

New Development Market Insights

SAN FRANCISCO Q3 2020



Compass Development MarketWatch / Q3-2020

SAN FRANCISCO DISTRICTS 6 – 9 SUMMARY

Condominium sales sprung ahead in San Francisco's most densely populated downtown districts during the third quarter, with overall sales volume outpacing that of Q3-19. Low interest rates coupled with extreme pent-up demand drove buyers back into the market this quarter, albeit with a sense of caution, and on lower priced units. But as the broader market continues to digest the longer-term impacts of the Coronavirus, condos in the city's center have demonstrated great resilience, largely disproving the notion that there is any meaningful flight away from San Francisco's urban core.

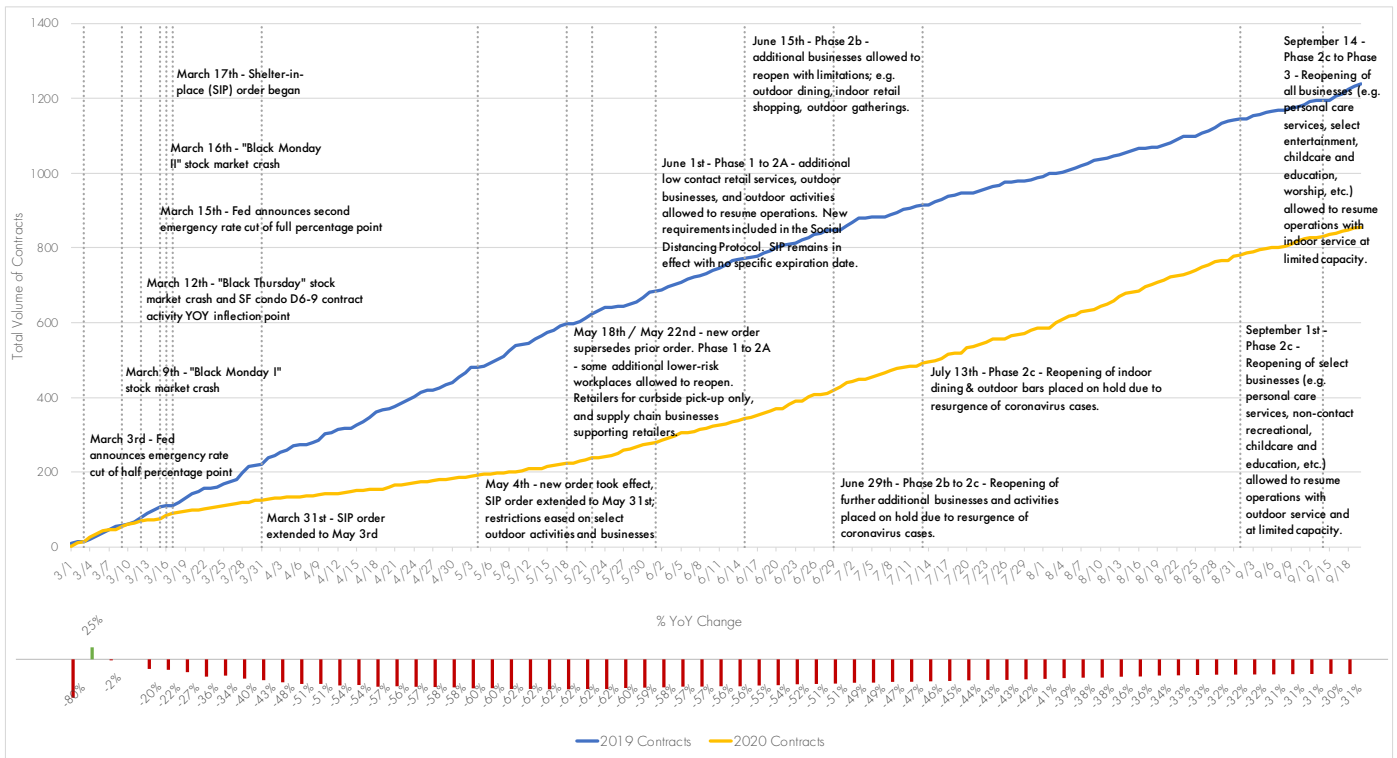
CDMG's New Development Market Insights report provides an in-depth look of San Francisco's core downtown neighborhoods. Published quarterly and highlighting the city's vast condo market, we pull information from a combination of public and proprietary databases which access the most up-to-date closing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

The quarterly MarketWatch, beginning on Page 3, highlights overall market trends in District 6, 7, 8, and 9, which collectively encompass the majority of 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 9, 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.

2019 VS. 2020 CORONAVIRUS IMPACT ON SAN FRANCISCO CONDO CONTRACTS

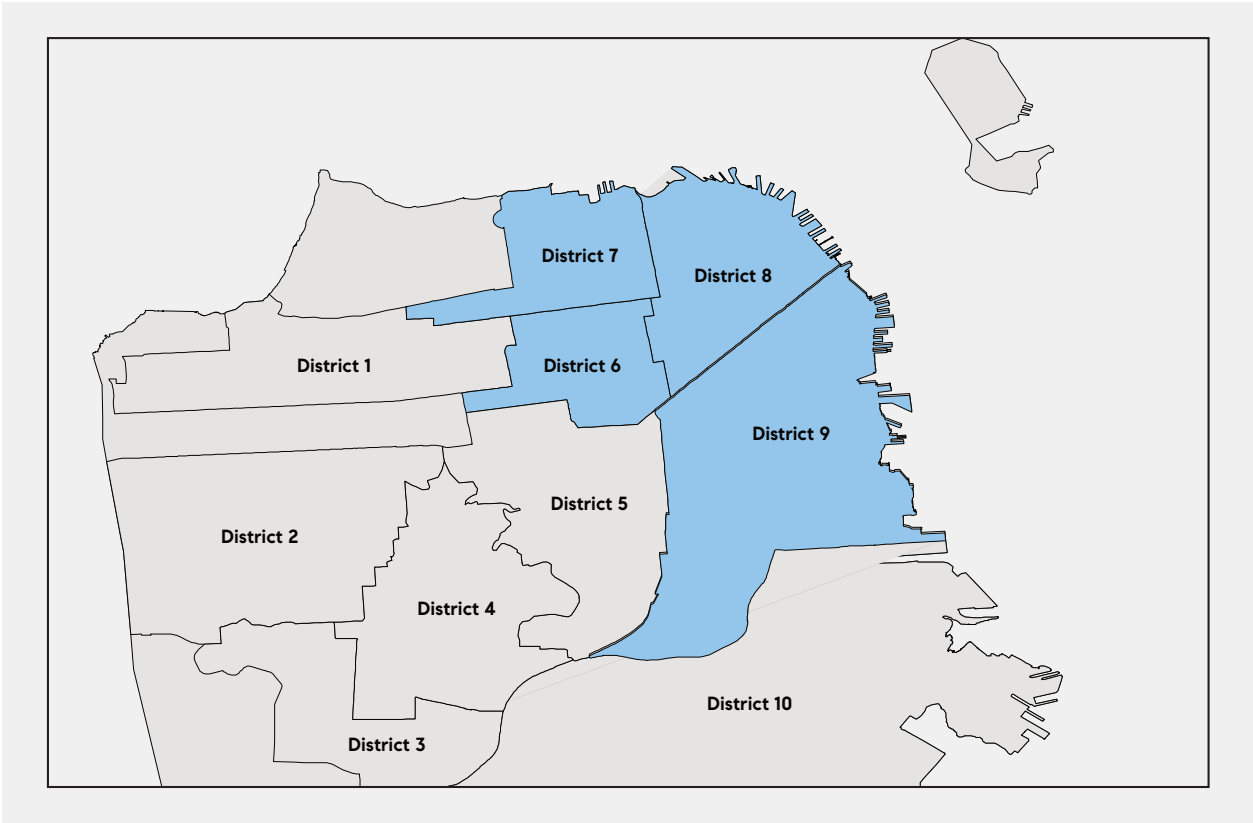


*Data is collected through the third Sunday of the ending month in the quarter. Data is gathered from the MLS and may not include many new construction project sales. Data deemed reliable, but may contain errors and is subject to revision. Total volume of contracts represents the cumulative contract volume beginning March 1st.

