

New Development Market Watch

SAN FRANCISCO Q1 2022

COMPASS
DEVELOPMENT
MARKETING
GROUP





CDMG's New Development Market Insights report provides an in-depth look at San Francisco's core downtown neighborhoods. Published quarterly and highlighting the city's vast condo market, we pull information from a combination of public and proprietary databases which access the most up-to-date closing information for new development properties as well as resales.

Quarterly San Francisco MarketWatch

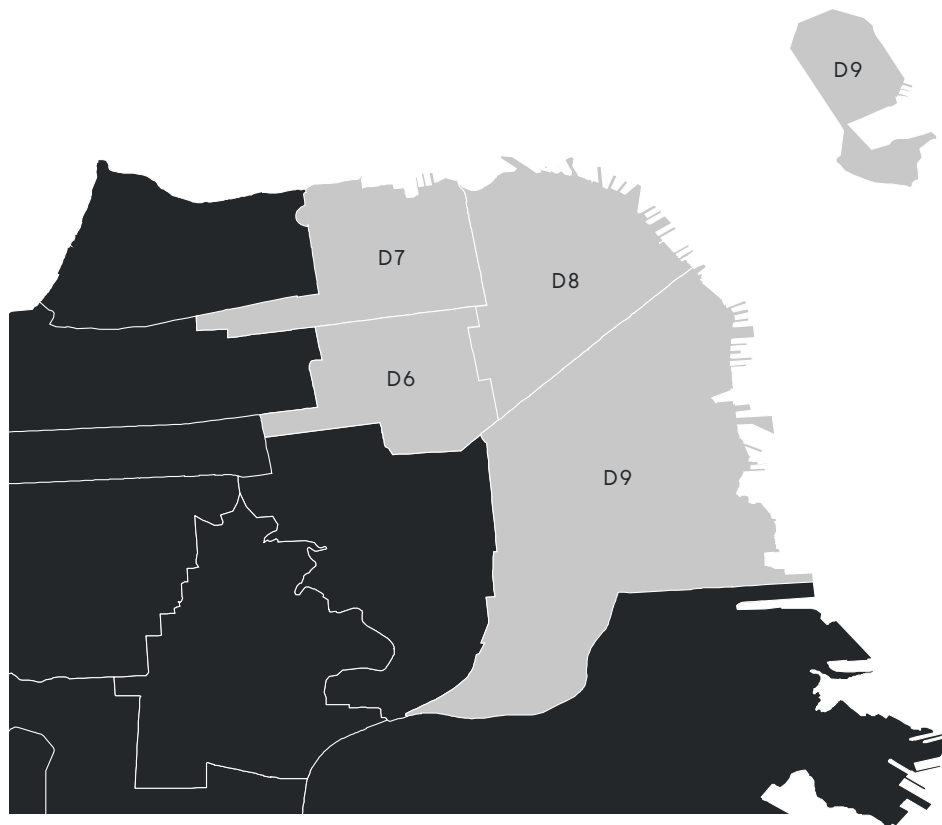
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SAN FRANCISCO DISTRICTS 6-9 SUMMARY

▼ **30.4%**

Sales volume YoY decreased in Q1 22 as momentum slowed across the core neighborhoods. More than 448 deals were recorded, compared to 644 over the same period last year.

▲ **6.3%**

Downtown San Francisco witnessed YoY improvement in the average PPSF to \$1,216, up in Q1 2022. However, QoQ the average PPSF was down 2.9%.

▲ **6.1%**

Despite slowed demand, the average sale price for Downtown San Francisco was up 6.1% YoY at \$1,424,508.

The Bay Area housing market remained robust throughout 2021 as buyers continued to enter the market at a steady pace driven by housing constraints and record low inventory for single-family homes in the urban core living environment. Year-end fundamentals peaked despite typical historical winter seasonality lulls. As the median price for homes continued to break record levels, this helped fuel demand in the condo and new home development market. Over the past 12 months the majority of deals in the market were between \$1M to \$3M, with approximately 1,969 recorded transactions. Much of the lower priced condo inventory was absorbed early last year as first time and second home buyers took advantage of city living and amenity rich new development product.

However, the start of 2022 was met with rising interest rates, inflation and economic uncertainty which created a bit of softening in the market. While it's difficult to predict the long-term effects of rising interest rates and economic fundamentals that influence the housing market, the Bay Area typically remains somewhat insulated. The San Francisco condo market in Q1 2022 showed a sales volume decrease of 30.4% year-over-year across Districts 6 through 9, after five quarters of increases. While the number of sales recordings was down across all districts compared to last year, pricing fundamentals still reported increases in Q1 2022. The overall price per square foot was up 6.3% to \$1,216 and the average sale price up 6.1% to \$1,424,508 year-over-year.

Compared to last quarter, where the ultra-luxury condo market characterized as price points above \$3M saw a healthy jump in both the number of sales and price per square foot, in Q1 2022 this sector also witnessed a softening. While affluent buyers are less dependent on interest rates and more sensitive to the financial markets, it appears that buyers may have paused plans awaiting more clarity in the market. Subsequently while year-over-year recorded sales were up 13.0%, transactions were down 40.9% from last quarter. Moving into the second quarter and spring months which is typically peak buying season, we expect to gain more clarity as to the long-term interest rate and economic effects on the housing market.

The quarterly MarketWatch, beginning on Page 4, highlights overall market trends in District 6, 7, 8, and 9, which collectively encompass most new development projects in the city. We subsequently break down each of these districts individually to paint a more granular picture of each sub-market.

On Page 14, we begin a citywide exploration of each currently selling new development project, including the most recent closings at each, followed by a brief overview of upcoming projects which are under construction or have yet to break ground.

For any inquiries regarding our research, please reach out to research.westcoast@compass.com.

SAN FRANCISCO DISTRICTS 6-9 SUMMARY

▼ **30.4%**

Sales volume in Q1 2022 for Districts 6-9 decreased 30.4% YoY, with a total of 448 recorded closings.

▲ **6.1%**

The combined core Districts 6-9 recorded an increase in Q1 2022 with an average sales price of \$1,424,508, a 6.1% increase YoY.

▲ **6.3%**

The average sales price per square foot in Districts 6-9 was \$1,216, up 6.3% YoY.

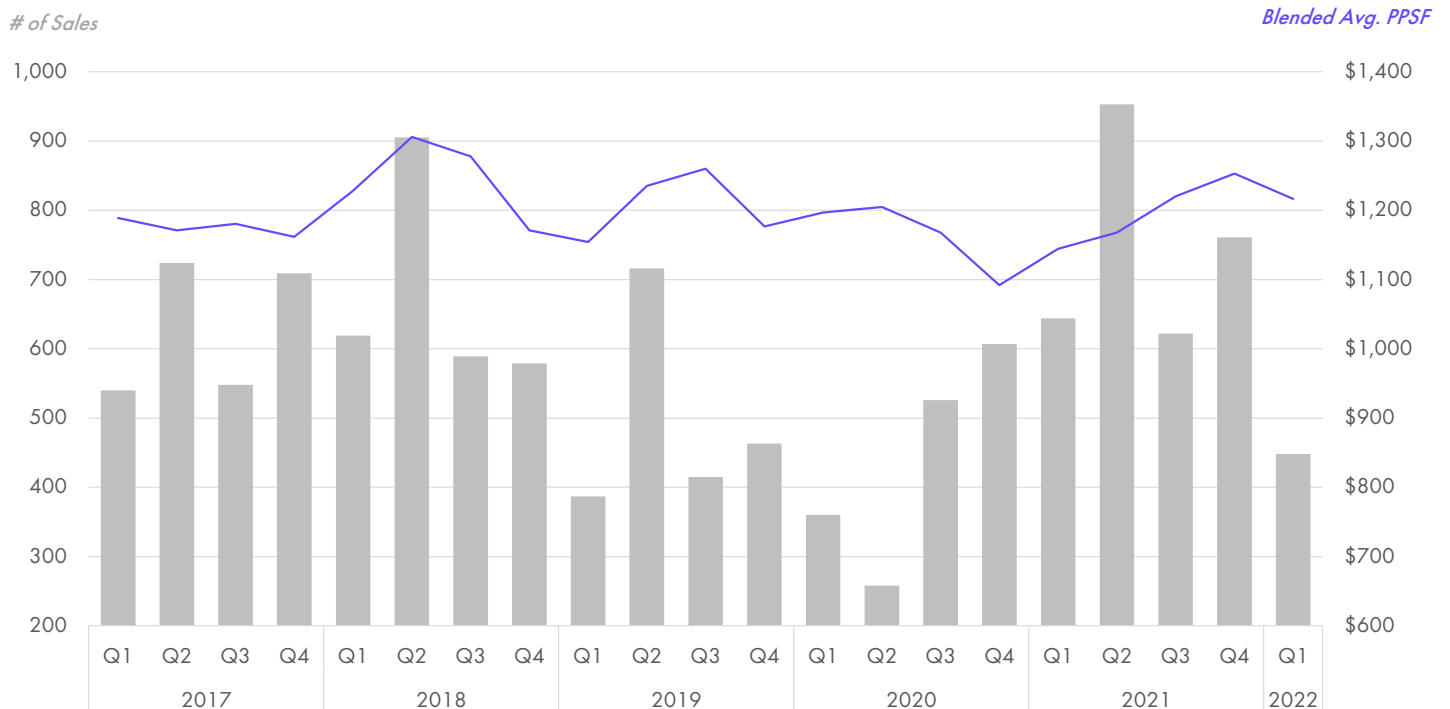
▲ **13.0%**

The \$3M+ price segment saw an increase in sales volume, up 13.0% YoY.

