLIN ST	Market Octavia	2,378	35	Mixres	Retail/Ent	12/3/2009
0668012	1465 PINE ST	Northeast	0	35	Resident	--N/A--	3/16/2005
5943008	268 MADISON ST	South Central, Other	25,000	1	Mixres	Retail/Ent	11/7/2007
0756001	1345 TURK ST	Western Addition	0	32	Resident	--N/A--	11/13/2009
3754039	1075 FOLSOM ST	East SoMa	5,000	31	Resident	--N/A--	12/22/2005
3727168	1145 MISSION ST	Downtown	1,996	25	Mixres	Retail/Ent	6/9/2006
4792029	1212 THOMAS AV	BVHP Area A,B	30,000	0	PDR	PDR	7/23/2008
3754066	1091 FOLSOM ST	East SoMa	-2,250	30	Resident	--N/A--	6/10/2005
3521005	340 11TH ST	WSoMa	5,682	20	Mixres	Retail/Ent	4/11/2005
3554027	411 VALENCIA ST	Mission	1,400	24	Mixres	Retail/Ent	10/13/2005
6473040	5735 MISSION ST	South Central, Other	5,240	20	Mixres	CIE	9/2/2009
3732071	468 CLEMENTINA ST	East SoMa	-500	25	Resident	--N/A--	7/20/2005
3560001	2210 MARKET ST	Market Octavia	2,000	20	Mixres	Retail/Ent	10/2/2008
3752019	870 HARRISON ST	WSoMa	-6,120	22	Mixres	Retail/Ent	7/14/2006
1368049	4614 CALIFORNIA ST	Richmond	13,686	0	Mixed	MIPS	1/23/2007
3548039	1801 MISSION ST	Mission	2,600	18	Mixres	Retail/Ent	7/17/2006
0101004	1741 POWELL ST	Northeast	-11,795	17	Mixres	Retail/Ent	8/12/2009
3521007	350 11TH ST	WSoMa	0	20	Resident	--N/A--	4/11/2005
3588012	3500 19TH ST	Mission	2,950	17	Mixres	Retail/Ent	5/1/2006
3726047	537 NATOMA ST	East SoMa	-5,425	14	Mixres	PDR	9/1/2005
1028028	2829 CALIFORNIA ST	Western Addition	112	12	Mixres	Retail/Ent	10/31/2007
3776092	246 RITCH ST	East SoMa	-4,130	19	Resident	--N/A--	1/5/2007
1742043	1266 09TH AV	Inner Sunset	-3,000	15	Mixres	Retail/Ent	12/18/2009
4058008	616 20TH ST	Central Waterfront	-1,000	16	Mixres	Retail/Ent	11/24/2009
0832026	360 OCTAVIA ST	Market Octavia	1,000	16	Mixres	Retail/Ent	10/1/2008
2018003	2400 NORIEGA ST	Outer Sunset	12,366	0	CIE	CIE	12/30/2009
0832025	300 OCTAVIA ST	Market Octavia	0	16	Resident	--N/A--	10/1/2008
1084001B	1 Stanyan Street	Richmond	-1,807	13	Mixres	Retail/Ent	12/14/2007
0282004	723 TAYLOR ST	Downtown	0	14	Resident	--N/A--	5/2/2005

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
6520036	3135 24TH ST	Mission	-13,640	12	Mixres	Retail/Ent	11/13/2007
3557062	200 DOLORES ST	Market Octavia	-8,463	13	Resident	--N/A--	8/19/2008
3197010	1446 OCEAN AV	Balboa Park	-2,500	13	Resident	--N/A--	10/31/2008
3732068	456 CLEMENTINA ST	East SoMa	0	12	Resident	--N/A--	7/11/2005
0041009	7 VANDEWATER ST	Northeast	-4,600	11	Resident	--N/A--	7/5/2005

