

New Development Market Watch

SAN FRANCISCO Q3 2021

COMPASS
DEVELOPMENT
MARKETING
GROUP

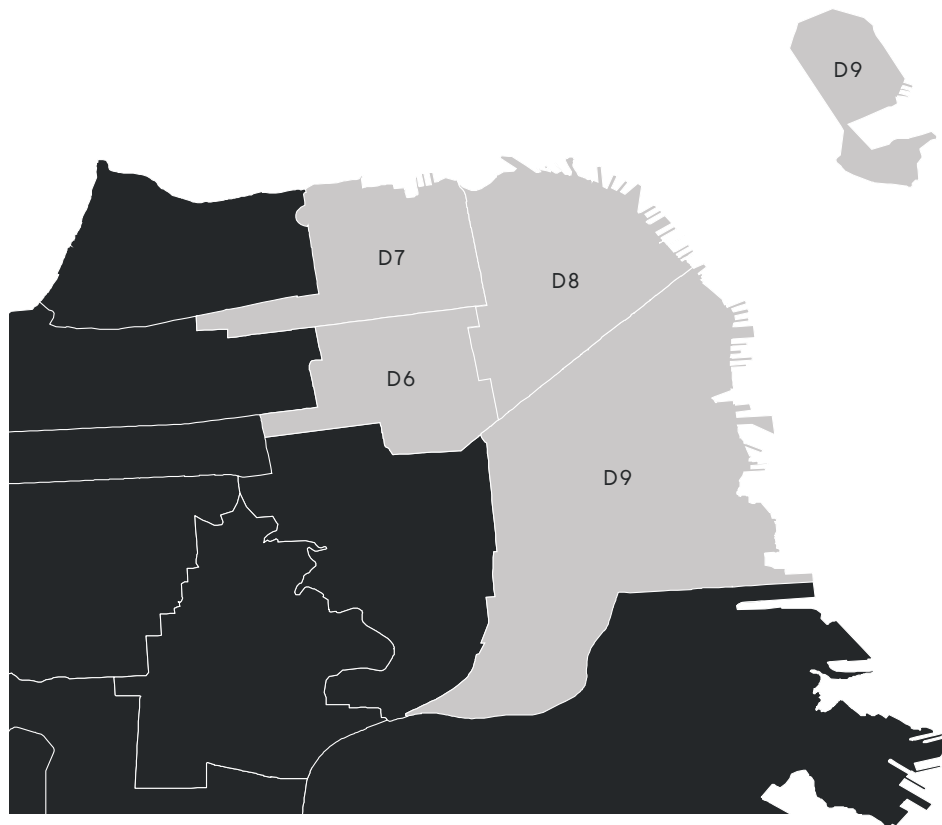


CDMG's New Development Market Insights report provides an in-depth look at San Francisco's core downtown neighborhoods. Published quarterly and highlighting the city's vast condo market, we pull information from a combination of public and proprietary databases which access the most up-to-date closing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

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SAN FRANCISCO DISTRICTS 6-9 SUMMARY

▲ 0.8%

Sales volume YoY slowed, albeit steadily increased from previous post-Covid demand fundamentals. More than 530 deals were recorded, an improvement over the same period last year.

▲ 3.7%

Resulting from increased buyer demand and sales volume, downtown San Francisco witnessed YoY improvement in the average PPSF to \$1,211, up 3.7% YoY.

▲ 10.5%

The luxury condo market \$3M+ saw a 10.5% increase YoY in the average median sale price due to increased demand.

As the economic recovery progresses forward and the general population in San Francisco now mostly vaccinated, businesses and residents have returned to quasi-normal activities. New home buyers enter the market at a steady pace driven by market constraints and record low inventory for single-family homes in the urban core living environment.

Fundamentals in Q3 2021 showed a tepid upward momentum for the condo sector as buyers take advantage of historically low-interest rates. Characterized as an opportunistic time for buyers in the San Francisco condo market, there is great value in this segment as prices haven't yet escalated quite as significantly as single-family homes. While condo prices have nearly returned to their 2019 and early 2020 levels, a short window of opportunity remains. The number of recorded sales inched up 0.8% year-over-year and the average price per square foot up 3.7%.

While the primary buyer types for new development product were new home and second home buyers, a strong percentage of buyers over the last few quarters were also current owners in the downtown looking to cash out, upgrade existing space, or neighborhoods. The importance of shorter commute times, walkability, and amenities like outdoor space, pools, gyms, and other perks are more important than ever before and a good amount of newer development projects accommodate these growing needs.

Ultra-luxury condos with price points above \$3M saw a healthy jump quarter over quarter in both price per square foot and average median sale prices by 23.3% and 14.7%, respectively. While the luxury market took a slight hit during the pandemic, urban core buyers quickly returned to the market taking advantage of slightly lower pricing and spectacular new product.

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

▼ **44.4%**

Sales volume slowed in Q3 2021 for Districts 6-9 decreasing -44.4% QoQ, with a total of 530 recorded closings.

▲ **3.7%**

The combined core Districts 6-9 recorded a YoY increase in Q3 2021 with an average price per square foot of \$1,211.

▲ **9.1%**

Homes \$3M+ had a positive increase in sales volume, recording 24 closings, up 9.1% YoY.

▲ **25.7%**

Luxury condo sales and pricing fundamentals for homes 3M+ increased across the board in Q3 2021. The average PPSF was up 25.7% YoY to \$2,034.

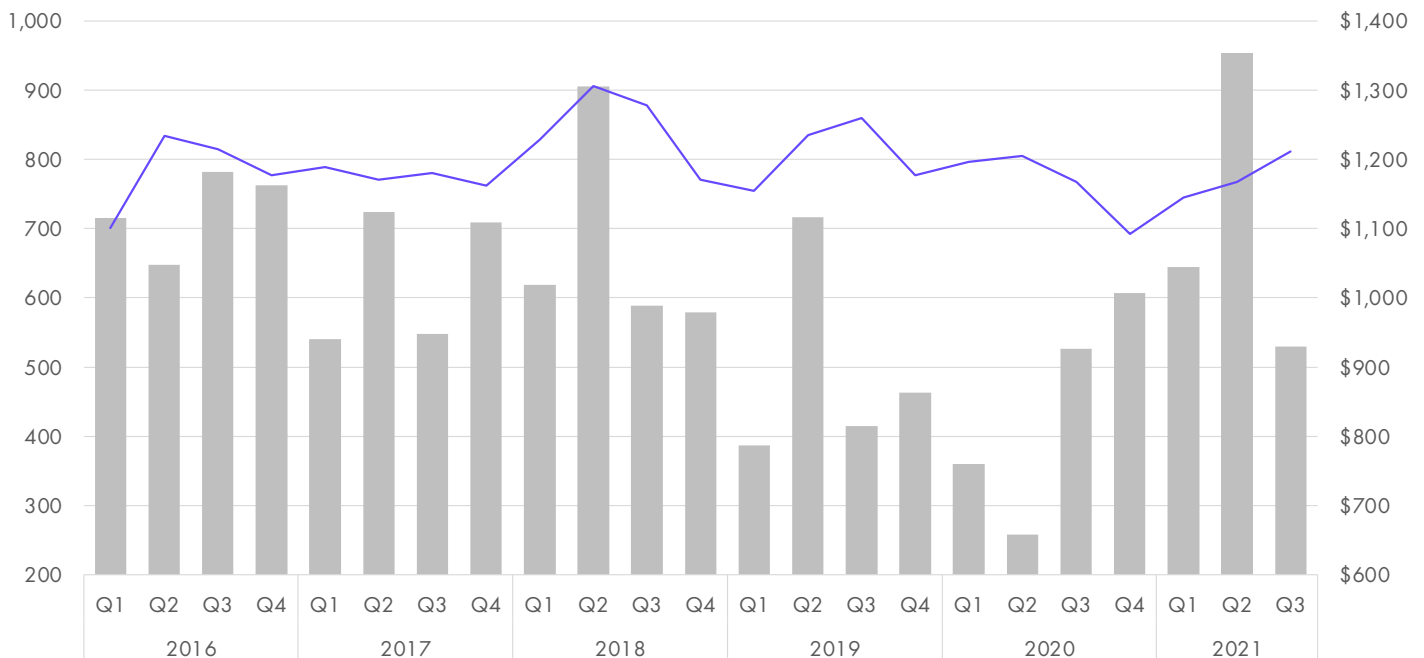
MARKET PERFORMANCE

CONDOS	Q3 21	YoY%	Q3 20	QoQ%	Q2 21
Avg. Sales Price	\$1,324,768	-4.8%	\$1,391,443	-4.4%	\$1,385,957
Blended Avg. PPSF	\$1,211	3.7%	\$1,168	3.7%	\$1,168
Number of Sales	530	0.8%	526	-44.4%	953
DOM	47	N/A	46	N/A	43