MARKET PERFORMANCE

CONDOS	Q1 22	YoY%	Q1 21	QoQ%	Q4 21
Avg. Sales Price	\$1,424,508	6.1%	\$1,343,224	-9.3%	\$1,570,720
Blended Avg. PPSF	\$1,216	6.3%	\$1,144	-2.9%	\$1,253
Number of Sales	448	-30.4%	644	-41.1%	761
DOM	49	N/A	62	N/A	43

ANNUAL PERFORMANCE	2021	YoY%	2020	YoY%	2019
Avg. Sales Price	\$1,414,642	2.7%	\$1,377,767	-1.8%	\$1,403,721
Blended Avg. PPSF	\$1,196	3.8%	\$1,152	-4.7%	\$1,209
Number of Sales	2,980	70.2%	1,751	-11.6%	1,981
DOM	48	N/A	47	N/A	37



SAN FRANCISCO DISTRICTS 6-9 SUMMARY

SALES BY PRICE POINT

UNDER \$1M	Q1 22	YoY%	Q1 21	QoQ%	Q4 21
Avg. Sales Price	\$752,280	-3.5%	\$779,382	-2.3%	\$770,141
Avg. PPSF	\$1,037	2.4%	\$1,013	2.3%	\$1,013
Number of Sales	167	-34.3%	254	-31.6%	244
DOM	51	N/A	61	N/A	47
\$1M-\$2M	Q1 22	YoY%	Q1 21	QoQ%	Q4 21
Avg. Sales Price	\$1,395,832	1.7%	\$1,372,533	-0.4%	\$1,401,727
Avg. PPSF	\$1,133	4.6%	\$1,083	0.9%	\$1,123
Number of Sales	201	-35.2%	310	-46.5%	376
DOM	38	N/A	56	N/A	35
\$2M-\$3M	Q1 22	YoY%	Q1 21	QoQ%	Q4 21
Avg. Sales Price	\$2,445,167	4.7%	\$2,335,718	2.4%	\$2,388,182
Avg. PPSF	\$1,359	8.1%	\$1,257	4.7%	\$1,298
Number of Sales	54	-5.3%	57	-44.3%	97
DOM	54	N/A	55	N/A	32
\$3M+	Q1 22	YoY%	Q1 21	QoQ%	Q4 21
Avg. Sales Price	\$3,844,135	-18.5%	\$4,715,304	-32.0%	\$5,652,295
Avg. PPSF	\$1,702	-3.1%	\$1,757	-17.3%	\$2,059
Number of Sales	26	13.0%	23	-40.9%	44
DOM	36	N/A	78	N/A	85

SAN FRANCISCO DISTRICT 6

LOWER PACIFIC HEIGHTS, ANZA VISTA, WESTERN ADDITION, NORTH PANHANDLE, ALAMO SQUARE, AND HAYES VALLEY

▼ **44.9%**

Sales volume in District 6 took a turn decreasing 44.9% YoY, with 65 recorded closings during Q1 2022.

▲ **8.4%**

Despite buyer demand lulls, the average PPSF for District 6 was up 8.4% YoY to \$1,143.

▲ **20.4%**

The average sales price for condos in District 6 increased to \$1,424,620, up 20.4% YoY.

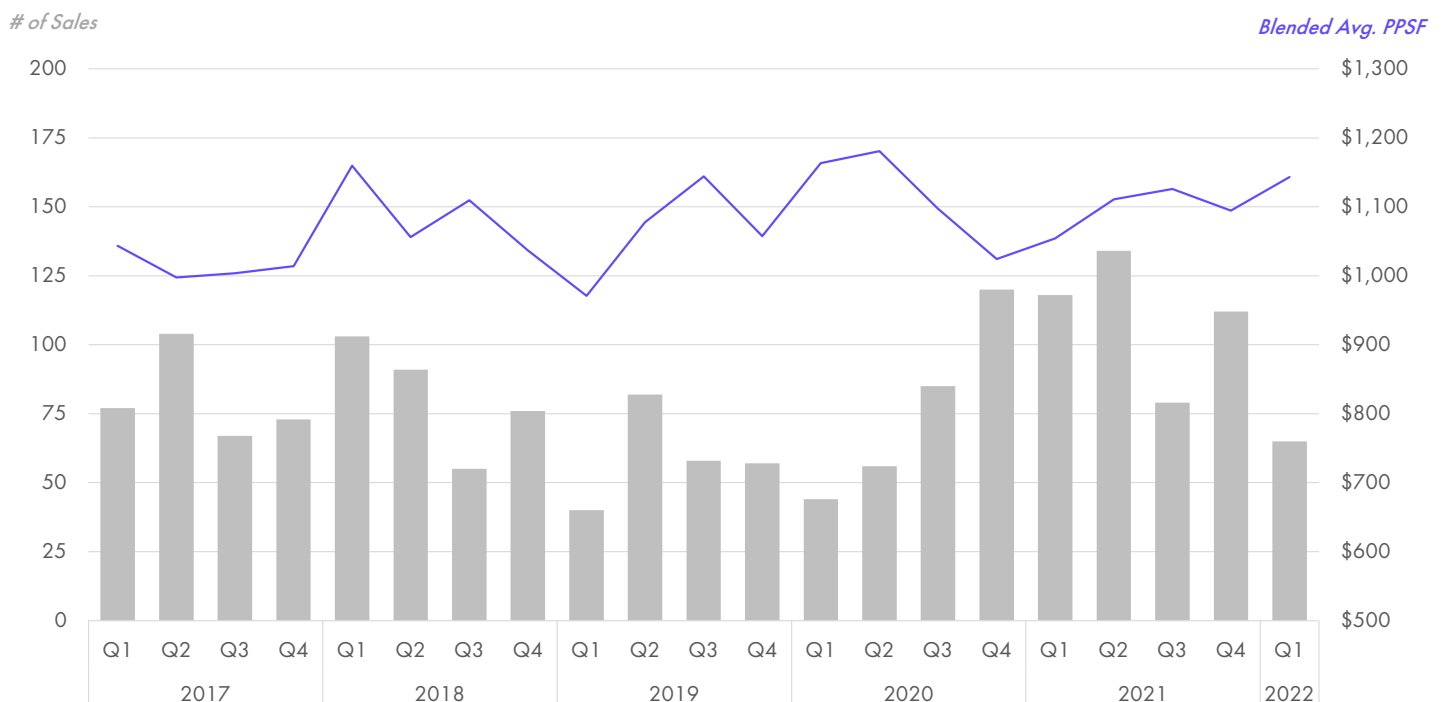
\$3M+

District 6 witnessed two recorded deals with an average of \$3,070,000 and 18 days on market.

MARKET PERFORMANCE

CONDOS	Q1 22	YoY%	Q1 21	QoQ%	Q4 21
Avg. Sales Price	\$1,424,620	20.4%	\$1,182,891	2.5%	\$1,389,352
Blended Avg. PPSF	\$1,143	8.4%	\$1,054	4.4%	\$1,095
Number of Sales	65	-44.9%	118	-42.0%	112
DOM	37	N/A	54	N/A	29

ANNUAL PERFORMANCE	2021	YoY%	2020	YoY%	2019
Avg. Sales Price	\$1,317,597	6.7%	\$1,234,443	-2.4%	\$1,264,780
Blended Avg. PPSF	\$1,095	0.4%	\$1,091	1.9%	\$1,070
Number of Sales	443	45.2%	305	28.7%	237
DOM	36	N/A	35	N/A	28



