



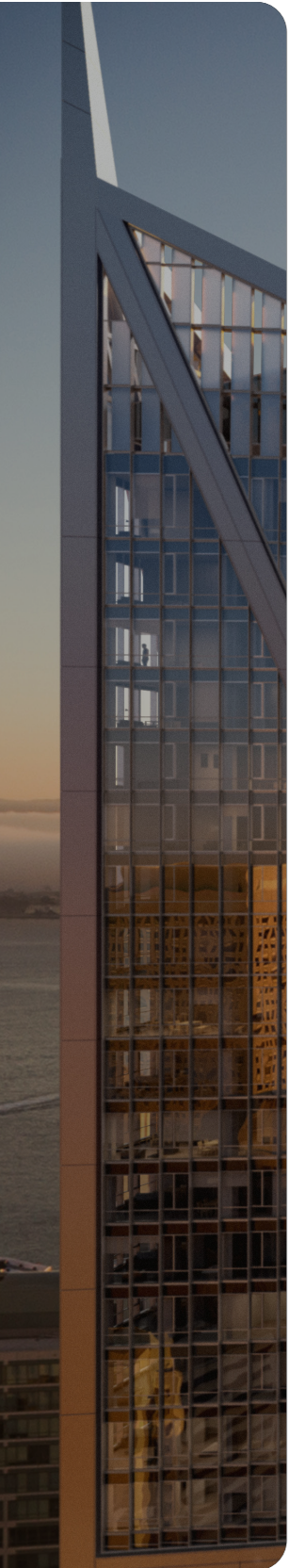
# New Development Market Insights

SAN FRANCISCO Q1 2021

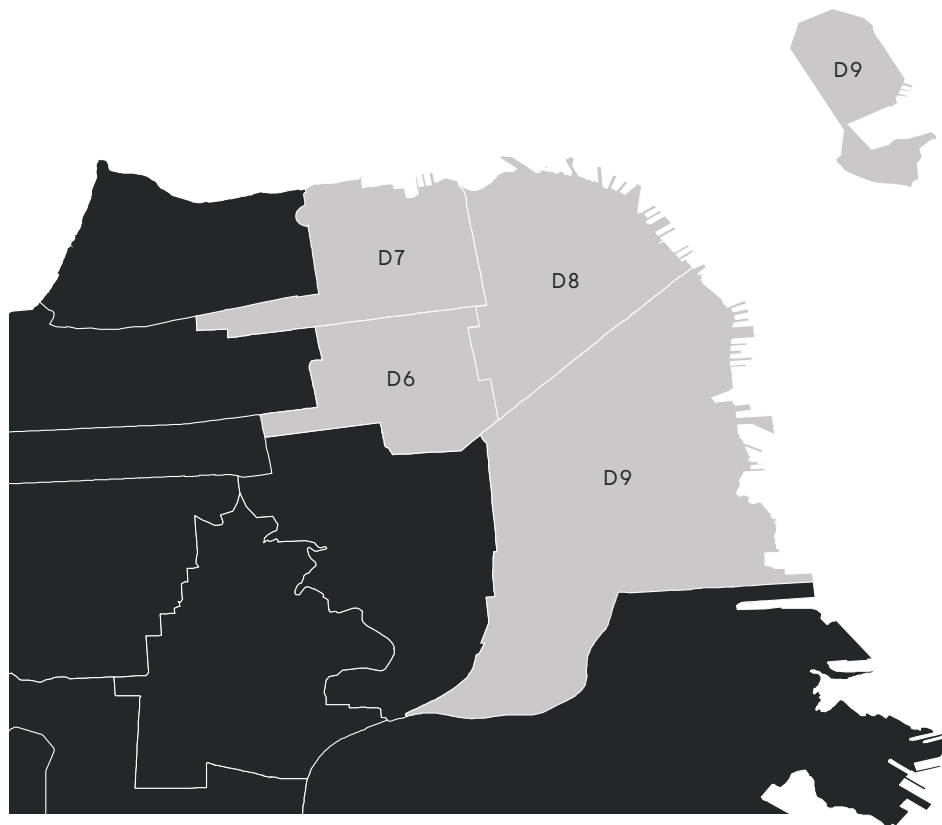
COMPASS  
DEVELOPMENT  
MARKETING  
GROUP







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## SAN FRANCISCO DISTRICTS 6 - 9 SUMMARY

+42.6%

**SALES VOLUME** increased substantially in Q1 2021 **JUMPING 42.6% YOY** as buyer confidence returned to the downtown market. More than 500 deals were recorded, a strong improvement over the same period last year.