ANNUAL PERFORMANCE	2020	YoY%	2019	YoY%	2018
Avg. Sales Price	\$1,377,767	-1.8%	\$1,403,721	-1.1%	\$1,419,181
Blended Avg. PPSF	\$1,152	-4.7%	\$1,209	-3.4%	\$1,252
Number of Sales	1,751	-11.6%	1,981	-26.4%	2,692
DOM	47	N/A	37	N/A	53

of Sales

Blended Avg. PPSF



SAN FRANCISCO DISTRICTS 6-9 SUMMARY

SALES BY PRICE POINT

UNDER \$1M	Q3 21	YoY%	Q3 20	QoQ%	Q2 21
Avg. Sales Price	\$774,831	-1.9%	\$790,060	-1.3%	\$784,898
Avg. PPSF	\$1,017	-5.3%	\$1,074	0.0%	\$1,018
Number of Sales	223	21.9%	183	-36.3%	350
DOM	53	N/A	36	N/A	51
\$1M-\$2M	Q3 21	YoY%	Q3 20	QoQ%	Q2 21
Avg. Sales Price	\$1,340,285	-4.0%	\$1,395,813	-3.2%	\$1,384,396
Avg. PPSF	\$1,123	1.9%	\$1,102	1.2%	\$1,110
Number of Sales	250	-9.1%	275	-46.6%	468
DOM	37	N/A	44	N/A	32
\$2M-\$3M	Q3 21	YoY%	Q3 20	QoQ%	Q2 21
Avg. Sales Price	\$2,385,259	2.0%	\$2,339,030	-0.8%	\$2,405,187
Avg. PPSF	\$1,435	13.2%	\$1,267	9.9%	\$1,306
Number of Sales	33	-28.3%	46	-64.9%	94
DOM	39	N/A	45	N/A	43
\$3M+	Q3 21	YoY%	Q3 20	QoQ%	Q2 21
Avg. Sales Price	\$4,814,792	10.5%	\$4,357,907	14.7%	\$4,198,000
Avg. PPSF	\$2,034	25.7%	\$1,618	23.3%	\$1,650
Number of Sales	24	9.1%	22	-41.5%	41
DOM	34	N/A	43	N/A	44

SAN FRANCISCO DISTRICT 6

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

▼ **25.9%**

Sales volume in District 6 took a downturn decreasing 25.9% YoY, with 63 recorded closings during Q3 2021.

▼ **0.7%**

The average sales price per square foot for District 6 was \$1,090, down -0.7% YoY.

▼ **1.6%**

The average sales price for condos in District 6 decreased to \$1.29M, down -1.6% YoY.

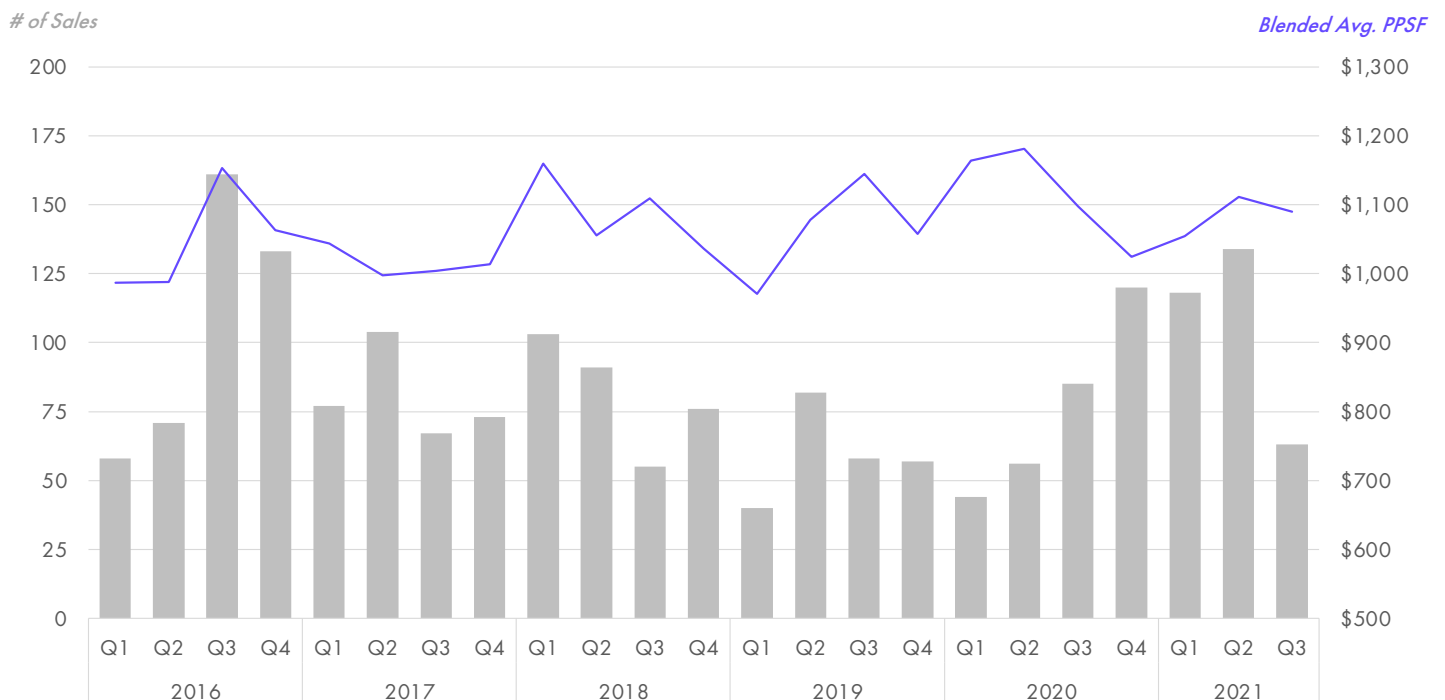
▲ **4.4%**

Activity \$1M under range for District 6 saw a healthy uptick in the average sales price up 4.4% YoY.

