

An aerial night photograph of San Francisco, California. The Transamerica Pyramid is the central focus, illuminated with warm lights. The Golden Gate Bridge is visible in the upper right, stretching across the water. The city lights create a vibrant, glowing effect against the dark night sky.

# New Development Market Watch

SAN FRANCISCO Q4 2021

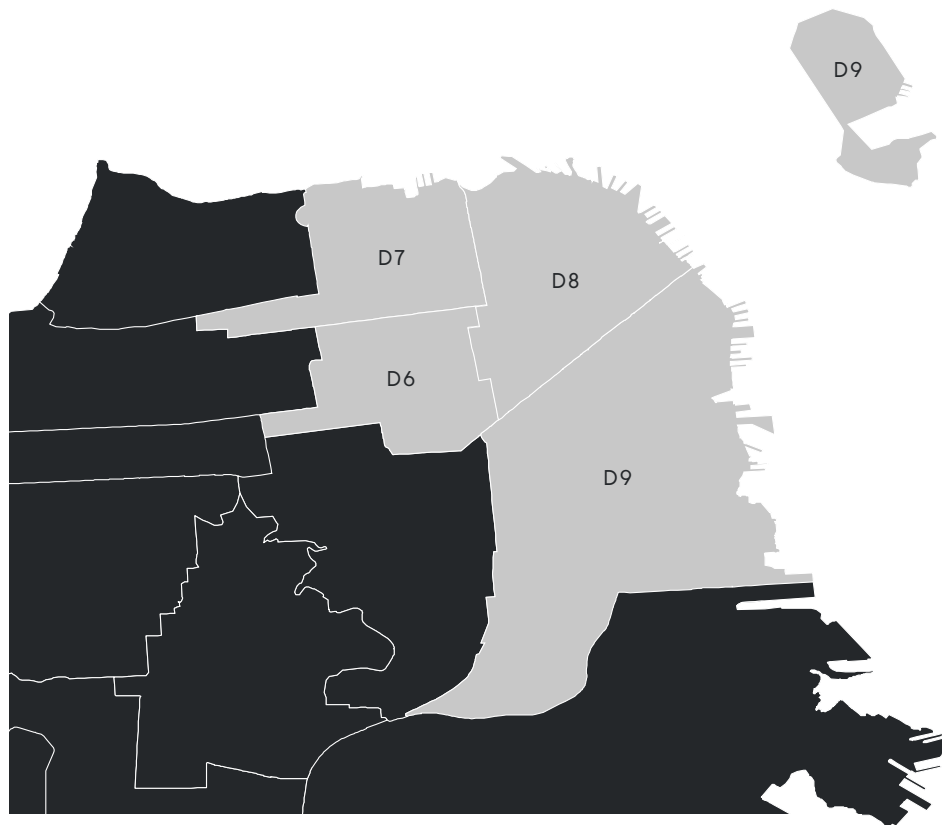
COMPASS  
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MARKETING  
GROUP





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

▲ **11.0%**

Sales volume YoY increased in Q4 2021 as momentum stabilized in the core neighborhoods. More than 674 deals were recorded, an improvement over the same period last year.

▲ **16.0%**

Downtown San Francisco witnessed YoY improvement in the average PPSF to \$1,267, up in Q4 2021, resulting from healthy buyer demand.

▲ **135.3%**

The luxury condo market priced \$3M+ saw a significant jump in recorded sales up an impressive 135% YoY due to demand in newer luxury product around the city.

Even with the pandemic variant presenting new challenges nationally, the Bay Area housing boom charted forward 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. As a result, year-end fundamentals peaked despite historical winter seasonality lulls. The San Francisco condo buyer market witnessed strong activity in Q4 2021 with more than 674 transactions recorded across Districts 6 through 9. In fact, 2021 demand ended on a high note with the total number of recorded sales for the year up more than 65% compared to last year; this is also up more than 7% from previous highs reported in 2018. District 9, which encompasses the lion's share of new development activity in San Francisco, accounted for more than 42% of the overall transactions this quarter. Strong sales volume in this district has continued to bode well for new projects hitting the market.

Price increases this quarter followed the steady sales volume with the average sale price up more than 21.9% year-over-year to \$1,604,254. District 7 saw the greatest overall increase this quarter with an average sale price and average price per square foot up more than 34.3% and 22.5%, respectively year-over-year. Located in District 7, Union House reported the close of one of their penthouse units for more than \$3,660 per square foot, the highest PPSF recorded in the district this quarter for a newly developed unit. Serif located in District 8 reported most of the new development sale transactions this quarter showing a closing average of \$1,458 PPSF.

For the second consecutive quarter, the ultra-luxury condo market with price points above \$3M saw a healthy jump in both number of sales and price per square foot year-over-year by 135.3% and 21.2%, 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. 181 Fremont reported 3 closings this quarter with an average sale price of \$3.75M and \$2,157 PPSF for its two-bedroom units.

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](mailto:research.westcoast@compass.com).

## SAN FRANCISCO DISTRICTS 6-9 SUMMARY

▲ **11.0%**

Sales volume in Q4 2021 for Districts 6-9 increased 11.0% YoY, with a total of 674 recorded closings.

▲ **21.9%**

The combined core Districts 6-9 recorded an increase in Q4 2021 with an average sales price of \$1,604,254, a 21.9% increased YoY.

▲ **16.1%**

The average sales price per square foot in Districts 6-9 was \$1,267, up 16.1% YoY.