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MAP OF COVERAGE: SF DISTRICTS 6-9



Compass Development MarketWatch / Q3-2020

SF DISTRICTS 6 TO 9 - CONDOS Q3 2020

\$1.39M
AVG. SALE PRICE

-5.2%
FROM Q3 2019

\$1,155/SF
ON 427 SALES

-8.4%
FROM Q3 2019

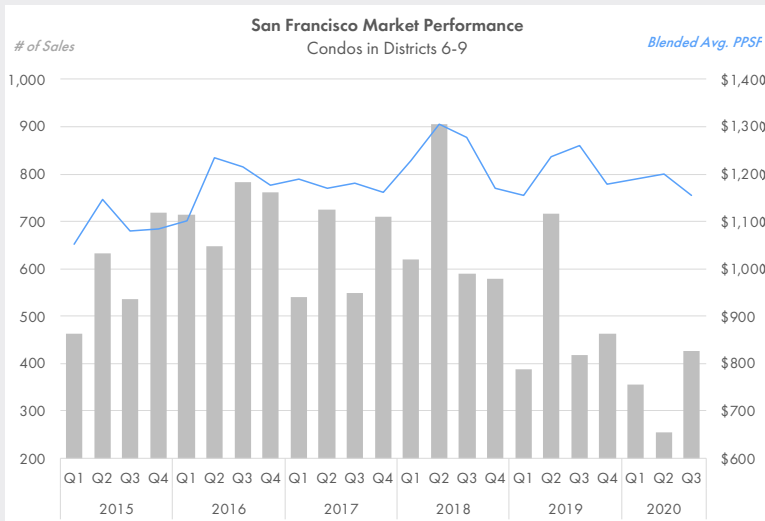
427
SALES IN Q3 2020

2.2%
FROM Q3 2019

Condominium sales surged in San Francisco during the third quarter, as buyers returned *en masse* to the city's most populated downtown enclaves. And while the market is not at its most buoyant relative to 2018/2019, strong sales production is a healthy indicator for things to come. 427 transactions recorded during the period, marking a very significant 2.2% YoY increase from the same period one year ago. The number represents a staggering 68.1% QoQ gain from Q2-19.

Market indicators by price segments were mixed but positive overall YoY in each tier. High priced units in the \$3M+ segment had a strong YoY gain in average absolute sale price, increasing 10.8% YoY, to \$4.3M, breathing some life into the notion that the luxury market, hardest hit by Covid, continues the move ahead. The \$2M-\$3M price segment saw strong improvement from Q2-20, with a 5.7% increase in average PPSF on 39 closings, up 116.7%.

MARKET PERFORMANCE, DISTRICTS 6-9



CONDO	Q3-20	YoY%	Q3-19	QoQ%	Q2-20
Avg. Sales Price	\$1,394,770	-5.2%	\$1,471,037	-1.1%	\$1,410,792
Blended Avg. PPSF	\$1,155	-8.4%	\$1,260	-3.8%	\$1,200
Number of Sales	427	2.2%	418	68.1%	254
DOM	45	N/A	37	N/A	41
ANNUAL PERFORMANCE	2019	YoY%	2018	YoY%	2017
Avg. Sales Price	\$1,405,264	-1.0%	\$1,419,181	2.5%	\$1,384,097
Avg. PPSF	\$1,210	-3.3%	\$1,252	6.6%	\$1,174
Number of Sales	1,984	-26.3%	2,692	6.8%	2,521
DOM	37	N/A	53	N/A	42

SALES BY PRICE POINT, DISTRICTS 6-9

Under \$1M	Q3-20	YoY%	Q3-19	QoQ%	Q2-20
Avg. Sales Price	\$791,355	-0.3%	\$794,030	-0.4%	\$794,407
Avg. PPSF	\$1,060	-6.8%	\$1,138	-6.0%	\$1,128
Number of Sales	145	13.3%	128	72.6%	84
DOM	34	N/A	33	N/A	30
\$1M-\$2M	Q3-20	YoY%	Q3-19	QoQ%	Q2-20
Avg. Sales Price	\$1,394,761	-0.6%	\$1,403,761	0.9%	\$1,381,714
Avg. PPSF	\$1,097	-6.2%	\$1,169	-1.7%	\$1,116
Number of Sales	226	4.1%	217	61.4%	140
DOM	45	N/A	29	N/A	34

\$2M-\$3M	Q3-20	YoY%	Q3-19	QoQ%	Q2-20
Avg. Sales Price	\$2,348,279	2.1%	\$2,300,692	0.8%	\$2,328,611
Avg. PPSF	\$1,268	-5.4%	\$1,340	5.7%	\$1,199
Number of Sales	39	-18.8%	48	116.7%	18
DOM	39	N/A	35	N/A	44
\$3M+	Q3-20	YoY%	Q3-19	QoQ%	Q2-20
Avg. Sales Price	\$4,354,198	10.8%	\$3,928,329	-7.1%	\$4,688,000
Avg. PPSF	\$1,543	-12.3%	\$1,759	-14.7%	\$1,808
Number of Sales	17	-32.0%	25	41.7%	12
DOM	52	N/A	21	N/A	45

District 6 MarketWatch / Q3-2020

SF DISTRICT 6 - CONDOS Q3 2020

\$1.33M
AVG. SALE PRICE

-0.8%
FROM Q3 2019

\$1,134/SF
ON 70 SALES

-0.9%
FROM Q3 2019

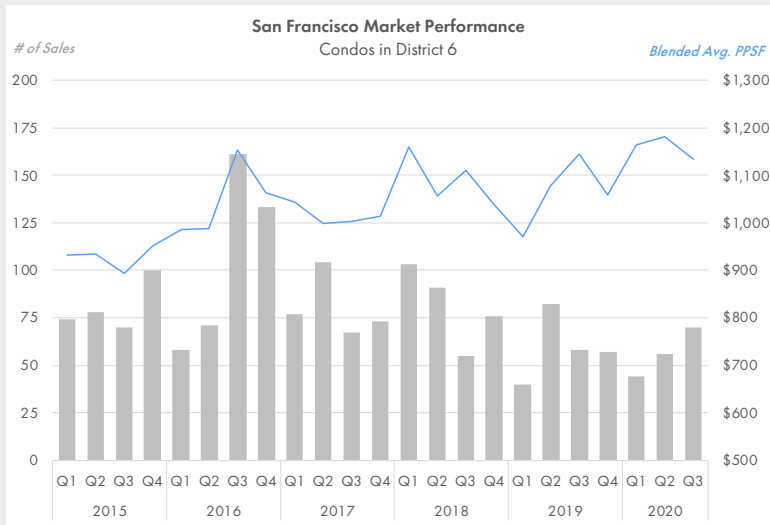
70
SALES IN Q3 2020

20.7%
FROM Q3 2019

District 6 encompasses Lower Pacific Heights, Anza Vista, Western Addition, North Panhandle, Alamo Square, and Hayes Valley. Closings were way up in Q3-20, with 70 deals recorded, a 20.7% YoY improvement. Fulton 555, a new building in Hayes Valley, recorded 13 closings in the quarter, accounting for 18% of the volume for District 6. The average sale price for District 6 was \$1.3M; a moderate decrease of 0.8% YoY, but an increase of 13.5% QoQ. Valuations remained steady in this submarket, dipping slightly by 0.9% YoY, to \$1,134 PSF.

Valuations in District 6 are largely driven by its busiest in-demand subdistrict: Hayes Valley. Comprising most of the neighborhood's chic restaurants, galleries, and new amenitized developments, Hayes Valley condos recorded an average of \$1,203 PSF in Q3-2020. In the outlying neighborhoods, condo sales trailed with an average valuation of \$1,110 PSF in the quarter.

