

New Development Market Watch

SAN FRANCISCO Q3 2022



COMPASS
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GROUP



CDMG's New Development Market Insights report provides an in-depth look at San Francisco's neighborhoods districts 6-9 where new developments are most prevalent. Published quarterly and highlighting the city's vast condominium market, we pull information from a combination of public and proprietary databases which access the most up-to-date closing information and sales conditions for new development properties as well as resales.

Quarterly San Francisco MarketWatch

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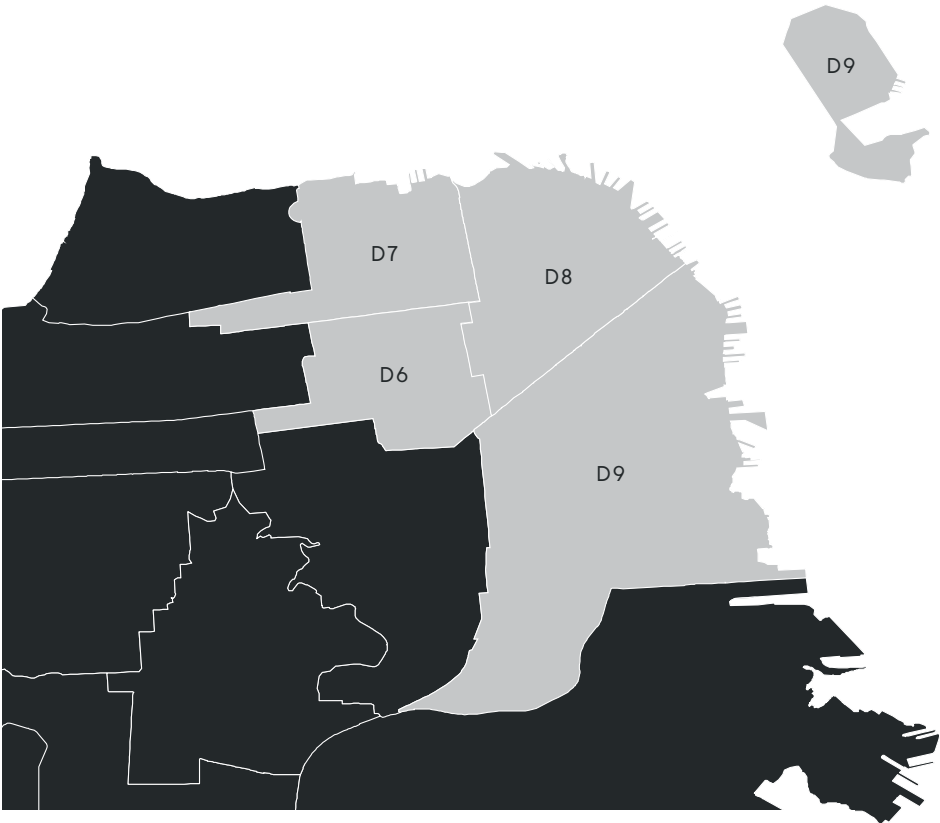
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SAN FRANCISCO DISTRICTS 6-9 SUMMARY

▼ 33.9%

Total number of sales declined YoY during Q3 '22 as marketwide momentum slowed across the city. 411 deals were recorded during the quarter, compared to 622 during the same period last year and the lowest since 2018.

▲ 15.2%

The luxury market segment (condos valued \$3M+) clocked a strong 15.2% increase in average price to \$5.37M, despite total sales declining to only 15 deals – a 50% decrease.

▲ 1.5%

Despite slowing sales volume and absorption, the average sale price rose 1.5% YoY to \$1.36M.

The San Francisco real estate market experienced extreme growth in late 2020 and all of 2021, when an overheated market produced record breaking prices and sales numbers across the city. Now, in Q3 '22, interest rate increases and the continued inflation threats are driving a market re-stabilization, which has been felt across the city. The number of condominium sales in San Francisco's districts 6-9 recorded its lowest third quarter in the past 5 years, with 411 sales closed in what is typically a busy season for buyers. The market experienced a steep QoQ decline with -36.4% fewer sales than Q2 '22. Yet despite cooling demand, prices remained less impacted while inventory remains low, and for now, sellers have resisted deep discounts.

Interest rates are at their highest in 15 years. The short term impact is fewer sales. While it's difficult to predict the longer term impacts of rate hikes and broadly based macro-economic headwinds, the Bay Area residential market has confirmed signs of sustained slowing in Q3 '22. Total number of sales was down across all districts compared to last year, however, pricing remains more steady. The average sales price was up 1.5% to \$1.36M YoY with the PPSF down 4.7% to \$1,163/SF.

The luxury market, defined as condo sales valued \$3M+, experienced the most significant YoY decline, with number of sales down 50% to 15 closings. While affluent buyers tend to be less tethered to interest rate changes and more sensitive to the financial markets, buyers may have hit 'pause' on their plans as they await more market clarity. However, those who are still buying have yet to see large discounts. The average price for condos over \$3M increased 15.2% YoY to \$5.37M.

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. From there, each district is assessed individually providing a more granular picture of the sub-market.

On Page 14, a citywide exploration of each currently selling new development project, including the most recent closings at each, is 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

▼ 12.2%

Number of sales for product priced from \$2M-\$3M, a typical sweet spot in the SF market, experienced the smallest decline YoY, down 12.2% with 36 sales in Q3 '22.

▼ 61.3%

The \$2M-\$3M price segment saw the largest number of sales plunge QoQ, down 61.3% in Q3 '22 with 36 sales, compared to 93 in Q2 '22.

▲ 1.0%

Product priced from \$1M-\$2M in Districts 6-9 recorded a slight uptick in average price, up 1% YoY at \$1.37M.

▲ 5.5%

The luxury market over \$3M+ saw an increase of 5.5% in average PPSF, up to \$2,100/SF from \$1,900/SF, YoY.

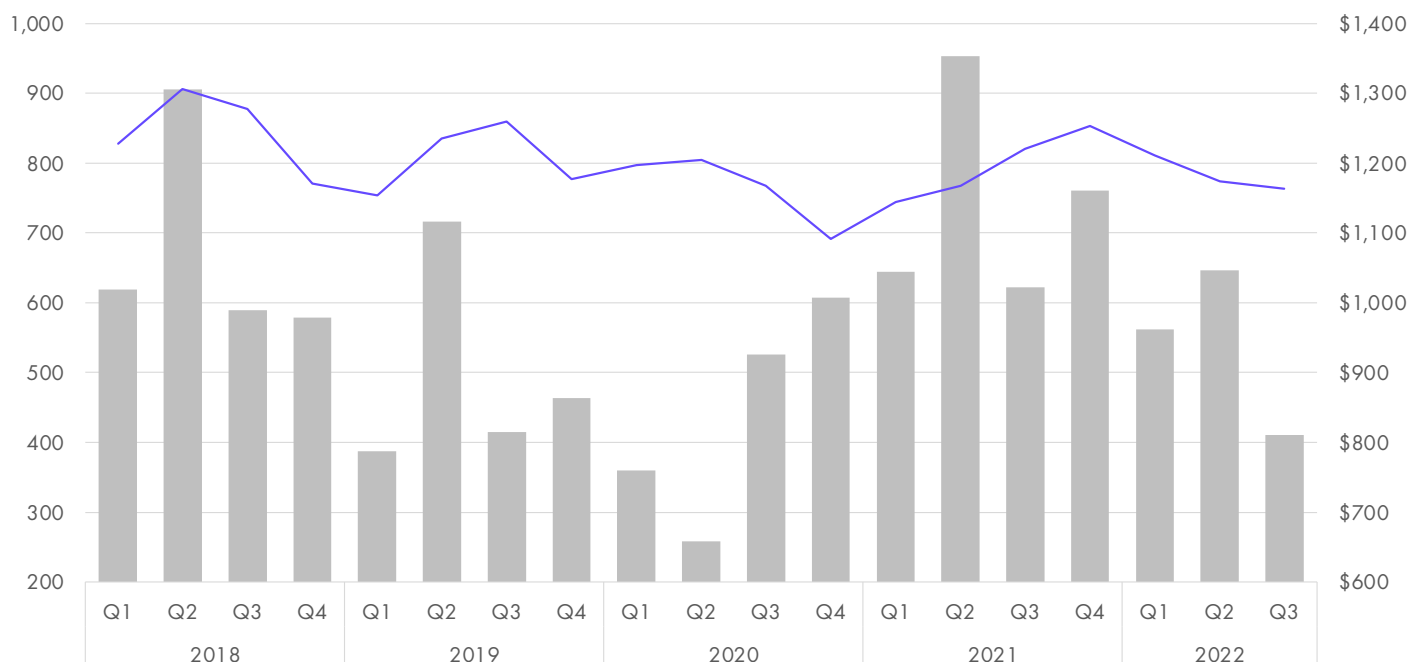
MARKET PERFORMANCE

CONDO	Q3-22	YoY%	Q3-21	QoQ%	Q2-22
Avg. Sales Price	\$1,361,175	1.5%	\$1,341,576	-3.7%	\$1,412,801
Blended Avg. PPSF	\$1,163	-4.7%	\$1,220	-1.0%	\$1,174
Number of Sales	411	-33.9%	622	-36.4%	646
DOM	50	N/A	47	N/A	35