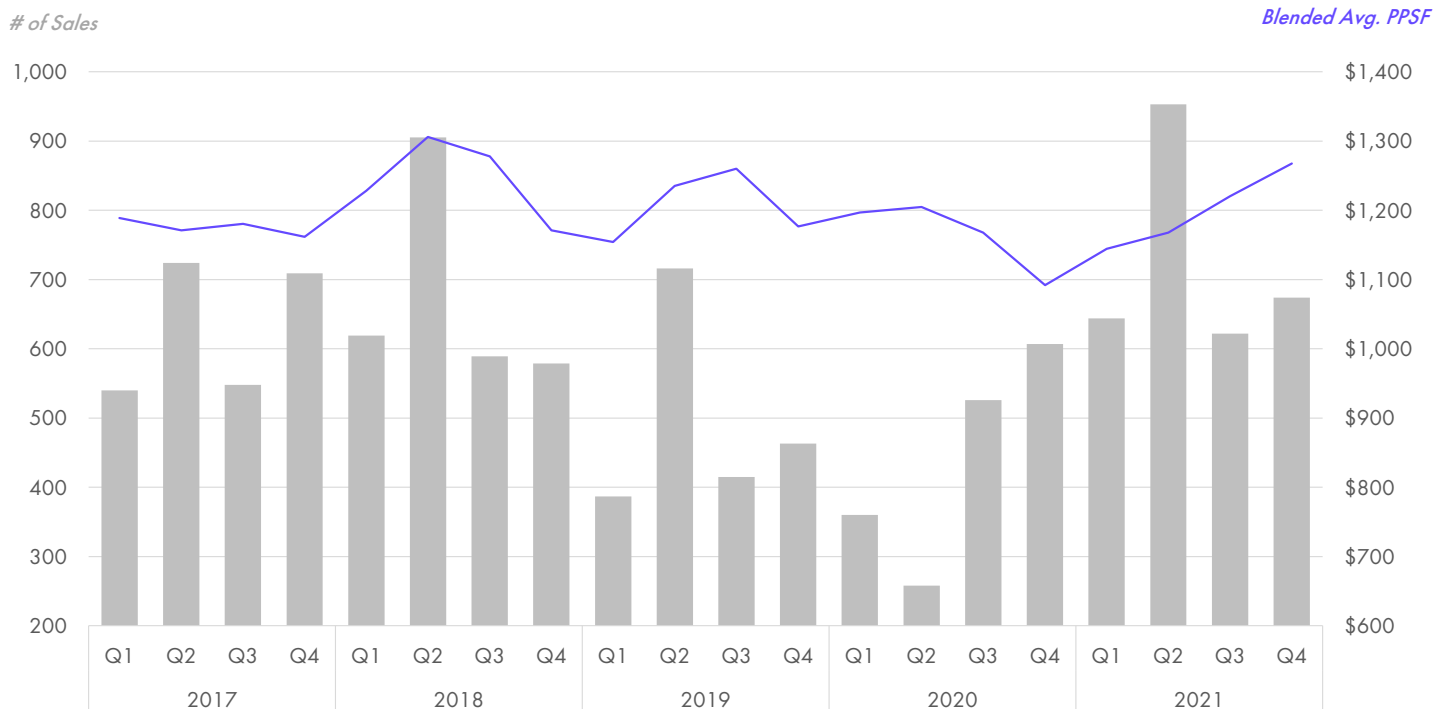
▲ **135.3%**

The \$3M+ price segment had a strong jump in sales volume increasing 135.3% YoY and 33.3% QoQ.

## MARKET PERFORMANCE

CONDOS	Q4 21	YoY%	Q4 20	QoQ%	Q3 21
Avg. Sales Price	\$1,604,254	21.9%	\$1,316,238	19.6%	\$1,341,576
Blended Avg. PPSF	\$1,267	16.1%	\$1,092	3.9%	\$1,220
Number of Sales	674	11.0%	607	8.4%	622
DOM	41	N/A	55	N/A	47

ANNUAL PERFORMANCE	2021	YoY%	2020	YoY%	2019
Avg. Sales Price	\$1,417,760	2.9%	\$1,377,767	-1.8%	\$1,403,721
Blended Avg. PPSF	\$1,198	3.9%	\$1,152	-4.7%	\$1,209
Number of Sales	2,893	65.2%	1,751	-11.6%	1,981
DOM	48	N/A	47	N/A	37



## SAN FRANCISCO DISTRICTS 6-9 SUMMARY

### SALES BY PRICE POINT

<b>UNDER \$1M</b>	<b>Q4 21</b>	<b>YoY%</b>	<b>Q4 20</b>	<b>QoQ%</b>	<b>Q3 21</b>
Avg. Sales Price	\$779,388	-2.2%	\$796,861	0.3%	\$777,287
Avg. PPSF	\$1,022	3.6%	\$986	0.5%	\$1,017
Number of Sales	206	-17.9%	251	-20.8%	260
DOM	45	N/A	55	N/A	51
<b>\$1M-\$2M</b>	<b>Q4 21</b>	<b>YoY%</b>	<b>Q4 20</b>	<b>QoQ%</b>	<b>Q3 21</b>
Avg. Sales Price	\$1,396,958	1.4%	\$1,377,078	3.2%	\$1,353,942
Avg. PPSF	\$1,126	8.8%	\$1,035	-0.9%	\$1,136
Number of Sales	339	13.8%	298	16.5%	291
DOM	34	N/A	46	N/A	37
<b>\$2M-\$3M</b>	<b>Q4 21</b>	<b>YoY%</b>	<b>Q4 20</b>	<b>QoQ%</b>	<b>Q3 21</b>
Avg. Sales Price	\$2,404,423	0.3%	\$2,398,371	0.1%	\$2,402,770
Avg. PPSF	\$1,302	6.3%	\$1,225	-9.9%	\$1,444
Number of Sales	89	117.1%	41	117.1%	41
DOM	30	N/A	54	N/A	43
<b>\$3M+</b>	<b>Q4 21</b>	<b>YoY%</b>	<b>Q4 20</b>	<b>QoQ%</b>	<b>Q3 21</b>
Avg. Sales Price	\$5,828,775	9.8%	\$5,308,353	25.0%	\$4,661,833
Avg. PPSF	\$2,094	21.2%	\$1,728	5.3%	\$1,990
Number of Sales	40	135.3%	17	33.3%	30
DOM	91	N/A	68	N/A	31

## SAN FRANCISCO DISTRICT 6

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

▼ **16.7%**

Sales volume in District 6 took a turn decreasing -16.7% YoY, with 100 recorded closings during Q4 2021.

▲ **7.1%**

Despite buyer demand lulls, the average PPSF for District 6 was up 7.1% YoY to \$1,097.

▲ **20.0%**

The average sales price for condos in District 6 increased to \$1.4M, up 20% YoY.

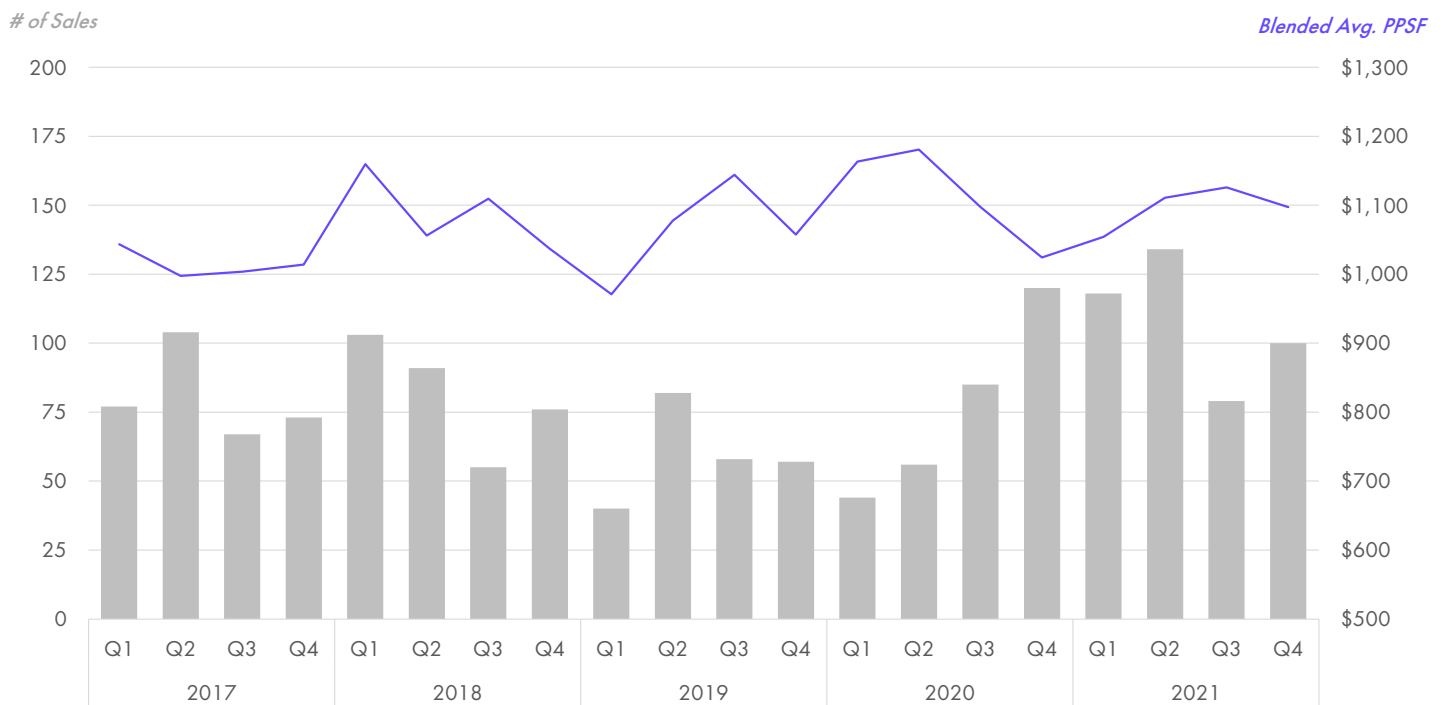
▲ **9.8%**

Activity in the \$1M-2M range for District 6 saw a healthy uptick in the average PPSF to \$1,119, up 9.8% YoY.