MARKET PERFORMANCE, DISTRICT 6



CONDO	Q3-20	YoY%	Q3-19	QoQ%	Q2-20
Avg. Sales Price	\$1,332,894	-0.8%	\$1,343,282	13.5%	\$1,174,560
Avg. PPSF	\$1,134	-0.9%	\$1,144	-3.9%	\$1,181
Number of Sales	70	20.7%	58	25.0%	56
DOM	33	N/A	24	N/A	32
ANNUAL PERFORMANCE	2019	YoY%	2018	YoY%	2017
Avg. Sales Price	\$1,264,780	-0.2%	\$1,267,446	3.1%	\$1,228,867
Avg. PPSF	\$1,070	-2.0%	\$1,092	7.8%	\$1,013
Number of Sales	237	-27.1%	325	1.2%	321
DOM	28	N/A	34	N/A	36

SALES BY PRICE POINT, DISTRICT 6

Under \$1M	Q3-20	YoY%	Q3-19	QoQ%	Q2-20
Avg. Sales Price	\$792,799	-1.4%	\$803,844	2.8%	\$770,852
Avg. PPSF	\$1,075	-9.2%	\$1,183	-6.6%	\$1,150
Number of Sales	21	31.3%	16	0.0%	21
DOM	18	N/A	27	N/A	17
\$1M-\$2M	Q3-20	YoY%	Q3-19	QoQ%	Q2-20
Avg. Sales Price	\$1,385,428	-2.7%	\$1,424,539	-0.7%	\$1,395,380
Avg. PPSF	\$1,113	0.9%	\$1,103	-8.1%	\$1,211
Number of Sales	44	25.7%	35	29.4%	34
DOM	29	N/A	22	N/A	19

\$2M-\$3M	Q3-20	YoY%	Q3-19	QoQ%	Q2-20
Avg. Sales Price	\$2,536,250	16.9%	\$2,170,000	18.2%	\$2,145,000
Avg. PPSF	\$1,204	-4.7%	\$1,263	37.0%	\$879
Number of Sales	4	-42.9%	7	300.0%	1
DOM	26	N/A	13	N/A	64
\$3M+	Q3-20	YoY%	Q3-19	QoQ%	Q2-20
Avg. Sales Price	\$5,550,000	N/A	-	N/A	-
Avg. PPSF	\$1,554	N/A	-	N/A	-
Number of Sales	1	N/A	0	N/A	0
DOM	20	N/A	-	N/A	-

District 7 MarketWatch / Q3-2020

SF DISTRICT 7 - CONDOS Q3 2020

\$1.97M
AVG. SALE PRICE

2.7%
FROM Q3 2019

\$1,286/SF
ON 74 SALES

-1.4%
FROM Q3 2019

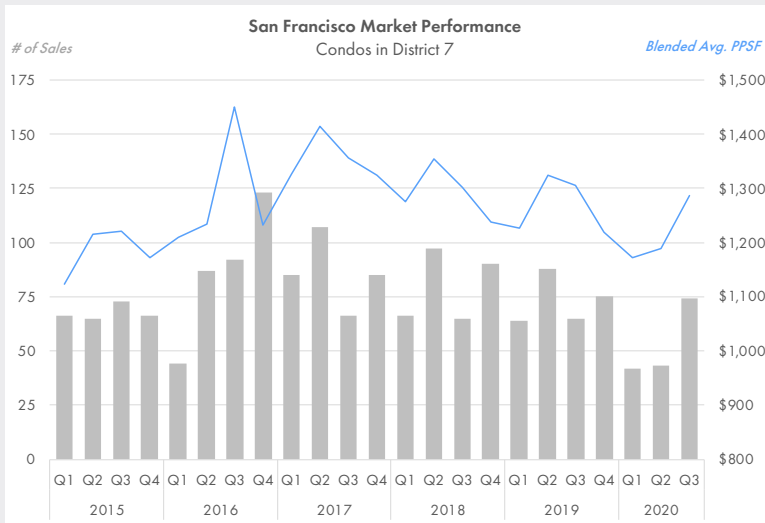
74
SALES IN Q3 2020

13.8%
FROM Q3 2019

Sales volume in District 7, which includes the Marina, Cow Hollow, Pacific Heights, and Presidio Heights, was up sharply in the third quarter. Typically the most expensive neighborhood, as measured by PPSF, in San Francisco's core condo market, condos in District 7 recorded an average PPSF of \$1,286 during the period, down a modest 1.4% YoY. During Q3-20, the average sale price rose 2.7% YoY and, more poignantly, climbed 15.3% QoQ, to \$2M.

The neighborhood reported a 13.8% increase YoY and 72.1% increase QoQ in total sales volume, with 74 closings — a significant increase from the second quarter, during which 43 deals were booked. 38 of the 74 closings in Q3-20 were in the \$1M-\$2M price point, accounting for 51% of the deals in the quarter. Condos in the \$2M-\$3M price segment saw a resurgence from Q2 lows, with 14 closings reported, a 40% increase QoQ.

MARKET PERFORMANCE, DISTRICT 7



CONDO	Q3-20	YoY%	Q3-19	QoQ%	Q2-20
Avg. Sales Price	\$1,974,289	2.7%	\$1,921,853	15.3%	\$1,712,721
Avg. PPSF	\$1,286	-1.4%	\$1,305	8.3%	\$1,188
Number of Sales	74	13.8%	65	72.1%	43
DOM	32	N/A	28	N/A	39
ANNUAL PERFORMANCE	2019	YoY%	2018	YoY%	2017
Avg. Sales Price	\$1,858,568	5.3%	\$1,764,606	-13.1%	\$2,030,902
Avg. PPSF	\$1,270	-1.7%	\$1,292	-4.9%	\$1,358
Number of Sales	292	-8.2%	318	-7.3%	343
DOM	35	N/A	27	N/A	31

SALES BY PRICE POINT, DISTRICT 7

Under \$1M	Q3-20	YoY%	Q3-19	QoQ%	Q2-20
Avg. Sales Price	\$855,167	2.6%	\$833,458	9.4%	\$781,333
Avg. PPSF	\$1,162	-7.5%	\$1,257	9.3%	\$1,064
Number of Sales	12	0.0%	12	100.0%	6
DOM	29	N/A	29	N/A	48
\$1M-\$2M	Q3-20	YoY%	Q3-19	QoQ%	Q2-20
Avg. Sales Price	\$1,488,829	4.2%	\$1,429,115	0.7%	\$1,478,292
Avg. PPSF	\$1,153	-10.6%	\$1,289	0.9%	\$1,142
Number of Sales	38	46.2%	26	58.3%	24
DOM	32	N/A	23	N/A	34

\$2M-\$3M	Q3-20	YoY%	Q3-19	QoQ%	Q2-20
Avg. Sales Price	\$2,394,750	11%	\$2,367,824	0.7%	\$2,378,000
Avg. PPSF	\$1,210	-0.8%	\$1,221	0.4%	\$1,206
Number of Sales	14	-17.6%	17	40.0%	10
DOM	21	N/A	18	N/A	37
\$3M+	Q3-20	YoY%	Q3-19	QoQ%	Q2-20
Avg. Sales Price	\$4,573,336	21.9%	\$3,750,896	41.4%	\$3,233,333
Avg. PPSF	\$1,635	13.2%	\$1,444	14.4%	\$1,430
Number of Sales	10	0.0%	10	233.3%	3
DOM	20	N/A	24	N/A	17