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3702053	1169 MARKET ST	Downtown	33,540	593	Mixres	Retail/Ent	8/3/2006
3746001	201 Folsom St	TB Combo	0	806	Resident	--N/A--	11/18/2003
4624009	227 West Point Road	Other S Bayshore	620	401	Mixres	Retail/Ent	6/12/2008
4154001	1001 POTRERO AV	Showpl/Potrero	419,070	0	CIE	CIE	12/2/2008
0857001	55 Laguna Street	Market Octavia	28,090	491	Mixres	Retail/Ent	1/17/2008
3834001	1000 16TH ST	Showpl/Potrero	26,500	450	Mixres	Retail/Ent	10/18/2004
3747001E	399 FREMONT ST	Rincon Hill	-2,256	432	Mixres	MIPS	8/4/2006
0331016	231 ELLIS ST	Downtown	22,000	400	Mixres	MIPS	1/24/2006
4355006	3240 Third Street	BVHP Area A,B	-32,969	391	Mixres	Retail/Ent	11/13/2006
3765015	425 First Street	Rincon Hill	-75,816	340	Resident	--N/A--	8/16/2005
8722001	300 16TH ST	Mission Bay	312,932	0	MIPS	MIPS	10/2/2008
3732009	900 FOLSOM ST	East SoMa	6,340	300	Mixres	Retail/Ent	7/29/2009
0757025	1100 GOLDEN GATE AV	Western Addition	0	98	Resident	--N/A--	12/18/2008
3701064	55 9TH ST	Downtown	267,000		MIPS	MIPS	3/25/2004
3766009	105 HARRISON ST	Rincon Hill	0	259	Resident	--N/A--	3/19/2009
0813006	1390 MARKET ST	Market Octavia	-1,500	230	Mixres	Retail/Ent	5/28/2009
7324001	77 CAMBON DR	Park Merced	-16,540	195	Mixres	Retail/Ent	10/9/2008
0345004	220 GOLDEN GATE AV	Downtown	-30,690	178	Mixres	MIPS	9/10/2008
0331010	168 EDDY ST	Downtown	15,000	170	Mixres	Retail/Ent	3/26/2009
3722079	134-140 NEW MONTGOME	TB Combo	-84,660	175	Mixres	Retail/Ent	12/11/2008
3955002	1740 17th Street	Showpl/Potrero	24,208	154	Mixres	Retail/Ent	3/27/2009
3533007	250 VALENCIA ST	Market Octavia	14,926	0	Mixed	CIE	3/16/2007
3732008	260 05TH ST	East SoMa	-35,843	151	Mixres	Retail/Ent	7/29/2009
0323015	472 ELLIS ST	Downtown	-65,926	60	Resident	--N/A--	12/12/2008
7331003	800 Brotherhood Way	Park Merced	0	127	Resident	--N/A--	12/10/2007

