San Francisco

PIPELINE REPORT

Quarter 3 2014

San Francisco Planning Department
December 2014

Cover Photo: Residential development near the Temporary Transbay Terminal. Source: Aksel Olsen

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Third Quarter 2014

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WHAT IS THE PIPELINE?

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

To filter inactive projects, the current pipeline only includes projects filed during the last five years, projects approved in the last four years (with the exception of large projects, which are kept for seven years), and projects for which construction has begun during the past three years.

Data sources for the pipeline are chiefly the project databases maintained by the Planning Department and the Department of Building Inspection, respectively, but data is also periodically obtained from the (now Successor Agency to the) San Francisco Redevelopment Agency. Affordable housing projects sponsored by the Mayor's Office of Housing figure in the pipeline database only after an application has been filed with either the Planning Department or the Department of Building Inspection.

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

Time Frame and Certainty of Development

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

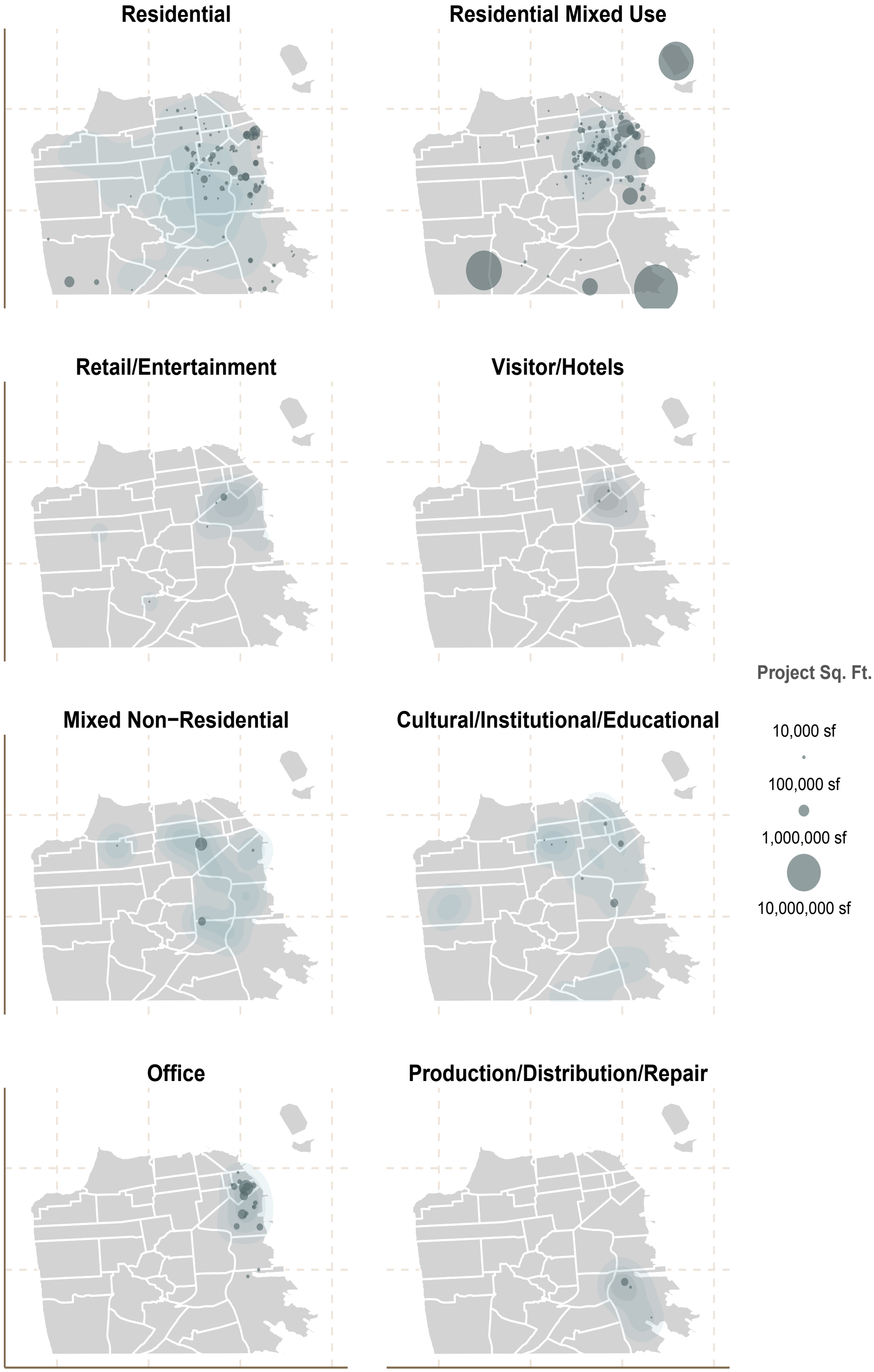
The Relevance of the Pipeline

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

Accuracy and Timeliness

The pipeline is compiled and consolidated from different data sources and is subject to errors due to varying accuracy and currency of original sources. The data in this report is pulled from original sources current through September 30, 2014. 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 958 projects in the pipeline. Of these, 75 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 50,600 new housing units would be added to the city's housing stock according to current data. This is high relative to historical numbers and is largely due to the filing and entitlement of applications during the past 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 acceleration of technology companies locating in the area, many development projects here predate the last recession, during which they were idle. As financing improved, many projects came back.

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 permiting process. Table 1 shows the following:

- Around 21 percent of all projects, representing 6,700 net added housing units and 5,400,000 sq ft of commercial space, are under construction.
- Around 20 percent of projects (with another 4,100 net units and 2,1 million sq ft of commercial space) have received building permit approvals. As of the time of writing, some may have moved to the construction phase.
- Around one in three projects (including 900 net new units and an net loss of 60,000 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 55 percent of the units and 37 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	121	8,900	4,568,300	(20,200)	-	3,806,300	(444,400)	711,900	514,600
	BP Filed	329	3,100	634,900	913,000	-	141,800	(98,800)	(56,300)	(264,800)
	Total, Not Entitled	450	12,000	5,203,200	892,800	-	3,948,200	(543,200)	655,700	249,700
Approved by Planning	PL Approved	80	26,900	6,131,200	33,600	-	3,762,000	296,700	1,612,700	426,200
	BP Filed	30	900	(61,500)	(5,700)	-	(19,600)	(58,100)	38,200	(16,300)
	BP Approved/ Issued/ Re-Instated	183	4,100	2,055,500	111,300	20,000	1,325,700	7,900	463,400	127,200
	Construction	215	6,700	5,405,900	567,800	1,767,400	2,986,700	(8,100)	86,600	5,400
	Total, Entitled	508	38,600	13,531,100	707,000	1,787,400	8,054,900	238,400	2,201,000	542,500
	Total	**958**	**50,600**	**18,734,300**	**1,599,800**	**1,787,400**	**12,002,900**	**(304,800)**	**2,856,500**	**792,300**

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%	100	0%	20	9,180	25	18
Bernal Heights	44	5%	120	0%	3	165,930	22	12
Buena Vista	21	2%	60	0%	3	-150	28	25
BVHP Area A,B	35	4%	420	1%	13	418,000	18	10
Candlestick	3	0%	10,310	20%	3,438	4,110,000	1	2
Central	78	8%	110	0%	1	5,320	24	21
Central Waterfront	19	2%	1,350	3%	71	-333,690	11	33
Downtown	44	5%	3,400	7%	85	1,684,280	5	5
East SoMa	36	4%	1,530	3%	42	621,070	10	8
Executive Park	1	0%	10	0%	12	0	32	22
Glen Park Compact	1	0%	0	0%	1	0	34	22
HP Shipyard	5	1%	50	0%	11	0	29	22
India Basin	4	0%	20	0%	6	-8,620	30	27
Ingleside, Other	41	4%	120	0%	3	25,350	23	14
Inner Sunset	42	4%	100	0%	2	6,520	26	19
Japantown	3	0%	0	0%	1	13,400	33	17
Marina	33	3%	390	1%	12	-8,950	19	28
Market Octavia	50	5%	2,900	6%	58	-419,880	6	34
Mission	79	8%	1,210	2%	15	-62,370	12	30
Mission Bay	5	1%	450	1%	113	2,445,500	17	3
Northeast	49	5%	940	2%	19	-233,750	14	32
Other S Bayshore	21	2%	140	0%	7	5,840	21	20
Outer Sunset	33	3%	100	0%	3	20,000	26	15
Park Merced	2	0%	5,860	12%	2,930	478,380	3	9
Richmond	84	9%	230	0%	3	18,090	20	16
Rincon Hill	8	1%	2,370	5%	296	-94,530	7	31
Showpl/Potrero	56	6%	4,070	8%	74	1,088,900	4	6
South Central, Other	70	7%	1,170	2%	17	93,130	13	13
South of Market, Other	4	0%	1,890	4%	631	2,043,630	8	4
TB Combo	10	1%	1,730	3%	173	5,275,150	9	1
Treasure Island	1	0%	7,800	15%	7,800	381,000	2	11
VisVal	4	0%	20	0%	5	-1,250	31	26
Western Addition	36	4%	720	1%	20	-50,730	16	29
WSoMa	31	3%	880	2%	30	1,039,480	15	7
Grand Total	**958**	**100%**	**50,570**	**100%**	**15,917**	**18,559,270**		