SAN FRANCISCO DISTRICT 6

LOWER PACIFIC HEIGHTS, ANZA VISTA, WESTERN ADDITION, NORTH PANHANDLE, ALAMO SQUARE, AND HAYES VALLEY

SALES BY PRICE POINT

UNDER \$1M	Q1 22	YoY%	Q1 21	QoQ%	Q4 21
Avg. Sales Price	\$800,000	1.0%	\$791,990	2.8%	\$778,313
Avg. PPSF	\$1,159	10.0%	\$1,053	24.7%	\$930
Number of Sales	20	-56.5%	46	-9.1%	22
DOM	45	N/A	55	N/A	38
\$1M-\$2M	Q1 22	YoY%	Q1 21	QoQ%	Q4 21
Avg. Sales Price	\$1,418,097	2.1%	\$1,388,945	3.7%	\$1,367,893
Avg. PPSF	\$1,098	3.0%	\$1,067	-1.0%	\$1,110
Number of Sales	34	-50.0%	68	-52.8%	72
DOM	28	N/A	47	N/A	27
\$2M-\$3M	Q1 22	YoY%	Q1 21	QoQ%	Q4 21
Avg. Sales Price	\$2,471,667	13.6%	\$2,175,353	11.2%	\$2,222,014
Avg. PPSF	\$1,236	31.4%	\$940	8.1%	\$1,143
Number of Sales	9	125.0%	4	-50.0%	18
DOM	31	N/A	36	N/A	26
\$3M+	Q1 22	YoY%	Q1 21	QoQ%	Q4 21
Avg. Sales Price	\$3,070,000	-	-	-	-
Avg. PPSF	\$1,157	-	-	-	-
Number of Sales	2	-	0	-	0
DOM	18	N/A	-	N/A	-

SAN FRANCISCO DISTRICT 7

MARINA, COW HOLLOW, PACIFIC HEIGHTS, AND PRESIDIO HEIGHTS

▲ **6.5%**

The average PPSF for District 7 increased 6.5% YoY to \$1,361 with new product coming on the market in this district.

▲ **11.7%**

The average sale price for District 7 increased 11.7% YoY to \$2,128,987.

▼ **32.1%**

District 7 saw less recorded deals YoY, down 32.1% from the previous year.

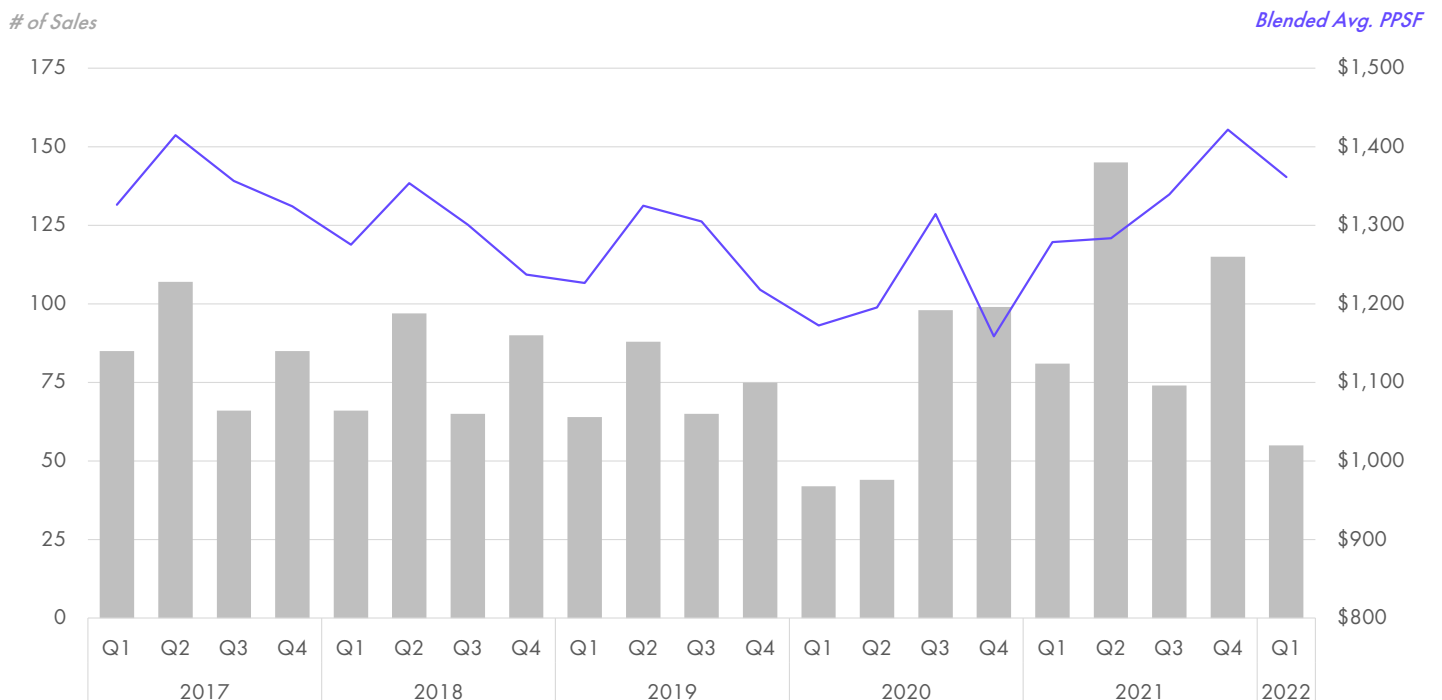
▲ **14.8%**

The \$2M-\$3M price segment showed an increase in PPSF, up 14.8% YoY to \$1,412.

MARKET PERFORMANCE

CONDOS	Q1 22	YoY%	Q1 21	QoQ%	Q4 21
Avg. Sales Price	\$2,128,987	11.7%	\$1,906,593	-8.9%	\$2,337,473
Blended Avg. PPSF	\$1,361	6.5%	\$1,279	-4.3%	\$1,422
Number of Sales	55	-32.1%	81	-52.2%	115
DOM	53	N/A	53	N/A	40

ANNUAL PERFORMANCE	2021	YoY%	2020	YoY%	2019
Avg. Sales Price	\$1,985,777	10.3%	\$1,800,850	-3.1%	\$1,858,568
Blended Avg. PPSF	\$1,334	9.5%	\$1,218	-4.1%	\$1,270
Number of Sales	415	46.6%	283	-3.1%	292
DOM	40	N/A	42	N/A	35



SAN FRANCISCO DISTRICT 7

MARINA, COW HOLLOW, PACIFIC HEIGHTS, AND PRESIDIO HEIGHTS

SALES BY PRICE POINT

UNDER \$1M	Q1 22	YoY%	Q1 21	QoQ%	Q4 21
Avg. Sales Price	\$848,060	6.5%	\$796,563	3.4%	\$820,279
Avg. PPSF	\$950	-20.0%	\$1,187	-18.8%	\$1,170
Number of Sales	5	-68.8%	16	-70.6%	17
DOM	72	N/A	60	N/A	28
\$1M-\$2M	Q1 22	YoY%	Q1 21	QoQ%	Q4 21
Avg. Sales Price	\$1,376,981	-4.1%	\$1,435,108	-7.8%	\$1,494,190
Avg. PPSF	\$1,154	2.7%	\$1,124	-4.4%	\$1,207
Number of Sales	26	-29.7%	37	-45.8%	48
DOM	45	N/A	53	N/A	30
\$2M-\$3M	Q1 22	YoY%	Q1 21	QoQ%	Q4 21
Avg. Sales Price	\$2,501,538	5.0%	\$2,382,056	-0.7%	\$2,520,249
Avg. PPSF	\$1,412	14.8%	\$1,231	8.6%	\$1,301
Number of Sales	13	-27.8%	18	-50.0%	26
DOM	16	N/A	39	N/A	23
\$3M+	Q1 22	YoY%	Q1 21	QoQ%	Q4 21
Avg. Sales Price	\$4,048,409	-11.4%	\$4,571,300	-17.4%	\$4,900,708
Avg. PPSF	\$1,620	-1.0%	\$1,636	-7.3%	\$1,747
Number of Sales	11	10.0%	10	-54.2%	24
DOM	42	N/A	44	N/A	74

SAN FRANCISCO DISTRICT 8

NORTH WATERFRONT, NORTH BEACH, TELEGRAPH HILL, FINANCIAL DISTRICT/BARBARY COAST, RUSSIAN HILL, NOB HILL, DOWNTOWN, TENDERLOIN, AND VAN NESS/CIVIC CENTER

▼ **21.5%**

District 8 recorded 102 closings a decrease of -21.5% YoY, suggesting a softening in the market.

▼ **9.8%**

The average sale price for District 8 decreased to \$1,209,537, down -9.8% YoY.

▲ **1.7%**

Condos in District 8 saw a slight uptick in PPSF to \$1,196, up 1.7% YoY.

▼ **45.2%**

The \$1M-\$2M segment for District 8 recorded a decrease in number of recorded sales to 34, down -45.2% YoY.