## MARKET PERFORMANCE

CONDOS	Q4 21	YoY%	Q4 20	QoQ%	Q3 21
Avg. Sales Price	\$1,408,330	20.0%	\$1,173,568	5.0%	\$1,341,218
Blended Avg. PPSF	\$1,097	7.1%	\$1,024	-2.6%	\$1,126
Number of Sales	100	-16.7%	120	26.6%	79
DOM	28	N/A	40	N/A	33

ANNUAL PERFORMANCE	2021	YoY%	2020	YoY%	2019
Avg. Sales Price	\$1,320,003	6.9%	\$1,234,443	-2.4%	\$1,264,780
Blended Avg. PPSF	\$1,096	0.4%	\$1,091	1.9%	\$1,070
Number of Sales	431	41.3%	305	28.7%	237
DOM	35	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

<b>UNDER \$1M</b>	<b>Q4 21</b>	<b>YoY%</b>	<b>Q4 20</b>	<b>QoQ%</b>	<b>Q3 21</b>
Avg. Sales Price	\$795,772	0.5%	\$792,115	-2.3%	\$814,569
Avg. PPSF	\$920	-11.3%	\$1,038	-4.7%	\$966
Number of Sales	18	-60.9%	46	-10.0%	20
DOM	37	N/A	45	N/A	51
<b>\$1M-\$2M</b>	<b>Q4 21</b>	<b>YoY%</b>	<b>Q4 20</b>	<b>QoQ%</b>	<b>Q3 21</b>
Avg. Sales Price	\$1,366,351	0.4%	\$1,361,154	2.5%	\$1,332,596
Avg. PPSF	\$1,119	9.8%	\$1,019	1.2%	\$1,106
Number of Sales	65	-7.1%	70	30.0%	50
DOM	25	N/A	31	N/A	26
<b>\$2M-\$3M</b>	<b>Q4 21</b>	<b>YoY%</b>	<b>Q4 20</b>	<b>QoQ%</b>	<b>Q3 21</b>
Avg. Sales Price	\$2,217,426	-2.6%	\$2,277,500	-0.2%	\$2,221,667
Avg. PPSF	\$1,127	10.0%	\$1,025	-15.2%	\$1,329
Number of Sales	17	325.0%	4	183.3%	6
DOM	28	N/A	43	N/A	9
<b>\$3M+</b>	<b>Q4 21</b>	<b>YoY%</b>	<b>Q4 20</b>	<b>QoQ%</b>	<b>Q3 21</b>
Avg. Sales Price	-	-	-	-	\$3,235,000
Avg. PPSF	-	-	-	-	\$1,400
Number of Sales	0	-	0	-100.0%	3
DOM	-	N/A	-	N/A	25

## SAN FRANCISCO DISTRICT 7

MARINA, COW HOLLOW, PACIFIC HEIGHTS, AND PRESIDIO HEIGHTS

▲ **22.5%**

The average PPSF for District 7 increased YoY to \$1,420 with new product coming online and strong buyer demand for this district.

▲ **34.3%**

The average sale price for District 7 increased YoY to \$2,340,732.

▲ **8.1%**

District 7 saw more recorded deals YoY, up 8.1% from the previous year.

▲ **8.5%**

The \$1M-\$2M price segment showed an increase in PPSF, up 8.5% YoY to \$1,199.

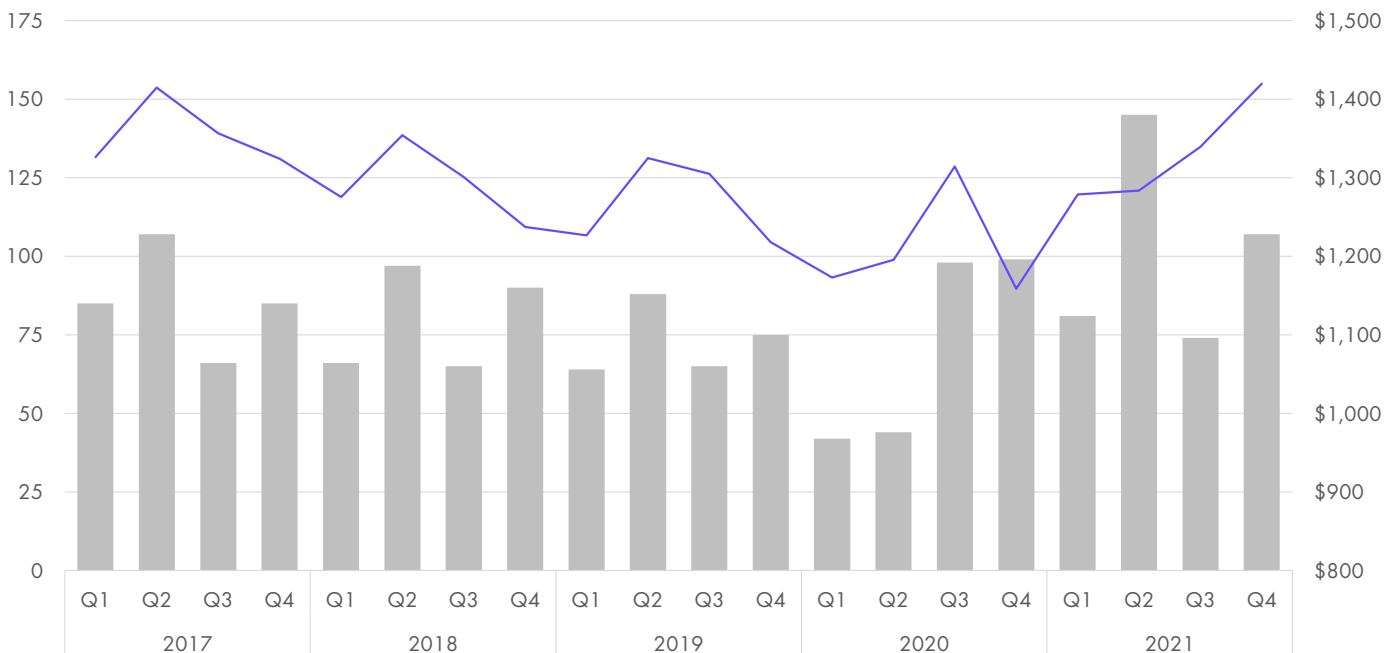
## MARKET PERFORMANCE

CONDOS	Q4 21	YoY%	Q4 20	QoQ%	Q3 21
Avg. Sales Price	\$2,340,732	34.3%	\$1,743,324	32.8%	\$1,763,050
Blended Avg. PPSF	\$1,420	22.5%	\$1,159	6.0%	\$1,339
Number of Sales	107	8.1%	99	44.6%	74
DOM	39	N/A	50	N/A	32