MARKET PERFORMANCE

CONDOS	Q3 21	YoY%	Q3 20	QoQ%	Q2 21
Avg. Sales Price	\$1,297,441	-1.6%	\$1,317,919	-4.8%	\$1,362,319
Blended Avg. PPSF	\$1,090	-0.7%	\$1,097	-1.9%	\$1,111
Number of Sales	63	-25.9%	85	-53.0%	134
DOM	35	N/A	34	N/A	29

ANNUAL PERFORMANCE	2020	YoY%	2019	YoY%	2018
Avg. Sales Price	\$1,234,443	-2.4%	\$1,264,780	-0.2%	\$1,267,446
Blended Avg. PPSF	\$1,091	1.9%	\$1,070	-2.0%	\$1,092
Number of Sales	305	28.7%	237	-27.1%	325
DOM	35	N/A	28	N/A	34



SAN FRANCISCO DISTRICT 6

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

SALES BY PRICE POINT

UNDER \$1M	Q3 21	YoY%	Q3 20	QoQ%	Q2 21
Avg. Sales Price	\$820,938	4.4%	\$786,607	5.2%	\$780,348
Avg. PPSF	\$938	-11.3%	\$1,058	-9.1%	\$1,032
Number of Sales	16	-38.5%	26	-51.5%	33
DOM	54	N/A	24	N/A	41
\$1M-\$2M	Q3 21	YoY%	Q3 20	QoQ%	Q2 21
Avg. Sales Price	\$1,300,595	-5.4%	\$1,374,881	-7.2%	\$1,401,632
Avg. PPSF	\$1,072	-0.8%	\$1,080	-2.9%	\$1,104
Number of Sales	40	-23.1%	52	-52.9%	85
DOM	29	N/A	29	N/A	21
\$2M-\$3M	Q3 21	YoY%	Q3 20	QoQ%	Q2 21
Avg. Sales Price	\$2,221,667	-8.2%	\$2,421,250	-3.6%	\$2,304,036
Avg. PPSF	\$1,329	19.0%	\$1,117	10.9%	\$1,198
Number of Sales	6	0.0%	6	-60.0%	15
DOM	9	N/A	31	N/A	27
\$3M+	Q3 21	YoY%	Q3 20	QoQ%	Q2 21
Avg. Sales Price	\$3,250,000	-41.4%	\$5,550,000	4.8%	\$3,100,000
Avg. PPSF	\$1,327	-14.6%	\$1,554	12.8%	\$1,176
Number of Sales	1	0.0%	1	0.0%	1
DOM	7	N/A	20	N/A	0

SAN FRANCISCO DISTRICT 7

MARINA, COW HOLLOW, PACIFIC HEIGHTS, AND PRESIDIO HEIGHTS

▲ **3.9%**

The average PPSF for District 7 increased 3.9% QoQ to \$1,333 with new product coming online and strong buyer demand for this district.

▼ **36.7%**

District 7 saw less recorded deals YoY down -36.7% suggesting a slight softening over the late summer and fall months.

▲ **13.4%**

The \$2M-\$3M segment showed an increase in PPSF up 13.4% YoY to \$1,423.

▲ **2.9%**

The \$1M-\$2M segment showed an increase in PPSF up 2.9% YoY to \$1,234.

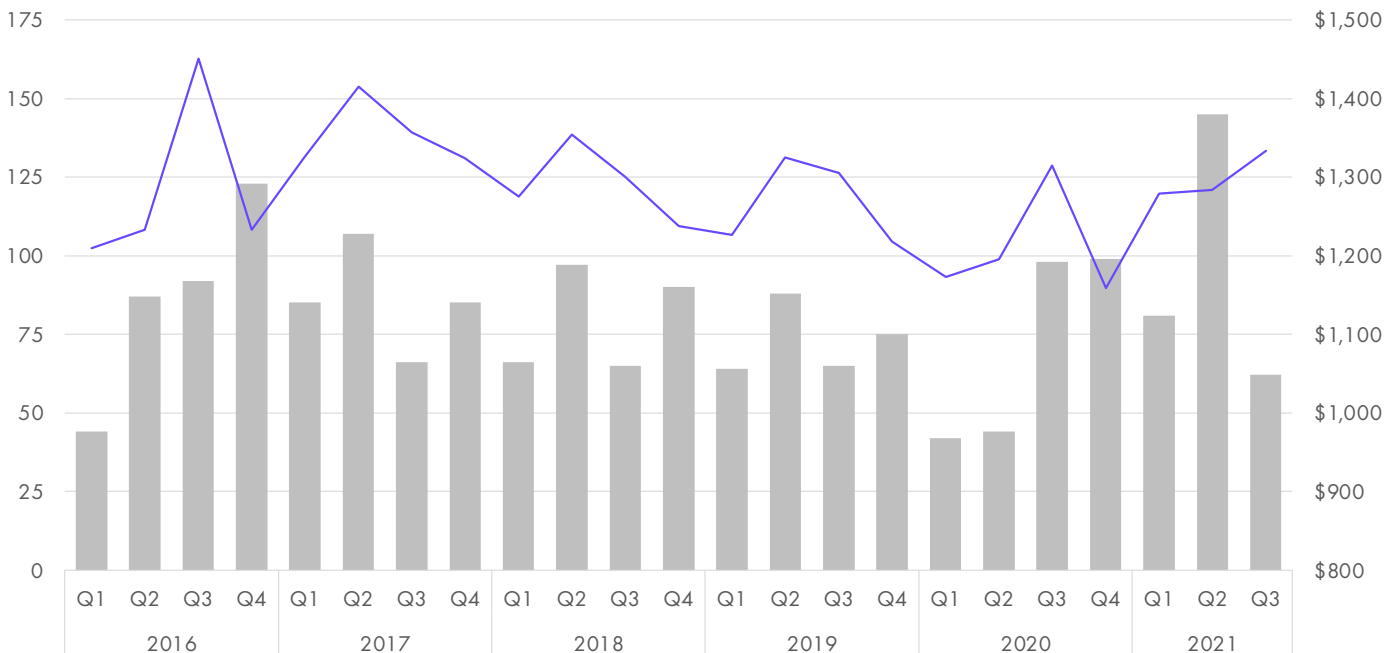
MARKET PERFORMANCE

CONDOS	Q3 21	YoY%	Q3 20	QoQ%	Q2 21
Avg. Sales Price	\$1,715,527	-8.0%	\$1,865,463	-8.0%	\$1,864,747
Blended Avg. PPSF	\$1,333	1.4%	\$1,314	3.9%	\$1,284
Number of Sales	62	-36.7%	98	-57.2%	145
DOM	33	N/A	39	N/A	37

ANNUAL PERFORMANCE	2020	YoY%	2019	YoY%	2018
Avg. Sales Price	\$1,800,850	-3.1%	\$1,858,568	5.3%	\$1,764,606
Blended Avg. PPSF	\$1,218	-4.1%	\$1,270	-1.7%	\$1,292
Number of Sales	283	-3.1%	292	-8.2%	318
DOM	42	N/A	35	N/A	27

of Sales

Blended Avg. PPSF



SAN FRANCISCO DISTRICT 7

MARINA, COW HOLLOW, PACIFIC HEIGHTS, AND PRESIDIO HEIGHTS

SALES BY PRICE POINT

UNDER \$1M	Q3 21	YoY%	Q3 20	QoQ%	Q2 21
Avg. Sales Price	\$801,654	-5.4%	\$847,350	-1.7%	\$815,600
Avg. PPSF	\$1,114	-10.1%	\$1,239	-1.8%	\$1,135
Number of Sales	13	-35.0%	20	-56.7%	30
DOM	28	N/A	38	N/A	55
\$1M-\$2M	Q3 21	YoY%	Q3 20	QoQ%	Q2 21
Avg. Sales Price	\$1,423,780	-5.6%	\$1,508,643	-3.2%	\$1,470,633
Avg. PPSF	\$1,234	2.9%	\$1,200	0.5%	\$1,228
Number of Sales	31	-36.7%	49	-50.0%	62
DOM	42	N/A	32	N/A	23
\$2M-\$3M	Q3 21	YoY%	Q3 20	QoQ%	Q2 21
Avg. Sales Price	\$2,448,545	2.6%	\$2,386,472	-2.4%	\$2,509,947
Avg. PPSF	\$1,423	13.4%	\$1,255	12.2%	\$1,269
Number of Sales	11	-38.9%	18	-71.1%	38
DOM	16	N/A	43	N/A	34
\$3M+	Q3 21	YoY%	Q3 20	QoQ%	Q2 21
Avg. Sales Price	\$3,552,857	-20.2%	\$4,453,487	-10.2%	\$3,957,533
Avg. PPSF	\$1,580	-4.6%	\$1,656	5.5%	\$1,497
Number of Sales	7	-36.4%	11	-53.3%	15
DOM	19	N/A	19	N/A	40

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 130 closings an increase of 21.5% YoY, suggesting buyer confidence in the market.