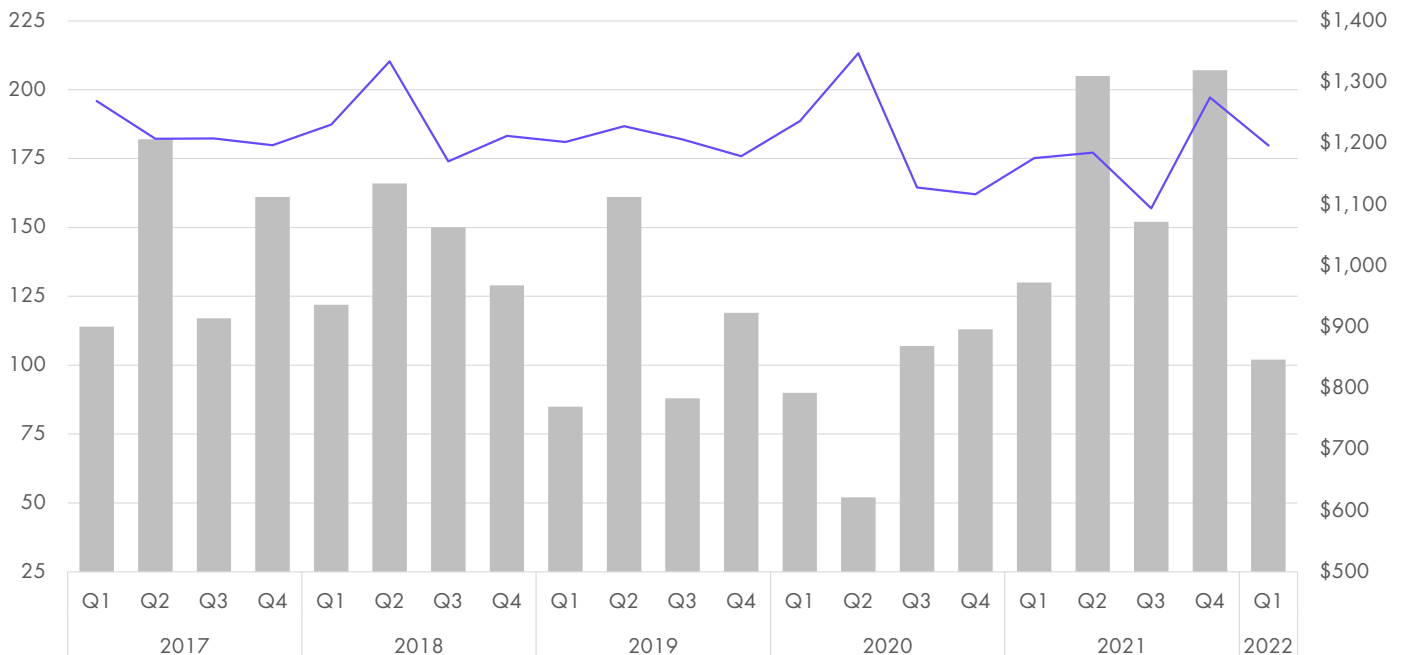
MARKET PERFORMANCE

CONDOS	Q1 22	YoY%	Q1 21	QoQ%	Q4 21
Avg. Sales Price	\$1,209,537	-9.8%	\$1,340,355	-18.0%	\$1,475,085
Blended Avg. PPSF	\$1,196	1.7%	\$1,175	-6.2%	\$1,275
Number of Sales	102	-21.5%	130	-50.7%	207
DOM	47	N/A	75	N/A	51

ANNUAL PERFORMANCE	2021	YoY%	2020	YoY%	2019
Avg. Sales Price	\$1,301,643	-2.7%	\$1,337,825	3.7%	\$1,290,523
Blended Avg. PPSF	\$1,194	0.4%	\$1,188	-1.3%	\$1,204
Number of Sales	694	91.7%	362	-20.1%	453
DOM	54	N/A	56	N/A	45

of Sales

Blended Avg. PPSF



SAN FRANCISCO DISTRICT 8

NORTH WATERFRONT, NORTH BEACH, TELEGRAPH HILL, FINANCIAL DISTRICT/BARBARY COAST, RUSSIAN HILL, NOB HILL, DOWNTOWN, TENDERLOIN, AND VAN NESS/CIVIC CENTER

SALES BY PRICE POINT

UNDER \$1M	Q1 22	YoY%	Q1 21	QoQ%	Q4 21
Avg. Sales Price	\$713,310	-0.2%	\$714,878	0.0%	\$713,585
Avg. PPSF	\$1,036	3.6%	\$999	0.6%	\$1,030
Number of Sales	54	12.5%	48	-40.0%	90
DOM	59	N/A	67	N/A	54
\$1M-\$2M	Q1 22	YoY%	Q1 21	QoQ%	Q4 21
Avg. Sales Price	\$1,392,765	4.9%	\$1,327,088	-3.2%	\$1,439,183
Avg. PPSF	\$1,184	6.5%	\$1,111	2.4%	\$1,156
Number of Sales	34	-45.2%	62	-58.5%	82
DOM	28	N/A	61	N/A	35
\$2M-\$3M	Q1 22	YoY%	Q1 21	QoQ%	Q4 21
Avg. Sales Price	\$2,288,889	-3.0%	\$2,358,500	-2.1%	\$2,336,808
Avg. PPSF	\$1,386	7.3%	\$1,292	7.5%	\$1,289
Number of Sales	9	-40.0%	15	-65.4%	26
DOM	43	N/A	91	N/A	49
\$3M+	Q1 22	YoY%	Q1 21	QoQ%	Q4 21
Avg. Sales Price	\$3,380,000	-24.1%	\$4,455,000	-51.2%	\$6,927,778
Avg. PPSF	\$1,523	-14.7%	\$1,786	-31.7%	\$2,231
Number of Sales	5	0.0%	5	-44.4%	9
DOM	21	N/A	161	N/A	116

SAN FRANCISCO DISTRICT 9

YERBA BUENA, SOUTH BEACH, SOMA, MISSION BAY, CENTRAL WATERFRONT/DOGPATCH, POTRERO HILL, INNER MISSION, AND BERNAL HEIGHTS

▼ **28.3%**

Sales volume decreased -28.3% YoY, recording 226 closings over the same period last year, indicating a softening in the densest condominium district.

▲ **7.1%**

The average PPSF increased 7.1% YoY in District 9, to \$1,199.

▲ **7.2%**

The average sales price increased 7.2% YoY in District 9, to \$1,350,054.

▲ **15.1%**

The \$3M+ ultra luxury segment for District 9 recorded an increase in PPSF, up 15.1% YoY to \$2,184.

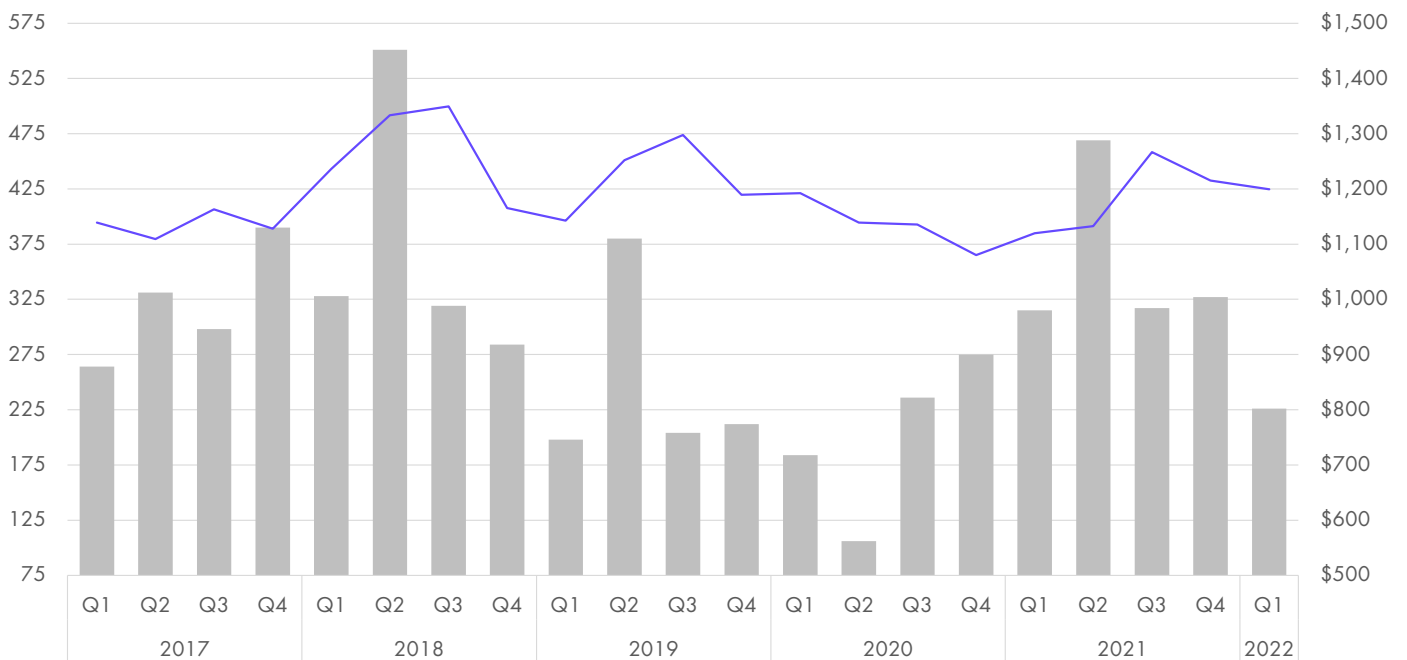
MARKET PERFORMANCE

CONDOS	Q1 22	YoY%	Q1 21	QoQ%	Q4 21
Avg. Sales Price	\$1,350,054	7.2%	\$1,259,603	-5.2%	\$1,423,727
Blended Avg. PPSF	\$1,199	7.1%	\$1,119	-1.3%	\$1,215
Number of Sales	226	-28.3%	315	-30.9%	327
DOM	53	N/A	62	N/A	45