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

of Sales

Blended Avg. PPSF



SAN FRANCISCO DISTRICTS 6-9 SUMMARY

SALES BY PRICE POINT

UNDER \$1M	Q3-22	YoY%	Q3-21	QoQ%	Q2-22
Avg. Sales Price	\$738,015	-5.1%	\$777,287	-7.7%	\$799,722
Avg. PPSF	\$973	-4.3%	\$1,017	-3.5%	\$1,009
Number of Sales	158	-39.2%	260	-20.6%	199
DOM	52	N/A	51	N/A	43
\$1M-\$2M	Q3-22	YoY%	Q3-21	QoQ%	Q2-22
Avg. Sales Price	\$1,368,082	1.0%	\$1,353,942	-1.2%	\$1,384,409
Avg. PPSF	\$1,070	-5.8%	\$1,136	-4.1%	\$1,116
Number of Sales	202	-30.6%	291	-39.5%	334
DOM	43	N/A	37	N/A	32
\$2M-\$3M	Q3-22	YoY%	Q3-21	QoQ%	Q2-22
Avg. Sales Price	\$2,386,361	-0.7%	\$2,402,770	0.5%	\$2,374,592
Avg. PPSF	\$1,328	-8.1%	\$1,444	-3.3%	\$1,372
Number of Sales	36	-12.2%	41	-61.3%	93
DOM	55	N/A	43	N/A	29
\$3M+	Q3-22	YoY%	Q3-21	QoQ%	Q2-22
Avg. Sales Price	\$5,371,667	15.2%	\$4,661,833	52.8%	\$3,514,750
Avg. PPSF	\$2,100	5.5%	\$1,990	33.0%	\$1,579
Number of Sales	15	-50.0%	30	-25.0%	20
DOM	90	N/A	31	N/A	22

SAN FRANCISCO DISTRICT 6

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

▼ 20.3%

Total number of sales in District 6 decreased 20.3% YOY, with 63 recorded closings during Q3 '22.

▼ 6.5%

The average price for District 6 was down 6.5% YoY to \$1.25M.

▼ 5.4%

The average PPSF for condos in District 6 decreased to \$1,065/SF, down 5.4% YoY.

▲ 5.4%

Product priced between \$1M-\$2M in District 6 recorded an increase of 5.4% in absolute pricing, reaching an average price of \$1.40M.

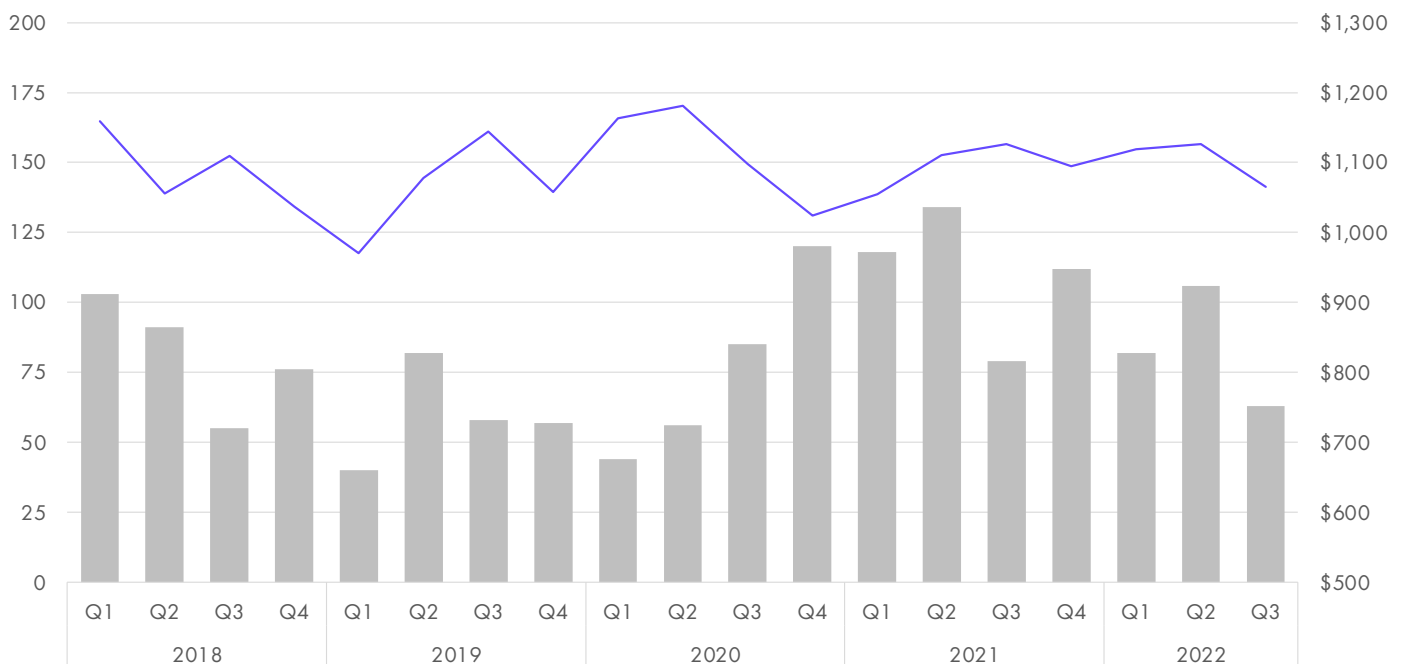
MARKET PERFORMANCE

CONDOS	Q3-22	YoY%	Q3-21	QoQ%	Q2-22
Avg. Sales Price	\$1,254,083	-6.5%	\$1,341,218	-10.1%	\$1,395,173
Blended Avg. PPSF	\$1,065	-5.4%	\$1,126	-5.5%	\$1,126
Number of Sales	63	-20.3%	79	-40.6%	106
DOM	33	N/A	33	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

of Sales

Blended Avg. PPSF



SAN FRANCISCO DISTRICT 6

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

SALES BY PRICE POINT

UNDER \$1M	Q3-22	YoY%	Q3-21	QoQ%	Q2-22
Avg. Sales Price	\$752,017	-7.7%	\$814,569	-7.7%	\$815,038
Avg. PPSF	\$997	3.3%	\$966	-9.7%	\$1,105
Number of Sales	20	0.0%	20	-23.1%	26
DOM	47	N/A	51	N/A	39
\$1M-\$2M	Q3-22	YoY%	Q3-21	QoQ%	Q2-22
Avg. Sales Price	\$1,404,918	5.4%	\$1,332,596	-2.1%	\$1,435,022
Avg. PPSF	\$1,050	-5.0%	\$1,106	-5.7%	\$1,113
Number of Sales	38	-24.0%	50	-44.1%	68
DOM	26	N/A	26	N/A	26
\$2M-\$3M	Q3-22	YoY%	Q3-21	QoQ%	Q2-22
Avg. Sales Price	\$2,116,000	-4.8%	\$2,221,667	-10.7%	\$2,369,626
Avg. PPSF	\$1,281	-3.6%	\$1,329	9.6%	\$1,168
Number of Sales	5	-16.7%	6	-54.5%	11
DOM	38	N/A	9	N/A	19
\$3M+	Q3-22	YoY%	Q3-21	QoQ%	Q2-22
Avg. Sales Price	-	-	\$3,235,000	-	\$3,050,000
Avg. PPSF	-	-	\$1,400	-	\$1,439
Number of Sales	0	-100.0%	3	-100.0%	1
DOM	-	N/A	25	N/A	60

SAN FRANCISCO DISTRICT 7

MARINA, COW HOLLOW, PACIFIC HEIGHTS, AND PRESIDIO HEIGHTS

▼ **6.1%**

The average PPSF for District 7 decreased 6.1% YoY to \$1,258/SF.

▼ **9.9%**

The average sale price for District 7 decreased 9.9% YoY to \$1.59M.

▼ **29.7%**

District 7 saw fewer recorded deals YoY, down 29.7% from Q3 '21, and down -50.5% QoQ.

▲ **5.2%**

The \$3M+ price segment showed an increase in average price, up 5.2% YoY to \$370M.