District 8 MarketWatch / Q3-2020

SF DISTRICT 8 - CONDOS Q3 2020

\$1.17M
AVG. SALE PRICE

-7.7%
FROM Q3 2019

\$1,108/SF
ON 91 SALES

-8.5%
FROM Q3 2019

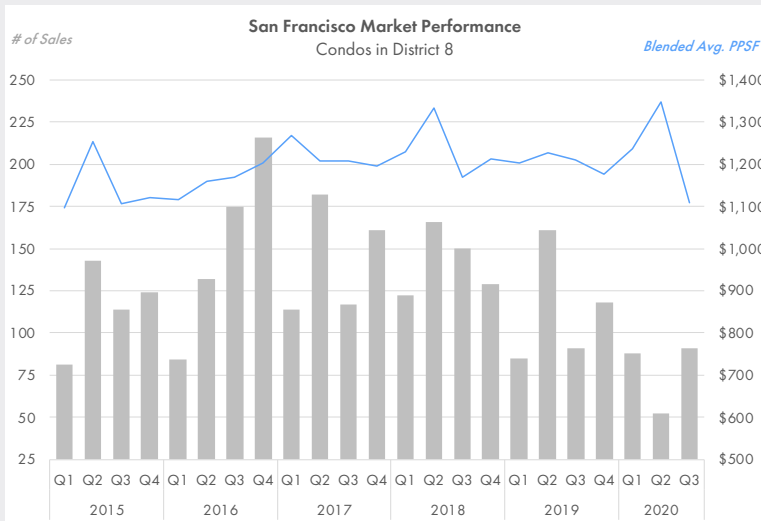
91
SALES IN Q3 2020

0.0%
FROM Q3 2019

District 8 includes the North Waterfront, North Beach, Telegraph Hill, Financial District/Barbary Coast, Russian Hill, Nob Hill, Downtown, Tenderloin, and Van Ness/Civic Center neighborhoods. While pricing was slow to recover during the quarter, volumes peaked back up to their pre-covid levels. Pricing in District 8 declined in the third quarter, reporting an average valuation of \$1,108 PSF, down 8.5% YoY and dropping 17.7% QoQ. The average absolute sale price decreased 7.7% YoY and fell 33% QoQ, to \$1.2M — the lowest average absolute price in any of San Francisco's core districts for Q3-20. Valuation decreases were driven by resales in the under \$1M and \$1M-\$2M price segments; the average PPSF was \$1,036 and \$1,088 respectively.

Though pricing was down YoY and QoQ, sales volumes in the under \$1M and \$1M-\$2M price segments had strong gains, reporting 43 and 41 closings, jumping significantly by 138.9% and 70.8% QoQ, respectively. The average DOM for District 8 was 56, one of the highest of any price segment in San Francisco's core districts.

MARKET PERFORMANCE, DISTRICT 8



CONDO	Q3-20	YoY%	Q3-19	QoQ%	Q2-20
Avg. Sales Price	\$1,174,495	-7.7%	\$1,272,724	-33.0%	\$1,754,163
Avg. PPSF	\$1,108	-8.5%	\$1,211	-17.7%	\$1,347
Number of Sales	91	0.0%	91	75.0%	52
DOM	56	N/A	51	N/A	55
ANNUAL PERFORMANCE	2019	YoY%	2018	YoY%	2017
Avg. Sales Price	\$1,290,945	-6.3%	\$1,377,178	0.8%	\$1,366,317
Avg. PPSF	\$1,205	-3.0%	\$1,243	2.2%	\$1,216
Number of Sales	455	-19.8%	567	-1.2%	574
DOM	45	N/A	43	N/A	48

SALES BY PRICE POINT, DISTRICT 8

Under \$1M	Q3-20	YoY%	Q3-19	QoQ%	Q2-20
Avg. Sales Price	\$732,767	-1.1%	\$740,925	-1.5%	\$743,833
Avg. PPSF	\$1,036	-4.5%	\$1,085	-7.4%	\$1,119
Number of Sales	43	7.5%	40	138.9%	18
DOM	41	N/A	44	N/A	44
\$1M-\$2M	Q3-20	YoY%	Q3-19	QoQ%	Q2-20
Avg. Sales Price	\$1,344,268	-3.0%	\$1,386,208	1.9%	\$1,319,479
Avg. PPSF	\$1,088	-6.1%	\$1,159	0.5%	\$1,083
Number of Sales	41	7.9%	38	70.8%	24
DOM	60	N/A	34	N/A	43

\$2M-\$5M	Q3-20	YoY%	Q3-19	QoQ%	Q2-20
Avg. Sales Price	\$2,426,250	7.3%	\$2,260,500	-1.1%	\$2,453,750
Avg. PPSF	\$1,472	5.9%	\$1,390	10.1%	\$1,337
Number of Sales	4	-60.0%	10	0.0%	4
DOM	58	N/A	86	N/A	73
\$3M+	Q3-20	YoY%	Q3-19	QoQ%	Q2-20
Avg. Sales Price	\$3,516,667	-3.2%	\$3,633,333	-41.9%	\$6,057,500
Avg. PPSF	\$1,200	-27.6%	\$1,657	-36.7%	\$1,895
Number of Sales	3	0.0%	3	-50.0%	6
DOM	130	N/A	73	N/A	70

District 9 MarketWatch / Q3-2020

SF DISTRICT 9 - CONDOS Q3 2020

\$1.3M
AVG. SALE PRICE

-10.6%
FROM Q3 2019

\$1,116/SF
ON 192 SALES

-13.9%
FROM Q3 2019

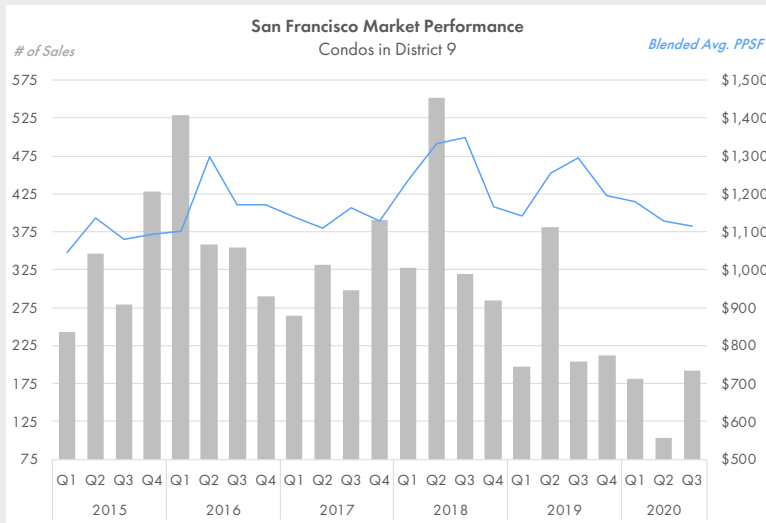
192
SALES IN Q3 2020

-5.9%
FROM Q3 2019

District 9 features the city's highest density condo neighborhoods, including Yerba Buena, South Beach, SoMa, Mission Bay, Central Waterfront/Dogpatch, Potrero Hill, Inner Mission, and Bernal Heights. Sales volume in District 9 charted a significant recovery during the third quarter, rebounding from record lows in Q2-20. And though sales were up almost 90% during the period, which recorded 192 transactions, pricing in the city's highest density neighborhoods continued to lag previous highs – mostly as high-priced units hit a stand-still. With lower priced condos dominating the overall volume, average price dipped down 10.6% YoY to \$1.3M, while average valuations stumbled 13.9% YoY to \$1,116 PSF.

Many of the city's new developments, particularly in the high-rise and luxury condo segment, sit within District 9. Closings at Mira, a project which recently completed, acted to bolster the market in the third quarter, and luxury projects The Harrison and The Avery posted some slow but steady progress. The third quarter saw a strong uptick in sales valued under \$1M, with 69 deals reporting, up 15.0% YoY. And the upswing in the lowest price segment was offset by condos valued from \$1M-\$2M, where sales volume declined from the same period last year, coupled with a decline in valuation. But it is in the highest price segment, \$3M+, where the market is still yet to recover. Only 3 of such deals were recorded in the third quarter, and down 25.6% YoY to \$1,592 PSF, at valuations significantly lower than previously achieved.