▼ **13.4%**

The average sale price for District 8 dropped to \$1.03M remaining down -13.4% YoY.

▼ **4.3%**

Condos in District 8 saw a slight downtick in PPSF to \$1,080, down -4.3% YoY.

▲ **52.0%**

The \$1M and under price segment for District 8 recorded an increase in number of recorded sales to 76, up 52% YoY.

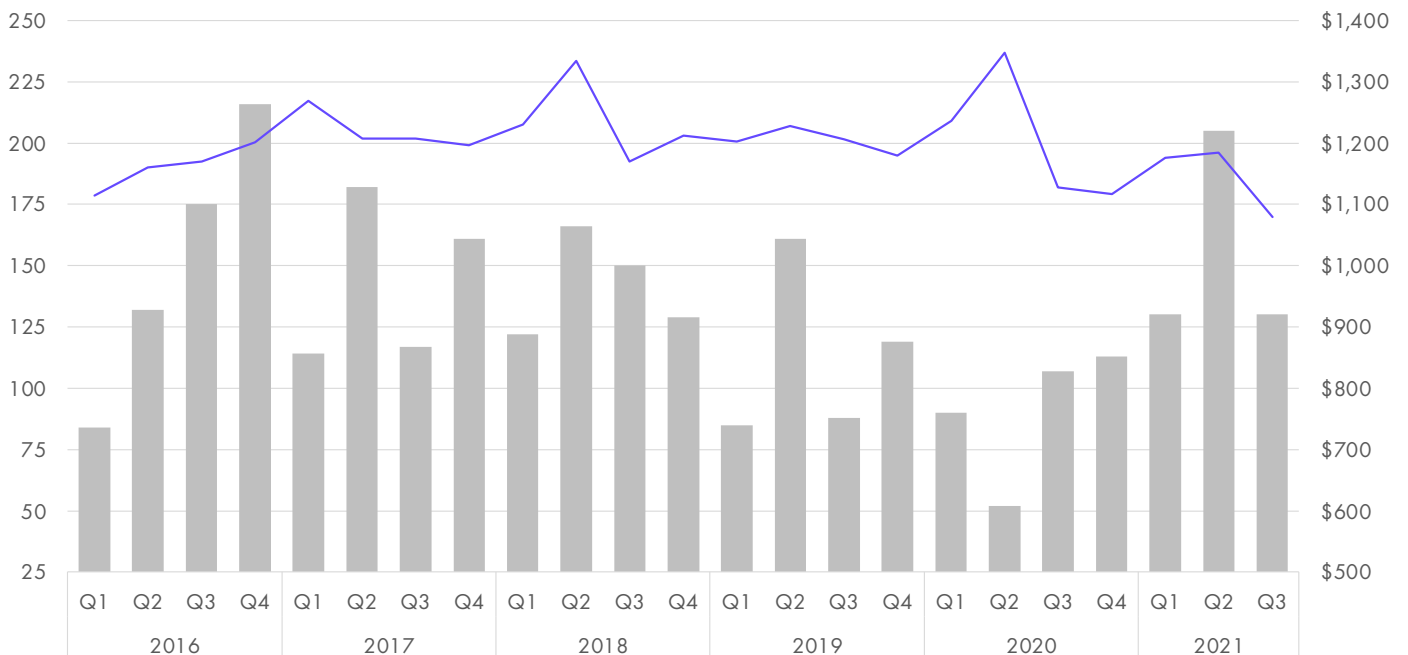
MARKET PERFORMANCE

CONDOS	Q3 21	YoY%	Q3 20	QoQ%	Q2 21
Avg. Sales Price	\$1,035,424	-13.4%	\$1,195,598	-18.7%	\$1,273,600
Blended Avg. PPSF	\$1,080	-4.3%	\$1,128	-8.9%	\$1,185
Number of Sales	130	21.5%	107	-36.6%	205
DOM	49	N/A	56	N/A	48

ANNUAL PERFORMANCE	2020	YoY%	2019	YoY%	2018
Avg. Sales Price	\$1,337,825	3.7%	\$1,290,523	-6.3%	\$1,377,178
Blended Avg. PPSF	\$1,188	-1.3%	\$1,204	-3.1%	\$1,243
Number of Sales	362	-20.1%	453	-20.1%	567
DOM	56	N/A	45	N/A	43

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	Q3 21	YoY%	Q3 20	QoQ%	Q2 21
Avg. Sales Price	\$724,811	-1.3%	\$734,660	-1.3%	\$734,541
Avg. PPSF	\$1,001	-4.1%	\$1,044	-2.5%	\$1,027
Number of Sales	76	52.0%	50	-22.4%	98
DOM	52	N/A	41	N/A	55
\$1M-\$2M	Q3 21	YoY%	Q3 20	QoQ%	Q2 21
Avg. Sales Price	\$1,284,351	-4.2%	\$1,340,688	-6.3%	\$1,370,337
Avg. PPSF	\$1,091	0.4%	\$1,087	-5.4%	\$1,154
Number of Sales	47	-2.1%	48	-43.4%	83
DOM	34	N/A	58	N/A	37
\$2M-\$3M	Q3 21	YoY%	Q3 20	QoQ%	Q2 21
Avg. Sales Price	\$2,255,000	-7.1%	\$2,426,250	-5.5%	\$2,385,357
Avg. PPSF	\$1,455	-1.2%	\$1,472	10.6%	\$1,315
Number of Sales	4	0.0%	4	-71.4%	14
DOM	43	N/A	58	N/A	41
\$3M+	Q3 21	YoY%	Q3 20	QoQ%	Q2 21
Avg. Sales Price	\$3,378,333	-1.4%	\$3,427,600	-19.5%	\$4,197,000
Avg. PPSF	\$1,247	-9.5%	\$1,377	-21.8%	\$1,595
Number of Sales	3	-40.0%	5	-70.0%	10
DOM	17	N/A	91	N/A	43

SAN FRANCISCO DISTRICT 9

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

▲ **16.5%**

Sales volume increased 16.5% YoY, recording 275 closings over the same period last year, indicating a healthy signal in the densest condominium district.

▲ **11.3%**

The average PPSF increased 11.3% YoY in District 9, to \$1,263.

▲ **5.3%**

The average sales price increased 5.3% YoY in District 9, to \$1.37M.

▲ **12.5%**

The number of recorded sales increased 35.6% noting 118 sales in the \$1M and under price segment as more deals were being made with new home buyers.