ANNUAL PERFORMANCE	2021	YoY%	2020	YoY%	2019
Avg. Sales Price	\$1,979,721	9.9%	\$1,800,850	-3.1%	\$1,858,568
Blended Avg. PPSF	\$1,331	9.3%	\$1,218	-4.1%	\$1,270
Number of Sales	407	43.8%	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

<b>UNDER \$1M</b>	<b>Q4 21</b>	<b>YoY%</b>	<b>Q4 20</b>	<b>QoQ%</b>	<b>Q3 21</b>
Avg. Sales Price	\$822,422	-0.2%	\$823,680	1.6%	\$809,321
Avg. PPSF	\$1,162	2.5%	\$1,133	3.7%	\$1,120
Number of Sales	16	6.7%	15	14.3%	14
DOM	25	N/A	34	N/A	27
<b>\$1M-\$2M</b>	<b>Q4 21</b>	<b>YoY%</b>	<b>Q4 20</b>	<b>QoQ%</b>	<b>Q3 21</b>
Avg. Sales Price	\$1,496,730	3.4%	\$1,447,741	7.1%	\$1,397,949
Avg. PPSF	\$1,199	8.5%	\$1,105	-2.4%	\$1,228
Number of Sales	44	-21.4%	56	22.2%	36
DOM	30	N/A	43	N/A	43
<b>\$2M-\$3M</b>	<b>Q4 21</b>	<b>YoY%</b>	<b>Q4 20</b>	<b>QoQ%</b>	<b>Q3 21</b>
Avg. Sales Price	\$2,520,249	5.9%	\$2,380,766	1.7%	\$2,479,267
Avg. PPSF	\$1,301	8.9%	\$1,195	-7.4%	\$1,405
Number of Sales	26	30.0%	20	73.3%	15
DOM	23	N/A	62	N/A	16
<b>\$3M+</b>	<b>Q4 21</b>	<b>YoY%</b>	<b>Q4 20</b>	<b>QoQ%</b>	<b>Q3 21</b>
Avg. Sales Price	\$5,043,667	27.9%	\$3,943,125	43.6%	\$3,513,333
Avg. PPSF	\$1,772	39.4%	\$1,271	11.2%	\$1,593
Number of Sales	21	162.5%	8	133.3%	9
DOM	78	N/A	51	N/A	16

## 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

▲ **61.1%**

District 8 recorded 182 closings an increase of 61.1% YoY, suggesting buyer confidence in the market.

▲ **25.4%**

The average sale price for District 8 increased to \$1,519,564, up 25.4% YoY.

▲ **15.7%**

Condos in District 8 saw an uptick in PPSF to \$1,291, up 15.7%.

▲ **80.0%**

The \$1M-\$2M segment for District 8 recorded an increase in number of recorded sales to 72, up 80.0% YoY.

## MARKET PERFORMANCE

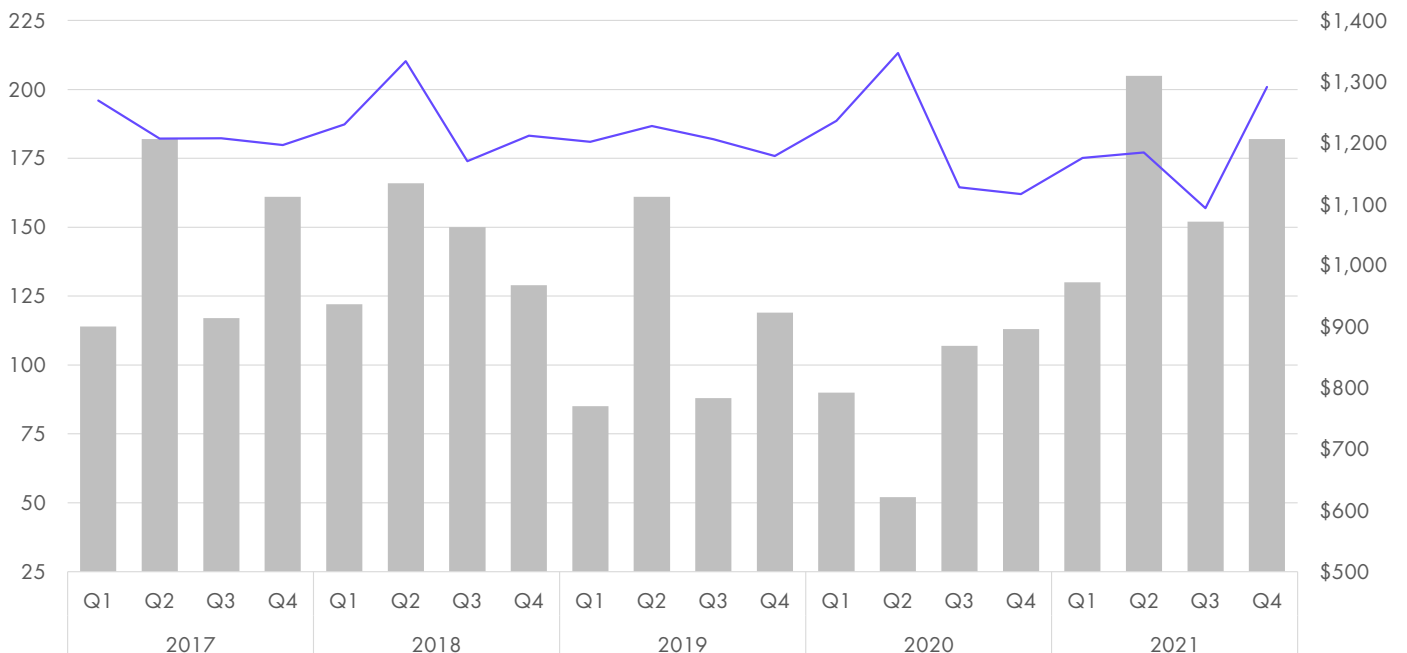
CONDOS	Q4 21	YoY%	Q4 20	QoQ%	Q3 21
Avg. Sales Price	\$1,519,564	25.4%	\$1,211,758	42.0%	\$1,070,152
Blended Avg. PPSF	\$1,291	15.7%	\$1,117	18.1%	\$1,094
Number of Sales	182	61.1%	113	19.7%	152
DOM	48	N/A	66	N/A	51

ANNUAL PERFORMANCE	2021	YoY%	2020	YoY%	2019
Avg. Sales Price	\$1,307,261	-2.3%	\$1,337,825	3.7%	\$1,290,523
Blended Avg. PPSF	\$1,196	0.6%	\$1,188	-1.3%	\$1,204
Number of Sales	669	84.8%	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