MARKET PERFORMANCE, DISTRICT 9



CONDO	Q3-20	YoY%	Q3-19	QoQ%	Q2-20
Avg. Sales Price	\$1,298,374	-10.6%	\$1,452,180	4.7%	\$1,239,828
Avg. PPSF	\$1,116	-13.9%	\$1,296	-1.1%	\$1,128
Number of Sales	192	-5.9%	204	86.4%	103
DOM	49	N/A	36	N/A	38
ANNUAL PERFORMANCE	2019	YoY%	2018	YoY%	2017
Avg. Sales Price	\$1,358,448	-2.6%	\$1,394,407	10.8%	\$1,257,971
Avg. PPSF	\$1,226	-4.4%	\$1,282	13.2%	\$1,133
Number of Sales	995	-32.9%	1,482	15.5%	1,283
DOM	36	N/A	72	N/A	44

SALES BY PRICE POINT, DISTRICT 9

Under \$1M	Q3-20	YoY%	Q3-19	QoQ%	Q2-20
Avg. Sales Price	\$816,328	-0.3%	\$818,931	-1.9%	\$832,455
Avg. PPSF	\$1,053	-7.4%	\$1,138	-6.9%	\$1,131
Number of Sales	69	15.0%	60	76.9%	39
DOM	36	N/A	28	N/A	28
\$1M-\$2M	Q3-20	YoY%	Q3-19	QoQ%	Q2-20
Avg. Sales Price	\$1,384,143	-1.0%	\$1,397,664	1.8%	\$1,359,492
Avg. PPSF	\$1,073	-8.2%	\$1,170	0.6%	\$1,067
Number of Sales	103	-12.7%	118	77.6%	58
DOM	50	N/A	31	N/A	39

\$2M-\$3M	Q3-20	YoY%	Q3-19	QoQ%	Q2-20
Avg. Sales Price	\$2,247,435	-2.8%	\$2,313,229	9.2%	\$2,058,333
Avg. PPSF	\$1,294	-15.6%	\$1,533	14.2%	\$1,133
Number of Sales	17	21.4%	14	466.7%	3
DOM	52	N/A	31	N/A	25
\$3M+	Q3-20	YoY%	Q3-19	QoQ%	Q2-20
Avg. Sales Price	\$4,062,667	-2.1%	\$4,149,940	19.4%	\$3,403,667
Avg. PPSF	\$1,592	-25.6%	\$2,139	-19.5%	\$1,979
Number of Sales	3	-75.0%	12	0.0%	3
DOM	88	N/A	5	N/A	22

New Construction Project Overview

The following section contains sales information and updates for actively selling developments with 20+ Market Rate units.

PROJECT LIST

1433 Bush
*181 Fremont Residences
2177 Third
950 Tennessee
99 Rausch
Four Seasons Private Residences
*Fulton 555
Lumina
Maison au Pont
Mira
*OneEleven
One Mission Bay
One Steuart Lane
The 36
*The Austin
The Avery
*The Harrison
*The Westerly
Union House

COMING SOON

1145 Polk
2238 - 2240 Market
*Crescent
Elevant (555 Golden Gate Ave)
Serif (950 Market)
The Oak (1554 Market)
The Bristol (Yerba Buena Island)
The Quinn (349 8th Street)

* Represented by Compass Development
Marketing Group

NOTES

- 1) New Construction developments are either actively selling for the first time or a rental development that has been converted to for sale and is now actively selling. Recent sales include publicly available information on closings over the last four quarters. Data is collected through the third Sunday of the ending month in the quarter.
- 2) This report covers new construction condominium developments with 20+ market rate units.
- 3) Assume that developments in the New Construction section are actively selling units unless noted otherwise. In addition, list prices and number of units available are based on the month of the report and closings are based on what has been recorded to date. Please note that closings can take 30-60 days to be recorded.
- 4) Date On Market refers to the date the Sales Center opened.
- 5) Average Absorption is calculated from Date On Market through the date of the report. It accounts for units both in contract and closed.
- 6) Average Price/SF is calculated using only units where both square footage and price are known. Average Price/SF is defined as the weighted average of unit closing prices and square footages.
- 7) Sales Status tracks the total number of units and are inclusive of Below Market Rate (BMR) units. BMR units are omitted from new construction and resale closings in the Recent Sales and Active Listings summary tables whenever possible.

New Construction Project Overview



Address
1433 Bush Street
San Francisco, CA

Developer
JS Sullivan

Residences
40 (34 Market Rate)

Average HOA Fees
\$470 - \$680/month

Date on Market
July 2019

Closings Commenced
Fall 2019

Average Absorption
2 units/month

SALES STATUS

Q3 2020

33

CLOSED

0

IN CONTRACT

7

AVAILABLE



Recent Sales (Q4 2019 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	10	\$622,100	\$1,607
1-BR	9	\$828,500	\$1,370
2-BR	2	\$1,535,000	\$1,551
3-BR	9	\$1,430,058	\$1,303
4-BR+	0	-	-
Total/Avg.	30	\$987,268	\$1,399

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	-	-

New Construction Project Overview



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 2020

36

CLOSED

N/A

IN CONTRACT

N/A

AVAILABLE



Recent Sales (Q4 2019 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	4	\$4,366,250	\$2,417
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	4	\$4,366,250	\$2,417

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,700,000	\$2,179
2-BR	3	\$8,600,000	\$3,525
3-BR	2	\$6,175,000	\$2,881
4-BR+	0	-	-
Total/Avg.	6	\$6,641,667	\$3,218

New Construction Project Overview



Address
2177 3rd Street
San Francisco, CA

Developer
Align Real Estate

Residences
114 (106 Market Rate)

Average HOA Fees
\$750 - \$1,100/month

Date on Market
December 2019

Closings Commenced
September 2020

Average Absorption
2 units/month

SALES STATUS

Q3 2020

2

CLOSED

21

IN CONTRACT

91

AVAILABLE



Recent Sales (Q4 2019 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$945,000	\$1,378
2-BR	1	\$1,525,000	\$1,320
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	2	\$1,235,000	\$1,342

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	1	\$740,000	\$1,474
1-BR	1	\$935,000	\$1,300
2-BR	2	\$1,495,000	\$1,447
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	4	\$1,166,250	\$1,419

New Construction Project Overview



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
TBD

Average Absorption
4 units/month

SALES STATUS

Q3 2020

N/A

CLOSED

35

IN CONTRACT

65

AVAILABLE



Recent Sales (Q4 2019 - Present)

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

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	2	\$653,500	\$1,447
1	2	\$1,019,000	\$1,286
2	2	\$1,273,500	\$1,279
3	0	-	-
4-BR+	0	-	-
Total/Avg.	6	\$982,000	\$1,315

New Construction Project Overview



Address
99 Rausch
San Francisco, CA

Developer
Belrich Partners/Pillar
Capital

Residences
112 (99 Market Rate)

Average HOA Fees
\$520 - \$890/month

Date on Market
June 2017

Closings Commenced
May 2018

Average Absorption
3 units/month

SALES STATUS Q3 2020

109

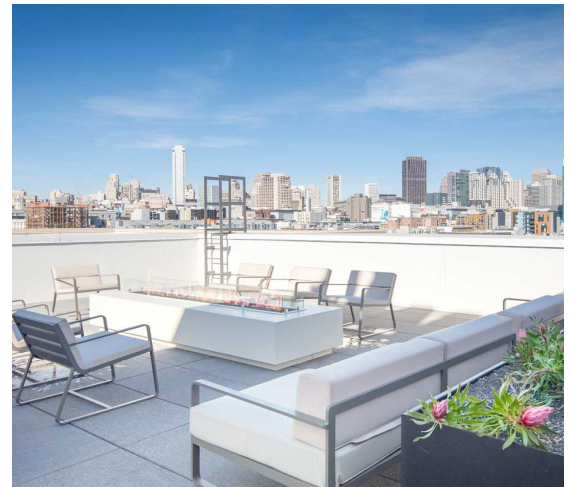
CLOSED

0

IN CONTRACT

3

AVAILABLE



Recent Sales (Q4 2019 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,300,000	\$1,559
2-BR	9	\$1,320,444	\$1,224
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	10	\$1,318,400	\$1,250

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	1	\$549,000	\$1,362
1-BR	1	\$829,000	\$1,264
2-BR	1	\$1,246,000	\$1,177
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	3	\$874,667	\$1,239