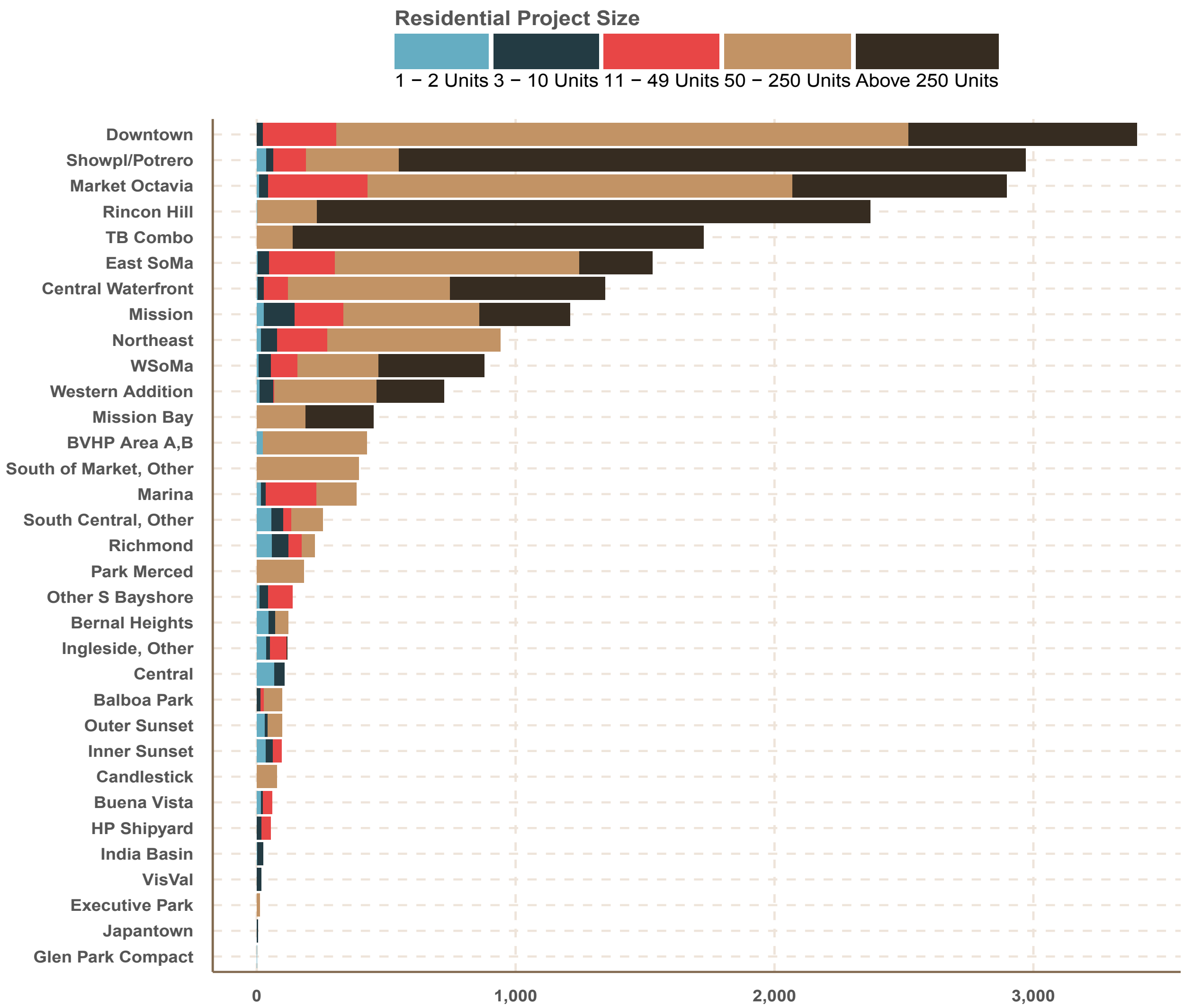
- Twelve percent of projects, representing 8,900 units and 4.6 million commercial square feet are under initial Planning Department review.

Amount and Type of Net New Commercial Space

Projects in the current pipeline as noted also represent a potential net addition of 18.7 million sq ft of commercial development that would result in the following land use inventory *changes*:

- 12 million sq ft of office space
- 2.9 million sq ft of retail space
- 800,000 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

Figure 1. Residential Pipeline Size Distribution, 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 300,000 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

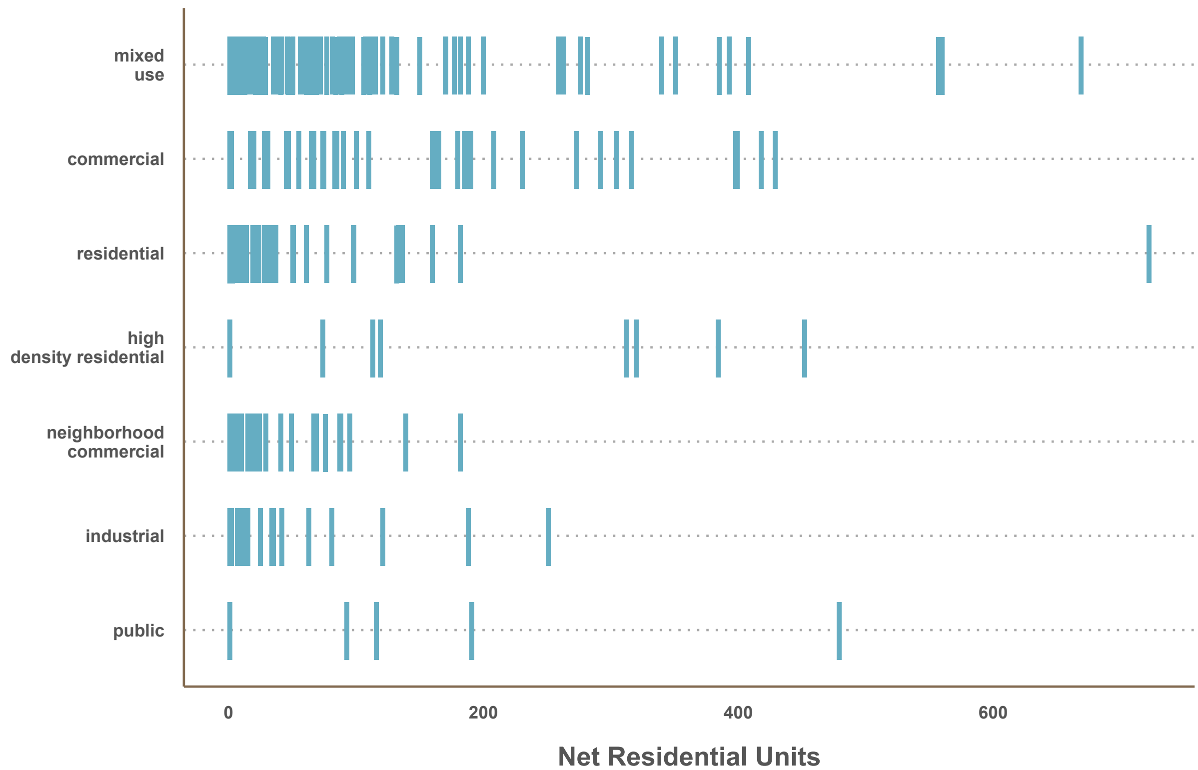
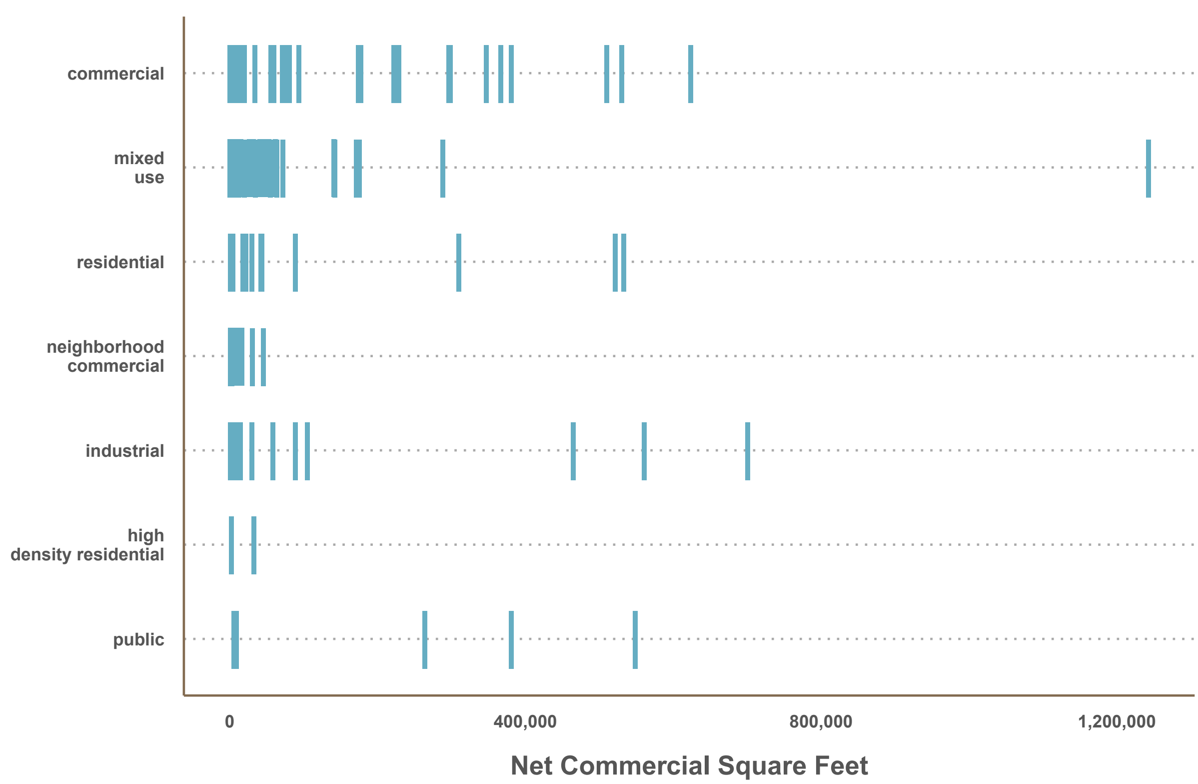


Figure 3. Non-Residential Pipeline Size Distribution, by Zoning Category



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

Figure 2 and Figure 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).