ANNUAL PERFORMANCE	2021	YoY%	2020	YoY%	2019
Avg. Sales Price	\$1,333,683	2.5%	\$1,300,913	-4.0%	\$1,355,288
Blended Avg. PPSF	\$1,178	4.2%	\$1,130	-7.7%	\$1,224
Number of Sales	1,428	78.3%	801	-19.4%	994
DOM	51	N/A	49	N/A	36

of Sales

Blended Avg. PPSF



SAN FRANCISCO DISTRICT 9

YERBA BUENA, SOUTH BEACH, SOMA, MISSION BAY, CENTRAL WATERFRONT/DOGPATCH, POTRERO HILL, INNER MISSION, AND BERNAL HEIGHTS

SALES BY PRICE POINT

UNDER \$1M	Q1 22	YoY%	Q1 21	QoQ%	Q4 21
Avg. Sales Price	\$759,906	-4.4%	\$794,946	-5.7%	\$805,427
Avg. PPSF	\$1,018	2.9%	\$989	1.9%	\$998
Number of Sales	88	-38.9%	144	-23.5%	115
DOM	47	N/A	60	N/A	46
\$1M-\$2M	Q1 22	YoY%	Q1 21	QoQ%	Q4 21
Avg. Sales Price	\$1,394,312	1.9%	\$1,368,242	1.6%	\$1,372,568
Avg. PPSF	\$1,125	5.1%	\$1,070	3.1%	\$1,090
Number of Sales	107	-25.2%	143	-38.5%	174
DOM	43	N/A	59	N/A	40
\$2M-\$3M	Q1 22	YoY%	Q1 21	QoQ%	Q4 21
Avg. Sales Price	\$2,464,087	6.7%	\$2,309,000	1.8%	\$2,421,255
Avg. PPSF	\$1,373	2.4%	\$1,340	-3.6%	\$1,424
Number of Sales	23	15.0%	20	-14.8%	27
DOM	86	N/A	45	N/A	27
\$3M+	Q1 22	YoY%	Q1 21	QoQ%	Q4 21
Avg. Sales Price	\$4,046,875	-20.0%	\$5,058,000	-35.2%	\$6,248,545
Avg. PPSF	\$2,184	15.1%	\$1,898	-19.0%	\$2,696
Number of Sales	8	0.0%	8	-27.3%	11
DOM	39	N/A	67	N/A	84



1288 HOWARD

ADDRESS

1288 Howard Street, San Francisco, CA

DEVELOPER

March Capital Management

RESIDENCES

112 (17 Market Rate)

AVERAGE HOA FEES

~\$400 - \$460/month

DATE ON MARKET

January 2022

CLOSINGS COMMENCED

TBD

AVERAGE ABSORPTION

0 units/month



SALES STATUS Q1 2022

N/A
CLOSED

0
IN CONTRACT

129
AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	0	-	-
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	0	-	-

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	2	\$655,000	\$1,194
1-BR	2	\$721,500	\$1,269
2-BR	3	\$1,378,333	\$1,308
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	7	\$984,000	\$1,277



181 FREMONT

ADDRESS

181 Fremont Street, San Francisco, CA

DEVELOPER

Jay Paul Company

RESIDENCES

55 and 12 Accessory Suites

AVERAGE HOA FEES

~\$3,000/month

DATE ON MARKET

May 2016

CLOSINGS COMMENCED

May 2018

AVERAGE ABSORPTION

N/A



SALES STATUS Q1 2022

42

CLOSED

N/A

IN CONTRACT

N/A

AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	4	\$3,687,250	\$2,165
3-BR	1	\$7,600,000	\$3,193
4-BR+	0	-	-
Total/Avg.	5	\$4,469,800	\$2,432

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,700,000	\$2,179
2-BR	1	\$4,900,000	\$2,544
3-BR	3	\$5,295,000	\$2,754
4-BR+	0	-	-
Total/Avg.	5	\$4,497,000	\$2,653



2177 THIRD

ADDRESS

2177 Third Street, San Francisco, CA

DEVELOPER

Align Real Estate

RESIDENCES

114 (106 Market Rate)

AVERAGE HOA FEES

~\$740 - \$1,100/month

DATE ON MARKET

December 2019

CLOSINGS COMMENCED

September 2020

AVERAGE ABSORPTION

2 units/month



SALES STATUS Q1 2022

56

CLOSED

0

IN CONTRACT

58

AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	2	\$699,000	\$1,368
1-BR	7	\$983,750	\$1,395
2-BR	7	\$1,441,786	\$1,449
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	16	\$1,153,938	\$1,422

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	1	\$725,000	\$1,444
1-BR	1	\$925,000	\$1,348
2-BR	1	\$1,450,000	\$1,478
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	3	\$1,033,333	\$1,429



950 TENNESSEE

ADDRESS

950 Tennessee Street, San Francisco, CA

DEVELOPER

Leap Development

RESIDENCES

100

AVERAGE HOA FEES

\$435 - \$770/month

DATE ON MARKET

December 2019

CLOSINGS COMMENCED

September 2020

AVERAGE ABSORPTION

2 units/month



SALES STATUS Q1 2022

58

CLOSED

0

IN CONTRACT

42

AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	12	\$627,917	\$1,358
1-BR	7	\$1,089,571	\$1,257
2-BR	8	\$1,293,875	\$1,235
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	27	\$944,926	\$1,276

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	1	\$650,000	\$1,505
1-BR	2	\$1,215,500	\$1,492
2-BR	3	\$1,647,000	\$1,326
3-BR	1	\$1,816,000	\$1,261
4-BR+	0	-	-
Total/Avg.	7	\$1,405,429	\$1,361



CRESCENT

ADDRESS

875 California Street, San Francisco, CA

DEVELOPER

Grosvenor Americas

RESIDENCES

44

AVERAGE HOA FEES

\$1,840/month

DATE ON MARKET

March 2021

CLOSINGS COMMENCED

September 2021

AVERAGE ABSORPTION

0 units/month



SALES STATUS Q1 2022

4

CLOSED

0

IN CONTRACT

40

AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,400,000	\$2,105
2-BR	2	\$2,660,000	\$1,512
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	3	\$2,240,000	\$1,606

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	2	\$4,022,500	\$3,018
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	2	\$4,022,500	\$3,018



ELEVANT

ADDRESS

555 Golden Gate Avenue,
San Francisco, CA

DEVELOPER

JS Sullivan Development

RESIDENCES

55 (48 Market Rate)

AVERAGE HOA FEES

\$550 - \$730/month

DATE ON MARKET

December 2020

CLOSINGS COMMENCED

April 2021

AVERAGE ABSORPTION

2 units/month



SALES STATUS Q1 2022

35

CLOSED

1

IN CONTRACT

19

AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	9	\$725,111	\$1,205
2-BR	15	\$979,825	\$1,136
3-BR	3	\$1,898,667	\$1,420
4-BR+	0	-	-
Total/Avg.	27	\$997,014	\$1,204

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	0	-	-
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	0	-	-



FOUR SEASONS PRIVATE RESIDENCES

ADDRESS

706 Mission Street, San Francisco, CA

DEVELOPER

Westbrook Partners

RESIDENCES

146

AVERAGE HOA FEES

\$3,180 - \$5,400/month

DATE ON MARKET

June 2019

CLOSINGS COMMENCED

December 2020

AVERAGE ABSORPTION

0 units/month



SALES STATUS Q1 2022

13
CLOSED

0
IN CONTRACT

133
AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	3	\$3,860,000	\$1,934
3-BR	2	\$8,250,000	\$2,428
4-BR+	0	-	-
Total/Avg.	5	\$5,616,000	\$2,196

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	0	-	-
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	0	-	-



FULTON 555

ADDRESS

555 Fulton Street, San Francisco, CA

DEVELOPER

Fulton Street Ventures, LLC

RESIDENCES

139 (122 Market Rate)

AVERAGE HOA FEES

\$560 - \$860/month

DATE ON MARKET

June 2015 - Launch

July 2017 - Relaunch

CLOSINGS COMMENCED

March 2020

AVERAGE ABSORPTION

1 units/month - Launch

2 units/month - Relaunch



SALES STATUS Q1 2022

120
CLOSED

1
IN CONTRACT

18
AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	9	\$763,556	\$1,087
2-BR	17	\$1,241,382	\$1,225
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	26	\$1,075,981	\$1,188