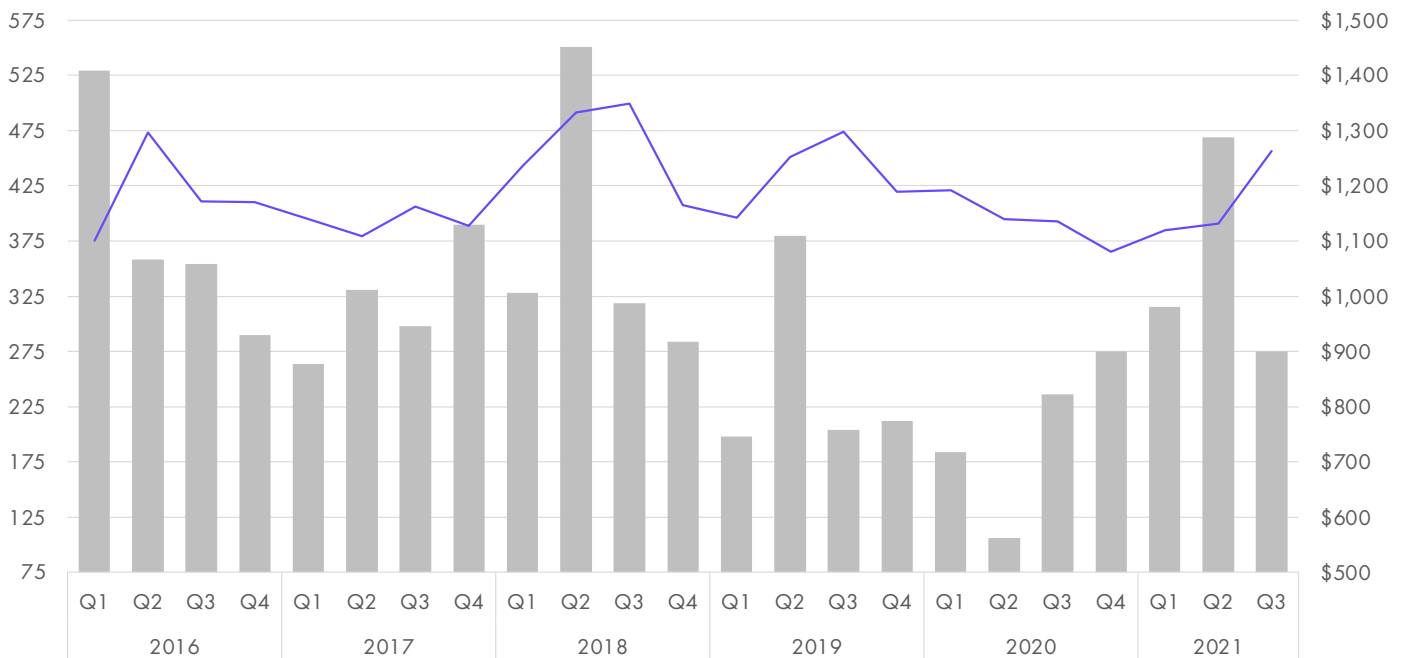
MARKET PERFORMANCE

CONDOS	Q3 21	YoY%	Q3 20	QoQ%	Q2 21
Avg. Sales Price	\$1,379,711	5.3%	\$1,309,879	6.6%	\$1,293,795
Blended Avg. PPSF	\$1,263	11.3%	\$1,136	11.6%	\$1,132
Number of Sales	275	16.5%	236	-41.4%	469
DOM	53	N/A	49	N/A	47

ANNUAL PERFORMANCE	2020	YoY%	2019	YoY%	2018
Avg. Sales Price	\$1,300,913	-4.0%	\$1,355,288	-2.8%	\$1,394,407
Blended Avg. PPSF	\$1,130	-7.7%	\$1,224	-4.5%	\$1,282
Number of Sales	801	-19.4%	994	-32.9%	1,482
DOM	49	N/A	36	N/A	72

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	Q3 21	YoY%	Q3 20	QoQ%	Q2 21
Avg. Sales Price	\$797,840	-1.5%	\$809,760	-1.1%	\$806,929
Avg. PPSF	\$1,029	-3.0%	\$1,062	3.5%	\$995
Number of Sales	118	35.6%	87	-37.6%	189
DOM	56	N/A	36	N/A	50
\$1M-\$2M	Q3 21	YoY%	Q3 20	QoQ%	Q2 21
Avg. Sales Price	\$1,352,619	-2.1%	\$1,381,574	-0.6%	\$1,360,678
Avg. PPSF	\$1,125	4.2%	\$1,080	5.3%	\$1,068
Number of Sales	132	4.8%	126	-44.5%	238
DOM	39	N/A	50	N/A	36
\$2M-\$3M	Q3 21	YoY%	Q3 20	QoQ%	Q2 21
Avg. Sales Price	\$2,452,463	9.3%	\$2,244,800	5.5%	\$2,324,222
Avg. PPSF	\$1,494	14.8%	\$1,300	4.1%	\$1,435
Number of Sales	12	-33.3%	18	-55.6%	27
DOM	76	N/A	50	N/A	68
\$3M+	Q3 21	YoY%	Q3 20	QoQ%	Q2 21
Avg. Sales Price	\$5,946,154	22.9%	\$4,839,520	31.8%	\$4,512,333
Avg. PPSF	\$2,535	42.9%	\$1,774	33.8%	\$1,894
Number of Sales	13	160.0%	5	-13.3%	15
DOM	51	N/A	53	N/A	57



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 Q3 2021

39
CLOSED

N/A
IN CONTRACT

N/A
AVAILABLE

Recent Sales (Q4 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	2	\$4,217,500	\$2,311
3-BR	2	\$7,100,000	\$3,025
4-BR+	0	-	-
Total/Avg.	4	\$5,658,750	\$2,713

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,700,000	\$2,179
2-BR	4	\$4,142,500	\$2,526
3-BR	1	\$6,880,000	\$3,040
4-BR+	0	-	-
Total/Avg.	6	\$4,191,667	\$2,619



1863 MISSION

ADDRESS

1863 Mission Street, San Francisco, CA

DEVELOPER

Corvorn

RESIDENCES

37 (33 Market Rate)

AVERAGE HOA FEES

\$450 - \$650/month

DATE ON MARKET

August 2021

CLOSINGS COMMENCED

TBD

AVERAGE ABSORPTION

N/A

SALES STATUS Q2 2021

N/A
CLOSED

N/A
IN CONTRACT

37
AVAILABLE

Recent Sales (Q3 2020 - 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	1	\$679,000	\$1,445
2-BR	0	-	-
3-BR	1	\$1,350,000	\$1,146
4-BR+	0	-	-
Total/Avg.	2	\$1,014,500	\$1,231



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

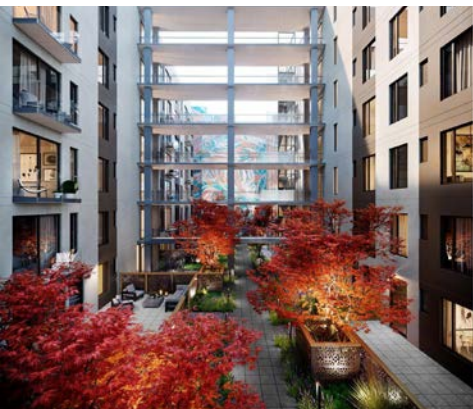
December 2019

CLOSINGS COMMENCED

September 2020

AVERAGE ABSORPTION

2 units/month



SALES STATUS Q3 2021

45

CLOSED

0

IN CONTRACT

69

AVAILABLE

Recent Sales (Q4 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	5	\$704,400	\$1,386
1-BR	7	\$997,115	\$1,376
2-BR	9	\$1,425,667	\$1,414
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	21	\$1,102,286	\$1,398

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	1	\$725,000	\$1,444
1-BR	3	\$951,667	\$1,387
2-BR	4	\$1,702,250	\$1,508
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	8	\$1,298,625	\$1,468



950 TENNESSEE

ADDRESS

950 Tennessee Street, San Francisco, CA

DEVELOPER

Leap Development

RESIDENCES

100

AVERAGE HOA FEES

\$435 - \$700/month

DATE ON MARKET

December 2019

CLOSINGS COMMENCED

September 2020

AVERAGE ABSORPTION

2 units/month



SALES STATUS Q3 2021

44

CLOSED

3

IN CONTRACT

53

AVAILABLE

Recent Sales (Q4 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	13	\$645,360	\$1,390
1-BR	9	\$989,778	\$1,207
2-BR	18	\$1,306,135	\$1,202
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	40	\$1,020,203	\$1,238