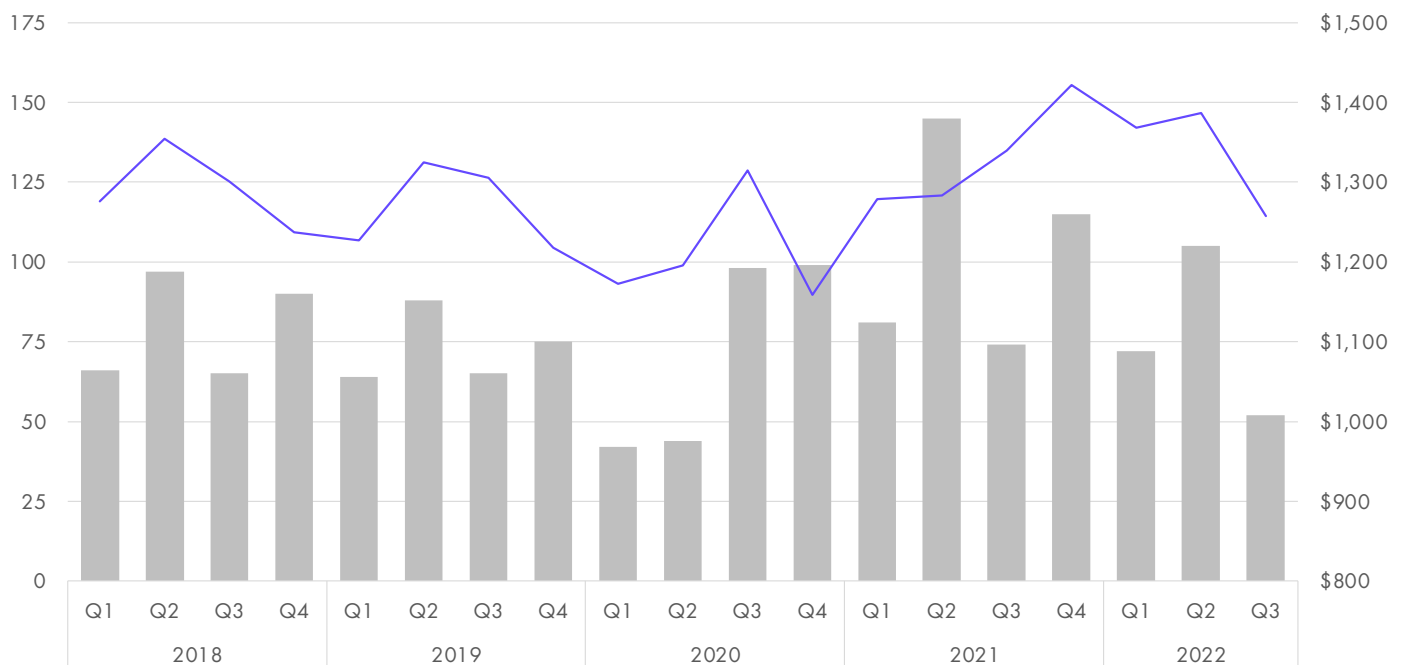
MARKET PERFORMANCE

CONDOS	Q3-22	YoY%	Q3-21	QoQ%	Q2-22
Avg. Sales Price	\$1,588,904	-9.9%	\$1,763,050	-16.9%	\$1,911,419
Blended Avg. PPSF	\$1,258	-6.1%	\$1,339	-9.3%	\$1,386
Number of Sales	52	-29.7%	74	-50.5%	105
DOM	39	N/A	32	N/A	23

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

of Sales

Blended Avg. PPSF



SAN FRANCISCO DISTRICT 7

MARINA, COW HOLLOW, PACIFIC HEIGHTS, AND PRESIDIO HEIGHTS

SALES BY PRICE POINT

UNDER \$1M	Q3-22	YoY%	Q3-21	QoQ%	Q2-22
Avg. Sales Price	\$814,250	0.6%	\$809,321	-2.7%	\$836,846
Avg. PPSF	\$1,115	-0.4%	\$1,120	-1.4%	\$1,130
Number of Sales	12	-14.3%	14	-7.7%	13
DOM	33	N/A	27	N/A	22
\$1M-\$2M	Q3-22	YoY%	Q3-21	QoQ%	Q2-22
Avg. Sales Price	\$1,317,615	-5.7%	\$1,397,949	-9.0%	\$1,448,361
Avg. PPSF	\$1,125	-8.5%	\$1,228	-9.7%	\$1,245
Number of Sales	26	-27.8%	36	-40.9%	44
DOM	46	N/A	43	N/A	28
\$2M-\$3M	Q3-22	YoY%	Q3-21	QoQ%	Q2-22
Avg. Sales Price	\$2,380,400	-4.0%	\$2,479,267	-1.7%	\$2,421,503
Avg. PPSF	\$1,400	-0.3%	\$1,405	-4.2%	\$1,462
Number of Sales	10	-33.3%	15	-73.7%	38
DOM	24	N/A	16	N/A	19
\$3M+	Q3-22	YoY%	Q3-21	QoQ%	Q2-22
Avg. Sales Price	\$3,697,500	5.2%	\$3,513,333	8.5%	\$3,407,500
Avg. PPSF	\$1,563	-1.9%	\$1,593	-3.5%	\$1,619
Number of Sales	4	-55.6%	9	-60.0%	10
DOM	45	N/A	16	N/A	11

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

▼ **35.5%**

District 8 recorded 98 closings, a decrease of 35.5% YoY, the lowest number of sales since Q2 '20.

▲ **46.1%**

The average sale price for District 8 increased to \$1.56M, up a considerable 46.1% YoY, due in large part to a \$17M and \$12M sale at 999 Green Street.

▲ **17.3%**

PPSF in District 8 also soared, up 17.3% YoY to \$1,283/SF.

▲ **83.3%**

The \$2M-\$3M segment for District 8 recorded an increase in number of recorded sales to 11, up 83.3% YoY.

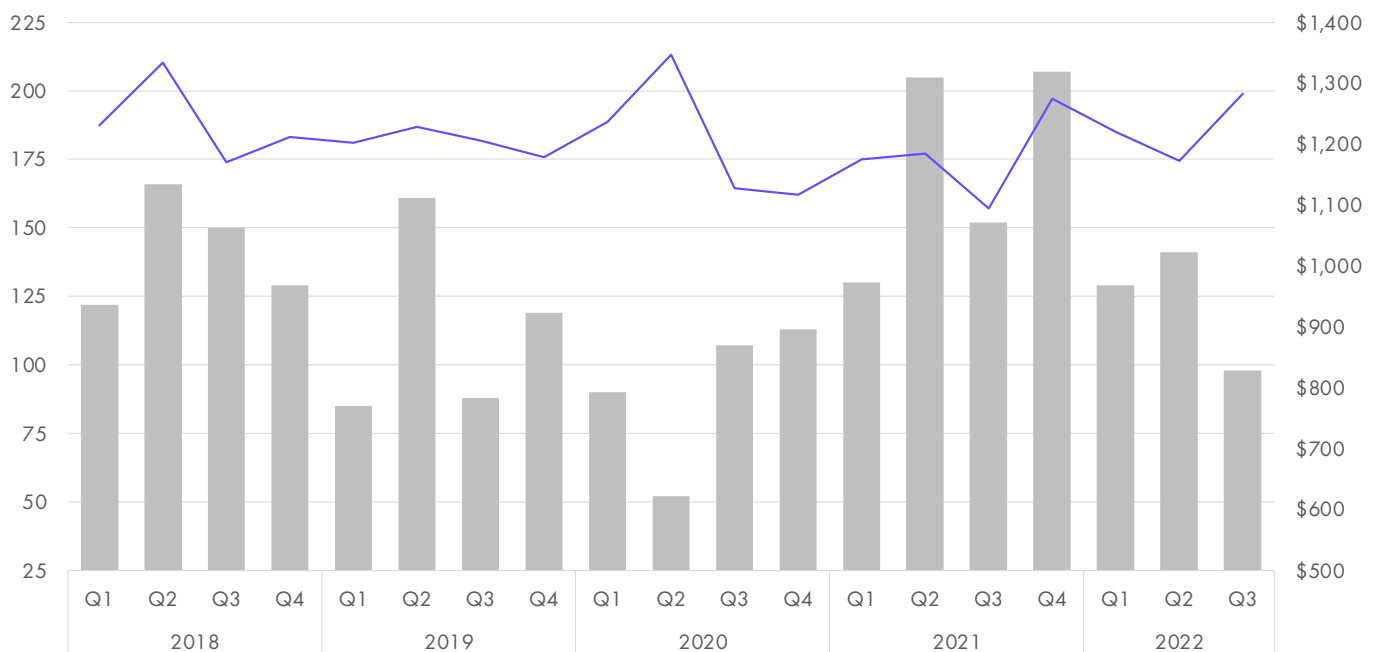
MARKET PERFORMANCE

CONDOS	Q3-22	YoY%	Q3-21	QoQ%	Q2-22
Avg. Sales Price	\$1,563,566	46.1%	\$1,070,152	17.6%	\$1,329,713
Blended Avg. PPSF	\$1,283	17.3%	\$1,094	9.4%	\$1,172
Number of Sales	98	-35.5%	152	-30.5%	141
DOM	49	N/A	51	N/A	41