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$895,000	\$1,243
2-BR	4	\$1,436,000	\$1,379
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	5	\$1,327,800	\$1,359



LE CENTRE

ADDRESS

42 Otis Street, San Francisco, CA

DEVELOPER

Vanguard Properties

RESIDENCES

24 (21 Market Rate)

AVERAGE HOA FEES

\$350 - \$355/month

DATE ON MARKET

January 2022

CLOSINGS COMMENCED

TBD

AVERAGE ABSORPTION

0 units/month



SALES STATUS Q1 2022

N/A
CLOSED

0
IN CONTRACT

24
AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	0	-	-
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	0	-	-

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	0	-	-
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	0	-	-



MAISON A SOMA

ADDRESS

230 7th Street, San Francisco, CA

DEVELOPER

JS Sullivan Development

RESIDENCES

40 (35 Market Rate)

AVERAGE HOA FEES

\$410 - \$530/month

DATE ON MARKET

October 2021

CLOSINGS COMMENCED

TBD

AVERAGE ABSORPTION

3 units/month



SALES STATUS Q1 2022

15
CLOSED

3
IN CONTRACT

22
AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	7	\$746,714	\$1,070
2-BR	4	\$1,275,500	\$1,194
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	11	\$939,000	\$1,128

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	2	\$1,278,000	\$1,206
3-BR	1	\$1,728,000	\$1,204
4-BR+	0	-	-
Total/Avg.	3	\$1,428,000	\$1,205



MIRA

ADDRESS

280 Spear Street, San Francisco, CA

DEVELOPER

Tishman Speyer

RESIDENCES

392 (235 Market Rate)

AVERAGE HOA FEES

\$1,075 - \$1,560/month

DATE ON MARKET

November 2018

CLOSINGS COMMENCED

June 2020

AVERAGE ABSORPTION

7 units/month



SALES STATUS Q1 2022

299

CLOSED

3

IN CONTRACT

90

AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	1	\$999,000	\$1,450
1-BR	4	\$1,029,125	\$1,417
2-BR	27	\$1,924,852	\$1,457
3-BR	1	\$1,645,000	\$1,129
4-BR+	0	-	-
Total/Avg.	33	\$1,779,742	\$1,442

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,380,000	\$1,663
2-BR	6	\$2,018,000	\$1,592
3-BR	3	\$3,661,667	\$2,043
4-BR+	0	-	-
Total/Avg.	10	\$2,447,300	\$1,772



MISSION MODERN

ADDRESS

3620 Cesar Chavez Street,
San Francisco, CA

DEVELOPER

Vanguard Properties

RESIDENCES

24

AVERAGE HOA FEES

\$460 - \$620/month

DATE ON MARKET

February 2020

CLOSINGS COMMENCED

July 2020

AVERAGE ABSORPTION

1 units/month



SALES STATUS Q1 2022

23

CLOSED

0

IN CONTRACT

1

AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$735,000	\$1,366
2-BR	6	\$1,261,667	\$1,175
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	7	\$1,186,429	\$1,190

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	1	\$1,199,000	\$1,048
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	1	\$1,199,000	\$1,048



MURANO

ADDRESS

3131 Pierce Street, San Francisco, CA

DEVELOPER

DM Development

RESIDENCES

22

AVERAGE HOA FEES

\$890 - \$1,390/month

DATE ON MARKET

January 2021

CLOSINGS COMMENCED

June 2021

AVERAGE ABSORPTION

1 units/month

SALES STATUS Q1 2022

14

CLOSED

0

IN CONTRACT

8

AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	3	\$1,097,667	\$1,471
2-BR	10	\$1,595,800	\$1,409
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	13	\$1,480,846	\$1,419

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	3	\$2,079,667	\$1,420
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	3	\$2,079,667	\$1,420



ONE ELEVEN

ADDRESS

588 Minna Street, San Francisco, CA

DEVELOPER

Z&L Properties

RESIDENCES

39

AVERAGE HOA FEES

\$525 - \$680/month

DATE ON MARKET

December 2019

CLOSINGS COMMENCED

February 2021

AVERAGE ABSORPTION

1 units/month



SALES STATUS Q1 2022

14

CLOSED

0

IN CONTRACT

25

AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	6	\$669,000	\$1,074
2-BR	2	\$1,252,750	\$1,101
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	8	\$829,188	\$1,084

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$699,000	\$1,048
2-BR	3	\$1,212,333	\$1,117
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	5	\$1,007,000	\$1,097



ONE MISSION BAY

ADDRESS

110 Channel Street / 1000 3rd Street,
San Francisco, CA

DEVELOPER

CIM Group / Strada Investment Group

RESIDENCES

350

AVERAGE HOA FEES

\$710 - \$1,100/month

DATE ON MARKET

May 2016

CLOSINGS COMMENCED

November 2017

AVERAGE ABSORPTION

5 units/month



SALES STATUS Q1 2022

348

CLOSED

0

IN CONTRACT

2

AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	2	\$731,000	\$1,398
1-BR	8	\$1,063,953	\$1,279
2-BR	10	\$1,415,039	\$1,206
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	20	\$1,206,201	\$1,242

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	5	\$960,780	\$1,359
2-BR	5	\$1,640,200	\$1,424
3-BR	1	\$2,950,000	\$1,615
4-BR+	0	-	-
Total/Avg.	11	\$1,450,445	\$1,435



ONE STEUART LANE

ADDRESS

1 Steuart Lane, San Francisco, CA

DEVELOPER

SRE Group LTD / Paramount Group

RESIDENCES

120

AVERAGE HOA FEES

\$2,500 - \$3,000/month

DATE ON MARKET

February 2020

CLOSINGS COMMENCED

August 2021

AVERAGE ABSORPTION

1 units/month



SALES STATUS Q1 2022

26

CLOSED

0

IN CONTRACT

94

AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	5	\$1,817,700	\$1,643
2-BR	7	\$5,795,714	\$2,960
3-BR	3	\$10,085,000	\$3,900
4-BR+	0	-	-
Total/Avg.	15	\$5,327,567	\$2,961

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$1,745,000	\$1,562
2-BR	2	\$2,895,000	\$1,726
3-BR	1	\$7,250,000	\$2,833
4-BR+	0	-	-
Total/Avg.	5	\$3,306,000	\$2,029



SERIF

ADDRESS

960 Market Street, San Francisco, CA

DEVELOPER

L37 Partners

RESIDENCES

242

AVERAGE HOA FEES

\$600 - \$1,100/month

DATE ON MARKET

June 2021

CLOSINGS COMMENCED

October 2021

AVERAGE ABSORPTION

4 units/month



SALES STATUS Q1 2022

34

CLOSED

7

IN CONTRACT

201

AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	16	\$583,021	\$1,469
1-BR	9	\$906,756	\$1,445
2-BR	7	\$1,674,000	\$1,591
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	32	\$912,723	\$1,508

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	3	\$615,000	\$1,418
1-BR	1	\$920,000	\$1,328
2-BR	1	\$1,390,000	\$1,376
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	5	\$831,000	\$1,383



THE AVERY

ADDRESS

488 Folsom Street, San Francisco, CA

DEVELOPER

Related

RESIDENCES

118

AVERAGE HOA FEES

\$1,550 - \$2,490/month

DATE ON MARKET

June 2018

CLOSINGS COMMENCED

August 2019

AVERAGE ABSORPTION

1 units/month



SALES STATUS Q1 2022

59

CLOSED

1

IN CONTRACT

58

AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$1,690,000	\$1,835
2-BR	14	\$2,653,929	\$1,757
3-BR	12	\$4,771,667	\$2,188
4-BR+	0	-	-
Total/Avg.	28	\$3,492,679	\$1,989

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	3	\$1,740,000	\$1,848
2-BR	4	\$3,020,000	\$1,908
3-BR	4	\$4,312,500	\$2,144
4-BR+	0	-	-
Total/Avg.	11	\$3,140,909	\$2,009



THE BRISTOL YERBA BUENA ISLAND

ADDRESS

1 Bristol Court, San Francisco, CA

DEVELOPER

Wilson Meany
Stockbridge Real Estate Funds

RESIDENCES

124 (110 Market Rate)

AVERAGE HOA FEES

\$1,290 - \$1,420/month

DATE ON MARKET

March 2021

CLOSINGS COMMENCED

TBD

AVERAGE ABSORPTION

N/A



SALES STATUS Q1 2022

N/A
CLOSED

24
IN CONTRACT

100
AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	0	-	-
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	0	-	-

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	1	\$695,000	\$1,139
1-BR	2	\$1,110,000	\$1,214
2-BR	4	\$2,106,250	\$1,375
3-BR	1	\$3,743,000	\$1,831
4-BR+	0	-	-
Total/Avg.	8	\$1,885,375	\$1,422