+2.0%

Downtown San Francisco witnessed QoQ improvement in the **AVERAGE PPSF TO \$1,109, UP 2%** in Q1 2021, resulting from increased sales volume and buyer demand.

+115.6%

Condos priced under \$1M saw a dramatic increase in **SALES VOLUME** recording over 200 closings and **RISING 115.6% YOY**, as home buyers capitalized on historical interest rate lows, softer prices, and resurgence of urban core living.

Compass Development Marketing Group'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.

Through most of 2020 economic fundamentals were dampened by electoral, civic, and economic uncertainty, yet an individual's home also became the center of the universe. With the start of 2021, a new optimism came along with the arrival of COVID-19 vaccinations, helping to release the pent-up demand for dining, travel, and leisure. San Francisco's downtown core market, represented as Districts 6-9, witnessed a flight to quality fueled by historically low-interest rates that motivated first-time home buyers, second home buyers, and those looking to upgrade space or neighborhoods at softer pricing. Sales volume increased 42.6% YoY during Q1 2021, compared to the early post-Covid performance in Q1 2020.

Nearly a quarter of the buyers for new condo developments were looking for upgrades in quality and neighborhood. Urban core living retained popularity despite early indications that a suburban migration was happening away from the downtown core. With most companies extending work-from-home policies or allowing hybrid models, the convenience of indoor living space to accommodate home offices, outdoor spaces like balconies as well as communal roof decks, gyms and pools were at the top of everyone's list.

Average price-per-square-foot remained soft at \$1,109 PSF, down 6.9% YoY however, there was a 2% increase QoQ suggesting a continued uptick over the next few quarters as values begin to catch up with higher demand. It should be noted, however, that the sales momentum at lower price points has dragged on the overall average.

Condos priced above \$3M recorded positive fundamentals across the board with the average sales price increasing 20.0% YoY, to \$4.3M, and demand up more than 16.0% YoY, recording 14 closings in the quarter.

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

**+42.6%**

**SALES VOLUME** in Q1 2021 for Districts 6-9 **INCREASED 42.6% YOY**, with a total of 509 recorded closings.

**+2.0%**

The combined core Districts 6-9 recorded a **2% INCREASE QOQ** for the **AVERAGE PRICE PER SQUARE FOOT** in Q1 2021, to \$1,109 PSF.