New Construction Project Overview



Address
706 Mission Street
San Francisco, CA

Developer
Westbrook Partners

Residences
146

Average HOA Fees
~\$4,000/month

Date on Market
June 2019

Closings Commenced
TBD

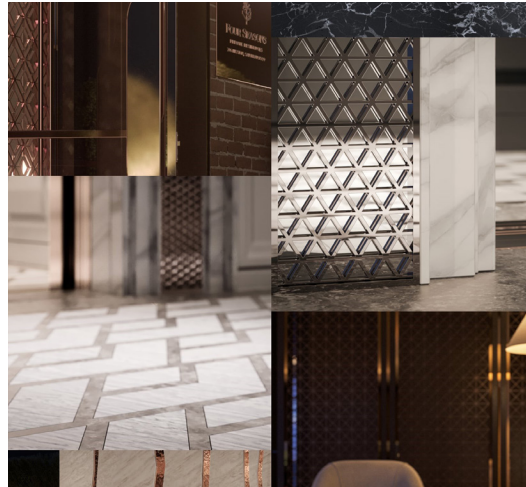
Average Absorption
N/A

SALES STATUS Q3 2020

N/A
CLOSED

N/A
IN CONTRACT

145
AVAILABLE



Recent Sales (Q4 2019 - 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	-	-

New Construction Project Overview



Address
555 Fulton Street
San Francisco, CA

Developer
Fulton Street Ventures, LLC

Residences
139 (122 Market Rate)

Average HOA Fees
\$610 - \$830/month

Date on Market
June 2015 Launch
July 2017 Relaunch

Closings Commenced
March 2020

Average Absorption
1 unit/month Launch
2 units/month Relaunch

SALES STATUS

Q3 2020

56

CLOSED

7

IN CONTRACT

76

AVAILABLE



Recent Sales (Q4 2019 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	20	\$763,636	\$1,210
2-BR	23	\$1,289,305	\$1,404
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	43	\$1,044,808	\$1,331

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	1	\$649,000	\$1,211
1	3	\$679,000	\$1,061
2	3	\$1,099,000	\$1,142
3	0	-	-
4-BR+	0	-	-
Total/Avg.	7	\$854,714	\$1,120

New Construction Project Overview



Address
201 Folsom Street
San Francisco, CA

Developer
Tishman Speyer Properties;
Vanke

Residences
656

Average HOA Fees
\$995 - \$3,670/month

Date on Market
October 2014

Closings Commenced
September 2015

Average Absorption
9 Units/month

SALES STATUS

Q3 2020

646

CLOSED

8

IN CONTRACT

2

AVAILABLE



Recent Sales (Q4 2019 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	1	\$738,000	\$967
1-BR	14	\$1,115,179	\$1,273
2-BR	13	\$2,048,665	\$1,429
3-BR	3	\$3,400,000	\$1,901
4-BR+	0	-	-
Total/Avg.	31	\$1,715,585	\$1,436

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1	10	\$1,241,900	\$1,329
2	15	\$2,146,993	\$1,497
3	6	\$6,498,150	\$1,858
4-BR+	1	\$5,390,000	\$2,002
Total/Avg.	32	\$2,781,337	\$1,632

New Construction Project Overview



Address
2448 Lombard Street
San Francisco, CA

Developer
J.S. Sullivan Development

Residences
43 (37 Market Rate)

Average HOA Fees
\$570 - \$680/month

Date on Market
February 2020

Closings Commenced
July 2020

Average Absorption
3 Units/month

SALES STATUS

Q3 2020

6

CLOSED

15

IN CONTRACT

22

AVAILABLE



Recent Sales (Q4 2019 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	5	\$976,600	\$1,437
2-BR	1	\$1,698,000	\$1,756
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	6	\$1,096,833	\$1,508

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1	2	\$1,020,000	\$1,441
2	3	\$1,522,333	\$1,488
3	0	-	-
4-BR+	0	-	-
Total/Avg.	5	\$1,321,400	\$1,473

New Construction Project Overview



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
3 Units/month

SALES STATUS

Q3 2020

56

CLOSED

20

IN CONTRACT

316

AVAILABLE



Recent Sales (Q4 2019 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,280,000	\$1,604
2-BR	6	\$1,470,379	\$1,302
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	7	\$1,443,182	\$1,334

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	1	\$995,000	\$1,490
1	2	\$1,137,500	\$1,577
2	3	\$1,808,333	\$1,452
3	1	\$4,695,000	\$2,346
4-BR+	0	-	-
Total/Avg.	7	\$1,912,857	\$1,706

New Construction Project Overview



Address
588 Minna Street
San Francisco, CA

Developer
Z&L Properties

Residences
39

Average HOA Fees
\$525 - \$640/month

Date on Market
November 2019

Closings Commenced
TBD

Average Absorption
TBD

SALES STATUS Q3 2020

N/A
CLOSED

N/A
IN CONTRACT

N/A
AVAILABLE



Recent Sales (Q4 2019 - 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	\$825,000	\$1,281
2-BR	1	\$1,373,000	\$1,400
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	2	\$1,099,000	\$1,353

New Construction Project Overview



ONE MISSION BAY

Address
110 Channel St./1000 3rd St.
San Francisco, CA

Developer
CIM Group
Strada Investment Group

Residences
350

Average HOA Fees
\$745 - \$1,100/month

Date on Market
May 2016

Closings Commenced
November 2017

Average Absorption
7 Units/month

SALES STATUS

Q3 2020

328

CLOSED

19

IN CONTRACT

3

AVAILABLE



Recent Sales (Q4 2019 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	1	\$820,000	\$1,524
1-BR	6	\$1,100,981	\$1,371
2-BR	6	\$1,616,167	\$1,373
3-BR	2	\$3,010,000	\$1,665
4-BR+	0	-	-
Total/Avg.	15	\$1,542,859	\$1,443

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	2	\$857,000	\$1,639
1	2	\$927,000	\$1,330
2	12	\$1,562,908	\$1,337
3	2	\$2,625,000	\$1,598
4-BR+	0	-	-
Total/Avg.	18	\$1,531,828	\$1,396

New Construction Project Overview



Address
75 Howard Street
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
TBD

Average Absorption
1 Units/month

SALES STATUS
Q3 2020

N/A
CLOSED

10
IN CONTRACT

110
AVAILABLE



Recent Sales (Q4 2019 - 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	1	\$1,395,000	\$1,521
2	2	\$3,695,000	\$2,486
3	0	-	-
4-BR+	0	-	-
Total/Avg.	3	\$2,928,333	\$2,258

New Construction Project Overview



Address
3620 Cesar Chavez
San Francisco, CA

Developer
Vanguard Properties

Residences
24

Average HOA Fees
\$460 - \$570/month

Date on Market
February 2020

Closings Commenced
July 2020

Average Absorption
1 Units/month

SALES STATUS

Q3 2020

2

CLOSED

4

IN CONTRACT

18

AVAILABLE



Recent Sales (Q4 2019 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$795,000	\$1,478
2-BR	1	\$1,240,000	\$1,084
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	2	\$1,017,500	\$1,210

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$795,000	\$1,478
2-BR	3	\$1,289,667	\$1,202
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	4	\$1,166,000	\$1,241

New Construction Project Overview



THE AUSTIN

Address
1545 Pine Street
San Francisco, CA

Developer
Pacific Eagle Holdings

Residences
100 (88 Market Rate)

Average HOA Fees
\$600 - \$1,130/month

Date on Market
February 2017

Closings Commenced
December 2017

Average Absorption
2 Units/month

SALES STATUS

Q3 2020

97

CLOSED

1

IN CONTRACT

2

AVAILABLE



Recent Sales (Q4 2019 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	1	\$770,000	\$1,209
1-BR	5	\$946,800	\$1,332
2-BR	4	\$1,588,750	\$1,386
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	10	\$1,185,900	\$1,351

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$997,000	\$1,387
2-BR	2	\$1,564,500	\$1,223
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	4	\$1,280,750	\$1,305

New Construction Project Overview



Address
488 Folsom Street
San Francisco, CA

Developer
Related

Residences
118

Average HOA Fees
\$1,570 - \$2,490/month

Date on Market
June 2018

Closings Commenced
August 2019

Average Absorption
1 Units/month

SALES STATUS

Q3 2020

21

CLOSED

3

IN CONTRACT

94

AVAILABLE



Recent Sales (Q4 2019 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	1	\$2,705,000	\$1,639
3-BR	6	\$3,759,167	\$1,915
4-BR+	0	-	-
Total/Avg.	7	\$3,608,571	\$1,881