THE HARRISON

ADDRESS

401 Harrison Street, San Francisco, CA

DEVELOPER

Rockpoint Group
Maximus Real Estate Partners

RESIDENCES

298

AVERAGE HOA FEES

\$1,025 - \$1,900/month

DATE ON MARKET

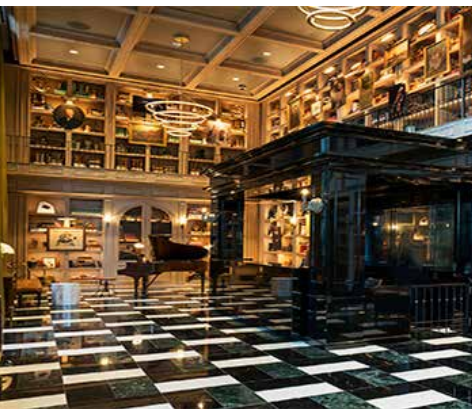
April 2016

CLOSINGS COMMENCED

August 2016

AVERAGE ABSORPTION

4 units/month



SALES STATUS Q1 2022

289
CLOSED

N/A
IN CONTRACT

7
AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	15	\$1,112,267	\$1,407
2-BR	18	\$2,059,278	\$1,531
3-BR	1	\$7,600,000	\$2,365
4-BR+	0	-	-
Total/Avg.	34	\$1,804,441	\$1,562

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$1,117,000	\$1,555
2-BR	8	\$2,067,250	\$1,574
3-BR	1	\$7,900,000	\$2,458
4-BR+	0	-	-
Total/Avg.	11	\$2,424,727	\$1,759



THE OAK

ADDRESS

55 Oak Street, San Francisco, CA

DEVELOPER

Z&L Properties

RESIDENCES

109 (96 Market Rate)

AVERAGE HOA FEES

\$705 - \$1,180/month

DATE ON MARKET

August 2021

CLOSINGS COMMENCED

TBD

AVERAGE ABSORPTION

1 units/month



SALES STATUS Q1 2022

N/A
CLOSED

11
IN CONTRACT

98
AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	0	-	-
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	0	-	-

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	1	\$655,000	\$1,326
1-BR	5	\$1,035,000	\$1,238
2-BR	2	\$1,514,000	\$1,428
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	8	\$1,107,250	\$1,304



UNION HOUSE

ADDRESS

1515 Union Street, San Francisco, CA

DEVELOPER

DM Development

RESIDENCES

41

AVERAGE HOA FEES

\$900 - \$1,680/month

DATE ON MARKET

February 2020

CLOSINGS COMMENCED

July 2020

AVERAGE ABSORPTION

1 units/month



SALES STATUS Q1 2022

23

CLOSED

1

IN CONTRACT

17

AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,610,000	\$1,825
2-BR	6	\$2,755,833	\$1,925
3-BR	2	\$4,837,500	\$2,526
4-BR+	0	-	-
Total/Avg.	9	\$3,091,111	\$2,092

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,350,000	\$1,724
2-BR	1	\$2,098,000	\$1,867
3-BR	1	\$5,500,000	\$2,940
4-BR+	0	-	-
Total/Avg.	3	\$2,982,667	\$2,368

New Development Pipeline Projects

Q1 2022



1

198 VALENCIA STREET



2

2238 - 2240 MARKET



3

88 AT THE PARK (88 ARKANSAS)



4

YERBA BUENA ISLAND



5

2030 POLK STREET



6

2525 VAN NESS



7

360 5TH STREET



8

5M (110 5TH STREET/925 MISSION)



9

603 TENNESSEE



10

OCEANWIDE CENTER (50 1ST ST)



11

1200 VAN NESS



12

2601 VAN NESS

New Development Pipeline Projects

Q1 2022



13

30 VAN NESS



14

3314 CESAR CHAVEZ



15

3700 CALIFORNIA



16

430 MAIN



17

469 EDDY



18

655 4TH STREET



19

655 FOLSOM



20

888 TENNESSEE



21

ONE OAK (1540 MARKET STREET)



22

PARCEL D - PIER 70



23

PARCEL F (542 - 550 HOWARD)



24

PARCEL K NORTH - PIER 70

New Development Pipeline Projects

Q1 2022



25

3333 CALIFORNIA



26

600 20TH STREET / 888 ILLINOIS



27

988 HARRISON STREET



28

TRANSBAY BLOCK 4 (201 HOWARD)



198 Valencia 198 VALENCIA STREET

COMING SOON

NEIGHBORHOOD	Mission
DEVELOPER	JS Sullivan Development
ARCHITECT	RG Architecture
RESIDENCES & STORIES	29 units & 5 floors
PRICE RANGE	TBD
COMPLETION DATE	2022
ADDITIONAL INFO	2K+ total sqft for two commercial units



2238 - 2240 Market 2238 - 2240 MARKET STREET

COMING SOON

NEIGHBORHOOD	Duboce Triangle
DEVELOPER	Prado Group
ARCHITECT	BDE Architecture
RESIDENCES & STORIES	42 residences & 5 stories
PRICE RANGE	TBD
COMPLETION DATE	2022
ADDITIONAL INFO	Rooftop terrace with open-air lounge space, outdoor kitchen and dining area, lobby and arrival experience, package and refrigerated grocery reception, bike repair room with secured storage, pet spa, EV-parking and secured parking,



88 at The Park 88 ARKANSAS STREET

COMING SOON

NEIGHBORHOOD	Mission
DEVELOPER	Zhuguang Group
ARCHITECT	BAR Architects
RESIDENCES & STORIES	127 units (102 market-rate) & 5 stories
PRICE RANGE	TBD
COMPLETION DATE	2022
ADDITIONAL INFO	Amenities include roof deck with outdoor kitchen, fire pit, and bocce court, lobby lounge and seating, front desk attendant, landscaped courtyard, bicycle storage and repair station, dog wash station, parcel storage room, storage lockers, EV charging stations, and car share



The Residences YERBA BUENA ISLAND

COMING SOON

NEIGHBORHOOD	Yerba Buena Island
DEVELOPER	Wilson Meany – Stockbridge Real Estate Funds
ARCHITECT	BDE Architecture / Hart Howerton
RESIDENCES & STORIES	137 units
PRICE RANGE	TBD
COMPLETION DATE	Phase II: 2022+ (Townhomes & Flats)
ADDITIONAL INFO	Home interiors are designed by Meyer Davis. The Courtyard Townhomes have private interior courtyards that connect the main residence to the private guest house; additional features include a dedicated entrance, attached garage, and private balconies.



2030 Polk 23 POLK STREET

NEIGHBORHOOD	Nob Hill
DEVELOPER	JS Pacific Street Partners / JS Sullivan Development
ARCHITECT	RG Architecture
RESIDENCES & STORIES	53 units & 6 floors
PRICE RANGE	TBD
COMPLETION DATE	TBD
ADDITIONAL INFO	3 Retail spaces for a combined 7,260 sqft.



2525 Van Ness 2525 VAN NESS AVENUE

NEIGHBORHOOD	Cow Hollow
DEVELOPER	Boubouffe LLC March Capital Management
ARCHITECT	Handel Architects Studio N Chris Dikeakos Architects Inc.
RESIDENCES & STORIES	28 residences & 7 stories
PRICE RANGE	TBD
COMPLETION DATE	TBD
ADDITIONAL INFO	1,100+ sqft retail space. Rooftop terrace for lounging, dining, and green space.



360 5th Street 360 5TH STREET

NEIGHBORHOOD	SoMa
DEVELOPER	Leap Development
ARCHITECT	KTGY Architecture
RESIDENCES & STORIES	127 residences & 4-8 stories
PRICE RANGE	TBD
COMPLETION DATE	TBD
ADDITIONAL INFO	Landscaped interior courtyard, roof terrace with BBQ and media area, ground floor commercial space.



5M 110 5TH STREET / 925 MISSION STREET

NEIGHBORHOOD	SoMa / Mid-Market
DEVELOPER	Brookfield Properties / Hearst Corp.
ARCHITECT	Kohn Pederson Fox Associates
RESIDENCES & STORIES	702 residences (400 condos & 302 apts) & 45 floors
PRICE RANGE	TBD
COMPLETION DATE	Phase 1: Late 2021 / Phase 2: 2022+
ADDITIONAL INFO	470-ft condo tower, 200-ft apt building, 395-ft office tower w/ 640K-sqft office space, renovated historic buildings (SF Chronicle / Camelline and Dempster), 23K-sqft rooftop public park at Chronicle and 26K-sqft Mary Court public park w/ dog-run and children's playground



603 Tennessee 603 TENNESSEE STREET

NEIGHBORHOOD	Dogpatch / Central Waterfront
DEVELOPER	Sol Properties LLC
ARCHITECT	Stanley Saitowitz / Natoma Architects Inc.
RESIDENCES & STORIES	24 residences & 6 stories
PRICE RANGE	TBD
COMPLETION DATE	TBD
ADDITIONAL INFO	Roof deck, bicycle storage space, lobby, and 1K-sqft art studio space



Oceanwide Center 50 1ST STREET / 512 MISSION ST.