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	2	\$639,000	\$1,414
1-BR	1	\$1,169,000	\$1,321
2-BR	1	\$1,748,000	\$1,310
3-BR	1	\$1,782,000	\$1,238
4-BR+	0	-	-
Total/Avg.	5	\$1,195,400	\$1,310



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 Q3 2021

1

CLOSED

0

IN CONTRACT

43

AVAILABLE

Recent Sales (Q4 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	1	\$2,320,000	\$1,607
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	1	\$2,320,000	\$1,607

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	-	-



ELEVANT

ADDRESS

555 Golden Gate Avenue,
San Francisco, CA

DEVELOPER

JS Sullivan Development

RESIDENCES

55 (48 Market Rate)

AVERAGE HOA FEES

\$550 - \$650/month

DATE ON MARKET

December 2020

CLOSINGS COMMENCED

April 2021

AVERAGE ABSORPTION

3 units/month



SALES STATUS Q3 2021

24

CLOSED

1

IN CONTRACT

30

AVAILABLE

Recent Sales (Q4 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	5	\$686,000	\$1,132
2-BR	10	\$944,037	\$1,086
3-BR	3	\$1,898,667	\$1,420
4-BR+	0	-	-
Total/Avg.	18	\$1,031,465	\$1,180

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$773,000	\$1,244
2-BR	6	\$1,056,333	\$1,229
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	8	\$985,500	\$1,232



FOUR SEASONS PRIVATE RESIDENCES

ADDRESS

706 Mission Street, San Francisco, CA

DEVELOPER

Westbrook Partners

RESIDENCES

146

AVERAGE HOA FEES

\$3,180 - \$4,300/month

DATE ON MARKET

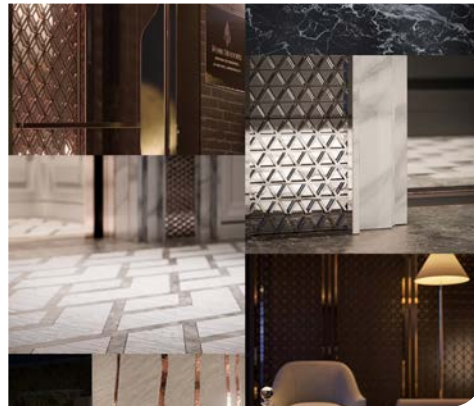
June 2019

CLOSINGS COMMENCED

December 2020

AVERAGE ABSORPTION

0 units/month



SALES STATUS Q3 2021

9

CLOSED

0

IN CONTRACT

137

AVAILABLE

Recent Sales (Q4 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	2	\$4,715,000	\$2,001
3-BR	3	\$9,280,000	\$2,522
4-BR+	1	\$12,555,000	\$2,726
Total/Avg.	6	\$8,304,167	\$2,448

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 Q3 2021

113
CLOSED

0
IN CONTRACT

26
AVAILABLE

Recent Sales (Q4 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	2	\$584,500	\$1,090
1-BR	25	\$761,041	\$1,116
2-BR	25	\$1,204,081	\$1,211
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	52	\$967,251	\$1,170

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$799,000	\$1,579
2-BR	3	\$1,182,667	\$1,374
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	4	\$1,086,750	\$1,408



MAISON AU PONT

SOLD OUT IN Q3 2021

ADDRESS

2448 Lombard Street,
San Francisco, CA

DEVELOPER

JS Sullivan Development

RESIDENCES

43 (37 Market Rate)

AVERAGE HOA FEES

\$570 - \$870/month

DATE ON MARKET

February 2020

CLOSINGS COMMENCED

July 2020

AVERAGE ABSORPTION

2 units/month



SALES STATUS Q3 2021

43

CLOSED

0

IN CONTRACT

0

AVAILABLE

Recent Sales (Q4 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	7	\$996,786	\$1,441
2-BR	8	\$1,512,625	\$1,430
3-BR	4	\$2,566,750	\$1,370
4-BR+	0	-	-
Total/Avg.	19	\$1,544,500	\$1,411

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	-	-



MIRA

ADDRESS

280 Spear Street, San Francisco, CA

DEVELOPER

Tishman Speyer

RESIDENCES

392 (235 Market Rate)

AVERAGE HOA FEES

\$1,080 - \$1,465/month

DATE ON MARKET

November 2018

CLOSINGS COMMENCED

June 2020

AVERAGE ABSORPTION

8 units/month



SALES STATUS Q3 2021

258

CLOSED

5

IN CONTRACT

129

AVAILABLE

Recent Sales (Q4 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	2	\$937,000	\$1,381
1-BR	4	\$959,671	\$1,313
2-BR	17	\$1,838,353	\$1,409
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	23	\$1,607,160	\$1,397

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,345,000	\$1,688
2-BR	5	\$1,663,600	\$1,447
3-BR	3	\$4,081,333	\$2,103
4-BR+	0	-	-
Total/Avg.	9	\$2,434,111	\$1,771



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 Q3 2021

23

CLOSED

0

IN CONTRACT

1

AVAILABLE

Recent Sales (Q4 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	3	\$741,667	\$1,370
2-BR	16	\$1,247,750	\$1,153
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	19	\$1,167,842	\$1,171

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 - \$1,240/month

DATE ON MARKET

January 2021

CLOSINGS COMMENCED

June 2021

AVERAGE ABSORPTION

2 units/month

SALES STATUS Q3 2021

7

CLOSED

2

IN CONTRACT

13

AVAILABLE

Recent Sales (Q4 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$1,122,000	\$1,478
2-BR	4	\$1,688,750	\$1,509
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	6	\$1,499,833	\$1,501

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	5	\$1,695,000	\$1,388
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	5	\$1,695,000	\$1,388



ONE ELEVEN

ADDRESS

588 Minna Street, San Francisco, CA

DEVELOPER

Z&L Properties

RESIDENCES

39

AVERAGE HOA FEES

\$525 - \$680/month

DATE ON MARKET

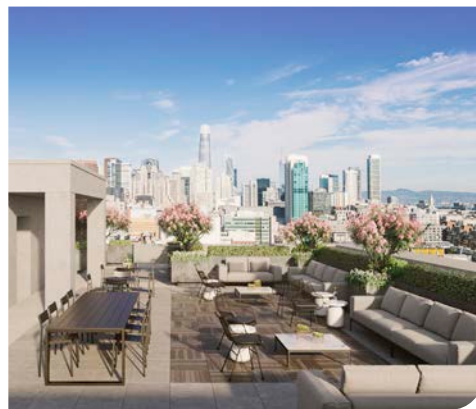
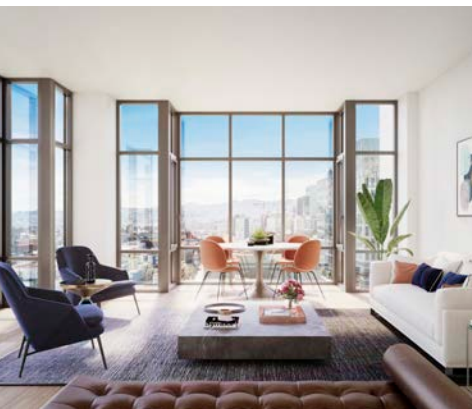
December 2019

CLOSINGS COMMENCED

February 2021

AVERAGE ABSORPTION

1 units/month



SALES STATUS Q3 2021

13
CLOSED

2
IN CONTRACT

24
AVAILABLE

Recent Sales (Q4 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	8	\$652,750	\$1,095
2-BR	5	\$1,154,500	\$1,105
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	13	\$845,731	\$1,100

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$749,000	\$1,086
2-BR	2	\$1,119,000	\$1,131
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	3	\$995,667	\$1,119



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 Q3 2021

330
CLOSED

16
IN CONTRACT

4
AVAILABLE

Recent Sales (Q4 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	1	\$785,000	\$1,545
1-BR	8	\$1,040,630	\$1,249
2-BR	8	\$1,403,486	\$1,195
3-BR	1	\$1,980,000	\$1,208
4-BR+	0	-	-
Total/Avg.	18	\$1,239,885	\$1,226