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	Q3-22	YoY%	Q3-21	QoQ%	Q2-22
Avg. Sales Price	\$685,576	-5.5%	\$725,735	-4.3%	\$716,698
Avg. PPSF	\$949	-4.9%	\$998	-6.8%	\$1,019
Number of Sales	46	-47.7%	88	-13.2%	53
DOM	49	N/A	51	N/A	51
\$1M-\$2M	Q3-22	YoY%	Q3-21	QoQ%	Q2-22
Avg. Sales Price	\$1,379,086	4.9%	\$1,314,694	2.7%	\$1,342,185
Avg. PPSF	\$1,071	-2.4%	\$1,098	-3.4%	\$1,108
Number of Sales	35	-35.2%	54	-46.2%	65
DOM	44	N/A	38	N/A	33
\$2M-\$3M	Q3-22	YoY%	Q3-21	QoQ%	Q2-22
Avg. Sales Price	\$2,418,182	3.1%	\$2,345,000	0.9%	\$2,396,711
Avg. PPSF	\$1,212	-19.3%	\$1,501	-10.0%	\$1,347
Number of Sales	11	83.3%	6	-42.1%	19
DOM	49	N/A	93	N/A	37
\$3M+	Q3-22	YoY%	Q3-21	QoQ%	Q2-22
Avg. Sales Price	\$7,804,167	127.3%	\$3,433,750	86.6%	\$4,181,250
Avg. PPSF	\$2,443	89.7%	\$1,287	47.7%	\$1,654
Number of Sales	6	50.0%	4	50.0%	4
DOM	54	N/A	13	N/A	7

SAN FRANCISCO DISTRICT 9

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

▼ 37.5%

Sales decreased 37.5% YoY, recording 198 closings, indicating a further softening in the densest condominium district in the Bay Area. This is the lowest sales volume since Q2 '20.

▼ 12.9%

The average PPSF decreased 12.9% YoY in District 9, to \$1,103/SF; this figure is unchanged QoQ.

▼ 10.1%

The average sales price decreased by 10.1% YoY in District 9, to \$1.24M,

▼ 37.4%

The \$3M+ ultra luxury segment for District 9 saw the deepest discounts with the average sales price down 37.4% to \$3.79M.

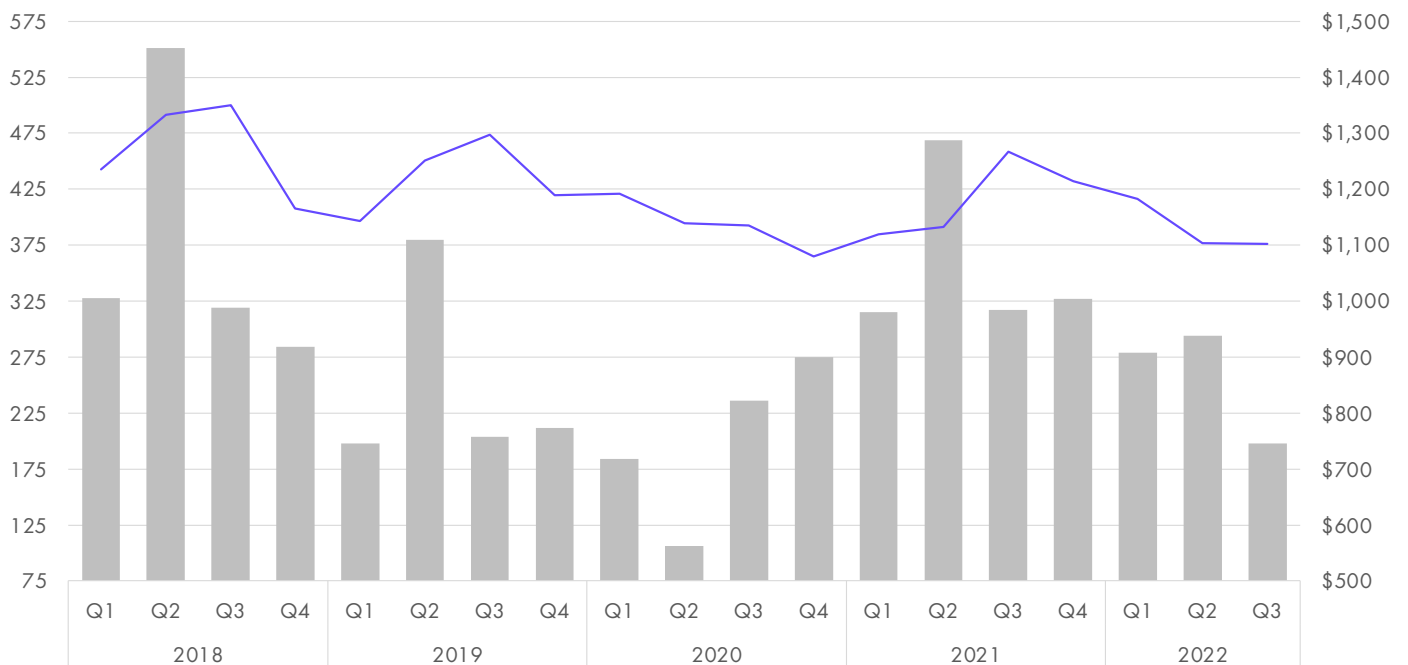
MARKET PERFORMANCE

CONDOS	Q3-22	YoY%	Q3-21	QoQ%	Q2-22
Avg. Sales Price	\$1,235,268	-10.1%	\$1,373,424	-3.6%	\$1,280,927
Blended Avg. PPSF	\$1,103	-12.9%	\$1,266	0.0%	\$1,103
Number of Sales	198	-37.5%	317	-32.7%	294
DOM	58	N/A	52	N/A	40

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	Q3-22	YoY%	Q3-21	QoQ%	Q2-22
Avg. Sales Price	\$753,231	-6.0%	\$801,508	-9.5%	\$832,613
Avg. PPSF	\$960	-6.4%	\$1,026	-1.2%	\$972
Number of Sales	80	-42.0%	138	-25.2%	107
DOM	57	N/A	54	N/A	43
\$1M-\$2M	Q3-22	YoY%	Q3-21	QoQ%	Q2-22
Avg. Sales Price	\$1,363,491	-0.1%	\$1,364,555	0.1%	\$1,362,047
Avg. PPSF	\$1,066	-6.5%	\$1,140	-2.0%	\$1,088
Number of Sales	103	-31.8%	151	-34.4%	157
DOM	48	N/A	39	N/A	35
\$2M-\$3M	Q3-22	YoY%	Q3-21	QoQ%	Q2-22
Avg. Sales Price	\$2,492,500	2.9%	\$2,423,183	8.9%	\$2,288,660
Avg. PPSF	\$1,424	-6.2%	\$1,519	4.2%	\$1,367
Number of Sales	10	-28.6%	14	-60.0%	25
DOM	101	N/A	64	N/A	44
\$3M+	Q3-22	YoY%	Q3-21	QoQ%	Q2-22
Avg. Sales Price	\$3,792,000	-37.4%	\$6,056,786	15.3%	\$3,289,000
Avg. PPSF	\$1,946	-24.6%	\$2,582	33.3%	\$1,461
Number of Sales	5	-64.3%	14	0.0%	5
DOM	170	N/A	51	N/A	47



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 Q3 2022

4

CLOSED

0

IN CONTRACT

125

AVAILABLE

Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	3	\$714,000	\$1,199
2-BR	1	\$1,145,000	\$1,133
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	4	\$821,750	\$1,175

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$675,000	\$1,151
2-BR	3	\$1,095,667	\$1,202
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	5	\$927,400	\$1,187



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 2022

44

CLOSED

0

IN CONTRACT

N/A

AVAILABLE

Recent Sales (Q3 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	3	\$5,266,667	\$2,522
4-BR+	0	-	-
Total/Avg.	7	\$4,364,143	\$2,336

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,700,000	\$2,179
2-BR	4	\$4,072,000	\$2,483
3-BR	2	\$6,805,000	\$3,142
4-BR+	0	-	-
Total/Avg.	7	\$4,514,000	\$2,707



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 2022

56

CLOSED

0

IN CONTRACT

58

AVAILABLE

Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	3	\$695,333	\$1,369
1-BR	6	\$983,750	\$1,424
2-BR	6	\$1,469,167	\$1,467
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	15	\$1,129,733	\$1,439

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	1	\$700,000	\$1,394
1-BR	2	\$912,000	\$1,405
2-BR	4	\$1,608,500	\$1,333
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	7	\$1,279,714	\$1,352