<b>UNDER \$1M</b>	<b>Q4 21</b>	<b>YoY%</b>	<b>Q4 20</b>	<b>QoQ%</b>	<b>Q3 21</b>
Avg. Sales Price	\$727,136	-2.5%	\$746,093	0.2%	\$725,735
Avg. PPSF	\$1,033	4.1%	\$993	3.5%	\$998
Number of Sales	78	25.8%	62	-11.4%	88
DOM	50	N/A	63	N/A	51
<b>\$1M-\$2M</b>	<b>Q4 21</b>	<b>YoY%</b>	<b>Q4 20</b>	<b>QoQ%</b>	<b>Q3 21</b>
Avg. Sales Price	\$1,429,542	5.8%	\$1,351,025	8.7%	\$1,314,694
Avg. PPSF	\$1,162	13.9%	\$1,021	5.9%	\$1,098
Number of Sales	72	80.0%	40	33.3%	54
DOM	32	N/A	63	N/A	38
<b>\$2M-\$3M</b>	<b>Q4 21</b>	<b>YoY%</b>	<b>Q4 20</b>	<b>QoQ%</b>	<b>Q3 21</b>
Avg. Sales Price	\$2,372,478	-3.2%	\$2,450,361	1.2%	\$2,345,000
Avg. PPSF	\$1,276	-3.1%	\$1,317	-15.0%	\$1,501
Number of Sales	23	187.5%	8	283.3%	6
DOM	49	N/A	33	N/A	93
<b>\$3M+</b>	<b>Q4 21</b>	<b>YoY%</b>	<b>Q4 20</b>	<b>QoQ%</b>	<b>Q3 21</b>
Avg. Sales Price	\$6,927,778	22.1%	\$5,675,667	101.8%	\$3,433,750
Avg. PPSF	\$2,231	7.4%	\$2,077	73.3%	\$1,287
Number of Sales	9	200.0%	3	125.0%	4
DOM	116	N/A	80	N/A	13

## SAN FRANCISCO DISTRICT 9

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

▲ **3.6%**

Sales volume increased 3.6% YoY, recording 285 closings over the same period last year, indicating a healthy signal in the densest condominium district.

▲ **14.5%**

The average PPSF increased 14.5% YoY in District 9, to \$1,237.

▲ **14.4%**

The average sales price increased 14.4% YoY in District 9, to \$1,450,580.

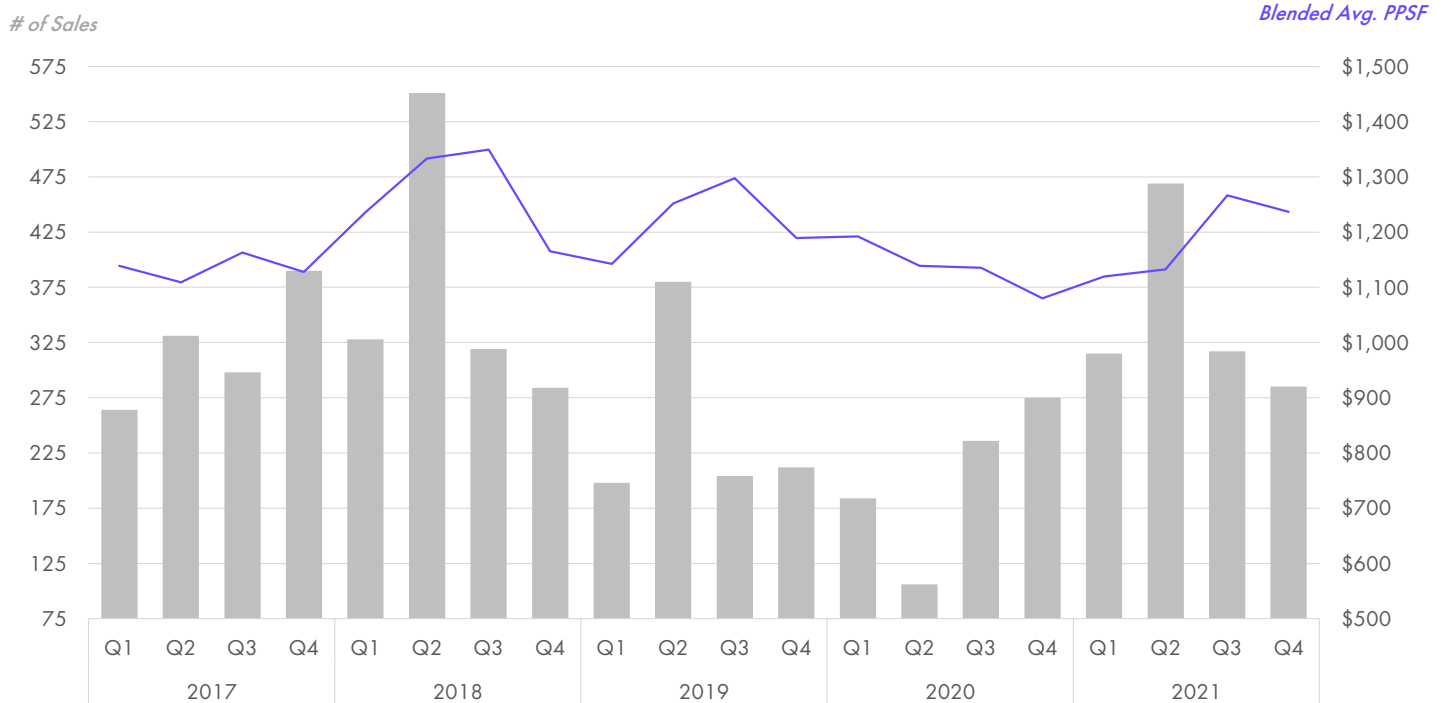
▲ **26.7%**

The \$3M+ ultra-luxury segment for District 9 recorded an increase in PPSF up 26.7% YoY to \$2,750.

## MARKET PERFORMANCE

CONDOS	Q4 21	YoY%	Q4 20	QoQ%	Q3 21
Avg. Sales Price	\$1,450,580	14.4%	\$1,267,675	5.6%	\$1,373,424
Blended Avg. PPSF	\$1,237	14.5%	\$1,080	-2.3%	\$1,266
Number of Sales	285	3.6%	275	-10.1%	317
DOM	44	N/A	60	N/A	52

ANNUAL PERFORMANCE	2021	YoY%	2020	YoY%	2019
Avg. Sales Price	\$1,336,476	2.7%	\$1,300,913	-4.0%	\$1,355,288
Blended Avg. PPSF	\$1,181	4.5%	\$1,130	-7.7%	\$1,224
Number of Sales	1,386	73.0%	801	-19.4%	994
DOM	51	N/A	49	N/A	36



## 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

<b>UNDER \$1M</b>	<b>Q4 21</b>	<b>YoY%</b>	<b>Q4 20</b>	<b>QoQ%</b>	<b>Q3 21</b>
Avg. Sales Price	\$812,283	-0.9%	\$820,014	1.3%	\$801,508
Avg. PPSF	\$1,014	6.4%	\$953	-1.2%	\$1,026
Number of Sales	94	-26.6%	128	-31.9%	138
DOM	46	N/A	57	N/A	54
<b>\$1M-\$2M</b>	<b>Q4 21</b>	<b>YoY%</b>	<b>Q4 20</b>	<b>QoQ%</b>	<b>Q3 21</b>
Avg. Sales Price	\$1,366,917	0.3%	\$1,363,438	0.2%	\$1,364,555
Avg. PPSF	\$1,093	7.3%	\$1,019	-4.1%	\$1,140
Number of Sales	158	19.7%	132	4.6%	151
DOM	39	N/A	49	N/A	39
<b>\$2M-\$3M</b>	<b>Q4 21</b>	<b>YoY%</b>	<b>Q4 20</b>	<b>QoQ%</b>	<b>Q3 21</b>
Avg. Sales Price	\$2,443,647	-0.1%	\$2,445,000	0.8%	\$2,423,183
Avg. PPSF	\$1,487	12.7%	\$1,320	-2.1%	\$1,519
Number of Sales	23	155.6%	9	64.3%	14
DOM	18	N/A	60	N/A	64
<b>\$3M+</b>	<b>Q4 21</b>	<b>YoY%</b>	<b>Q4 20</b>	<b>QoQ%</b>	<b>Q3 21</b>
Avg. Sales Price	\$6,488,400	-6.6%	\$6,945,000	7.1%	\$6,056,786
Avg. PPSF	\$2,750	26.7%	\$2,170	6.5%	\$2,582
Number of Sales	10	66.7%	6	-28.6%	14
DOM	94	N/A	84	N/A	51