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	1	\$700,000	\$1,301
1-BR	1	\$1,048,000	\$1,273
2-BR	1	\$1,688,000	\$1,332
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	3	\$1,145,333	\$1,307



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

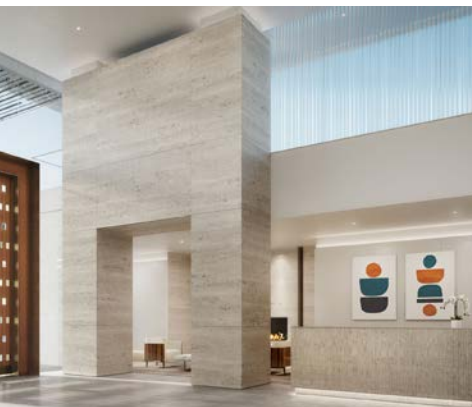
February 2020

CLOSINGS COMMENCED

August 2021

AVERAGE ABSORPTION

1 units/month



SALES STATUS Q3 2021

13
CLOSED

0
IN CONTRACT

107
AVAILABLE

Recent Sales (Q4 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	3	\$1,987,833	\$1,671
2-BR	4	\$6,088,750	\$3,288
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	7	\$4,331,214	\$2,762

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,495,000	\$1,358
2-BR	2	\$2,765,000	\$1,921
3-BR	1	\$8,950,000	\$3,830
4-BR+	0	-	-
Total/Avg.	4	\$3,993,750	\$2,529



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

N/A

AVERAGE ABSORPTION

1 units/month



SALES STATUS Q3 2021

N/A
CLOSED

3
IN CONTRACT

239
AVAILABLE

Recent Sales (Q4 2020 - 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	\$520,000	\$1,512
1-BR	2	\$735,000	\$1,419
2-BR	1	\$1,205,000	\$1,372
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	4	\$798,750	\$1,415



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 Q3 2021

46

CLOSED

1

IN CONTRACT

71

AVAILABLE

Recent Sales (Q4 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$1,690,000	\$1,835
2-BR	8	\$2,712,500	\$1,693
3-BR	10	\$4,718,500	\$2,083
4-BR+	0	-	-
Total/Avg.	20	\$3,613,250	\$1,937

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	3	\$1,740,000	\$1,848
2-BR	4	\$3,250,000	\$1,899
3-BR	3	\$7,708,333	\$2,843
4-BR+	0	-	-
Total/Avg.	10	\$4,134,500	\$2,322



THE BRISTOL YERBA BUENA ISLAND

ADDRESS

400 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 Q3 2021

N/A
CLOSED

7
IN CONTRACT

117
AVAILABLE

Recent Sales (Q4 2020 - 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	\$832,000	\$1,143
1-BR	1	\$1,156,000	\$1,287
2-BR	1	\$1,850,000	\$1,311
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	3	\$1,279,333	\$1,264



THE FLATS YERBA BUENA ISLAND

ADDRESS

290 Meadow Drive, San Francisco, CA

DEVELOPER

Wilson Meany
Stockbridge Real Estate Funds

RESIDENCES

55

AVERAGE HOA FEES

\$1,125 - \$1,275/month

DATE ON MARKET

March 2021

CLOSINGS COMMENCED

TBD

AVERAGE ABSORPTION

N/A



SALES STATUS Q3 2021

N/A
CLOSED

0
IN CONTRACT

55
AVAILABLE

Recent Sales (Q4 2020 - 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	2	\$3,840,000	\$1,546
4-BR+	0	-	-
Total/Avg.	2	\$3,840,000	\$1,546



THE TOWNHOMES YERBA BUENA ISLAND

ADDRESS

Meadow Drive, San Francisco, CA

DEVELOPER

Wilson Meany
Stockbridge Real Estate Funds

RESIDENCES

71

AVERAGE HOA FEES

\$1,125 - \$1,275/month

DATE ON MARKET

March 2021

CLOSINGS COMMENCED

TBD

AVERAGE ABSORPTION

N/A



SALES STATUS Q3 2021

N/A
CLOSED

0
IN CONTRACT

71
AVAILABLE

Recent Sales (Q4 2020 - 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	1	\$3,601,000	\$1,454
3-BR	1	\$3,825,000	\$1,608
4-BR+	0	-	-
Total/Avg.	2	\$3,713,000	\$1,529



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

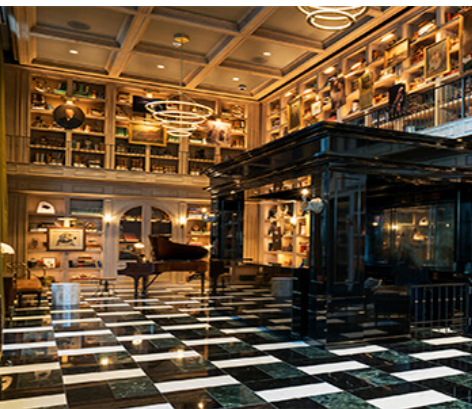
April 2016

CLOSINGS COMMENCED

August 2016

AVERAGE ABSORPTION

4 units/month



SALES STATUS Q3 2021

284
CLOSED

N/A
IN CONTRACT

12
AVAILABLE

Recent Sales (Q4 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	11	\$1,066,636	\$1,285
2-BR	20	\$2,079,450	\$1,578
3-BR	2	\$5,762,500	\$2,236
4-BR+	0	-	-
Total/Avg.	33	\$1,965,061	\$1,595

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	6	\$1,195,667	\$1,544
2-BR	9	\$2,373,778	\$1,709
3-BR	1	\$3,595,000	\$1,845
4-BR+	0	-	-
Total/Avg.	16	\$2,008,313	\$1,683



THE OAK

ADDRESS

55 Oak Street, San Francisco, CA

DEVELOPER

Z&L Properties

RESIDENCES

109 (96 Market Rate)

AVERAGE HOA FEES

N/A

DATE ON MARKET

August 2021

CLOSINGS COMMENCED

TBD

AVERAGE ABSORPTION

N/A



SALES STATUS Q3 2021

N/A
CLOSED

N/A
IN CONTRACT

109
AVAILABLE

Recent Sales (Q4 2020 - 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	\$625,500	\$1,266
1-BR	3	\$960,133	\$1,322
2-BR	0	-	-
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	4	\$876,475	\$1,312



THE QUINN

ADDRESS

345 8th Street, San Francisco, CA

DEVELOPER

Presidio Bay Ventures

RESIDENCES

38 (32 Market Rate)

AVERAGE HOA FEES

\$560 - \$670/month

DATE ON MARKET

September 2021

CLOSINGS COMMENCED

TBD

AVERAGE ABSORPTION

N/A



SALES STATUS Q3 2021

N/A
CLOSED

N/A
IN CONTRACT

38
AVAILABLE

Recent Sales (Q4 2020 - 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	1	\$675,000	\$1,257
2-BR	1	\$1,160,000	\$1,308
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	2	\$917,500	\$1,289



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 Q3 2021

19
CLOSED

0
IN CONTRACT

22
AVAILABLE

Recent Sales (Q4 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	4	\$1,464,750	\$1,673
2-BR	5	\$2,619,400	\$1,940
3-BR	1	\$2,300,000	\$1,267
4-BR+	0	-	-
Total/Avg.	10	\$2,050,091	\$1,737

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,575,000	\$1,786
2-BR	2	\$3,270,000	\$2,142
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	3	\$2,705,000	\$2,062

New Development Pipeline Projects

Q3 2021



1

2238 - 2240 MARKET



2

88 AT THE PARK (88 ARKANSAS)



3

MAISON À SOMA (230 7TH ST)