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
0250001	1401 CALIFORNIA ST	Northeast	-19,056	95	Mixres	Retail/Ent	10/20/2008
3767305	429 BEALE ST	Rincon Hill	-35,628	113	Resident	--N/A--	5/14/2009
3702046	1127 MARKET ST	Downtown	-8,250	98	Mixres	Retail/Ent	5/20/2009
3704069	973 MARKET ST	Downtown	-52,750	100	Mixres	Retail/Ent	8/14/2008
1073013	800 PRESIDIO AV	Richmond	10,180	83	Mixres	CIE	1/25/2008
3535001	2001 MARKET ST	Market Octavia	-14,517	69	Mixres	Retail/Ent	6/13/2008
3703079	1036-1040 MISSION ST	Downtown	1,256	100	Mixres	Retail/Ent	5/14/2009
5431A015	320-350 PAUL AV	BVHP Area A,B	33,489	0	PDR	PDR	2/3/2009
1052024	2655 BUSH ST	Western Addition	-40,617	84	Mixres	Retail/Ent	10/10/2008
3732074	251 06TH ST	East SoMa	1,450	83	Mixres	Retail/Ent	7/13/2009
0345002	145 LEAVENWORTH ST	Downtown	0	84	Resident	--N/A--	6/4/2007
0287013	300 Grant Ave.	Downtown	-1,250	66	Mixres	Retail/Ent	7/10/2008
3180001	50 PHELAN AV	Balboa Park	11,682	60	Mixres	Retail/Ent	1/25/2010
1149011	350 MASONIC AV	Western Addition	69,308	-1	CIE	CIE	8/8/2008
3994001B	2065 03RD ST	Central Waterfront	-4,725	62	Mixres	Retail/Ent	3/26/2009
6969001	5050 MISSION ST	South Central, Other	7,030	61	Mixres	Retail/Ent	8/14/2008
0711031	1100 ELLIS ST	Western Addition	11,513	0	CIE	CIE	8/6/2009
0336017	245 HYDE ST	Downtown	-26,640	65	Resident	--N/A--	4/10/2008
3715002	115 Steuart Street	Downtown	46,748	0	MIPS	MIPS	2/15/2009
3725101	474 NATOMA STREET	Downtown	0	58	Resident	--N/A--	12/16/2008
0258033	500 PINE ST	Downtown	56,830		MIPS	MIPS	3/15/2001
5992A060	495 CAMBRIDGE ST	South Central, Other	0	56	Resident	--N/A--	5/30/2007
3776149	424 BRANNAN ST	East SoMa	0	55	Resident	--N/A--	9/16/2008
0347013	399 GOLDEN GATE AV	Downtown	53,000	0	Retail/Ent	Retail/Ent	11/27/2007
0855011	4 OCTAVIA ST	Market Octavia	3,530	49	Mixres	Retail/Ent	10/6/2008
3785003	690 05TH ST	WSoMa	32,500	0	Visitor	Visitor	6/17/2009
1029003	2901 California St	Western Addition	15,604	-3	CIE	CIE	6/16/2009
0828012	735 Fell St	Western Addition	16,000	0	CIE	CIE	2/2/2008
0279011	1080 SUTTER ST	Downtown	1,339	35	Mixres	Retail/Ent	5/28/2009
3753081	345 06TH ST	East SoMa	324	33	Mixres	Retail/Ent	4/2/2009
0570010	1622 BROADWAY	Marina	0	34	Resident	--N/A--	3/12/2009
0281003	832 SUTTER ST	Downtown	1,176	27	Mixres	Retail/Ent	8/24/2008

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
6473038	5735-5743 MISSION ST	South Central, Other	-7,153	16	Mixres	Retail/Ent	6/12/2008
1460014B	420 29TH AV	Richmond	-2,500	20	Mixres	Retail/Ent	12/18/2008
3564091	2299 MARKET ST	Central	6,940	18	Mixres	Retail/Ent	6/10/2008
3794002A	750 02ND ST	East SoMa	-2,710	18	Mixres	Retail/Ent	9/10/2009
0640010	1990 CALIFORNIA ST	Marina	0	11	Resident	--N/A--	5/15/2008
3732112	452 TEHAMA ST	East SoMa	-4,917	20	Mixres	Retail/Ent	6/22/2007
3728069	121 09TH ST	WSoMa	-4,975	20	Mixres	Retail/Ent	7/31/2009
1028003	2829 California Street	Western Addition	373	12	Mixres	Retail/Ent	1/17/2008
4108003C	1025 TENNESSEE ST	Central Waterfront	-6,550	12	Mixres	Retail/Ent	3/30/2009
5869014	4199 MISSION ST	South Central, Other	600	12	Mixres	Retail/Ent	8/5/2008