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$1,455,000	\$1,529
2-BR	2	\$1,850,000	\$1,547
3-BR	3	\$7,531,667	\$2,723
4-BR+	0	-	-
Total/Avg.	7	\$4,172,143	\$2,046

New Construction Project Overview



Address
401 Harrison Street
San Francisco, CA

Developer
Rockpoint Group
Maximus Real Estate Partners

Residences
298

Average HOA Fees
\$1,025 - \$1,655/month

Date on Market
April 2016

Closings Commenced
August 2016

Average Absorption
5 Units/month

SALES STATUS

Q3 2020

265

CLOSED

N/A

IN CONTRACT

33

AVAILABLE



Recent Sales (Q4 2019 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	6	\$1,098,250	\$1,455
2-BR	9	\$1,901,555	\$1,462
3-BR	2	\$3,669,000	\$1,868
4-BR+	0	-	-
Total/Avg.	17	\$1,825,971	\$1,540

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	5	\$1,131,000	\$1,519
2-BR	11	\$2,531,727	\$1,810
3-BR	2	\$6,075,000	\$2,357
4-BR+	0	-	-
Total/Avg.	18	\$2,536,333	\$1,882

New Construction Project Overview



Address
2800 Sloat Blvd
San Francisco, CA

Developer
Propriis

Residences
56 (49 Market Rate)

Average HOA Fees
\$450 - \$550/month

Date on Market
July 2019

Closings Commenced
September 2020

Average Absorption
N/A

SALES STATUS Q3 2020

N/A
CLOSED

N/A
IN CONTRACT

N/A
AVAILABLE



Recent Sales (Q4 2019 - Present)

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

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	1	\$1,475,000	\$1,207
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	1	\$1,475,000	\$1,207

New Construction Project Overview



Address
1515 Union Street
San Francisco, CA

Developer
DM Development

Residences
41

Average HOA Fees
\$960 - \$1,680/month

Date on Market
February 2020

Closings Commenced
July 2020

Average Absorption
1 Units/month

SALES STATUS

Q3 2020

4

CLOSED

4

IN CONTRACT

33

AVAILABLE



Recent Sales (Q4 2019 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	0	-	-
3-BR	1	\$6,075,000	\$3,015
4-BR+	0	-	-
Total/Avg.	1	\$6,075,000	\$3,015

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,549,000	\$1,622
2-BR	1	\$2,455,000	\$1,975
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	2	\$2,002,000	\$1,822

New Development Pipeline



1145 Polk - Coming Soon

Developer	Dolmen Property Group
Architect	BDE Architecture
Condo Units & Stories	54 units & 6 stories
Neighborhood	Polk Gulch
Anticipated Sales Date	2020
Completion Date	2021
Status	Under Construction
Unit Mix	Studio, 2BR
Additional Info	Four retail spaces totaling approx. 7,515sf.



2238 - 2240 Market - Coming Soon

Developer	Prado Group
Architect	BDE Architecture
Condo Units & Stories	44 units (39 market-rate) & 5 stories
Parking	23 off-street parking spaces
Neighborhood	Duboce Triangle
Anticipated Sales Date	Fall 2020
Completion Date	2021
Status	Under Construction
Unit Mix	Studio: 11, 1BR: 9, 2BR: 20, 3BR: 2, PH-3BR: 1, PH-4BR:1
Additional Info	Approx. 4.9k-sqft ground floor retail space.



Crescent (875 California) - Coming Soon

Developer	Grosvenor Americas
Architect	Robert A.M. Stern Architects
Condo Units & Stories	44 units & 8 stories
Parking	N/A
Neighborhood	Nob Hill
Completion Date	2020
Status	Pre-selling
Unit Mix	Studio, 1BR, 2BR, 3BR
Additional Info	48 off-street parking spaces. 24-hour attended lobby. Lounge w/ fireplace, butler's pantry, and terrace overlooking garden. Roof terrace w/ gas grill, a double-sided fireplace, and a dining area. Fully equipped gym and yoga studio

New Development Pipeline



Elevant (555 Golden Gate Avenue) - Coming Soon

Developer	JS Sullivan Development
Architect	Stanley Saitowitz Natoma Architects Inc.
Condo Units & Stories	55 units (48 market-rate) & 11 stories
Parking	21 off-street parking spaces & 1 car-share parking
Neighborhood	Van Ness / Civic Center
Anticipated Sales Date	Winter 2020
Completion Date	December 2020
Status	Under Construction
Unit Mix	1BR: 17, 2BR: 35, 3BR: 3
Additional Info	N/A



Serif (950 Market Street) - Coming Soon

Developer	L37 Partners
Architect	Handel Architects
Condo Units & Stories	242 units & 12 stories
Parking	82 off-street parking spaces, 2 car-share spaces
Neighborhood	Mid-Market
Anticipated Sales Date	Fall 2020
Completion Date	2021
Status	Under Construction
Unit Mix	Studio: 33, JR-1BR: 88, 1BR:77, 2BR: 44 Residences range from 350 - 1,200 sqft with prices starting in the \$500K's
Additional Info	232-room The Line (hotel), 16,050-sqft retail. 24hr attended lobby, roof-top solarium w/ library and bar, entertaining kitchen, fitness center, yoga studio, pet spa, dog run, bicycle parking and storage



The Oak (1554 Market) - Coming Soon

Developer	Z&L Properties
Architect	Handel Architects
Condo Units & Stories	109 units (96 market-rate) & 12 stories (2 buildings)
Parking	N/A
Neighborhood	Hayes Valley
Anticipated Sales Date	Fall 2020
Completion Date	April 2021
Status	Under Construction
Unit Mix	Studio: 10, 1BR: 78, 2BR: 20, 3BR: 1
Additional Info	Two 12-story towers with a shared courtyard, connected by a pedestrian sky bridge. Amenities include fitness center, resident lounge, rooftop deck. Three retail spaces

New Development Pipeline



The Bristol (Yerba Buena Island) - Coming Soon

Developer	Wilson Meany / Stockbridge Real Estate Funds
Architect	BDE Architecture / Hart Howerton
Condo Units & Stories	124 units (110 market-rate) & 5 stories
Neighborhood	Yerba Buena Island
Anticipated Sales Date	2021
Completion Date	Phase I: 2021 Phase II: TBD (Flats & Townhomes)
Status	Under Construction
Unit Mix	Studios, one-, two-, and three-bedrooms; Residences range from 630 - 2,248 sqft
Additional Info	Courtyard, fitness studio, children's room, lounges, and rooftop terrace. Community amenities include access to 14k-sqft private club featuring a swimming pool, fitness center, and spa. Community landscaping will feature 72 acres of park and 5 miles of walking and hiking trails



The Quinn (349 8th Street) - Coming Soon

Developer	Presidio Bay Ventures
Architect	RG Architecture
Condo Units & Stories	38 units (32 market-rate) & 5 floors
Parking	N/A
Neighborhood	SoMa
Anticipated Sales Date	2021
Completion Date	2021
Status	Under Construction
Unit Mix	One-, two-, and three-bedrooms
Additional Info	Pricing starting from the \$800K's 927-sqft ground floor commercial space, 1.4k-sqft inner courtyard, 1.1k-sqft outer courtyard at Rodgers Street, and 1,008-sqft sky-bridge connecting portions of fifth floor



325 Fremont

Developer	Z&L Properties
Architect	Handel Architects
Condo Units & Stories	118 units & 25 floors
Parking	41 off-street parking
Neighborhood	Rincon Hill
Anticipated Sales Date	TBD
Completion Date	2022+
Status	Under Construction
Unit Mix	Studio: 19%, 1BR: 40%, 2BR: 41%
Additional Info	Includes ~4,686-sqft of common open space via ground floor street improvements along Zeno Place, a roof deck, and private open space via private balconies

New Development Pipeline



STREET VIEW SOUTH TO MISSION STREET

5M (110 5th Street / 925 Mission Street)

Developer	Brookfield Properties / Hearst Corp.
Architect	Kohn Pederson Fox Associates
Condo Units & Stories	702 units (400 condos & 302 apartments) & 45 fls
Parking	~756 subterranean parking spaces
Neighborhood	SoMa / Mid-Market
Anticipated Sales Date	TBD
Completion Date	Phase 1: Office tower, apt building in late-2021 Phase 2: 2022+
Status	Under Construction
Unit Mix	N/A
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