## 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 Q4 2021

**42**

CLOSED

**N/A**

IN CONTRACT

**N/A**

AVAILABLE

### Recent Sales (Q1 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	5	\$3,936,800	\$2,231
3-BR	2	\$7,100,000	\$3,025
4-BR+	0	-	-
Total/Avg.	7	\$4,840,571	\$2,507

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,700,000	\$2,179
2-BR	4	\$4,662,500	\$2,604
3-BR	2	\$5,737,500	\$2,710
4-BR+	0	-	-
Total/Avg.	7	\$4,546,429	\$2,614



## 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 Q4 2021

**50**

CLOSED

**0**

IN CONTRACT

**64**

AVAILABLE

### Recent Sales (Q1 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	3	\$714,333	\$1,394
1-BR	9	\$980,781	\$1,352
2-BR	7	\$1,403,929	\$1,401
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	19	\$1,081,342	\$1,380

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	1	\$775,000	\$1,535
1-BR	2	\$992,500	\$1,377
2-BR	1	\$1,650,000	\$1,557
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	4	\$1,102,500	\$1,467



## 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 Q4 2021

**50**  
CLOSED

**1**  
IN CONTRACT

**49**  
AVAILABLE

### Recent Sales (Q1 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	9	\$623,556	\$1,367
1-BR	6	\$1,040,500	\$1,227
2-BR	13	\$1,255,303	\$1,200
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	28	\$1,006,212	\$1,236

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	2	\$614,000	\$1,421
1-BR	1	\$1,169,000	\$1,321
2-BR	2	\$1,718,500	\$1,248
3-BR	1	\$1,782,000	\$1,238
4-BR+	0	-	-
Total/Avg.	6	\$1,269,333	\$1,282





## 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 Q4 2021

**3**

CLOSED

**0**

IN CONTRACT

**41**

AVAILABLE

### Recent Sales (Q1 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,400,000	\$2,105
2-BR	1	\$2,320,000	\$1,607
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	2	\$1,860,000	\$1,764

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,295,000	\$2,002
2-BR	1	\$2,395,000	\$1,675
3-BR	1	\$6,995,000	\$3,833
4-BR+	0	-	-
Total/Avg.	3	\$3,561,667	\$2,738



## 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

2 units/month



## SALES STATUS Q4 2021

**31**  
CLOSED

**1**  
IN CONTRACT

**23**  
AVAILABLE

### Recent Sales (Q1 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	8	\$716,000	\$1,182
2-BR	12	\$975,281	\$1,112
3-BR	3	\$1,898,667	\$1,420
4-BR+	0	-	-
Total/Avg.	23	\$1,005,538	\$1,194

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$828,000	\$1,458
2-BR	2	\$1,073,444	\$1,291
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	3	\$991,629	\$1,333



## 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 Q4 2021

**10**  
CLOSED

**0**  
IN CONTRACT

**136**  
AVAILABLE

### Recent Sales (Q1 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 Q4 2021

**114**  
CLOSED

**4**  
IN CONTRACT

**21**  
AVAILABLE

### Recent Sales (Q1 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	1	\$599,000	\$1,118
1-BR	17	\$764,002	\$1,100
2-BR	22	\$1,215,182	\$1,225
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	40	\$1,008,026	\$1,180

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$971,000	\$1,349
2-BR	1	\$1,610,000	\$1,589
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	2	\$1,290,500	\$1,489



## MAISON A SOMA

### ADDRESS

230 7th Street, San Francisco, CA

### DEVELOPER

JS Sullivan Development

### RESIDENCES

40 (35 Market Rate)

### AVERAGE HOA FEES

\$407 - \$495/month

### DATE ON MARKET

October 2021

### CLOSINGS COMMENCED

TBD

### AVERAGE ABSORPTION

1 units/month



## SALES STATUS Q4 2021

**N/A**  
CLOSED

**4**  
IN CONTRACT

**36**  
AVAILABLE

### Recent Sales (Q1 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	4	\$728,250	\$1,037
2-BR	1	\$1,088,000	\$1,038
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	5	\$800,200	\$1,037



## 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 Q4 2021

**281**  
CLOSED

**10**  
IN CONTRACT

**101**  
AVAILABLE

### Recent Sales (Q1 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	1	\$999,000	\$1,450
1-BR	5	\$1,067,537	\$1,435
2-BR	24	\$1,901,917	\$1,465
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	30	\$1,732,756	\$1,462

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	6	\$1,814,167	\$1,457
3-BR	3	\$3,795,000	\$1,954
4-BR+	0	-	-
Total/Avg.	9	\$2,474,444	\$1,675



## 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 Q4 2021

**23**

CLOSED

**0**

IN CONTRACT

**1**

AVAILABLE

### Recent Sales (Q1 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	3	\$741,667	\$1,370
2-BR	15	\$1,253,267	\$1,155
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	18	\$1,168,000	\$1,174

### 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 Q4 2021

**11**

CLOSED

**0**

IN CONTRACT

**11**

AVAILABLE

### Recent Sales (Q1 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	3	\$1,097,667	\$1,471
2-BR	7	\$1,649,857	\$1,433
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	10	\$1,484,200	\$1,441

### 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 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 Q4 2021

**14**  
CLOSED

**0**  
IN CONTRACT

**25**  
AVAILABLE

### Recent Sales (Q1 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	9	\$669,000	\$1,084
2-BR	5	\$1,154,500	\$1,105
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	14	\$842,393	\$1,094

### 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

### 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 Q4 2021

**348**

CLOSED

**0**

IN CONTRACT

**2**

AVAILABLE

### Recent Sales (Q1 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	2	\$731,000	\$1,398
1-BR	8	\$1,052,505	\$1,253
2-BR	9	\$1,427,265	\$1,221
3-BR	1	\$1,980,000	\$1,208
4-BR+	0	-	-
Total/Avg.	20	\$1,235,371	\$1,240

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	1	\$1,499,000	\$1,231
3-BR	1	\$3,000,000	\$1,642
4-BR+	0	-	-
Total/Avg.	2	\$2,249,500	\$1,478



## 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 Q4 2021

**20**

CLOSED

**0**

IN CONTRACT

**100**

AVAILABLE

### Recent Sales (Q1 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	4	\$1,803,375	\$1,621
2-BR	5	\$6,370,000	\$3,267
3-BR	3	\$10,085,000	\$3,900
4-BR+	0	-	-
Total/Avg.	12	\$5,776,542	\$3,157

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,495,000	\$1,358
2-BR	3	\$3,341,667	\$2,200
3-BR	1	\$7,195,000	\$2,812
4-BR+	0	-	-
Total/Avg.	5	\$3,743,000	\$2,278