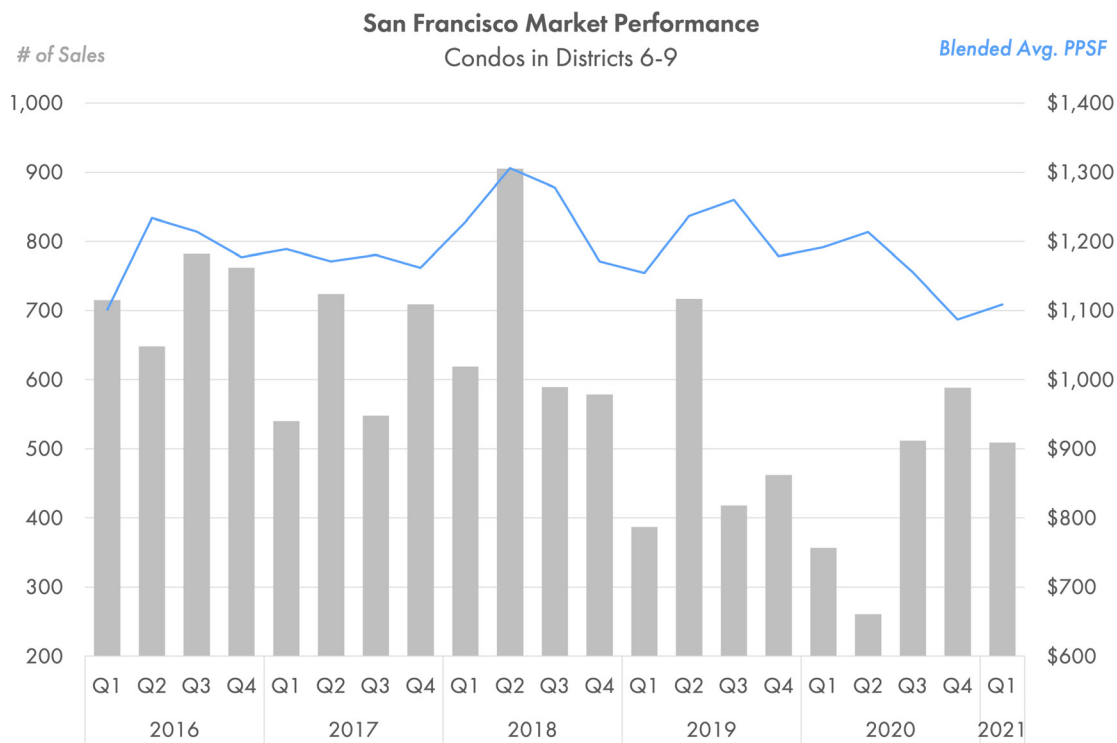
**-2.3%**

The **AVERAGE SALES PRICE** in Q1 2021 in Districts 6-9 was \$1.3M, **DECREASING 2.3% QOQ**, but relatively low given a large number of transactions at lower price points.

**+12.9%**

The **\$3M+** price segment for Districts 6-9 saw an increase in the **AVERAGE PRICE PER SQUARE FOOT** to \$1,649, **UP 12.9% YOY**.

## MARKET PERFORMANCE



CONDO	Q1-21	YoY%	Q1-20	QoQ%	Q4-20
Avg. Sales Price	\$1,293,209	-9.3%	\$1,425,323	-2.3%	\$1,324,005
Blended Avg. PPSF	\$1,109	-6.9%	\$1,191	2.0%	\$1,087
Number of Sales	509	42.6%	357	-13.4%	588
DOM	67	N/A	38	N/A	55

ANNUAL PERFORMANCE	2020	YoY%	2019	YoY%	2018
Avg. Sales Price	\$1,379,792	-1.8%	\$1,405,264	-1.0%	\$1,419,181
Blended Avg. PPSF	\$1,148	-5.2%	\$1,210	-3.3%	\$1,252
Number of Sales	1,718	-13.4%	1,984	-26.3%	2,692
DOM	47	N/A	37	N/A	53



## SAN FRANCISCO DISTRICTS 6 - 9

<\$1M

\$1M-\$2M

\$2M-\$3M

\$3M+

## SALES BY PRICE POINT

Under \$1M	Q1-21	YoY%	Q1-20	QoQ%	Q4-20
Avg. Sales Price	\$782,277	-2.3%	\$800,939	-2.2%	\$799,533
Avg. PPSF	\$1,000	-10.6%	\$1,118	2.2%	\$978
Number of Sales	207	115.6%	96	-14.5%	242
DOM	65	N/A	40	N/A	56
\$1M-\$2M	Q1-21	YoY%	Q1-20	QoQ%	Q4-20
Avg. Sales Price	\$1,363,373	-0.8%	\$1,375,057	-1.0%	\$1,376,572
Avg. PPSF	\$1,064	-7.2%	\$1,146	3.6%	\$1,027
Number of Sales	244	20.2%	203	-15.3%	288
DOM	60	N/A	29	N/A	47
\$2M-\$3M	Q1-21	YoY%	Q1-20	QoQ%	Q4-20
Avg. Sales Price	\$2,366,498	-1.3%	\$2,397,904	-1.3%	\$2,398,371
Avg. PPSF	\$1,257	-2.5%	\$1,289	2.6%	\$1,225
Number of Sales	44	-4.3%	46	7.3%	41
DOM	59	N/A	34	N/A	54
\$3M+	Q1-21	YoY%	Q1-20	QoQ%	Q4-20
Avg. Sales Price	\$4,251,643	20.0%	\$3,542,500	-19.9%	\$5,308,353
Avg. PPSF	\$1,649	12.9%	\$1,460	-4.6%	\$1,728
Number of Sales	14	16.7%	12	-17.6%	17
DOM	79	N/A	34	N/A	68

## SAN FRANCISCO DISTRICTS 6

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

**+127.3%**

**SALES VOLUME** in District 6 **SKYROCKETED 127.3% YOY**, with 100 recorded closings during Q1 2021.

**+1.2%**

The **AVERAGE SALES PRICE PER SQUARE FOOT** for District 6 in Q1 2021 was \$1,036, **UP 1.2% QOQ**.