Oceanwide Center

Developer	Oceanwide Holdings / Hony Capital
Architect	Foster + Partners
Condo Units & Stories	265 units (109 units at 1st St & 156 units at Mission St) / 2 towers (52 & 61 floors)
Parking	360 parking spaces
Neighborhood	Rincon Hill / Yerba Buena
Anticipated Sales Date	TBD
Completion Date	2023+
Status	Under Construction
Unit Mix	1BR: 32, 2BR: 154, 2BR+: 8, 3BR: 61, 3BR+: 3, 4BR: 3, PH: 4
Additional Info	135-million-sqft of office space, 169-room hotel, ground floor retail space and privately-owned public open spaces



One Oak (1540 Market Street)

Developer	BUILD
Architect	Solomon, Cordwell, Buenz (SCB)
Condo Units & Stories	318 units & 40 floors
Parking	136 off-street parking spaces
Neighborhood	Mid-Market
Anticipated Sales Date	TBD
Completion Date	2022+
Status	Approved
Unit Mix	Studios, one-, two-, and three-bedroom units
Additional Info	Extended entitlements in Q1-2020 for an additional two years

New Development Pipeline



1200 Van Ness

Developer	Van Ness Post Center LLC
Architect	Woods Bagot.
Condo Units & Stories	96 units & 13 floors
Neighborhood	Polk Gulch
Completion Date	TBD
Status	Approved
Unit Mix	N/A
Additional Info	Rooftop garden, fitness / yoga studio, multi-functional spaces, pet grooming area. 95K-sqft commercial / retail space



1601 Mission

Developer	Zhuguang Holdings Group
Architect	Handel Architects
Condo Units & Stories	220 units & 12 floors
Neighborhood	Mission
Completion Date	TBD
Status	Approved
Unit Mix	N/A
Additional Info	7,000-sqft of retail space



230 7th Street

Developer	JS Sullivan Development
Architect	RG Architecture
Condo Units & Stories	40 units & 6 stories
Neighborhood	SoMa
Completion Date	TBD
Status	Approved
Unit Mix	N/A
Additional Info	2K-sqft ground floor commercial space

New Development Pipeline



2525 Van Ness

Developer	Executive Group Development
Architect	Studio N & Chris Dikeakos Architects Inc.
Condo Units & Stories	28 units & 6 stories
Neighborhood	Cow Hollow
Completion Date	TBD
Status	Approved
Unit Mix	N/A
Additional Info	2,000+ sqft new café / retail space



2601 Van Ness

Developer	L.F. George Properties
Architect	Costa Brown Architecture
Condo Units & Stories	60 units & 9 stories
Neighborhood	Cow Hollow
Completion Date	TBD
Status	Approved
Unit Mix	One-, two- and three-bedrooms
Additional Info	3 retail / commercial spaces



3314 Cesar Chavez

Developer	Zone Design Development
Architect	RG Architecture
Condo Units & Stories	57 units & 6 floors
Neighborhood	Mission District
Completion Date	TBD
Status	Approved
Unit Mix	N/A
Additional Info	3K-sqft ground floor office space

New Development Pipeline



360 5th Street

Developer	Leap Development
Architect	KTGY Architecture
Condo Units & Stories	127 units & 4-8 stories
Neighborhood	SoMa
Completion Date	TBD
Status	Approved
Unit Mix	Studio: 31, 1BR: 43, 2BR: 34, 3BR:19
Additional Info	Landscaped interior courtyard, roof terrace with BBQ and media area, ground floor commercial space



3700 California

Developer	TMG Partners / Grosvenor Americas
Architect	Robert A.M. Stern Architects
Condo Units & Stories	273 units, 3-7 stories
Neighborhood	Presidio Heights
Completion Date	2028+
Status	Approved
Unit Mix	1BR: 69, 2BR: 88, 3BR: 96, 4BR+: 20
Additional Info	Multi-family buildings, Townhomes & Single-family homes



430 Main

Developer	Warhorse LLC & Tidewater Capital
Architect	Solomon, Cordwell, Buenz (SCB)
Condo Units & Stories	144 units
Neighborhood	Rincon Hill
Completion Date	TBD
Status	Approved
Unit Mix	Studios, one- and two-bedrooms
Additional Info	Development team pursuing entitlements

New Development Pipeline



469 Eddy

Developer	JS Sullivan Development
Architect	Stanley Saitowitz Natoma Architects Inc.
Condo Units & Stories	28 units & 8 stories
Neighborhood	Tenderloin
Completion Date	TBD
Status	Approved
Unit Mix	N/A
Additional Info	~700-sqft ground floor commercial space



655 4th Street

Developer	Tishman Speyer
Architect	Adamson Associates & Bjarke Ingels Group
Condo Units & Stories	960 units & 40 stories
Neighborhood	SoMa
Completion Date	TBD
Status	Approved
Unit Mix	960 units & 40 stories
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

Developer	Pillar Capital Group
Architect	Arqhitectonica
Condo Units & Stories	89 units & 14 floors
Neighborhood	SoMa
Completion Date	TBD
Status	Approved
Unit Mix	N/A
Additional Info	Ground floor retail space. Roof deck lounge and second-floor outdoor terrace

New Development Pipeline



888 Tennessee

Developer	S. Hekemian Group
Architect	David Baker Architects
Condo Units & Stories	110 units & 4 floors
Neighborhood	Dogpatch/Central Waterfront
Completion Date	TBD
Status	Approved
Unit Mix	N/A
Additional Info	5,500-sqft of restaurant / retail space



Parcel D - Pier 70

Developer	Brookfield Properties
Architect	Handel Architects
Condo Units & Stories	Approx 90 units
Neighborhood	Dogpatch/Central Waterfront
Completion Date	TBD
Status	Approved
Unit Mix	TBD
Additional Info	Located in the heart of Pier 70's market square



Parcel F (542 - 550 Howard Street)

Developer	Hines / Urban Pacific Development / Broad Street Principal Investments
Architect	Pelli Clark Pelli
Condo Units & Stories	165 units & 61 stories
Neighborhood	SoMa
Completion Date	TBD
Status	Approved
Unit Mix	N/A
Additional Info	189-room hotel, 325K-sqft office space, 8.7K-sqft retail space

New Development Pipeline



Parcel K North - Pier 70

Developer	Westbrook Partners / Presidio Bay Ventures
Architect	Handel Architects
Condo Units & Stories	250 units & 6 stories
Neighborhood	Dogpatch
Completion Date	TBD
Status	Approved
Unit Mix	Studios to 3-bedroom penthouses
Additional Info	Common terrace. Ground floor retail / commercial space.



30 Van Ness

Developer	Lendlease
Architect	Solomon, Cordwell, Buenz (SCB)
Condo Units & Stories	610 units & 40 stories
Neighborhood	Civic Center
Completion Date	TBD
Status	Under Review
Unit Mix	N/A
Additional Info	Office, retail, apartments, condos are TBD



3333 California

Developer	Prado Group / SKS Partners
Architect	Jensen Architects
Condo Units & Stories	744 units
Neighborhood	Presidio Heights
Completion Date	TBD
Status	Under Review
Unit Mix	N/A
Additional Info	~34.5K-sqft retail space and ~14.7K-sqft childcare space

New Development Pipeline



600 20th Street

Developer	Workshop 1
Architect	Workshop 1
Condo Units & Stories	20 units & 6 floors
Neighborhood	Dogpatch/Central Waterfront
Completion Date	TBD
Status	Under Review
Unit Mix	1BR: 50%, 2BR: 45%, 3BR: 5%
Additional Info	1.7K-sqft ground commercial space



Transbay Block 4 (201 - 299 Howard Street)

Developer	Hines / Urban Pacific Development / Broad Street Principal Investments
Architect	Solomon, Cordwell, Buenz (SCB)
Condo Units & Stories	713 units & 45 floors
Neighborhood	SoMa
Completion Date	TBD
Status	Under Review
Unit Mix	N/A
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

San Francisco MarketWatch / Q3 2020

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