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4886008	Hunters Point Expy	Candlestick	7,996,866	11379	Mixres	MIPS	12/3/2007
7303001	3711 19th Ave	Park Merced	478,383	5677	Mixres	Retail/Ent	1/8/2008
1939001	Treasure Island	Treasure Island	250,000	6000	Mixres	Retail/Ent	12/4/2007
3708006	50 01ST ST	TB Combo	1,134,000	600	Mixres	Visitor	12/21/2006
3720001	425 MISSION ST	TB Combo	1,742,950	0	MIPS	MIPS	7/1/2008
4222A001	1095 Connecticut St	Showpl/Potrero	0	872	Resident	--N/A--	12/31/2008
6310001	1654 Sunnydale Ave	South Central, Other	0	733	Resident	--N/A--	12/31/2008
3719010	181 FREMONT ST	TB Combo	492,866	140	Mixres	MIPS	5/15/2007
3710017	350 MISSION ST	TB Combo	415,603	0	MIPS	MIPS	11/19/2008
3762106	725-765 Harrison Street	East SoMa	26,900	510	Resident	--N/A--	11/8/2005
3756003	350 08TH ST	WSoMa	56,700	416	Mixres	Retail/Ent	9/7/2007
0244001	950 MASON STREET	Northeast	-295,000	160	Mixres	Visitor	2/11/2009
3704071	949 Market Street	Downtown	237,300	0	Retail/Ent	Retail/Ent	2/22/2008
1075001	2501 Sutter St	Western Addition	0	450	Resident	--N/A--	12/31/2008
0647007	1634 PINE ST	Western Addition	448	250	Mixres	MIPS	11/5/2008
3706093	706 MISSION ST	Downtown	35,000	220	Mixres	CIE	9/11/2008
0697037	1333 GOUGH ST	Japantown	0	231	Resident	--N/A--	7/15/2005
0173001	600 BATTERY ST	Northeast	92,400	0	MIPS	MIPS	10/17/2007
0836002	1540 MARKET ST	Market Octavia	-13,252	180	Mixres	Retail/Ent	2/27/2009
0238002	300 CALIFORNIA ST	Downtown	61,600	0	MIPS	MIPS	12/19/2007

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3736074	41 TEHAMA ST	TB Combo	-1,400	176	Resident	--N/A--	10/31/2006
3507042	1400 MISSION ST	Downtown	3,640	165	Mixres	Retail/Ent	4/8/2009
0794015	746 LAGUNA ST	Market Octavia	2,325	143	Mixres	MIPS	8/29/2008
3725015	938 HOWARD ST	East SoMa	-18,956	154	Mixres	Retail/Ent	3/27/2006
0192014	835-845 Jackson St	Northeast	68,010	0	CIE	CIE	6/26/2008
3616007	2558 MISSION ST	Mission	0	125	Resident	--N/A--	12/21/2005
0872005	1960-1998 MARKET ST	Market Octavia	9,000	115	Mixres	Retail/Ent	5/29/2007
3912001	1-25 Division Street	Showpl/Potrero	-35,453	100	Mixres	Retail/Ent	1/26/2006
0526021	2550 VAN NESS AV	Northeast	-51,353	109	Mixres	Retail/Ent	5/17/2005
3749064	FOLSOM AND ESSEX	TB Combo	0	100	Resident	--N/A--	6/8/2007
3740027	SPEAR STREET AND FOLS	TB Combo	0	85	Resident	--N/A--	6/8/2007
9900041H	PIER 31	Northeast	12,990	0	PDR	PDR	8/27/2008
5476009	6600 Third Street	BVHP Area A,B	0	37	Resident	--N/A--	9/23/2008
0808036	401 Grove Street	Market Octavia	7,000	70	Mixres	Retail/Ent	5/23/2007
3753140	935 FOLSOM ST	East SoMa	-13,808	69	Mixres	Retail/Ent	5/25/2006
3704015	942 MISSION ST	Downtown	53,514	0	Visitor	Visitor	2/14/2008
4045006	2121 3rd Street	Central Waterfront	-5,000	66	Mixres	Retail/Ent	4/11/2006
3543011	2175 MARKET ST	Market Octavia	5,813	60	Mixres	Retail/Ent	8/31/2006
3753005	205 SHIPLEY ST	East SoMa	-11,000	51	Mixres	Retail/Ent	5/26/2006
0165021	235 BROADWAY	Northeast	5,000	50	Mixres	Retail/Ent	7/2/2008
4591A010	142 ALBATROSS	Other S Bayshore	0	50	Resident	--N/A--	6/8/2007
0595013	1645-1661 PACIFIC AV	Northeast	-27,275	50	Resident	--N/A--	7/25/2007
3753008	374 5TH ST	East SoMa	0	47	Resident	--N/A--	8/19/2009
3534069	25 DOLORES ST	Market Octavia	-19,037	46	Resident	--N/A--	7/17/2006
0318020	651 GEARY ST	Downtown	-8,010	40	Mixres	Retail/Ent	8/15/2008
3980007	1717 17TH ST	Showpl/Potrero	-13,369	41	Mixres	PDR	12/22/2005
3576001	2100 MISSION ST	Mission	-4,987	29	Mixres	Retail/Ent	9/21/2009
6935001	1607-1649 Ocean Ave.	Balboa Park	-19,485	31	Resident	--N/A--	5/4/2006
3639002	2652 HARRISON ST	Mission	-7,250	30	Resident	--N/A--	1/11/2006
3752023	397 05TH ST	WSoMa	5,000	24	Mixres	Retail/Ent	9/24/2007
0670024	1433 BUSH ST	Downtown	-4,420	26	Mixres	Retail/Ent	11/17/2009
7148040	ONE CAPITOL AV	Ingleside, Other	0	28	Resident	--N/A--	2/12/2009