ON-HOLD

NEIGHBORHOOD	Rincon Hill / Yerba Buena
DEVELOPER	Oceanwide Holdings
ARCHITECT	Foster + Partners
RESIDENCES & STORIES	265 residences (109 units at 1st St & 156 units at Mission St) / 2 towers (52 & 61 floors)
PRICE RANGE	TBD
COMPLETION DATE	2023+
ADDITIONAL INFO	135-million-sqft of office space, 169-room hotel, ground floor retail space and privately-owned public open spaces



1200 Van Ness 1200 VAN NESS AVENUE

NEIGHBORHOOD	Polk Gulch
DEVELOPER	Van Ness Post Center LLC
ARCHITECT	Woods Bagot
RESIDENCES & STORIES	107 residences & 13 floors
PRICE RANGE	TBD
COMPLETION DATE	TBD
ADDITIONAL INFO	Rooftop garden, fitness / yoga studio, multi-functional spaces, pet grooming area. 135K-sqft commercial / retail space



2601 Van Ness 2601 VAN NESS AVENUE

NEIGHBORHOOD	Cow Hollow
DEVELOPER	L.F. George Properties
ARCHITECT	Costa Brown Architecture
RESIDENCES & STORIES	60 residences & 9 stories
PRICE RANGE	TBD
COMPLETION DATE	TBD
ADDITIONAL INFO	3 retail / commercial spaces



30 Van Ness 30 VAN NESS AVENUE

NEIGHBORHOOD	Civic Center
DEVELOPER	Lendlease
ARCHITECT	Solomon, Cordwell, Buenz (SCB)
RESIDENCES & STORIES	333 residences & 47 stories
PRICE RANGE	TBD
COMPLETION DATE	2025
ADDITIONAL INFO	Office, retail, apartments, condos are TBD. 234,100 sqft. of office space, 20,920 sqft. of retail space, 1,560 sqft. of public open space, and 151 stacker parking spaces. 3 Outdoor deck spaces to include lounging, al-fresco dining, and a dog run. Interior amenities to include a fitness center, coworking lounge, socializing room, solarium, and game room.



3314 Cesar Chavez 3314 CESAR CHAVEZ STREET

NEIGHBORHOOD	Mission
DEVELOPER	Zone Design Development
ARCHITECT	RG Architecture
RESIDENCES & STORIES	57 residences & 6 floors
PRICE RANGE	TBD
COMPLETION DATE	TBD
ADDITIONAL INFO	3K-sqft ground floor office space



3700 California 3700 CALIFORNIA STREET

NEIGHBORHOOD	Presidio Heights
DEVELOPER	TMG Partners / Grosvenor Americas
ARCHITECT	Robert A.M. Stern Architects
RESIDENCES & STORIES	273 residences, 3-7 stories
PRICE RANGE	TBD
COMPLETION DATE	2028+
ADDITIONAL INFO	Multi-family buildings, Townhomes & Single-family homes.



430 Main 430 MAIN STREET

NEIGHBORHOOD	Rincon Hill
DEVELOPER	Warhorse LLC & Tidewater Capital
ARCHITECT	Solomon, Cordwell, Buenz (SCB)
RESIDENCES & STORIES	144 residences
PRICE RANGE	TBD
COMPLETION DATE	TBD
ADDITIONAL INFO	Development team pursuing entitlements.



469 Eddy 469 EDDY STREET

NEIGHBORHOOD	Tenderloin
DEVELOPER	JS Sullivan Development
ARCHITECT	Stanley Saitowitz Natoma Architects Inc.
RESIDENCES & STORIES	28 residences & 8 stories
PRICE RANGE	TBD
COMPLETION DATE	TBD
ADDITIONAL INFO	~700-sqft ground floor commercial space.



655 4th Street 655 4TH STREET

NEIGHBORHOOD	SoMa
DEVELOPER	Tishman Speyer
ARCHITECT	Adamson Associates & Bjarke Ingels Group
RESIDENCES & STORIES	960 residences & 40 stories
PRICE RANGE	TBD
COMPLETION DATE	TBD
ADDITIONAL INFO	25k-sqft for a 38-room boutique hotel, 20k-sqft coworking office space, 18k-sqft of ground-floor retail and additional space for retail and public plazas.



655 Folsom 650 FOLSOM STREET

NEIGHBORHOOD	SoMa
DEVELOPER	Pillar Capital Group
ARCHITECT	Arqhitectonica
RESIDENCES & STORIES	89 residences & 14 floors
PRICE RANGE	TBD
COMPLETION DATE	TBD
ADDITIONAL INFO	Ground floor retail space. Roof deck lounge and second-floor outdoor terrace.



888 Tennessee 888 TENNESSEE STREET

NEIGHBORHOOD	Dogpatch / Central Waterfront
DEVELOPER	S. Hekemian Group
ARCHITECT	David Baker Architects
RESIDENCES & STORIES	110 residences & 4 floors
PRICE RANGE	TBD
COMPLETION DATE	TBD
ADDITIONAL INFO	5,500-sqft of restaurant / retail space.



One Oak 1540 MARKET STREET

NEIGHBORHOOD	Mid-Market
DEVELOPER	BUILD
ARCHITECT	Solomon, Cordwell, Buenz (SCB)
RESIDENCES & STORIES	318 residences & 40 floors
PRICE RANGE	TBD
COMPLETION DATE	TBD
ADDITIONAL INFO	Extended entitlements in Q1 2020 for an additional two years, to 2022



Parcel D - Pier 70 PIER 70

NEIGHBORHOOD	Dogpatch / Central Waterfront
DEVELOPER	Brookfield Properties
ARCHITECT	Handel Architects
RESIDENCES & STORIES	Approx 90 residences
PRICE RANGE	TBD
COMPLETION DATE	TBD
ADDITIONAL INFO	Located in the heart of Pier 70's market square.



Parcel F 542 - 550 HOWARD STREET

NEIGHBORHOOD	SoMa
DEVELOPER	Hines / Urban Pacific Development / Broad Street Principal Investments
ARCHITECT	Pelli Clark Pelli
RESIDENCES & STORIES	170 units & 61 stories
PRICE RANGE	TBD
COMPLETION DATE	2026
ADDITIONAL INFO	180-room hotel, 250K-sqft office space, 9K-sqft retail space, and 20K-sqft of open space



Parcel K North PIER 70

NEIGHBORHOOD	Dogpatch
DEVELOPER	TMG Partners / Presidio Bay Ventures
ARCHITECT	Handel Architects
RESIDENCES & STORIES	250 residences & 6 stories
PRICE RANGE	TBD
COMPLETION DATE	TBD
ADDITIONAL INFO	Common terrace. Ground floor retail / commercial space..



3333 California 3333 CALIFORNIA STREET

NEIGHBORHOOD	Presidio Heights
DEVELOPER	Prado Group / SKS Partners
ARCHITECT	BAR Architects Jensen Architects Solomon Cordwell Buenz Architects (SCB)
RESIDENCES & STORIES	744 residences
PRICE RANGE	TBD
COMPLETION DATE	TBD
ADDITIONAL INFO	~34.5K-sqft retail space and ~14.7K-sqft childcare space.



600 20th Street / 888 Illinois Street

NEIGHBORHOOD	Dogpatch / Central Waterfront
DEVELOPER	Mindful Investments / Workshop 1
ARCHITECT	Workshop 1
RESIDENCES & STORIES	20 residences & 6 floors
PRICE RANGE	TBD
COMPLETION DATE	TBD
ADDITIONAL INFO	1.7K-sqft ground commercial space.



988 Harrison Street 988 HARRISON STREET

NEIGHBORHOOD	SoMa
DEVELOPER	JS Sullivan Development
ARCHITECT	Kerman Morris Architects / Workshop 1
RESIDENCES & STORIES	90 units & 8 stories
PRICE RANGE	TBD
COMPLETION DATE	TBD
ADDITIONAL INFO	Common roof deck and 2.9K+ sqft ground floor retail space



Transbay Block 4 201 - 299 HOWARD STREET

NEIGHBORHOOD	SoMa
DEVELOPER	Hines / Urban Pacific Development Broad Street Principal Investments
ARCHITECT	Solomon, Cordwell, Buenz (SCB)
RESIDENCES & STORIES	713 residences & 45 floors
PRICE RANGE	TBD
COMPLETION DATE	TBD
ADDITIONAL INFO	450-ft tall residential tower w/ mid-rise & townhouses. Project will potentially provide over 500 new residential units, up to 45% affordable units.

New Development Market Insights

SAN FRANCISCO Q1 2022

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