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	10	161	26,140	0	0	8,000	0	18,000	0
	C-3	48	5,907	4,498,430	102,000	0	2,698,000	-60,000	809,000	949,000
Neighborhood Commercial	NC	23	178	-5,790	0	0	7,000	0	-12,000	0
	NCT	30	1,320	1,270	13,000	0	8,000	-6,000	-18,000	5,000
Industrial	M	6	1,822	1,970,500	8,000	0	1,700,000	13,000	250,000	0
	PDR	20	268	942,900	0	0	773,000	144,000	26,000	0
	SLI	4	0	673,804	0	0	695,000	-30,000	10,000	0
	HP-RA	13	247	0	0	0	0	0	0	0
Mixed Use	C-M	1	121	300	0	0	2,000	-4,000	2,000	0
	CRNC	1	0	68,010	68,000	0	0	0	0	0
	CVR	1	23	-8,290	0	0	0	0	-8,000	0
	MUG	10	548	23,800	0	0	0	-2,000	59,000	-32,000
	MUO	14	260	940,660	0	0	893,000	-73,000	30,000	91,000
	MUR	16	1,138	-44,480	0	0	-9,000	-57,000	22,000	0
	NC	81	904	-17,290	-2,000	-25,000	26,000	-15,000	16,000	-16,000
	NCT	17	571	119,290	107,000	0	12,000	-8,000	9,000	0
	RC	20	1,423	670,800	904,000	0	-18,000	17,000	-4,000	-228,000
	RED	14	171	680	0	0	10,000	-9,000	0	0
	SLR	5	76	13,160	0	0	16,000	-3,000	0	0
	SPD	2	2	3,720	0	0	4,000	-1,000	1,000	0
	UMU	43	4,362	-243,030	0	0	199,000	-505,000	64,000	0
	MB	3	451	1,800,500	0	1,801,000	0	0	0	0
	CCB	1	1	0	0	0	0	0	0	0
Public	P	11	18,917	6,670,830	431,000	0	4,456,000	399,000	1,043,000	341,000
	MB	1	0	264,000	0	0	264,000	0	0	0
Residential	RH	433	744	155,060	-59,000	0	215,000	-5,000	21,000	-17,000
	RM	85	8,894	328,620	38,000	12,000	103,000	-9,000	485,000	-300,000
	RTO	37	272	-24,820	-8,000	0	-21,000	-19,000	24,000	0
High Density Residential	DTR	8	1,775	-94,530	0	0	-36,000	-71,000	12,000	0
Grand Total		**958**	**50,556**	**18,734,210**	**1,600,000**	**1,787,000**	**12,003,000**	**-305,000**	**2,857,000**	**792,000**

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, 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 18,900 units.

Residential projects on *residentially* zoned lots, representing the largest number of projects, account for 9,900 units, or the second largest class. Two thirds of these units, however, are in the Parkmerced redesign project and a couple of large San Francisco Housing Authority projects (one in the Potrero Hill area, the other on Sunnydale Ave as part of the Hope SF program). The remainder of projects on residentially zoned parcels are relatively small with about a quarter of projects being single family housing projects. Small scale projects of one to nine units account for some 90 percent of the residential projects. Only a handful are larger and thus account for the majority of units.

The mixed use districts, a diverse group ranging from Eastern Neighborhoods districts to Chinatown, account for 10,100 units in 229 projects.

Residential projects on downtown commercial zoned lots would add 6,000 new units in 60 projects, although the count here also includes commercial only projects.

Another 2,300 units are pending on industrially zoned lands. About a third of these projects are mixed use projects with a commercial component. The added residential units in industrial areas are typically accompanied by loss of PDR space and addition of retail space (see Table 5).

Projects in neighborhood commercial districts would add 1,500 units in 53 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 45 percent of proposed projects but just 2 percent of the total units (or 744 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 districts[2]; thus the majority of commercial space are proposed to be added in these land classes.

The commercial pipeline (counting by project type, not zoning district) in general is characterized by 77 projects, but also 161 mixed use projects which contain both residential and non-residential components. The commercial component in the 161 mixed use district projects are, in general also small, with half of projects being smaller than 5,000 gross square feet, respectively. (Some of these projects in mixed use *districts* are exclusively residential.)

The largest concentration of potential commercial development is in a small number of projects classified under public zoning[3]. Development here would

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.

add some net 6.7 million square feet, or 43 percent of all proposed commercial development, in just 11 projects. The largest of these projects is the Bayview Waterfront Project which would add millions of commercial square feet over a 20+ year period.

Downtown Commercial districts account for a sizable concentration of non-residential development, with 2.7 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 3.1 million square feet. Industrial districts would add another 3 million square feet. Remaining districts account for only a minor portion of non-residential development.

Table 4. Projects by Neighborhood and Building Size

	Project Size								
Neighborhood	Single Family	2-9 Units	10-19 Units	20-49 Units	50-99 Units	100-249 Units	Above 250	Grand Total	Rank
Balboa Park	0	17	13	0	71	0	0	101	28
Bernal Heights	17	66	0	0	50	0	0	133	24
Buena Vista	4	37	12	24	0	0	0	77	29
BVHP Area A,B	6	24	0	0	93	309	0	432	19
Candlestick	0	0	0	0	63	132	10,500	10,695	1
Central	17	154	0	0	0	0	0	171	22
Central Waterfront	1	29	18	76	294	330	599	1,347	12
Downtown	0	28	17	284	440	1,815	893	3,477	5
East SoMa	3	37	23	186	554	429	282	1,514	11
Executive Park	0	0	0	0	0	110	0	110	27
Glen Park Compact	0	2	0	0	0	0	0	2	34
HP Shipyard	0	18	36	0	0	0	0	54	30
India Basin	0	24	0	0	0	0	0	24	31
Ingleside, Other	13	56	11	53	0	0	722	855	16
Inner Sunset	16	52	10	34	0	0	0	112	26
Japantown	0	4	0	0	0	0	0	4	33
Marina	8	45	36	163	154	0	0	406	20
Market Octavia	1	67	74	355	225	1,417	828	2,967	6
Mission	5	184	79	175	233	291	351	1,318	13
Mission Bay	0	0	0	0	0	188	263	451	18
Northeast	3	104	36	182	232	437	0	994	14
Other S Bayshore	6	45	0	94	0	0	0	145	23
Outer Sunset	3	61	0	0	56	0	0	120	25
Park Merced	0	0	0	0	0	182	8,898	9,080	2
Richmond	7	191	13	39	50	0	0	300	21
Rincon Hill	1	0	0	0	0	232	2,137	2,370	7
Showpl/Potrero	2	93	56	69	159	200	4,122	4,701	4
South Central, Other	30	90	10	32	122	0	1,700	1,984	8
South of Market, Other	0	0	0	0	0	394	1,500	1,894	9
TB Combo	0	0	0	0	140	0	1,587	1,727	10
Treasure Island	0	0	0	0	0	0	8,619	8,619	3
VisVal	0	24	0	0	0	0	0	24	31
Western Addition	6	78	0	24	397	0	260	765	17
WSoMa	4	44	62	68	65	249	408	900	15
Grand Total	**153**	**1,574**	**506**	**1,858**	**3,398**	**6,715**	**43,669**	**57,873**	