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
0028014	1255- 1275 COLUMBUS A	Northeast	-9,352	20	Mixres	Retail/Ent	7/29/2009
0512025	2353 LOMBARD ST	Marina	964	21	Mixres	Retail/Ent	12/29/2009
4711118	Hudson Ave and Whitney Y	BVHP Area A,B	0	24	Resident	--N/A--	6/6/2007
3148001	4550 MISSION ST	South Central, Other	-3,250	17	Mixres	Retail/Ent	7/19/2006
3596113	899 VALENCIA ST	Mission	4,705	18	Mixres	Retail/Ent	8/11/2005
0194009	740 WASHINGTON ST	Northeast	-9,050	18	Mixres	CIE	2/28/2007
3547027	80 JULIAN AV	Mission	12,900	6	Mixres	CIE	11/30/2009
3721019	562 HOWARD ST	TB Combo	0	19	Mixres	Retail/Ent	10/3/2007
0853021	102-104 OCTAVIA STREET	Market Octavia	0	20	Resident	--N/A--	6/8/2007
3965001	2401 16TH ST	Mission	1,722	12	Mixres	MIPS	10/9/2008
3617008	1050 VALENCIA ST	Mission	400	16	Mixres	Retail/Ent	12/20/2007
1018012	3657 SACRAMENTO ST	Richmond	0	18	Resident	--N/A--	11/20/2007
0729046	1210 SCOTT STREET	Western Addition	0	18	Resident	--N/A--	6/8/2007
3727004	150 07TH ST	WSoMa	10,808	0	Retail/Ent	Retail/Ent	4/2/2007
2463A014	2233 VICENTE ST	Outer Sunset	13,469	0	Retail/Ent	Retail/Ent	4/14/2005
0327011	72 ELLIS ST	Downtown	79,054		Visitor	Visitor	12/2/2009
5262004	2095 Jerrold Ave	BVHP Area A,B	127,779		PDR	PDR	12/18/2009
3707052	2 NEW MONTGOMERY ST	TB Combo	0	125	Resident	--N/A--	12/4/2007
0694005	1100 VAN NESS AVE	Downtown	150,885		MIPS	MIPS	9/22/2009
3722027	151 THIRD ST	Downtown	66,685		CIE	CIE	4/9/2009
0816003	205 FRANKLIN ST	Market Octavia	14,500		Mixed	Retail/Ent	9/23/2009

Acknowledgements

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Mixed use retail and residential building, 55 9th St, by Aksel K Olsen.