4

YERBA BUENA ISLAND



5

198 VALENCIA 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

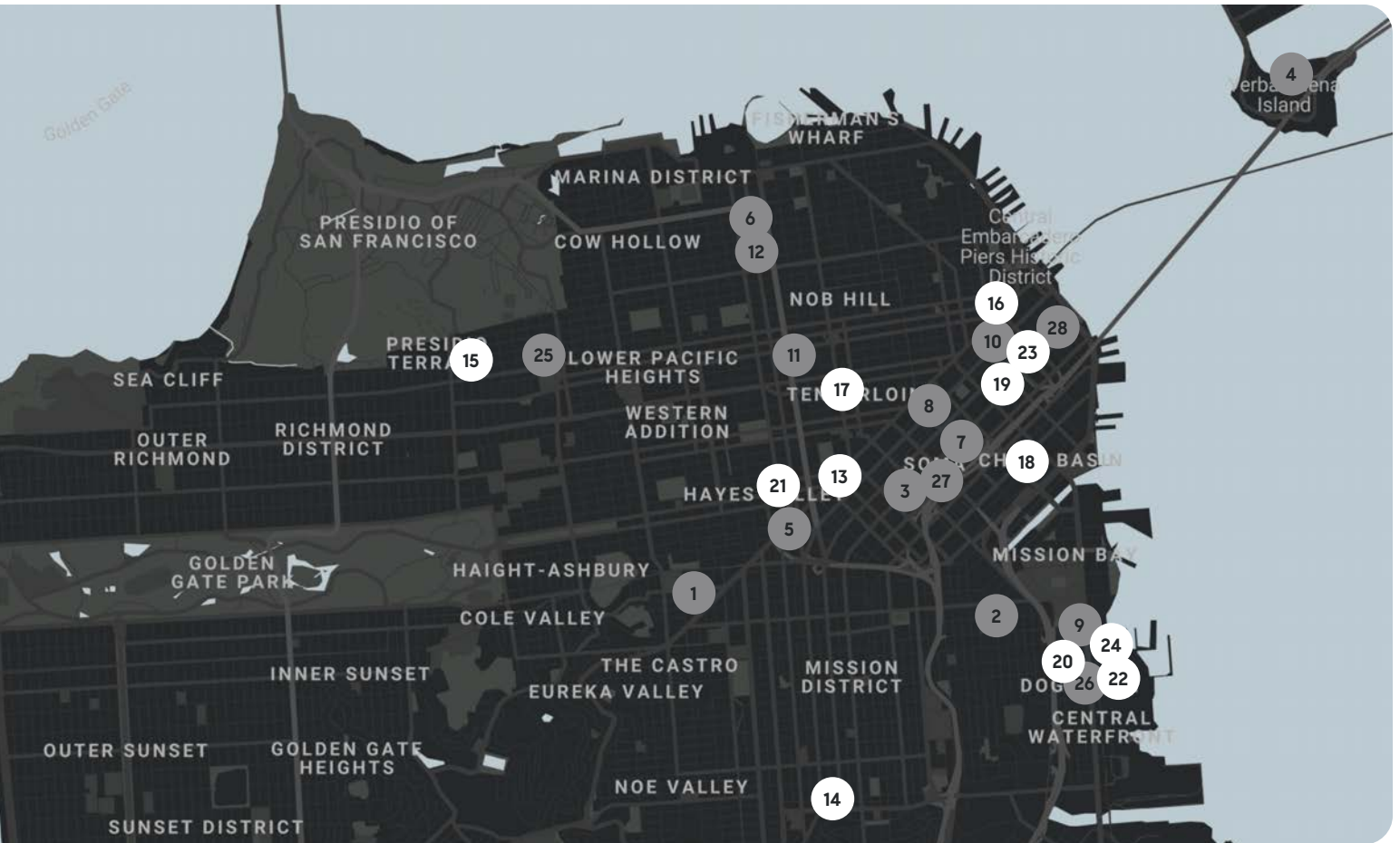


12

2601 VAN NESS

New Development Pipeline Projects

Q3 2021



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

Q3 2021



25

3333 CALIFORNIA



26

600 20TH STREET / 888 ILLINOIS



27

988 HARRISON STREET



28

TRANSBAY BLOCK 4 (201 HOWARD)



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	2021
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	2021
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



Maison à SoMa 230 7TH STREET

COMING SOON

NEIGHBORHOOD	SoMa
DEVELOPER	JS Sullivan Development
ARCHITECT	RG Architecture
RESIDENCES & STORIES	40 units & 6 stories
PRICE RANGE	Pricing starting from the \$600K's
COMPLETION DATE	TBD
ADDITIONAL INFO	One-, two-, and three-bedrooms, and a limited edition of 2-level garden townhomes



The Courtyard Townhomes The Estate Homesites YERBA BUENA ISLAND

COMING SOON

NEIGHBORHOOD	Yerba Buena Island
DEVELOPER	Wilson Meany – Stockbridge Real Estate Funds
ARCHITECT	BDE Architecture / Hart Howerton
RESIDENCES & STORIES	16 units
PRICE RANGE	Pricing starting from \$5 million
COMPLETION DATE	Phase II: 2022+ (Townhomes & Estates)
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.



198 Valencia 198 VALENCIA STREET

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



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	1,600+ 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.

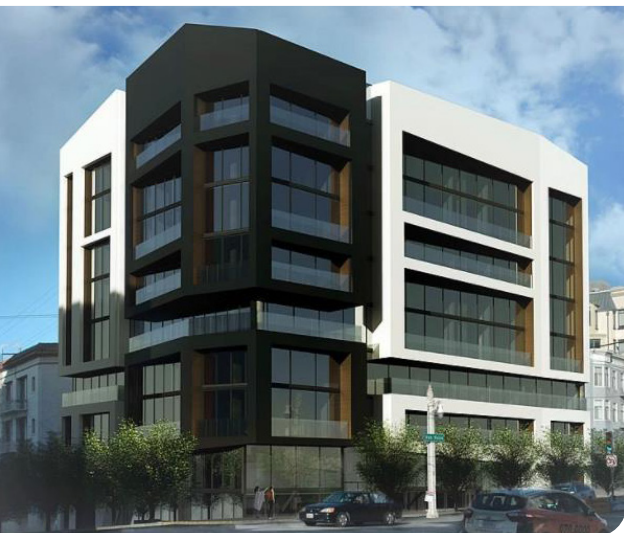
ON-HOLD

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	TBD
ADDITIONAL INFO	Office, retail, apartments, condos are TBD. Outdoor space to include lounging space, outdoor dining tables, 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



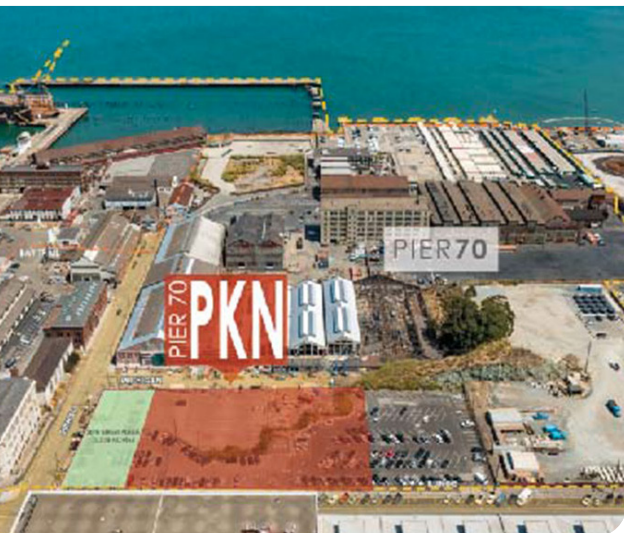
Parcel D - Pier 70 PIER 70

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 Q3 2021

Contact

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