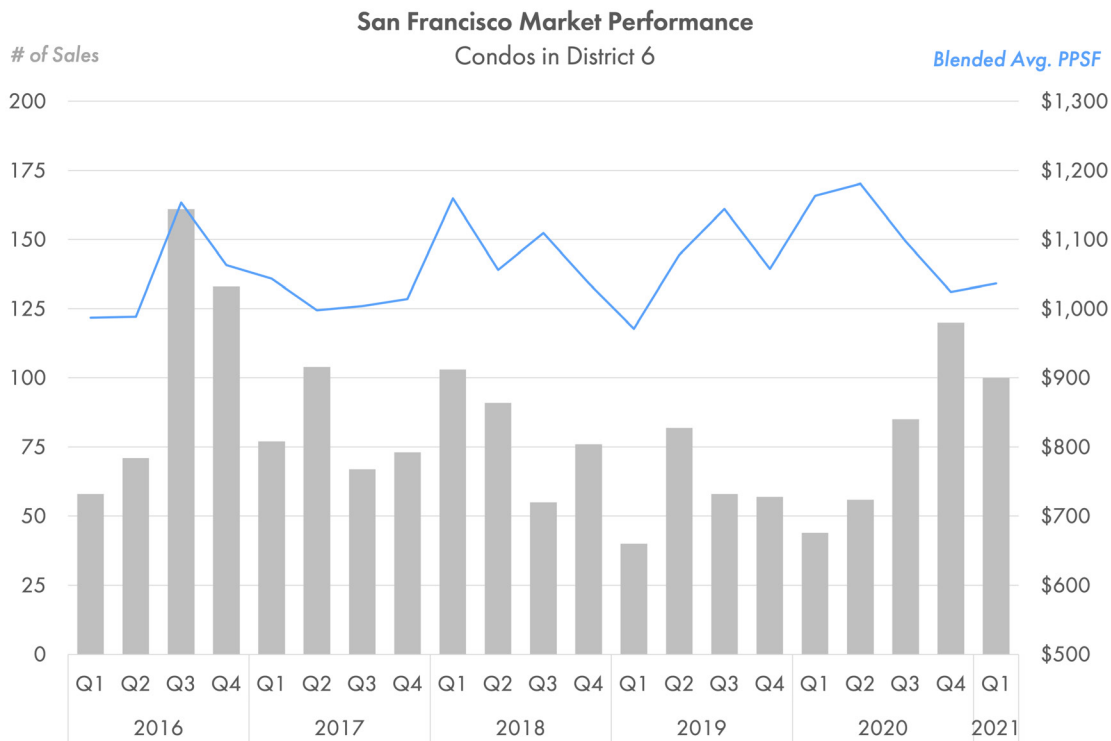
**-1.5%**

The **AVERAGE SALES PRICE** for condos in District 6 in Q1 2021 fell slightly to \$1.2M, a **DOWNTICK OF 1.5% QOQ**, due to a higher percentage of activity under \$1M.

**+272.7%**

Activity **UNDER \$1M** for District 6 recorded the strongest increase in **SALES VOLUME YOY, JUMPING 272.7%** for Q1 2021 recording 41 closings.

## MARKET PERFORMANCE



CONDO	Q1-21	YoY%	Q1-20	QoQ%	Q4-20
Avg. Sales Price	\$1,155,492	-12.2%	\$1,315,421	-1.5%	\$1,173,568
Blended Avg. PPSF	\$1,036	-10.9%	\$1,163	1.2%	\$1,024
Number of Sales	100	127.3%	44	-16.7%	120
DOM	59	N/A	28	N/A	40