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

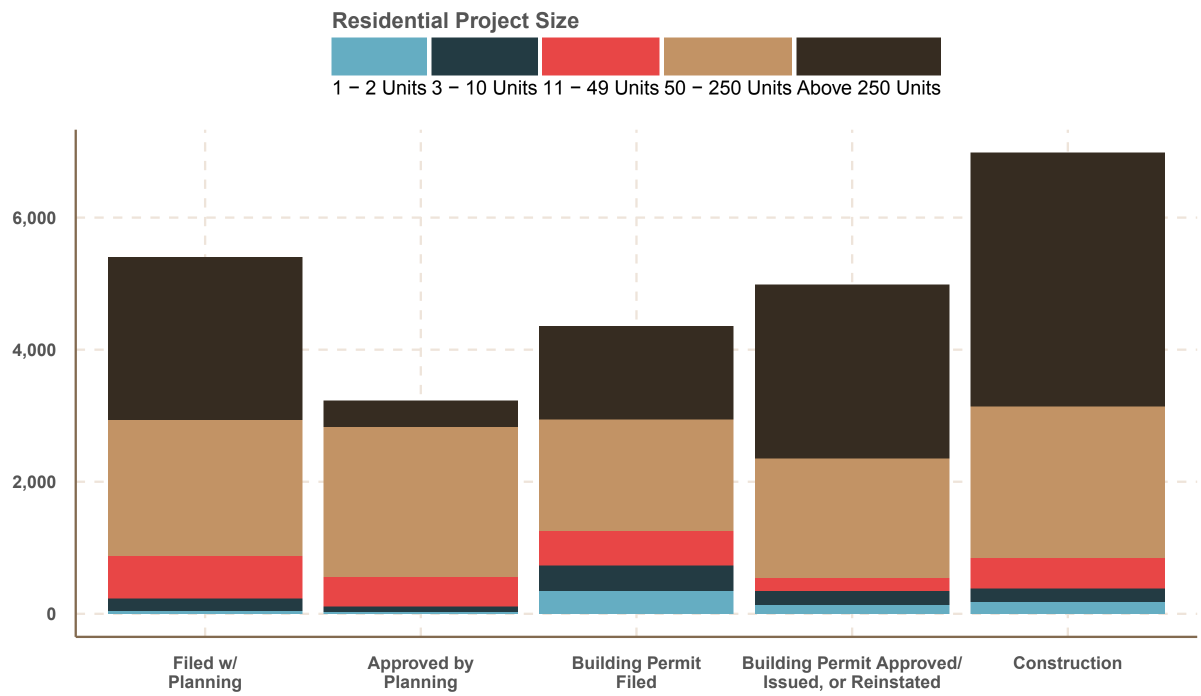
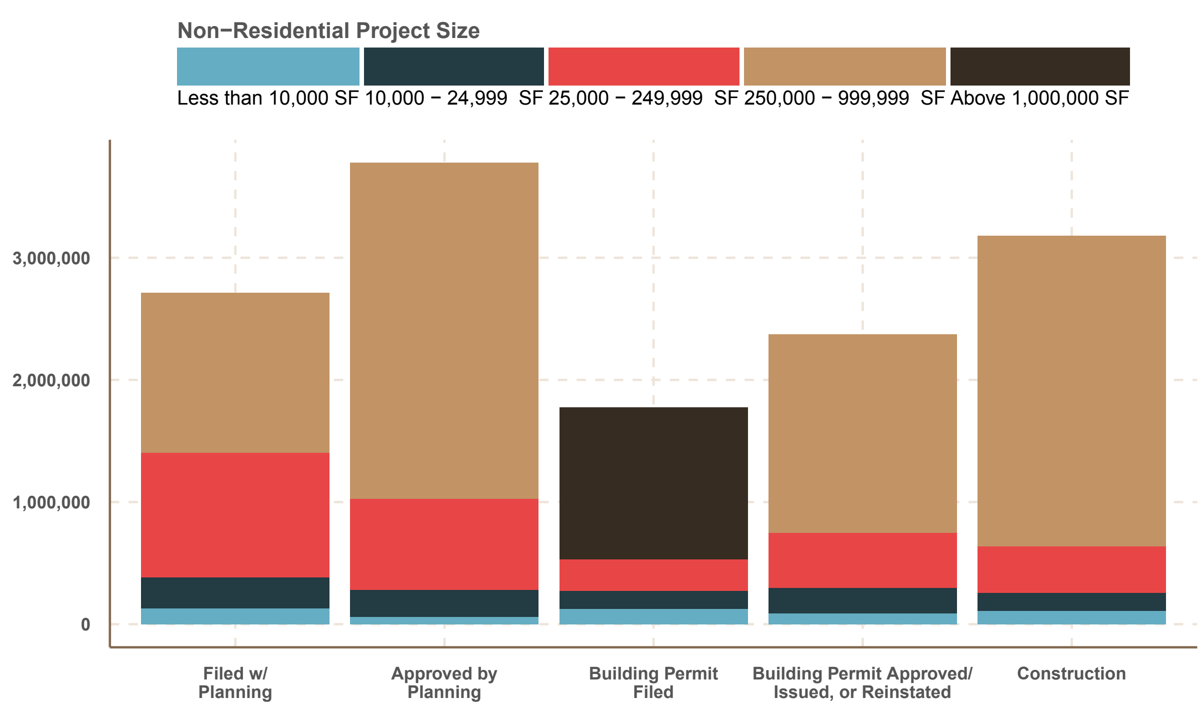


Figure 5. Non-Residential Pipeline, by Status & Building Size



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

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 4 on page 10 shows the residential pipeline by building size and pipeline status. The residential pipeline shows that:

- Of the 4,100 units with building permits approved or issued, five out of every eight units are in buildings of 250 units and above, underlining the large scale of the near future cohorts of residential projects.
- 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 entitled 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 to Residential Use[5]

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 25 projects. These projects, adding up to 3,600 units and 2,900 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.

4 State projects are not subject to Planning Department review and is thus not a part of the standard permit stream this reports build on. The project was added manually to the construction list in early 2014.

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 5) and office space (Table 6).

6 Table 5 shows only projects that include the conversion or loss of PDR space to residential use. Table 1 shows a net loss of 305,000 sq ft as it is a net tally of all projects that add, convert or demolish PDR space while this table only counts the loss side of the ledger.

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

Neighborhood	Projects	Percent	Net Units	Percent	PDR Net	Percent
Central Waterfront	9	18%	1,080	30%	-293,700	35%
Showpl/Potrero	5	10%	600	17%	-176,000	21%
Downtown	4	8%	260	7%	-84,800	10%
Mission	10	20%	350	10%	-78,300	9%
Rincon Hill	2	4%	570	16%	-70,900	9%
East SoMa	11	22%	440	12%	-58,800	7%
Northeast	2	4%	120	3%	-20,800	3%
Market Octavia	1	2%	40	1%	-19,000	2%
WSoMa	3	6%	110	3%	-16,800	2%
India Basin	2	4%	10	0%	-8,600	1%
Richmond	1	2%	0	0%	-2,100	0%
Grand Total	**50**	**100%**	**3,570**	**100%**	**-829,800**	**100%**

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

Neighborhood	Projects	Percent	Net Units	Percent	Office Net	Percent
Downtown	4	16%	240	8%	-155,200	17%
East SoMa	1	4%	120	4%	-3,800	0%
Market Octavia	6	24%	1,380	47%	-611,200	66%
Mission	1	4%	0	0%	-1,000	0%
Northeast	4	16%	140	5%	-33,500	4%
Rincon Hill	2	8%	700	24%	-60,000	7%
Showpl/Potrero	2	8%	140	5%	-28,200	3%
South Central, Other	1	4%	0	0%	-1,900	0%
South of Market, Other	1	4%	210	7%	-20,800	2%
Western Addition	1	4%	0	0%	-2,500	0%
WSoMa	2	8%	10	0%	-2,400	0%
Grand Total	**25**	**100%**	**2,940**	**100%**	**-920,400**	**100%**

Notes:
Unit numbers are rounded to the nearest 10, while PDR numbers are rounded to the nearest hundred.

- Most of the PDR to residential conversions are found in Central Waterfront, Showplace Square / Potrero Hill, Downtown, Mission and Rincon Hill districts, accounting together for eight out of 10 converted square feet. The loss of PDR space in these neighborhoods would in turn bring in 2,900 net new housing units.

Conversion of Office Space

- Approximately 900,000 sq ft of office space is proposed to be converted to residential and/or other commercial use. This loss of office space is mainly taking place in the northeastern part of the city 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 11.6 million sq ft citywide.

INCLUSIONARY HOUSING

The San Francisco Planning Code § 415.5 contains the provisions for the Inclusionary Affordable Housing Program, requiring developments with 10 units or more to contribute to the development of housing affordable to middle-income households in the City.[7] Project sponsors can mainly fulfill this requirement either by contributing to a fund, providing units on-site, dedicating land, or building on a different site.

The affordable housing pipeline can be thought of in stages: First, affordable housing production per the inclusionary program is a function of fees on market rate housing development and/or direct provision of affordable units. Such market rate development can be thought of as "parent projects," leading to derived units now (on site) or later (through fees paid). The second stage, then, is when monies are pooled,

7 This data and section was last updated at the end of quarter 1, 2014.

Table 7. Inclusionary Housing Pipeline, by Type

Type	Declaration	Projects	Total Units	BMR On-Site	BMR Off-Site
Parent	On Site Provision	50	6,241	906	-
	In Lieu Fee	27	2,703	-	404 [1]
	Off site (Future BMR)	1	725	-	164
	Land Dedication	2	353	-	-
	Combination	8	6,706	370	36
	Undeclared	10	1,172	-	139 [2]
Child	Stand-Alone BMR	3	203	-	-
Grand Total		**101**	**18,103**	**1,276**	**743**

Notes:
/1/ BMR unit counts are estimated at 15% of the Total unit count, assumed to be off site.
/2/ BMR unit counts are estimated at 12% of the Total unit count, assumed to be off site. Some of these may be on-site once a declaration is issued.

a site identified, and the affordable housing built, typically by a non-profit developer. To stay with the parent analogy, these downstream projects may accordingly be thought of as "children." For economy of scale reasons, there are relatively few--currently three--such projects. Conversely, 50 projects (Table 7, first row) will provide on-site affordable units. These projects, along with the BMR stand-alone projects, are shown on Map 2.