## 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

6 units/month



## SALES STATUS Q4 2021

**24**

CLOSED

**16**

IN CONTRACT

**202**

AVAILABLE

### Recent Sales (Q1 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	12	\$598,320	\$1,436
1-BR	7	\$895,114	\$1,452
2-BR	4	\$1,642,750	\$1,509
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	23	\$870,288	\$1,464

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	3	\$596,000	\$1,433
1-BR	1	\$835,000	\$1,360
2-BR	1	\$1,205,000	\$1,372
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	5	\$765,600	\$1,397



## 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 Q4 2021

**51**  
CLOSED

**1**  
IN CONTRACT

**66**  
AVAILABLE

### Recent Sales (Q1 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$1,690,000	\$1,835
2-BR	12	\$2,664,583	\$1,745
3-BR	10	\$5,401,000	\$2,177
4-BR+	0	-	-
Total/Avg.	24	\$3,723,542	\$1,987

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	3	\$1,740,000	\$1,848
2-BR	1	\$2,625,000	\$1,695
3-BR	3	\$4,475,000	\$2,241
4-BR+	0	-	-
Total/Avg.	7	\$3,038,571	\$2,052



## 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 Q4 2021

**N/A**  
CLOSED

**13**  
IN CONTRACT

**111**  
AVAILABLE

### Recent Sales (Q1 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	1	\$1,156,000	\$1,287
2-BR	1	\$2,098,000	\$1,602
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	2	\$1,627,000	\$1,474



## THE FLATS YERBA BUENA ISLAND

### ADDRESS

Meadow Drive, San Francisco, CA

### DEVELOPER

Wilson Meany  
Stockbridge Real Estate Funds

### RESIDENCES

14

### AVERAGE HOA FEES

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

### DATE ON MARKET

March 2021

### CLOSINGS COMMENCED

TBD

### AVERAGE ABSORPTION

N/A



## SALES STATUS Q4 2021

**N/A**  
CLOSED

**0**  
IN CONTRACT

**14**  
AVAILABLE

### Recent Sales (Q1 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	-	-



## THE TOWNHOMES YERBA BUENA ISLAND

### ADDRESS

Forest Road & Meadow Drive,  
San Francisco, CA

### DEVELOPER

Wilson Meany  
Stockbridge Real Estate Funds

### RESIDENCES

39

### AVERAGE HOA FEES

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

### DATE ON MARKET

March 2021

### CLOSINGS COMMENCED

TBD

### AVERAGE ABSORPTION

N/A



## SALES STATUS Q4 2021

**N/A**  
CLOSED

**0**  
IN CONTRACT

**39**  
AVAILABLE

### Recent Sales (Q1 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	-	-





## 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

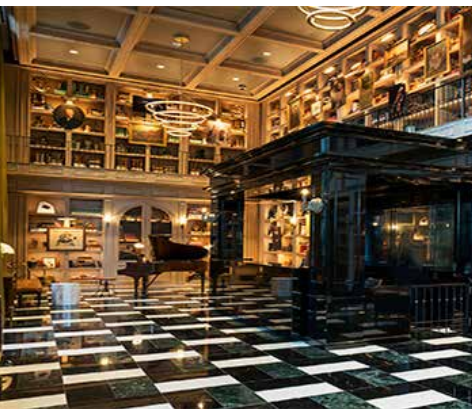
April 2016

### CLOSINGS COMMENCED

August 2016

### AVERAGE ABSORPTION

4 units/month



## SALES STATUS Q4 2021

**286**  
CLOSED

**N/A**  
IN CONTRACT

**12**  
AVAILABLE

### Recent Sales (Q1 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	13	\$1,124,923	\$1,393
2-BR	22	\$2,038,136	\$1,543
3-BR	2	\$5,762,500	\$2,236
4-BR+	0	-	-
Total/Avg.	37	\$1,918,595	\$1,588

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$1,220,000	\$1,698
2-BR	8	\$2,395,850	\$1,734
3-BR	2	\$5,747,500	\$2,226
4-BR+	0	-	-
Total/Avg.	12	\$2,758,483	\$1,875



## THE OAK

### ADDRESS

55 Oak Street, San Francisco, CA

### DEVELOPER

Z&L Properties

### RESIDENCES

109 (96 Market Rate)

### AVERAGE HOA FEES

\$705 - \$1,178/month

### DATE ON MARKET

August 2021

### CLOSINGS COMMENCED

TBD

### AVERAGE ABSORPTION

1 units/month



## SALES STATUS Q4 2021

**N/A**  
CLOSED

**3**  
IN CONTRACT

**106**  
AVAILABLE

### Recent Sales (Q1 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	\$625,500	\$1,266
1-BR	5	\$1,031,000	\$1,231
2-BR	1	\$1,468,000	\$1,319
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	7	\$1,035,500	\$1,251



## 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

1 units/month



## SALES STATUS Q4 2021

**N/A**  
CLOSED

**2**  
IN CONTRACT

**36**  
AVAILABLE

### Recent Sales (Q1 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	2	\$789,500	\$1,111
2-BR	2	\$1,225,000	\$1,294
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	4	\$1,007,250	\$1,216



## 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 Q4 2021

**21**  
CLOSED

**0**  
IN CONTRACT

**20**  
AVAILABLE

### Recent Sales (Q1 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	3	\$1,451,333	\$1,662
2-BR	6	\$2,652,833	\$1,921
3-BR	2	\$4,837,500	\$2,526
4-BR+	0	-	-
Total/Avg.	11	\$2,722,364	\$2,032

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,350,000	\$1,724
2-BR	1	\$2,455,000	\$1,975
3-BR	1	\$7,500,000	\$3,175
4-BR+	0	-	-
Total/Avg.	3	\$3,768,333	\$2,576

# New Development Pipeline Projects

Q4 2021



1288 HOWARD



198 VALENCIA STREET



2238 - 2240 MARKET



88 AT THE PARK (88 ARKANSAS)



LE CENTRE



YERBA BUENA ISLAND



2525 VAN NESS



360 5TH STREET



5M (110 5TH STREET/925 MISSION)