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



## SAN FRANCISCO DISTRICT 6

<\$1M

\$1M-\$2M

\$2M-\$3M

\$3M+

## SALES BY PRICE POINT

Under \$1M	Q1-21	YoY%	Q1-20	QoQ%	Q4-20
Avg. Sales Price	\$791,257	0.4%	\$788,255	-0.1%	\$792,115
Avg. PPSF	\$1,051	-9.6%	\$1,162	1.3%	\$1,038
Number of Sales	41	272.7%	11	-10.9%	46
DOM	61	N/A	16	N/A	45
\$1M-\$2M	Q1-21	YoY%	Q1-20	QoQ%	Q4-20
Avg. Sales Price	\$1,367,968	-1.2%	\$1,384,258	0.5%	\$1,361,154
Avg. PPSF	\$1,040	-9.9%	\$1,154	2.1%	\$1,019
Number of Sales	56	86.7%	30	-20.0%	70
DOM	50	N/A	22	N/A	31
\$2M-\$3M	Q1-21	YoY%	Q1-20	QoQ%	Q4-20
Avg. Sales Price	\$2,167,137	-3.3%	\$2,240,000	-4.8%	\$2,277,500
Avg. PPSF	\$938	-32.2%	\$1,383	-8.5%	\$1,025
Number of Sales	3	50.0%	2	-25.0%	4
DOM	38	N/A	11	N/A	43
\$3M+	Q1-21	YoY%	Q1-20	QoQ%	Q4-20
Avg. Sales Price	-	N/A	\$3,200,000	N/A	-
Avg. PPSF	-	N/A	\$1,051	N/A	-
Number of Sales	0	N/A	1	N/A	0
DOM	-	N/A	21	N/A	-

## SAN FRANCISCO DISTRICT 7

MARINA, COW HOLLOW, PACIFIC HEIGHTS, & PRESIDIO HEIGHTS

### +4.9%

In Q1 2021, District 7 recorded an **AVERAGE PER SQUARE FOOT** pricing of \$1,207, **UP 4.9% QOQ**; a strong indication that buyers are returning to the market.

### +42.9%

**SALES VOLUME** for District 7 in Q1 2021 close to doubled with 60 sales recorded, **JUMPING 42.9% YOY**.

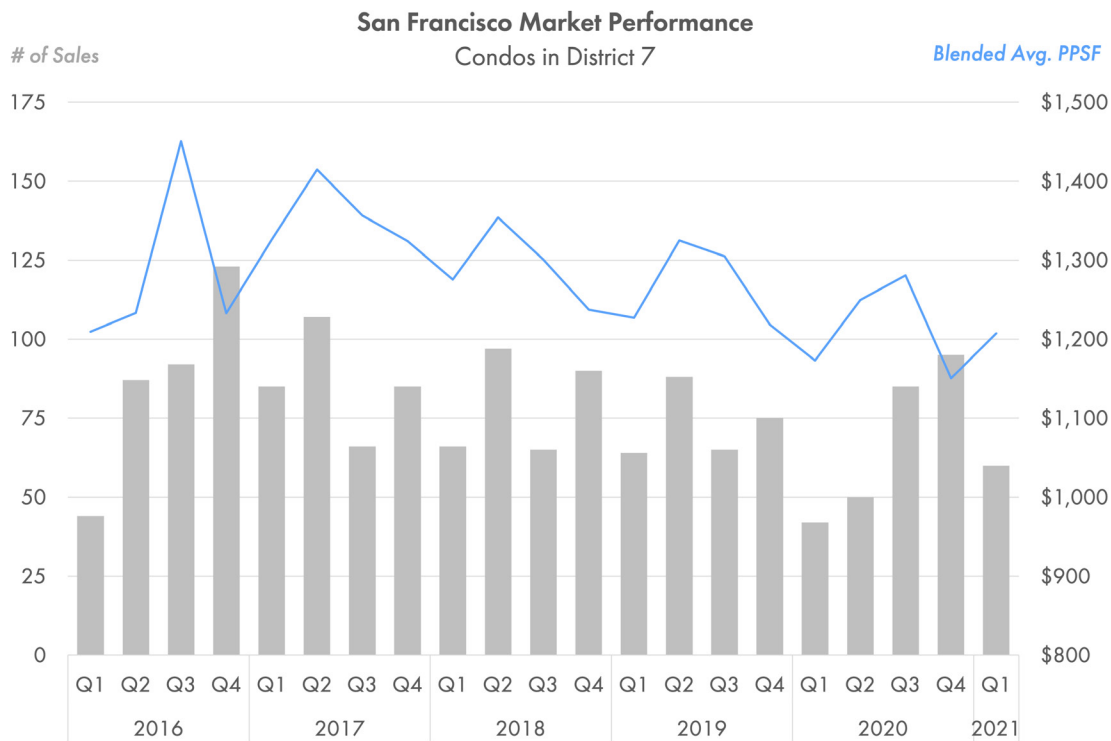
### +9.3%

The **\$3M+** price segment for District 7 recorded the strongest increase in **AVERAGE PRICE PER SQUARE FOOT** valuation at \$1,389, **INCREASING 9.3% QOQ**.