950 TENNESSEE

ADDRESS

950 Tennessee Street, San Francisco, CA

DEVELOPER

Leap Development

RESIDENCES

100

AVERAGE HOA FEES

\$435 - \$770/month

DATE ON MARKET

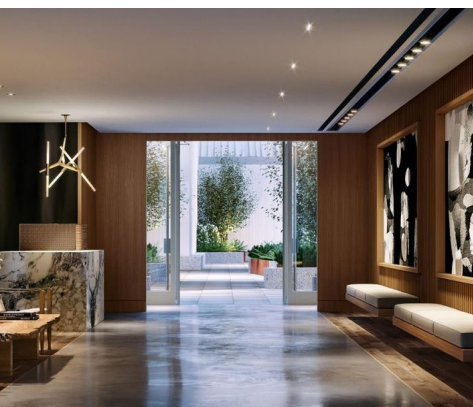
December 2019

CLOSINGS COMMENCED

September 2020

AVERAGE ABSORPTION

2 units/month



SALES STATUS Q3 2022

59

CLOSED

0

IN CONTRACT

41

AVAILABLE

Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	12	\$629,250	\$1,368
1-BR	5	\$1,103,600	\$1,263
2-BR	4	\$1,333,500	\$1,205
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	21	\$876,333	\$1,285

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	-	-



CRESCENT

ADDRESS

875 California Street, San Francisco, CA

DEVELOPER

Grosvenor Americas

RESIDENCES

44

AVERAGE HOA FEES

\$1,840/month

DATE ON MARKET

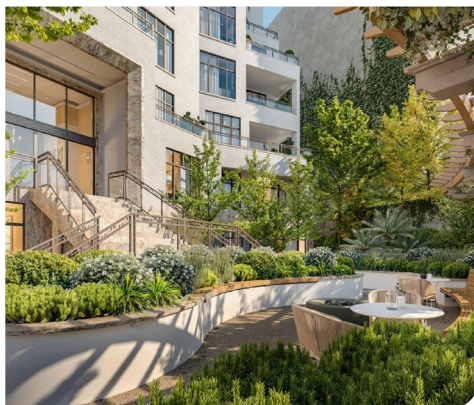
March 2021

CLOSINGS COMMENCED

September 2021

AVERAGE ABSORPTION

0 units/month



SALES STATUS Q3 2022

6

CLOSED

0

IN CONTRACT

38

AVAILABLE

Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$1,362,500	\$1,839
2-BR	2	\$2,660,000	\$1,512
3-BR	1	\$6,000,000	\$3,288
4-BR+	0	-	-
Total/Avg.	5	\$2,809,000	\$2,058

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	3	\$1,328,333	\$1,526
2-BR	3	\$4,081,333	\$2,886
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	6	\$2,704,833	\$2,368



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

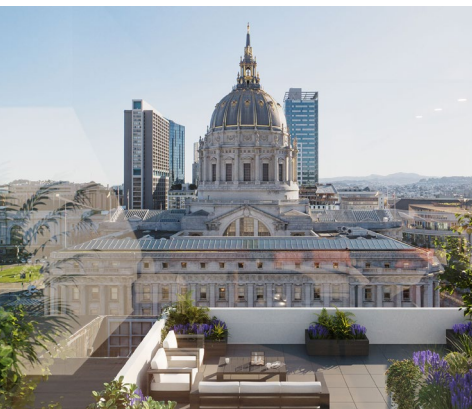
December 2020

CLOSINGS COMMENCED

April 2021

AVERAGE ABSORPTION

2 units/month



SALES STATUS Q3 2022

37

CLOSED

1

IN CONTRACT

17

AVAILABLE

Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	6	\$742,167	\$1,265
2-BR	13	\$1,031,336	\$1,184
3-BR	3	\$1,898,667	\$1,420
4-BR+	0	-	-
Total/Avg.	22	\$1,070,744	\$1,250

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

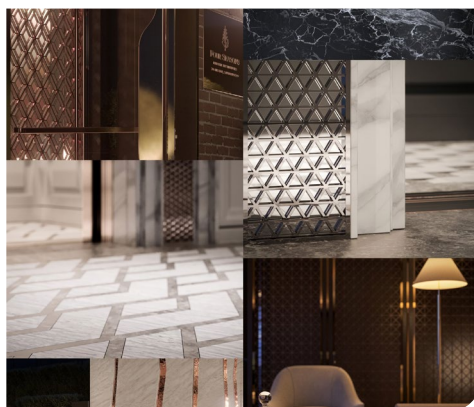
June 2019

CLOSINGS COMMENCED

December 2020

AVERAGE ABSORPTION

0 units/month



SALES STATUS Q3 2022

13
CLOSED

0
IN CONTRACT

133
AVAILABLE

Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	2	\$2,905,000	\$1,811
3-BR	2	\$8,250,000	\$2,428
4-BR+	0	-	-
Total/Avg.	4	\$5,577,500	\$2,230

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

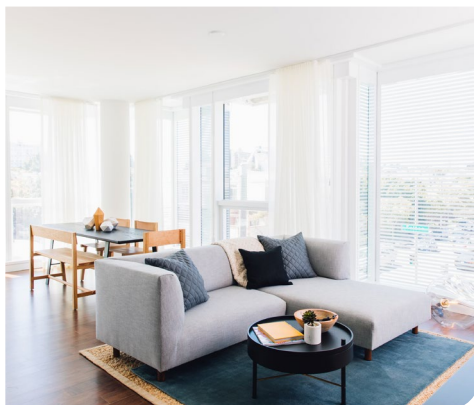
CLOSINGS COMMENCED

March 2020

AVERAGE ABSORPTION

1 units/month - Launch

2 units/month - Relaunch



SALES STATUS Q3 2022

122
CLOSED

1
IN CONTRACT

16
AVAILABLE

Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	8	\$767,250	\$1,150
2-BR	6	\$1,284,083	\$1,261
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	14	\$988,750	\$1,209

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	-	-



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 Q3 2022

N/A
CLOSED

0
IN CONTRACT

24
AVAILABLE

Recent Sales (Q3 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

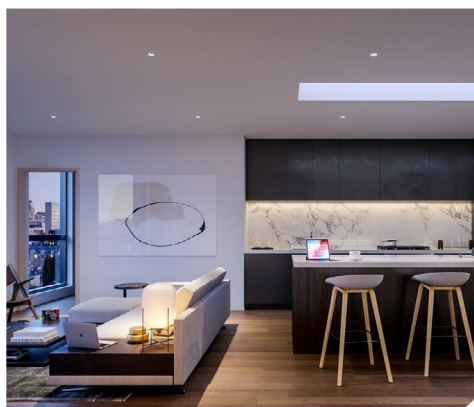
October 2021

CLOSINGS COMMENCED

TBD

AVERAGE ABSORPTION

3 units/month



SALES STATUS Q3 2022

25

CLOSED

0

IN CONTRACT

12

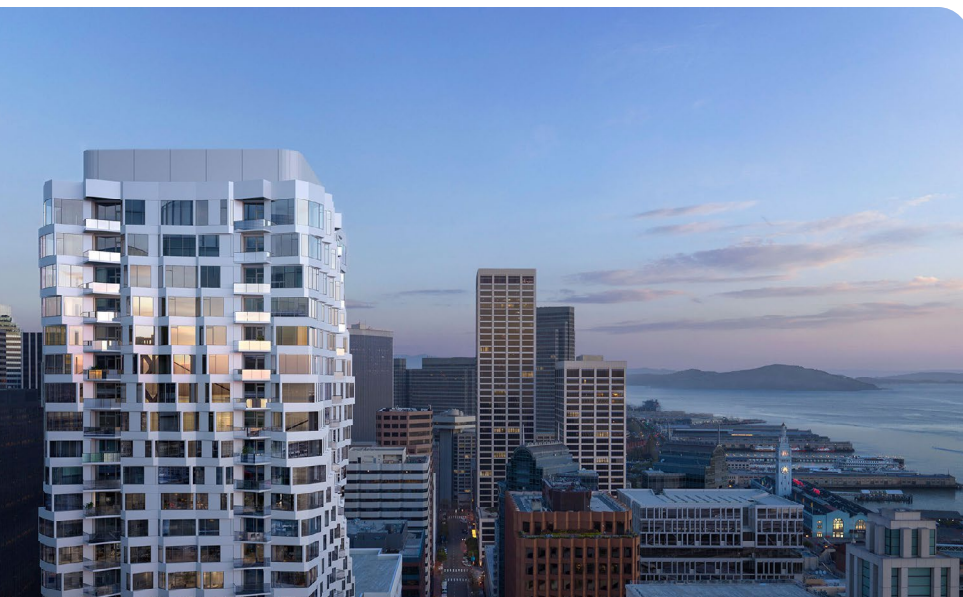
AVAILABLE

Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	10	\$790,162	\$1,121
2-BR	7	\$1,237,571	\$1,136
3-BR	3	\$1,603,333	\$1,283
4-BR+	0	-	-
Total/Avg.	20	\$1,068,731	\$1,160

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	2	\$1,040,500	\$963
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	2	\$1,040,500	\$963