Map 2. Inclusionary Affordable Housing Pipeline, By Type and Size

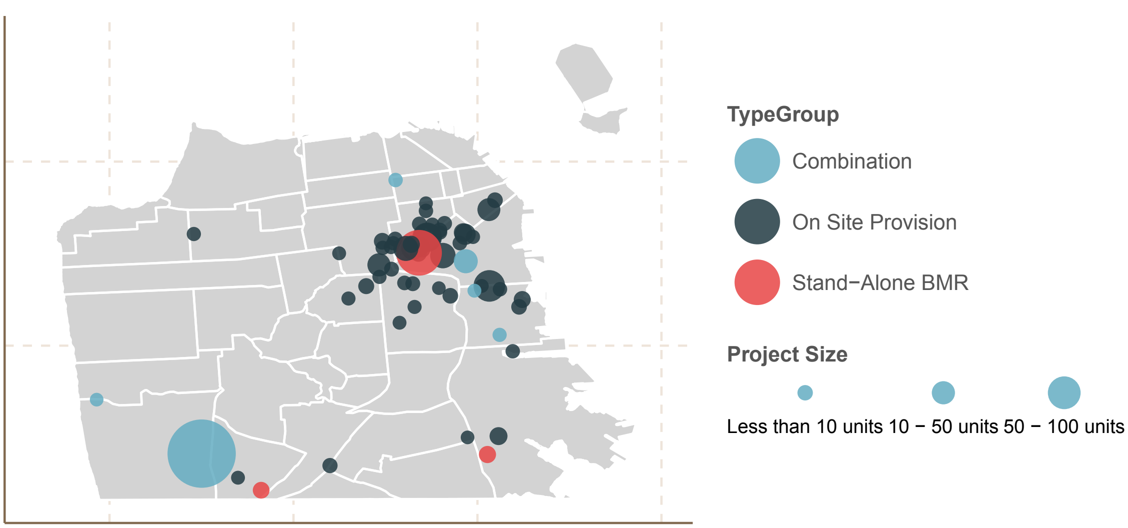
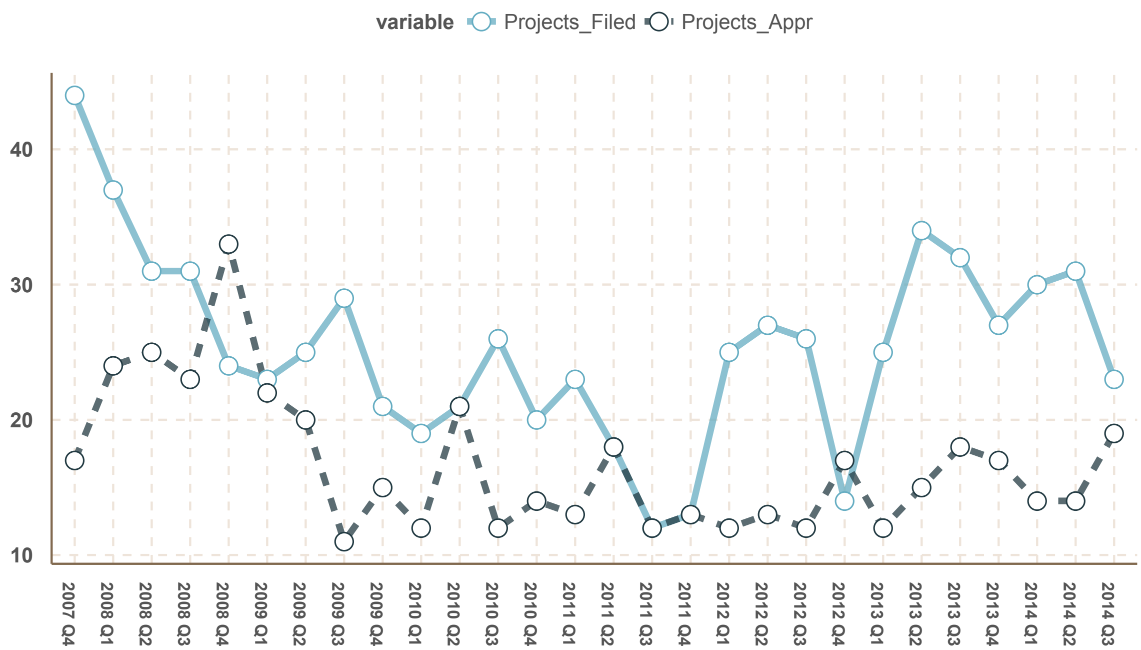


Figure 6. Pipeline Over Time: Projects Filed / Approved



RECENT ACTIVITY

Project Application Filings During q3 2014

A total of 24 planning applications were filed in the third quarter of 2014, down from last quarter , consistent with a seasonal slowdown. Corresponding to these 24 projects is a count of 250 residential units and 279,000 sq ft of non-residential development.

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. As such, nearly 800 units were entitled during the quarter.

A few of the larger projects filed during the third quarter of 2014 include:

- At 1095 Market Street, a proposal would change occupancy from office to hotel use, with 202 rooms, and add a new roof deck.
- At 230 7th Street, the proposed project would demolish a 14,230 sq ft single-story garage parking building and construct two new buildings with an at-grade inner court between the two buildings with an underground parking garage with 29 spaces. The new building along the 7th Street frontage would be a six-story building a small commercial space on the ground floor and 27 residential units. The building along Langton Street would be a four-story building containing 17 residential units.
- At 198 Valencia Street, sponsor would erect a five story, no basement, 28 unit residential condo building with ground floor commercial space.
- At 768 Harrison Street, the proposed project entails the demolition of an existing 2-story building and the construction of a new 9-story building with retail on the ground floor and mezzanine and residential uses above. The project would have 26 residential units and no off-street parking.

Completed projects during the past four quarters

Table 8 shows that the past four quarters resulted in a net addition of 3,090 units to the city's housing stock, while there was a net addition of 280,000 sq ft of non-residential space. The median time to completion for these projects from the first filing was 43 months. Projects less than 10,000 sq ft had a median completion time of 30 months. Such projects tend to be less complex than larger ones, as evidenced in completion times as sizes increase. The trend is broken down by zoning district in Figure 7: Particularly residential districts exhibit substantial variation in time to completion without much change in project size, suggesting other factors than size are at play.

Projects sized between 10,000 and 24,999 sq ft, 25,000 - 249,999 sq ft had median completion times of 52 and 71 months, respectively.

The largest group, sized 250,000 - 999,000 sq ft took 53 months from the initial filing to project completion.[8] For some of the projects, the long completion times may well reflect a strong recession effect (project sponsors waiting due to financial uncertainty) on the current completion cohort, although the smaller projects are by now predominantly filed after the slowdown ended. However, there is tremendous variation in how long it takes from conception to completion.

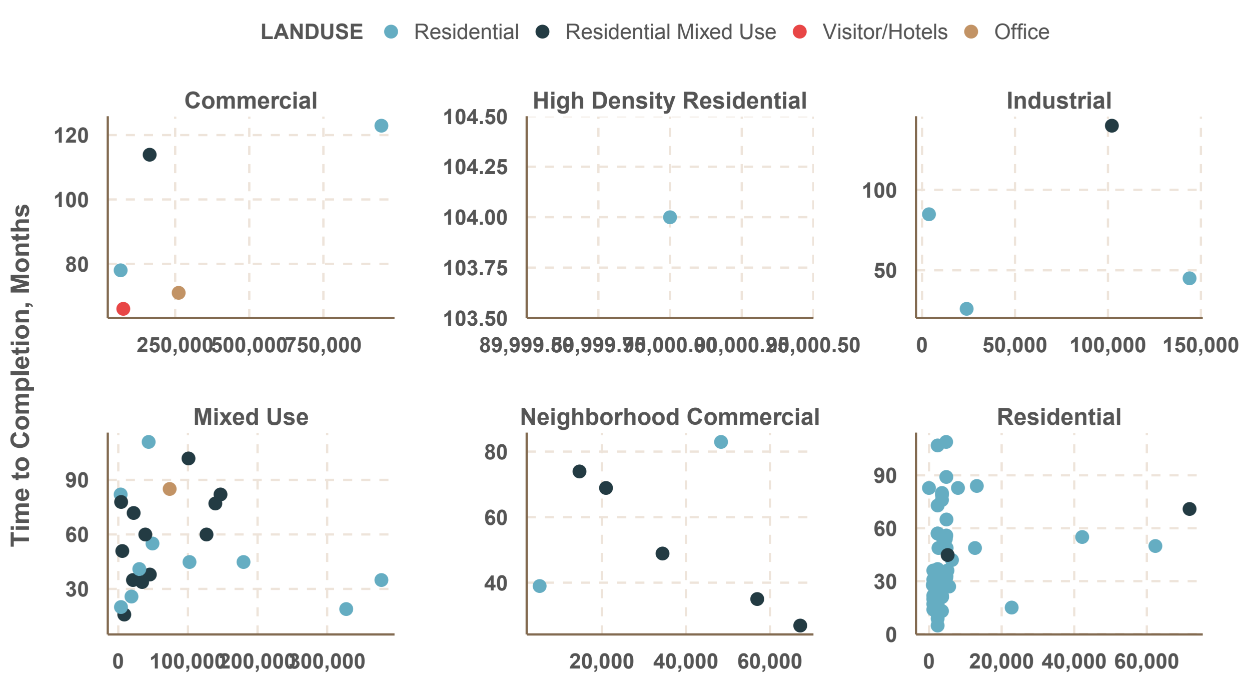
8 Certificates of Final Completions will occasionally lag the actual completion time and/or may be recorded on a different permit application finalizing work authorized per an older permit, so these figures should be taken as approximations.