### +6.6%

The ultra-luxury market showed a strong increase in values as the **\$3M+** price segment for District 7 recorded an **AVERAGE SALES PRICE** of \$3.5M, **UP 6.6% YOY**.

## MARKET PERFORMANCE



CONDO	Q1-21	YoY%	Q1-20	QoQ%	Q4-20
Avg. Sales Price	\$1,795,600	-4.3%	\$1,876,168	1.9%	\$1,761,674
Blended Avg. PPSF	\$1,207	2.9%	\$1,173	4.9%	\$1,150
Number of Sales	60	42.9%	42	-36.8%	95
DOM	56	N/A	32	N/A	50

ANNUAL PERFORMANCE	2020	YoY%	2019	YoY%	2018
Avg. Sales Price	\$1,827,880	-1.7%	\$1,858,568	5.3%	\$1,764,606
Blended Avg. PPSF	\$1,211	-4.6%	\$1,270	-1.7%	\$1,292
Number of Sales	272	-6.8%	292	-8.2%	318
DOM	42	N/A	35	N/A	27



## SAN FRANCISCO DISTRICT 7

<\$1M

\$1M-\$2M

\$2M-\$3M

\$3M+

## SALES BY PRICE POINT

Under \$1M	Q1-21	YoY%	Q1-20	QoQ%	Q4-20
Avg. Sales Price	\$789,833	-4.4%	\$825,938	-4.1%	\$823,680
Avg. PPSF	\$1,189	15.2%	\$1,032	4.9%	\$1,133
Number of Sales	12	50.0%	8	-20.0%	15
DOM	69	N/A	38	N/A	34
\$1M-\$2M	Q1-21	YoY%	Q1-20	QoQ%	Q4-20
Avg. Sales Price	\$1,409,346	-5.4%	\$1,489,325	-3.4%	\$1,458,529
Avg. PPSF	\$1,078	-9.7%	\$1,194	-0.6%	\$1,085
Number of Sales	26	85.7%	14	-50.0%	52
DOM	60	N/A	32	N/A	44
\$2M-\$3M	Q1-21	YoY%	Q1-20	QoQ%	Q4-20
Avg. Sales Price	\$2,403,714	-1.5%	\$2,441,529	1.0%	\$2,380,766
Avg. PPSF	\$1,240	5.7%	\$1,173	3.8%	\$1,195
Number of Sales	14	-17.6%	17	-30.0%	20
DOM	46	N/A	19	N/A	62
\$3M+	Q1-21	YoY%	Q1-20	QoQ%	Q4-20
Avg. Sales Price	\$3,495,375	6.6%	\$3,278,333	-11.4%	\$3,943,125
Avg. PPSF	\$1,389	12.2%	\$1,238	9.3%	\$1,271
Number of Sales	8	166.7%	3	0.0%	8
DOM	32	N/A	29	N/A	51

## SAN FRANCISCO DISTRICT 8

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

**+23.9%**

District 8 recorded 109 **CLOSINGS** in Q1 2021, an **INCREASE OF 23.9% YOY**, suggesting buyer confidence in the market.

**+0.8%**

The **AVERAGE VALUATION** for District 8 in Q1 2021 was \$1,126 PSF, an **UPTICK OF 0.8% QOQ**.