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 Q3 2022

302

CLOSED

1

IN CONTRACT

87

AVAILABLE

Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	1	\$999,000	\$1,450
1-BR	2	\$1,137,000	\$1,573
2-BR	30	\$1,923,533	\$1,446
3-BR	1	\$1,645,000	\$1,129
4-BR+	0	-	-
Total/Avg.	34	\$1,841,882	\$1,440

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$1,157,500	\$1,566
2-BR	5	\$1,726,000	\$1,466
3-BR	3	\$2,556,667	\$1,618
4-BR+	0	-	-
Total/Avg.	10	\$1,861,500	\$1,538



MISSION MODERN

ADDRESS

3620 Cesar Chavez Street,
San Francisco, CA

DEVELOPER

Vanguard Properties

RESIDENCES

24

AVERAGE HOA FEES

\$460 - \$620/month

DATE ON MARKET

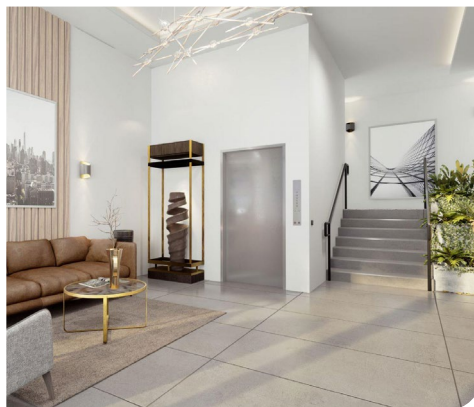
February 2020

CLOSINGS COMMENCED

July 2020

AVERAGE ABSORPTION

1 units/month



SALES STATUS Q3 2022

23

CLOSED

0

IN CONTRACT

1

AVAILABLE

Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	3	\$1,205,000	\$1,123
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	3	\$1,205,000	\$1,123

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	1	\$1,175,000	\$1,027
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	1	\$1,175,000	\$1,027



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 Q3 2022

19

CLOSED

0

IN CONTRACT

3

AVAILABLE

Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	3	\$1,097,667	\$1,471
2-BR	15	\$1,610,467	\$1,384
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	18	\$1,525,000	\$1,393

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	2	\$2,245,000	\$1,516
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	2	\$2,245,000	\$1,516



ONE ELEVEN

ADDRESS

588 Minna Street, San Francisco, CA

DEVELOPER

Z&L Properties

RESIDENCES

39

AVERAGE HOA FEES

\$525 - \$680/month

DATE ON MARKET

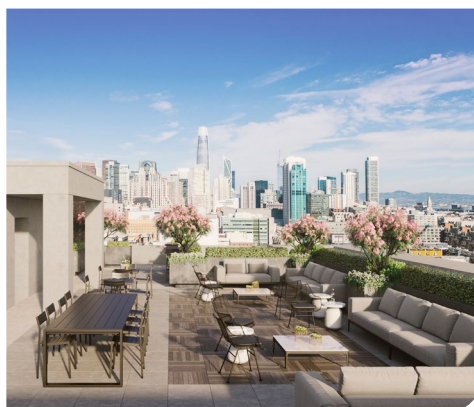
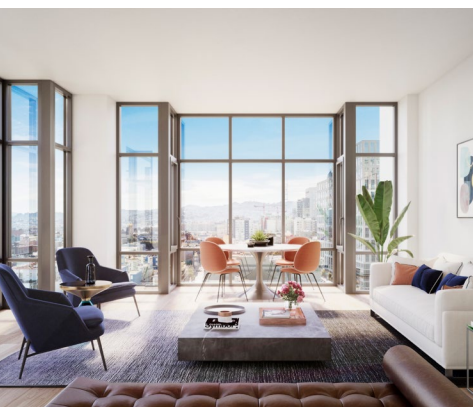
December 2019

CLOSINGS COMMENCED

February 2021

AVERAGE ABSORPTION

1 units/month



SALES STATUS Q3 2022

15
CLOSED

0
IN CONTRACT

24
AVAILABLE

Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	3	\$680,100	\$1,023
2-BR	2	\$1,252,750	\$1,101
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	5	\$957,300	\$1,062

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	-	-



ONE MISSION BAY

SOLD OUT

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 2022

350

CLOSED

0

IN CONTRACT

0

AVAILABLE

SOLD OUT

Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	2	\$731,000	\$1,398
1-BR	12	\$1,020,552	\$1,290
2-BR	16	\$1,483,219	\$1,256
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	30	\$1,248,004	\$1,272

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$1,019,000	\$1,182
2-BR	2	\$1,504,500	\$1,212
3-BR	1	\$2,750,000	\$1,505
4-BR+	0	-	-
Total/Avg.	5	\$1,559,400	\$1,292



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

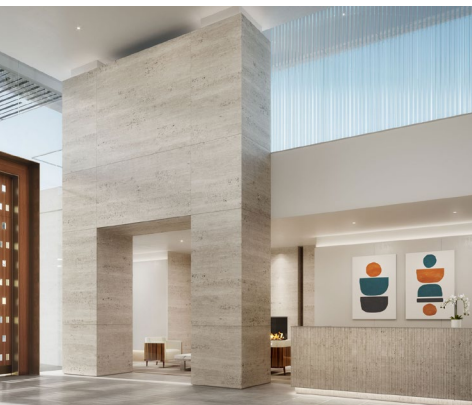
February 2020

CLOSINGS COMMENCED

August 2021

AVERAGE ABSORPTION

1 units/month



SALES STATUS Q3 2022

27

CLOSED

0

IN CONTRACT

93

AVAILABLE

Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	5	\$1,817,700	\$1,643
2-BR	8	\$5,333,125	\$2,802
3-BR	3	\$10,085,000	\$3,900
4-BR+	0	-	-
Total/Avg.	16	\$5,125,531	\$2,876

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,420,000	\$1,290
2-BR	3	\$2,628,333	\$1,540
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	4	\$2,326,250	\$1,495

New Construction Projects Overview

Q3 2022



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 Q3 2022

34

CLOSED

7

IN CONTRACT

201

AVAILABLE

Recent Sales (Q3 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	2	\$514,000	\$1,351
1-BR	4	\$749,500	\$1,200
2-BR	2	\$1,355,750	\$1,271
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	8	\$842,188	\$1,250



THE AVERY

ADDRESS

488 Folsom Street, San Francisco, CA

DEVELOPER

Related

RESIDENCES

118

AVERAGE HOA FEES

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

DATE ON MARKET

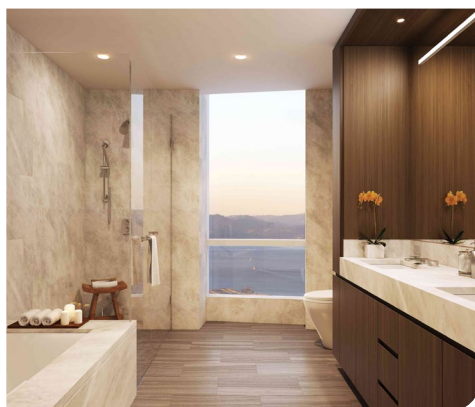
June 2018

CLOSINGS COMMENCED

August 2019

AVERAGE ABSORPTION

1 units/month



SALES STATUS Q3 2022

62

CLOSED

1

IN CONTRACT

55

AVAILABLE

Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	3	\$1,718,333	\$1,866
2-BR	13	\$2,641,538	\$1,780
3-BR	9	\$4,978,333	\$2,225
4-BR+	0	-	-
Total/Avg.	25	\$3,372,000	\$1,998

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$1,740,000	\$1,894
2-BR	3	\$3,111,667	\$1,855
3-BR	3	\$4,408,333	\$2,114
4-BR+	0	-	-
Total/Avg.	8	\$3,255,000	\$1,984



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 Q3 2022

32

CLOSED

8

IN CONTRACT

84

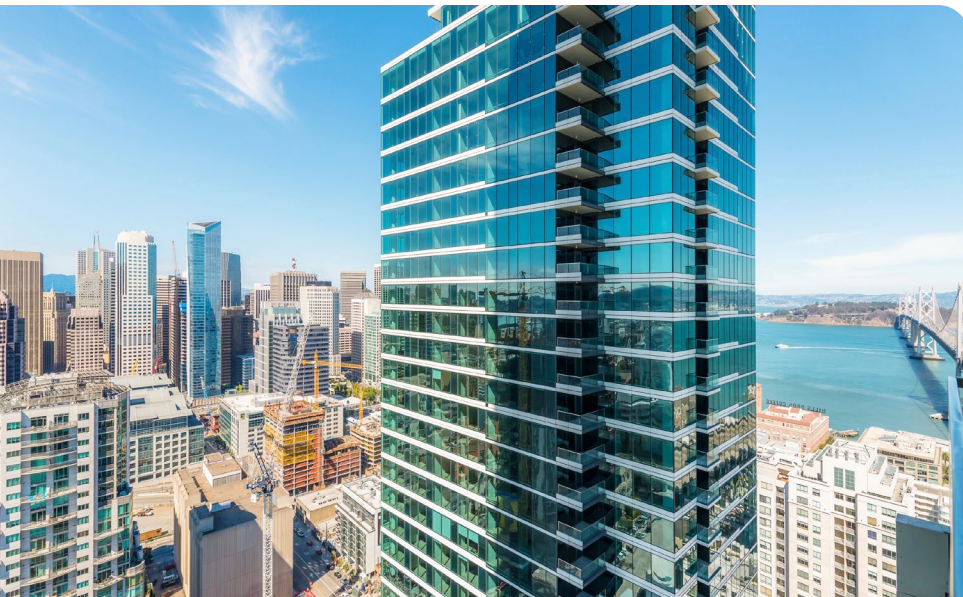
AVAILABLE

Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	1	\$855,000	\$1,402
1-BR	8	\$1,360,559	\$1,390
2-BR	6	\$1,923,083	\$1,436
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	15	\$1,551,865	\$1,413