Table 8. Projects Completed Past Year, By Use Type

Land Use	Projects	Net Units	Net Comm'l Sq. Ft.
Mixres	21	1,200	-13,000
Resident	78	1,910	-72,000
MIPS	2	-20	309,000
Visitor	1	0	54,000
Grand Total	**102**	**3,090**	**278,000**

Figure 7 details the relationship between project size and time to completion. All other things equal, bigger, more complex projects can be expected to take longer to complete. They need more layers of review and refine, and financing may be more uncertain. The chart shows that this relationship is much stronger in some types of zoning districts than others. The association one might expect between project size and completion time, per this chart, is

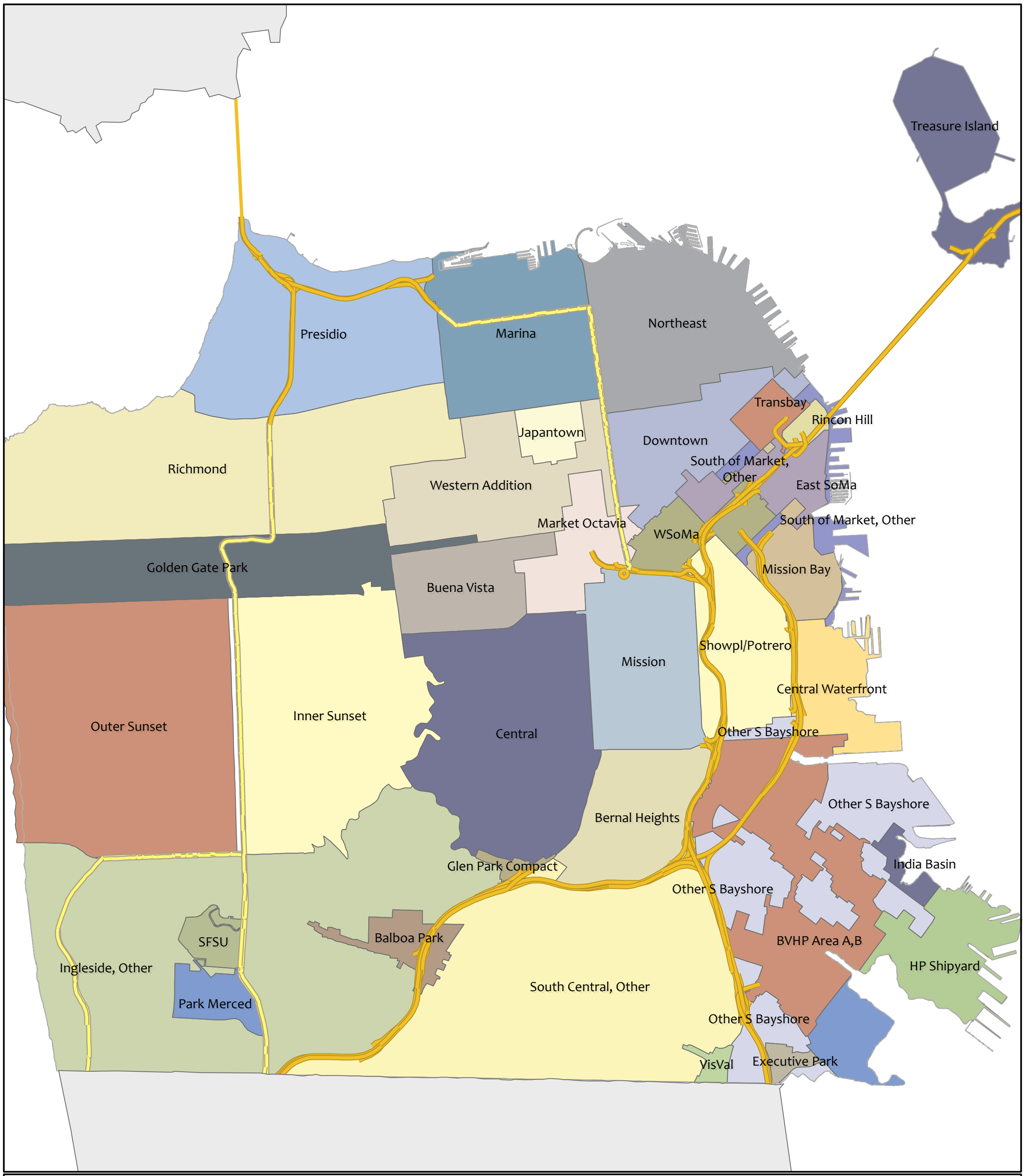
Figure 7. Relation between Project Size and Months to Completion, By Zoning and Land Use



Map 3. Magnitude and Location of Past Year's Completed Development, by Major Land Use Type

not strongly borne out by the data for residential districts . The connection is a little stronger for mixed use projects, which may differ both in terms of the neighborhoods they are located in as well as the type of financing available. For projects in neighborhood commercial districts, the smaller projects took the longest to complete.

Map 4. Neighborhood Designation for Pipeline Report

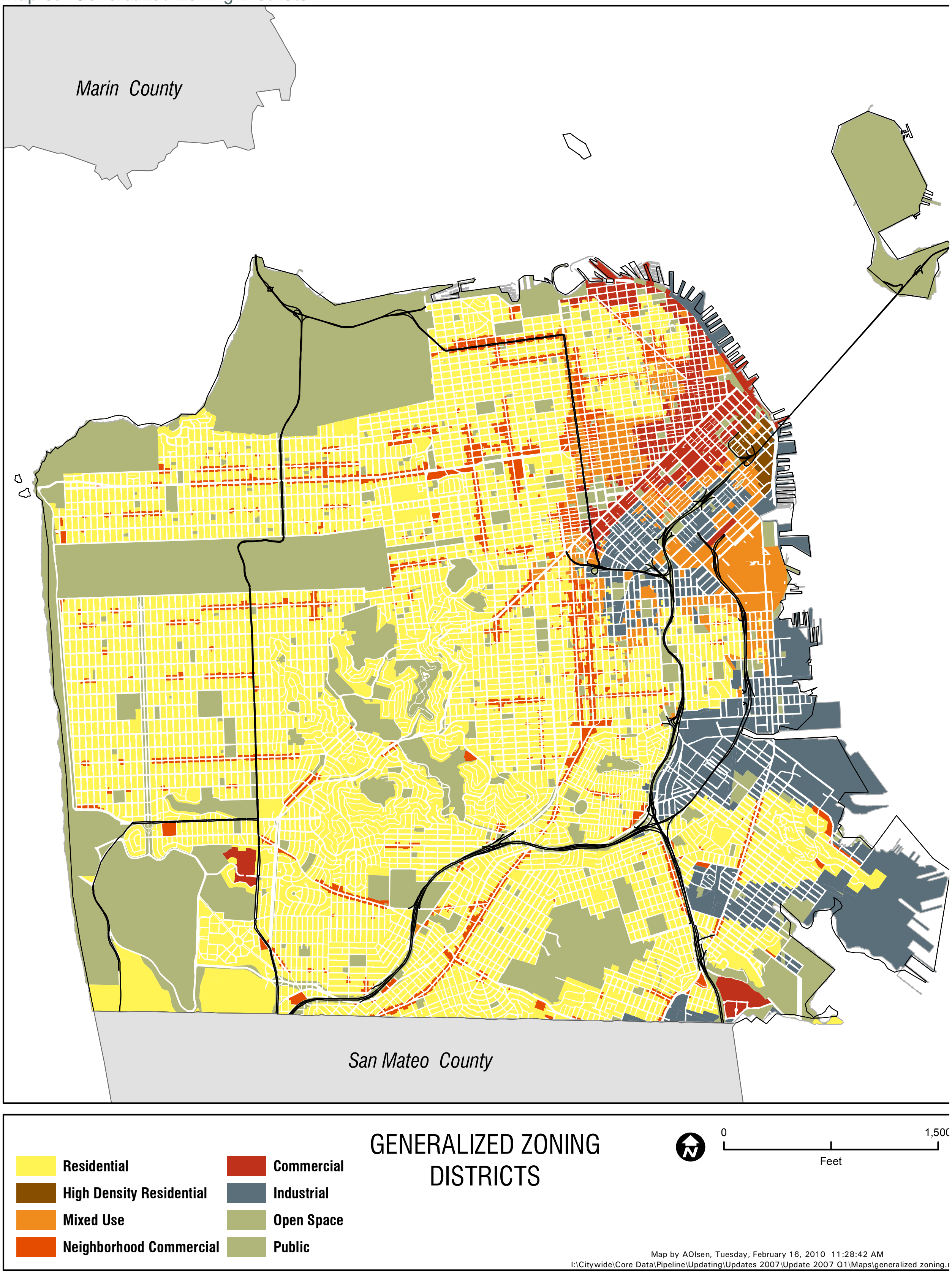


Pipeline Geography

0 1,500
Feet

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 5. Generalized Zoning Districts