603 TENNESSEE



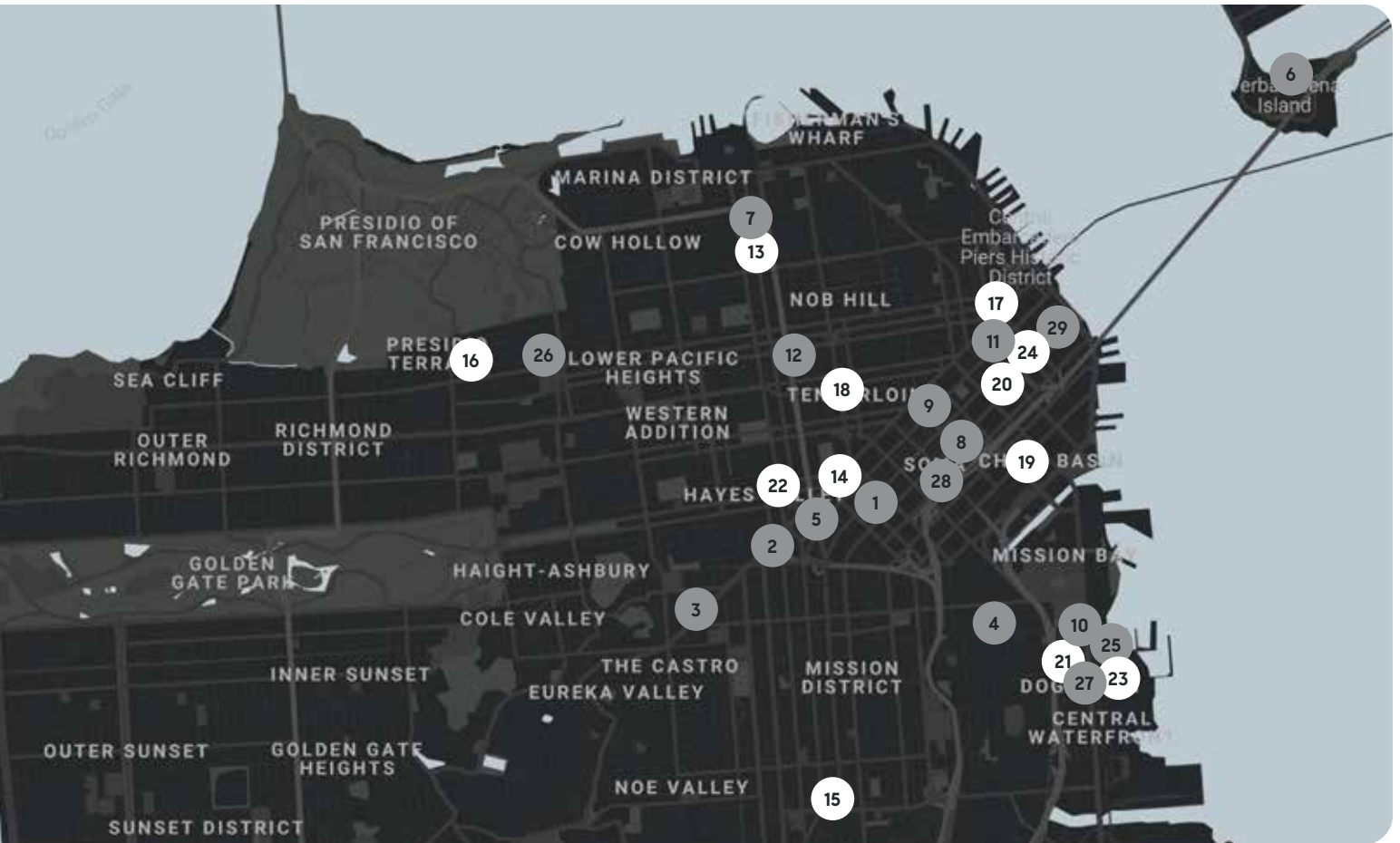
OCEANWIDE CENTER (50 1ST ST)



1200 VAN NESS

# New Development Pipeline Projects

Q4 2021



13

2601 VAN NESS



14

30 VAN NESS



15

3314 CESAR CHAVEZ



16

3700 CALIFORNIA



17

430 MAIN



18

469 EDDY



19

655 4TH STREET



20

655 FOLSOM



21

888 TENNESSEE



22

ONE OAK (1540 MARKET STREET)



23

PARCEL D - PIER 70



24

PARCEL F (542 - 550 HOWARD)

# New Development Pipeline Projects

Q4 2021



25

PARCEL K NORTH - PIER 70



26

3333 CALIFORNIA



27

600 20TH STREET / 888 ILLINOIS



28

988 HARRISON STREET



29

TRANSBAY BLOCK 4 (201 HOWARD)



## 1288 Howard 1288 HOWARD STREET

COMING SOON

NEIGHBORHOOD	SoMa
DEVELOPER	WorldCo / Burrard Group
ARCHITECT	Levy Design Partners
RESIDENCES & STORIES	129 units & 5 stories
PRICE RANGE	TBD
COMPLETION DATE	2022
ADDITIONAL INFO	12.6k-sqft of ground floor office space, ~1,250-sqft restaurant/retail space at 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



## Le Centre 42 OTIS STREET

COMING SOON

NEIGHBORHOOD	SoMa
DEVELOPER	Vanguard Properties
ARCHITECT	Elevation Architects
RESIDENCES & STORIES	24 units (21 market-rate) & 5 stories
PRICE RANGE	TBD
COMPLETION DATE	2022
ADDITIONAL INFO	Each home features Bertazzoni appliances, StudioBecker cabinetry, air-conditioning and large floor-to-ceiling windows. Secure bike room, Amazon package locker system, and a sunny roof deck.



## 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	89 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.



## 2525 Van Ness 2525 VAN NESS AVENUE

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



## 360 5th Street 360 5TH STREET

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



## 5M 110 5TH STREET / 925 MISSION STREET

<b>NEIGHBORHOOD</b>	SoMa / Mid-Market
<b>DEVELOPER</b>	Brookfield Properties / Hearst Corp.
<b>ARCHITECT</b>	Kohn Pederson Fox Associates
<b>RESIDENCES &amp; STORIES</b>	702 residences (400 condos & 302 apts) & 45 floors
<b>PRICE RANGE</b>	TBD
<b>COMPLETION DATE</b>	Phase 1: Late 2021 / Phase 2: 2022+
<b>ADDITIONAL INFO</b>	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

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



## Oceanwide Center 50 1ST STREET / 512 MISSION ST.

ON-HOLD

<b>NEIGHBORHOOD</b>	Rincon Hill / Yerba Buena
<b>DEVELOPER</b>	Oceanwide Holdings
<b>ARCHITECT</b>	Foster + Partners
<b>RESIDENCES &amp; STORIES</b>	265 residences (109 units at 1st St & 156 units at Mission St) / 2 towers (52 & 61 floors)
<b>PRICE RANGE</b>	TBD
<b>COMPLETION DATE</b>	2023+
<b>ADDITIONAL INFO</b>	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

<b>NEIGHBORHOOD</b>	Polk Gulch
<b>DEVELOPER</b>	Van Ness Post Center LLC
<b>ARCHITECT</b>	Woods Bagot
<b>RESIDENCES &amp; STORIES</b>	107 residences & 13 floors
<b>PRICE RANGE</b>	TBD
<b>COMPLETION DATE</b>	TBD
<b>ADDITIONAL INFO</b>	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.  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

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



## 430 Main 430 MAIN STREET

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



## 469 Eddy 469 EDDY STREET

<b>NEIGHBORHOOD</b>	Tenderloin
<b>DEVELOPER</b>	JS Sullivan Development
<b>ARCHITECT</b>	Stanley Saitowitz   Natoma Architects Inc.
<b>RESIDENCES &amp; STORIES</b>	28 residences & 8 stories
<b>PRICE RANGE</b>	TBD
<b>COMPLETION DATE</b>	TBD
<b>ADDITIONAL INFO</b>	~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

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



## Parcel D - Pier 70 PIER 70

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



## Parcel F 542 - 550 HOWARD STREET

<b>NEIGHBORHOOD</b>	SoMa
<b>DEVELOPER</b>	Hines / Urban Pacific Development / Broad Street Principal Investments
<b>ARCHITECT</b>	Pelli Clark Pelli
<b>RESIDENCES &amp; STORIES</b>	170 units & 61 stories
<b>PRICE RANGE</b>	TBD
<b>COMPLETION DATE</b>	2026
<b>ADDITIONAL INFO</b>	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 Q4 2021

## Contact

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