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	1	\$738,000	\$1,206
1-BR	2	\$1,244,500	\$1,222
2-BR	2	\$1,658,000	\$1,199
3-BR	1	\$3,866,000	\$1,891
4-BR+	0	-	-
Total/Avg.	6	\$1,734,833	\$1,396



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

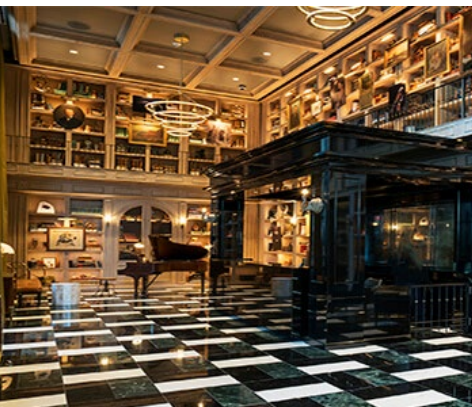
April 2016

CLOSINGS COMMENCED

August 2016

AVERAGE ABSORPTION

4 units/month



SALES STATUS Q3 2022

294
CLOSED

N/A
IN CONTRACT

2
AVAILABLE

Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	12	\$1,147,083	\$1,447
2-BR	20	\$2,088,350	\$1,542
3-BR	2	\$5,425,000	\$2,101
4-BR+	0	-	-
Total/Avg.	34	\$1,952,412	\$1,589

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$1,077,500	\$1,349
2-BR	3	\$2,114,667	\$1,648
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	5	\$1,699,800	\$1,560



THE OAK

ON HOLD

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

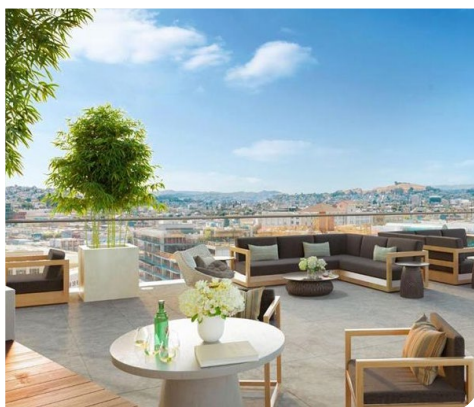
Project on Hold

CLOSINGS COMMENCED

TBD

AVERAGE ABSORPTION

1 units/month



SALES STATUS Q2 2022

N/A
CLOSED

N/A
IN CONTRACT

N/A
AVAILABLE



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 2022

25

CLOSED

1

IN CONTRACT

15

AVAILABLE

Recent Sales (Q3 2021 - Present)

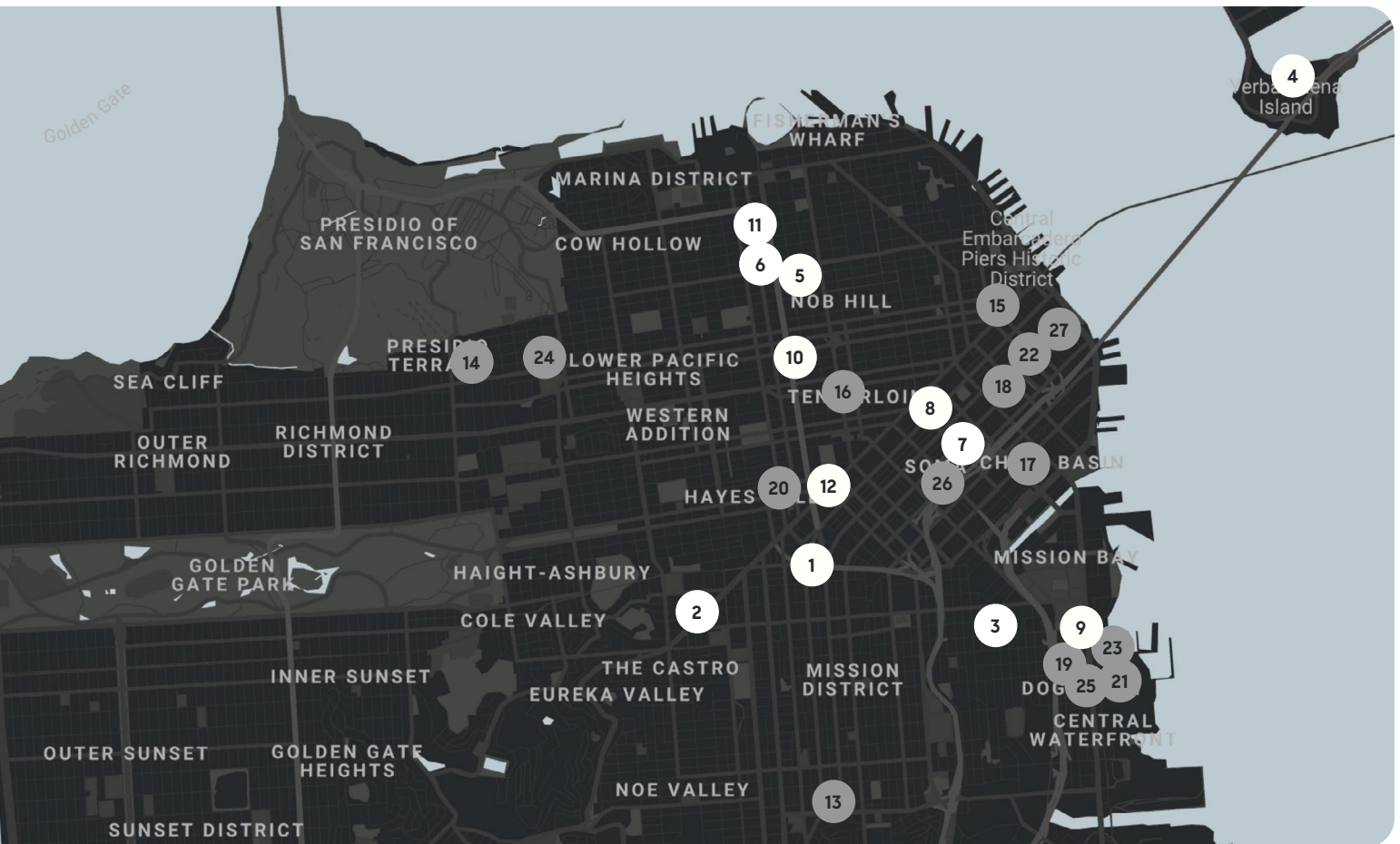
Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	7	\$2,759,143	\$1,912
3-BR	1	\$7,375,000	\$3,660
4-BR+	0	-	-
Total/Avg.	8	\$3,336,125	\$2,203

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$1,295,000	\$1,490
2-BR	2	\$2,747,000	\$1,832
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	4	\$2,021,000	\$1,707

New Development Pipeline Projects

Q3 2022



198 VALENCIA STREET



2238 - 2240 MARKET



88 AT THE PARK (88 ARKANSAS)



YERBA BUENA ISLAND



2030 POLK STREET



2525 VAN NESS



360 5TH STREET



5M (110 5TH STREET/925 MISSION)