DATA DICTIONARY

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

Quarter 3, 2014

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

CONSTRUCTION

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3720001	TRANSBAY TOWER	TB Combo	1743k	0	MIPS	MIPS	6/25/2014
3746001	390 Main St	Rincon Hill	0k	669	Resident	--N/A--	9/30/2014
3735063	222 02ND ST	TB Combo	623k	0	MIPS	MIPS	9/29/2014
4154001	1001 POTRERO AV	Showpl/Potrero	419k	0	CIE	CIE	2/10/2014
3710017	350 MISSION ST	TB Combo	416k	0	MIPS	MIPS	9/23/2014
3747320	The Californian	Rincon Hill	-2k	452	Mixres	MIPS	8/7/2014
3738004	280 BEALE ST	TB Combo	0k	479	Resident	--N/A--	9/3/2014
0814020	100 VAN NESS AV	Market Octavia	-424k	399	Mixres	Retail/Ent	9/24/2014
3833002	1006 16TH ST	Showpl/Potrero	0k	393	Resident	--N/A--	9/30/2014
3749059	45 LANSING ST	Rincon Hill	-14k	320	Resident	--N/A--	9/18/2014
3765015	One Rincon Hill Phase II	Rincon Hill	0k	312	Resident	--N/A--	6/9/2014
3722367	151 THIRD ST	Downtown	67k		CIE	CIE	9/24/2014
3721122	535 MISSION ST	TB Combo	296k	0	MIPS	MIPS	9/12/2014
3732009	900 FOLSOM ST	East SoMa	6k	282	Mixres	Retail/Ent	8/8/2014
3701064	55 9TH ST	Downtown	0k	273	Resident	--N/A--	12/9/2013
8710007	718 LONG BRIDGE ST	Mission Bay	0k	263	Resident	--N/A--	9/30/2014
3717019	120 HOWARD ST	Downtown	67k	0	MIPS	MIPS	6/13/2012
0857001A	218 BUCHANAN ST	Market Octavia	0k	191	Resident	--N/A--	7/31/2014
3507039	1420 MISSION ST	Downtown	12k	190	Resident	--N/A--	9/10/2014
0831023	MARKET OCTAVIA - PARC	Market Octavia	4k	182	Mixres	Retail/Ent	9/29/2014
7331003	800 Brotherhood Way	Park Merced	0k	182	Resident	--N/A--	9/11/2012
3509043	104 9th Street	Downtown	-8k	160	Mixres	Retail/Ent	10/1/2014
0794028	555 FULTON ST	Market Octavia	0k	139	Resident	--N/A--	9/30/2014
0857001	55 Laguna Street	Market Octavia	28k	133	Mixres	Retail/Ent	7/31/2014
4991277	833-881 Jamestown	Candlestick	0k	14	Resident	--N/A--	9/17/2007
3510001	1415 MISSION ST	Downtown	0k	121	Mixres	MIPS	9/17/2014
5431A001	5800 03RD ST	BVHP Area A,B	13k	121	Resident	--N/A--	9/29/2014
0870003	100 BUCHANAN ST	Market Octavia	0k	116	Resident	--N/A--	9/30/2014

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3616007	2558 MISSION ST	Mission	0k	114	Resident	--N/A--	9/11/2014
3731003	226 06TH ST	East SoMa	5k	37	Mixres	Visitor	9/24/2014
1052024	2655 BUSH ST	Western Addition	-41k	81	Mixres	Retail/Ent	9/24/2014
3180001	50 PHELAN AV	Balboa Park	12k	71	Mixres	Retail/Ent	9/5/2014
0165021	235 BROADWAY	Northeast	5k	75	Mixres	Retail/Ent	9/19/2014
3789003	72 TOWNSEND ST	East SoMa	0k	74	Resident	--N/A--	9/11/2014
0671006	1450 FRANKLIN ST	Western Addition	-24k	69	Resident	--N/A--	3/4/2014
4591C042	101 DONAHUE ST	Candlestick	0k	63	Resident	--N/A--	9/30/2014
5281003	901 RANKIN ST	BVHP Area A,B	58k	0	PDR	PDR	9/17/2014
3788039	345 BRANNAN ST	East SoMa	53k	0	MIPS	MIPS	5/23/2014
0855011	8 OCTAVIA ST	Market Octavia	4k	49	Mixres	Retail/Ent	9/26/2014
3532091	245 VALENCIA ST	Market Octavia	13k	0	CIE	CIE	8/25/2014
3548032	1875 MISSION ST	Mission	-35k	39	Mixres	Retail/Ent	7/17/2014
3534069	25 DOLORES ST	Market Octavia	-19k	37	Resident	--N/A--	9/16/2014
0619012	1860 VAN NESS AV	Northeast	2k	35	Mixres	Retail/Ent	9/29/2014
4591C095	401 INNES AV	Other S Bayshore	0k	35	Resident	--N/A--	9/22/2014
4591C099	50 JERROLD AV	Other S Bayshore	0k	34	Resident	--N/A--	9/16/2014
0570011	1650 BROADWAY *	Marina	0k	34	Resident	--N/A--	9/11/2014
5943008	268 MADISON ST	South Central, Other	25k	1	Mixres	Retail/Ent	1/8/2014
3518006	248 - 252 09TH ST	WSoMa	5k	15	Mixres	MIPS	8/25/2014
7148040	ONE CAPITOL AV	Ingleside, Other	0k	28	Resident	--N/A--	9/4/2014
3752019	870 HARRISON ST	WSoMa	-6k	26	Mixres	Retail/Ent	6/3/2014
0527002	2559 VAN NESS AV	Marina	-2k	27	Resident	--N/A--	9/12/2014
4591C093	201 DONAHUE ST	Other S Bayshore	0k	25	Resident	--N/A--	9/30/2014
3596113	899 VALENCIA ST	Mission	5k	18	Mixres	Retail/Ent	9/18/2014
3548001	300 South Van Ness Ave	Mission	20k	0	Retail/Ent	Retail/Ent	9/25/2014
4591C094	201 FRIEDELL ST	HP Shipyard	0k	12	Resident	--N/A--	9/25/2014
4591C069	198 COLEMAN ST	HP Shipyard	0k	12	Resident	--N/A--	9/15/2014
4591C098	200 COLEMAN ST	HP Shipyard	0k	12	Resident	--N/A--	9/23/2014
7332005	700 BROTHERHOOD WY	Ingleside, Other	0k	11	Resident	--N/A--	6/25/2014
8724001	UCSF Medical Center	Mission Bay	1800k	0	MED	MED	10/13/2010
8719002	1351 03RD ST	Mission Bay	264k		MIPS	MIPS	8/6/2014

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

BP ISSUED

3719010	181 FREMONT ST	TB Combo	493k	74	Mixres	MIPS	12/26/2013
3783001	801 BRANNAN ST	Showpl/Potrero	8k	557	Mixres	Retail/Ent	9/26/2014
3911001	1 HENRY ADAMS ST	Showpl/Potrero	15k	560	Resident	--N/A--	7/8/2014
3756003	350 08TH ST	WSoMa	57k	408	Mixres	Retail/Ent	3/20/2014
3833001	1000 16TH ST	Showpl/Potrero	0k	385	Resident	--N/A--	9/7/2012
8720016	1455 03RD ST	Mission Bay	381k	0	MIPS	MIPS	4/23/2010
3704071	949 Market Street	Downtown	237k	0	Retail/Ent	Retail/Ent	12/27/2012
3733008	250 4TH ST	South of Market, Other	73k	208	Mixres	Visitor	9/12/2014
8711019	701 LONG BRIDGE ST	Mission Bay	0k	188	Resident	--N/A--	3/26/2012
3732150	240 05TH ST	East SoMa	0k	182	Resident	--N/A--	8/27/2012
3794024	144 KING ST	East SoMa	44k	132	Mixres	Visitor	8/28/2014
3774026	270 BRANNAN ST	East SoMa	154k	0	MIPS	MIPS	4/25/2014
0811002	101 POLK ST	Downtown	1k	162	Mixres	Retail/Ent	4/7/2014
0785029	FWY PARCEL F	Market Octavia	64k	69	Mixres	CIE	11/26/2013
0785029	388 FULTON ST	Market Octavia	46k	69	Mixres	CIE	11/26/2013
0757025	1100 GOLDEN GATE AV	Western Addition	0k	98	Resident	--N/A--	6/26/2013
0757027	1239 TURK ST	Western Addition	0k	98	Resident	--N/A--	6/26/2013
3834001	1000 16TH ST	Showpl/Potrero	26k	65	Mixres	Retail/Ent	9/7/2012
1073013	800 PRESIDIO AV	Richmond	10k	50	Mixres	CIE	6/20/2014
3731001	200-214 6th St	East SoMa	3k	67	Mixres	Retail/Ent	1/30/2014
0808039	450 HAYES STREET	Market Octavia	3k	41	Mixres	Retail/Ent	7/18/2014
3560001	2210 MARKET ST	Market Octavia	2k	22	Mixres	Retail/Ent	3/14/2012
0028014	1255- 1275 COLUMBUS A	Northeast	-9k	20	Mixres	Retail/Ent	4/22/2014
3732071	468 CLEMENTINA ST	East SoMa	-0k	25	Resident	--N/A--	10/23/2013
0512026	2347 LOMBARD ST	Marina	0k	21	Resident	--N/A--	7/25/2014
5457037	2895 SAN BRUNO AV	South Central, Other	11k	10	Mixres	MIPS	8/19/2013
1051034	2320 SUTTER ST	Western Addition	11k	0	MED	MED	5/28/2014
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
3987010	140 PENNSYLVANIA AV	Showpl/Potrero	0k	12	Resident	--N/A--	8/6/2014

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
3973002C	480 POTRERO AV	Mission	0k	77	Resident	--N/A--	5/23/2014

BP APPROVED

4884025	2600 ARELIOUS WALKER	BVHP Area A,B	0k	93	Resident	--N/A--	8/21/2014
6969001	5050 MISSION ST	South Central, Other	7k	61	Mixres	Retail/Ent	3/13/2014
6969011	5050 MISSION ST	South Central, Other	0k	61	Resident	--N/A--	3/13/2014
0258033	500 PINE ST	Downtown	57k		MIPS	MIPS	4/7/2014
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
3736078A	57 TEHAMA ST	TB Combo	0k	418	Resident	--N/A--	4/30/2014
3748006	340 FREMONT ST	Rincon Hill	-43k	384	Mixres	Retail/Ent	8/3/2012
3553052	1979 MISSION ST	Mission	0k	351	Resident	--N/A--	12/17/2013
4172022	1201-1225 TENNESSEE ST	Central Waterfront	-140k	259	Mixres	Retail/Ent	12/23/2013
3703059	1095 MARKET ST	Downtown	0k	202	Resident	--N/A--	9/11/2014
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
4991600	101 EXECUTIVE PARK BL	Executive Park	0k	12	Resident	--N/A--	10/25/2010
0836007	1554 MARKET ST	Market Octavia	0k	110	Resident	--N/A--	11/22/2013
4102026	1300 22nd Street	Showpl/Potrero	-30k	94	Resident	--N/A--	12/9/2013
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
4352007	1301 CESAR CHAVEZ ST	BVHP Area A,B	82k	0	MIPS	MIPS	10/15/2007