603 TENNESSEE



1200 VAN NESS



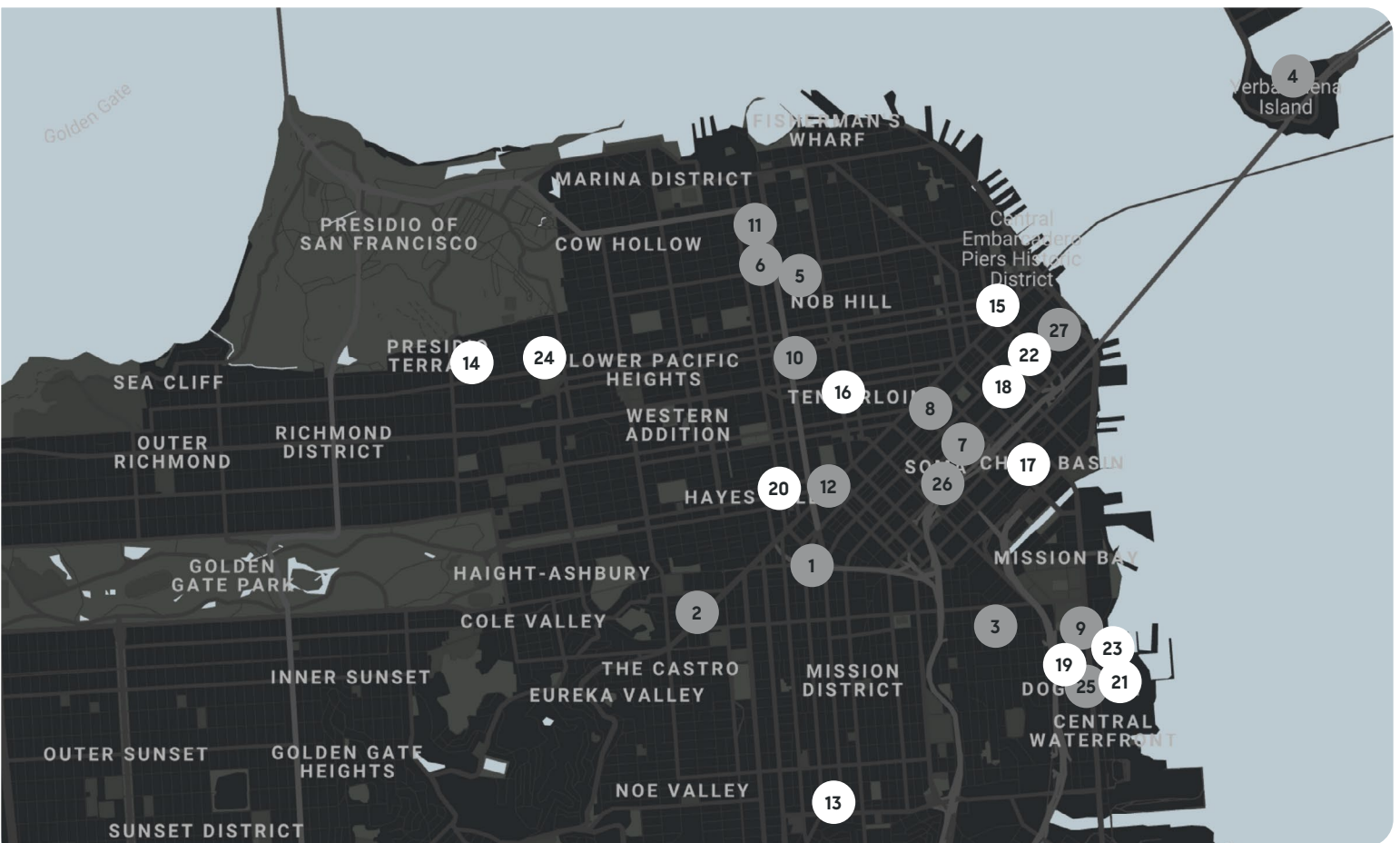
2601 VAN NESS



30 VAN NESS

New Development Pipeline Projects

Q3 2022



13

3314 CESAR CHAVEZ



14

3700 CALIFORNIA



15

430 MAIN



16

469 EDDY



17

655 4TH STREET



18

655 FOLSOM



19

888 TENNESSEE



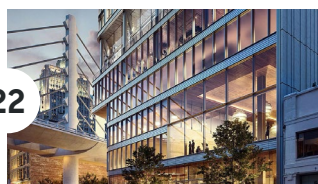
20

ONE OAK (1540 MARKET STREET)



21

PARCEL D - PIER 70



22

PARCEL F (542 - 550 HOWARD)



23

PARCEL K NORTH - PIER 70



24

3333 CALIFORNIA

New Development Pipeline Projects

Q3 2022



25

600 20TH STREET / 888 ILLINOIS



26

988 HARRISON STREET



27

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



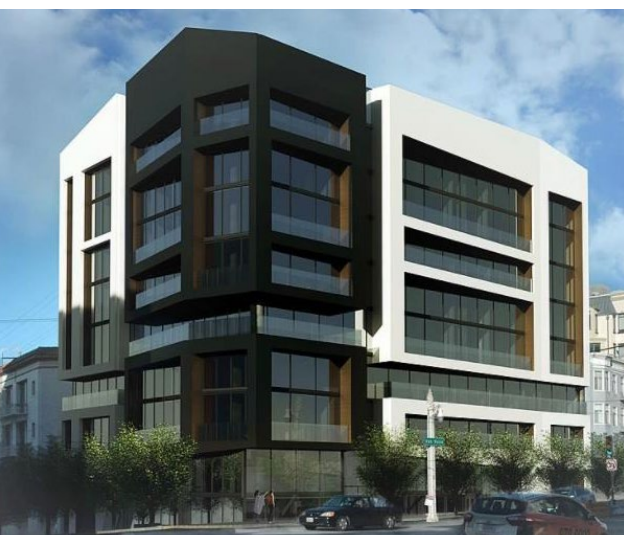
603 Tennessee 603 TENNESSEE STREET

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



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.



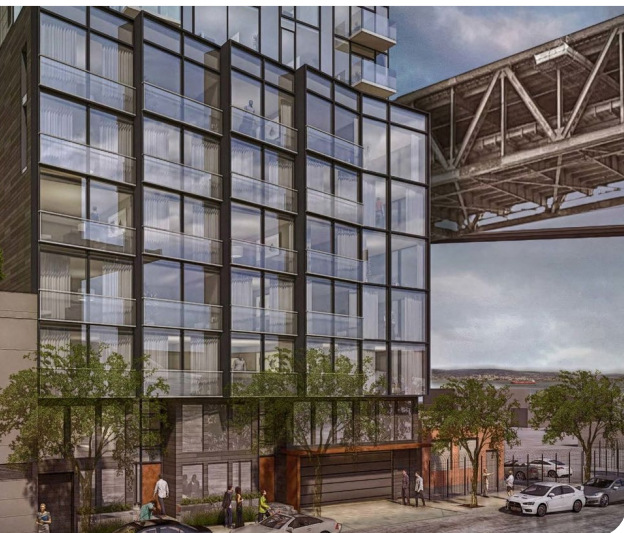
3314 Cesar Chavez 3314 CESAR CHAVEZ STREET

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.



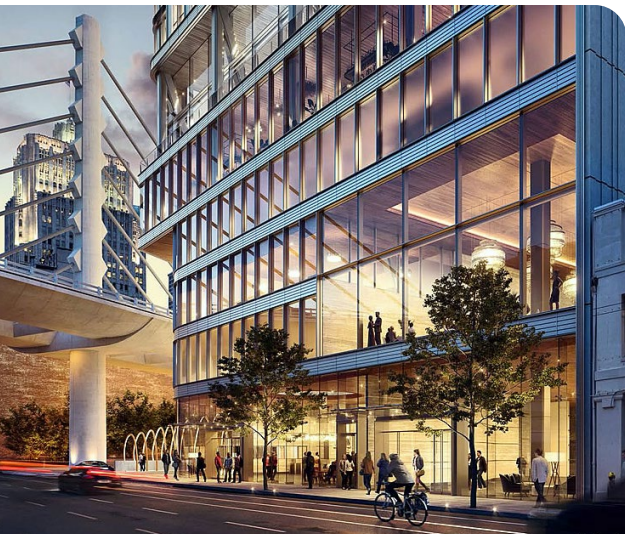
One Oak 1540 MARKET STREET

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



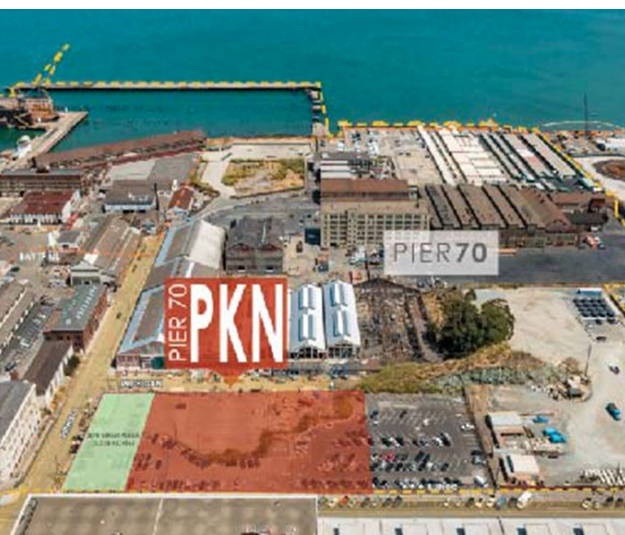
Parcel D - Pier 70 PIER 70

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 Q3 2022

Contact

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