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
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
3962008	346 POTRERO AVENUE	Mission	3k	72	Mixres	Retail/Ent	11/20/2013
4059001A	815 TENNESSEE STREET	Central Waterfront	-32k	69	Resident	--N/A--	5/5/2014
3736085	48 TEHAMA ST	TB Combo	0k	66	Resident	--N/A--	7/12/2006
0165022	717 BATTERY ST	Northeast	28k	0	MIPS	MIPS	12/1/2008
2515001	2800 SLOAT BL	Outer Sunset	10k	56	Resident	--N/A--	2/4/2014
3703086	570 JESSIE ST	Downtown	-15k	47	Resident	--N/A--	2/2/2006
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
4792029	1212 THOMAS AV	BVHP Area A,B	30k	0	PDR	PDR	7/23/2008
3727168	1145 MISSION ST	Downtown	4k	25	Mixres	Retail/Ent	6/9/2006
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
3502108	198 VALENCIA ST	Market Octavia	0k	28	Resident	--N/A--	8/5/2014
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	-6k	23	Resident	--N/A--	6/28/2013
3753096	233 SHIPLEY ST	East SoMa	0k	22	Resident	--N/A--	1/24/2014
1368049	4614 CALIFORNIA ST	Richmond	14k	0	Mixed	MIPS	1/23/2007
3546026	449 14th street	Market Octavia	0k	20	Resident	--N/A--	3/17/2014
0832026	360 OCTAVIA ST	Market Octavia	1k	16	Mixres	Retail/Ent	10/1/2008
3821007	1150 16th Street	Showpl/Potrero	1k	15	Mixres	Retail/Ent	7/22/2011
0832025	300 OCTAVIA ST	Market Octavia	0k	16	Resident	--N/A--	10/1/2008
3576090	3420 18TH ST	Mission	-4k	16	Resident	--N/A--	11/4/2013
3511015	1532 HOWARD ST	WSoMa	-1k	15	Resident	--N/A--	5/30/2014
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
0937029	2419 LOMBARD ST	Marina	0k	11	Resident	--N/A--	4/3/2014

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6044007	450 SOMERSET ST	South Central, Other	21k		CIE	CIE	8/11/2014

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Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
4886008	Bayview Waterfront	Candlestick	4110k	10,237	Mixres	MIPS	8/3/2010
7303001	Parkmerced	Park Merced	478k	5,677	Mixres	Retail/Ent	5/25/2011
1939001	Treasure Island	Treasure Island	381k	7,800	Mixres	Retail/Ent	3/15/2011
6575001	CPMC - ST. LUKE'S HOSPIT	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
3706093	706 MISSION ST	Downtown	26k	185	Mixres	Retail/Ent	7/31/2013
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
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
3747012	325 FREMONT ST	Rincon Hill	0k	119	Resident	--N/A--	7/17/2014
3767305	429 BEALE ST	Rincon Hill	-36k	113	Resident	--N/A--	5/14/2009
0340002	19-25 MASON ST & 2-16 T	Downtown	3k	110	Mixres	Retail/Ent	3/4/2014
4060001	888 TENNESSEE ST	Central Waterfront	-36k	110	Mixres	Retail/Ent	10/16/2013
3994001C	650 ILLINOIS ST	Central Waterfront	-15k	97	Resident	--N/A--	6/5/2014
3753081	345 06TH ST	East SoMa	7k	89	Mixres	Retail/Ent	5/1/2014
3753079	363 06TH ST	East SoMa	-10k	87	Mixres	Retail/Ent	10/3/2012
3753122	301 06TH ST	East SoMa	4k	84	Mixres	Retail/Ent	7/2/2013
3703079	1036-1040 MISSION ST	Downtown	1k	83	Mixres	Retail/Ent	6/26/2014
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	1/10/2014

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
0619009	1800 Van Ness Ave.	Northeast	-1k	62	Mixres	Retail/Ent	10/20/2011
0287013	300 Grant Ave.	Downtown	-20k	45	Mixres	Retail/Ent	10/6/2011
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
3726103	114 07th Street	Downtown	-30k	39	Mixres	Retail/Ent	6/19/2014
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
0522002A	2601 VAN NESS AV	Marina	7k	26	Mixres	Retail/Ent	5/13/2014
0670024	1433 BUSH ST	Downtown	-4k	26	Mixres	Retail/Ent	7/31/2014
0281003	832 SUTTER ST	Downtown	1k	27	Mixres	Retail/Ent	2/27/2014
0620006	1601 LARKIN ST	Northeast	0k	28	Resident	--N/A--	11/15/2013
3751033	768 HARRISON ST	East SoMa	2k	26	Mixres	Retail/Ent	3/21/2014
3778047	610-620 Brannan Street	Showpl/Potrero	527k		MIPS	MIPS	6/14/2014

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9900048	Seawall Lot 337	South of Market, Other	1950k	1,500	Mixres	MIPS	4/23/2013
3708006	50 01ST ST	TB Combo	1704k	292	Mixres	MIPS	6/4/2014
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
0814001	150 VAN NESS AVE	Market Octavia	-128k	429	Mixres	Retail/Ent	4/23/2014
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
0350003	1066 MARKET ST	Downtown	-1k	304	Mixres	Retail/Ent	6/18/2014
3954016	1301 - 16TH STREET	Showpl/Potrero	-39k	276	Resident	--N/A--	9/16/2013
0647007	1634-1690 PINE ST	Western Addition	7k	260	Mixres	Retail/Ent	7/17/2012
4167011	1395 22nd St	Showpl/Potrero	0k	251	Resident	--N/A--	1/13/2014

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
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
0350002	1028 MARKET ST	Downtown	10k	186	Mixres	Retail/Ent	4/29/2014
4022001	2070 BRYANT ST	Mission	-50k	177	Resident	--N/A--	6/12/2014
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
3728019	1298 HOWARD STREET	WSoMa	10k	121	Mixres	MIPS	3/19/2014
5231002B	1995 EVANS AV	BVHP Area A,B	65k	0	MIPS	MIPS	3/21/2013
3703062	1075 MARKET ST	Downtown	-16k	90	Mixres	Retail/Ent	2/12/2014
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
0744002	807 FRANKLIN ST	Western Addition	0k	50	Resident	--N/A--	4/8/2014
5696036	992 PERALTA AV	Bernal Heights	0k	50	Resident	--N/A--	6/20/2013
3730004	230 07TH ST	East SoMa	0k	44	Mixres	Retail/Ent	7/30/2014
0855016	1700 MARKET ST	Market Octavia	-2k	42	Mixres	Retail/Ent	7/2/2014
3115043	625 MONTEREY BL	Ingleside, Other	21k	0	Retail/Ent	Retail/Ent	5/26/2010
4059001C	2230 3RD STREET	Central Waterfront	-3k	37	Mixres	Retail/Ent	3/6/2014
4108017	901 TENNESSEE STREET	Central Waterfront	-9k	39	Resident	--N/A--	9/12/2013
0166003	240 PACIFIC AV	Northeast	1k	31	Mixres	Retail/Ent	8/27/2014
0836011	22 FRANKLIN ST	Market Octavia	4k	28	Mixres	Retail/Ent	1/2/2014
5992A060	495 CAMBRIDGE ST	South Central, Other	-23k	32	Resident	--N/A--	5/15/2014
3576001	2100 MISSION ST	Mission	-5k	29	Mixres	Retail/Ent	9/21/2009
0337014A	469 EDDY ST	Downtown	-18k	29	Mixres	Retail/Ent	8/28/2014
3575070	600 SOUTH VAN NESS AV	Mission	1k	27	Mixres	Retail/Ent	9/10/2013
0194009	740 WASHINGTON ST	Northeast	-8k	23	Mixres	Retail/Ent	9/26/2014
3753095	233-237 SHIPLEY ST	East SoMa	-2k	22	Resident	--N/A--	7/10/2013

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
0041001	311 BAY ST	Northeast	-2k	17	Mixres	Retail/Ent	6/16/2014
3995007	600 18TH STREET	Central Waterfront	1k	18	Mixres	Retail/Ent	9/30/2014
0645003	1335 LARKIN ST	Northeast	0k	20	Resident	--N/A--	7/23/2014
3639001	2600 HARRISON ST	Mission	0k	20	Resident	--N/A--	6/20/2014
3753140	935 FOLSOM ST	East SoMa	-14k	69	Mixres	Retail/Ent	4/19/2010
4008002	540 DE HARO ST	Showpl/Potrero	-7k	17	Resident	--N/A--	7/3/2014
0506036	1727 LOMBARD ST	Marina	-16k	14	Resident	--N/A--	1/31/2012
3526005	520 9TH STREET	Showpl/Potrero	0k	12	Resident	--N/A--	8/21/2013
3521005	340 11TH ST	WSoMa	16k		Mixed	MIPS	9/5/2014
3784007	510 TOWNSEND ST	WSoMa	255k		MIPS	MIPS	8/8/2014
3703066	1053 MARKET ST	Downtown	66k		Visitor	Visitor	6/16/2014
3913005	155 DE HARO STREET	Showpl/Potrero	15k	0	PDR	PDR	8/15/2014

ACKNOWLEDGEMENTS

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