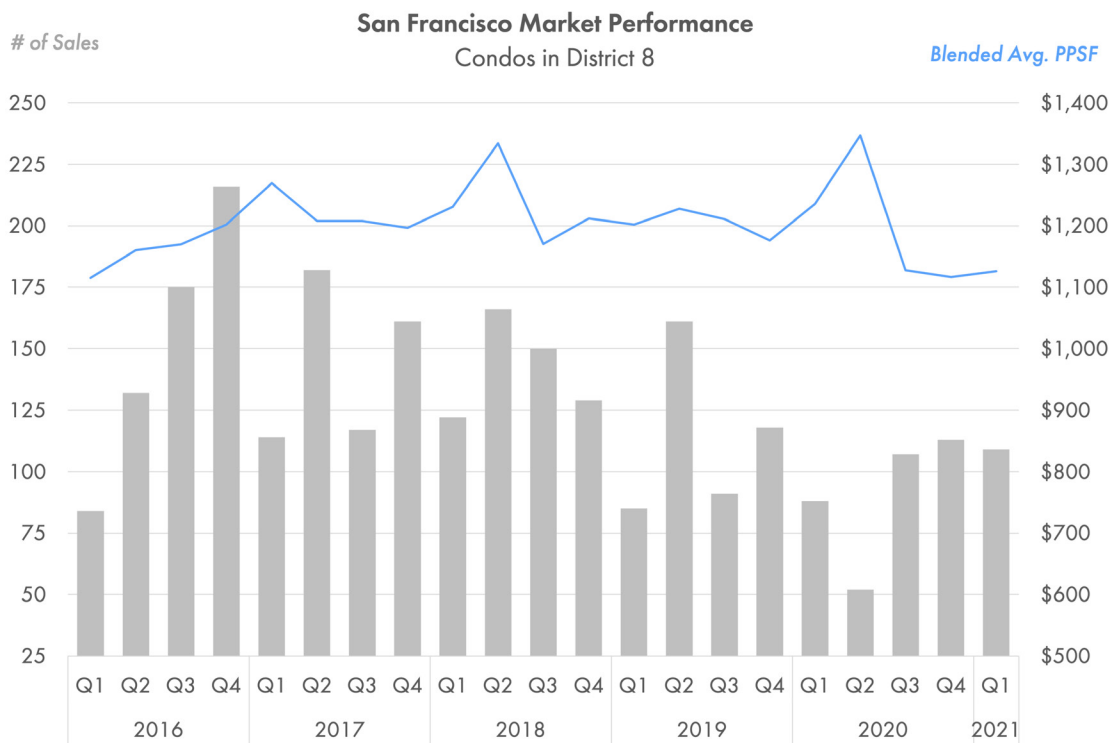
**+5.5%**

In Q1 2021, condos in District 8 recorded an **AVERAGE SALES PRICE** of \$1.3M, **INCREASING 5.5% QOQ**.

**+2.3%**

The **\$3M+** price segment recorded an **INCREASE OF 2.3% YOY** in the **AVERAGE SALE PRICE**, to \$3.4M.

## MARKET PERFORMANCE



CONDO	Q1-21	YoY%	Q1-20	QoQ%	Q4-20
Avg. Sales Price	\$1,278,487	-10.3%	\$1,425,517	5.5%	\$1,211,758
Blended Avg. PPSF	\$1,126	-8.9%	\$1,236	0.8%	\$1,117
Number of Sales	109	23.9%	88	-3.5%	113
DOM	78	N/A	42	N/A	66

ANNUAL PERFORMANCE	2020	YoY%	2019	YoY%	2018
Avg. Sales Price	\$1,337,555	3.6%	\$1,290,945	-6.3%	\$1,377,178
Blended Avg. PPSF	\$1,188	-1.4%	\$1,205	-3.0%	\$1,243
Number of Sales	360	-20.9%	455	-19.8%	567
DOM	56	N/A	45	N/A	43



## SAN FRANCISCO DISTRICT 8

<\$1M

\$1M-\$2M

\$2M-\$3M

\$3M+

## SALES BY PRICE POINT

Under \$1M	Q1-21	YoY%	Q1-20	QoQ%	Q4-20
Avg. Sales Price	\$727,162	-0.2%	\$728,339	-2.5%	\$746,093
Avg. PPSF	\$1,004	-11.1%	\$1,129	1.2%	\$993
Number of Sales	38	22.6%	31	-38.7%	62
DOM	67	N/A	49	N/A	63
\$1M-\$2M	Q1-21	YoY%	Q1-20	QoQ%	Q4-20
Avg. Sales Price	\$1,335,008	-3.2%	\$1,378,540	-1.2%	\$1,351,025
Avg. PPSF	\$1,102	-5.0%	\$1,161	8.0%	\$1,021
Number of Sales	57	50.0%	38	42.5%	40
DOM	67	N/A	27	N/A	63
\$2M-\$3M	Q1-21	YoY%	Q1-20	QoQ%	Q4-20
Avg. Sales Price	\$2,398,125	-5.1%	\$2,527,344	-2.1%	\$2,450,361
Avg. PPSF	\$1,318	-2.8%	\$1,356	0.1%	\$1,317
Number of Sales	12	-25.0%	16	50.0%	8
DOM	84	N/A	46	N/A	33
\$3M+	Q1-21	YoY%	Q1-20	QoQ%	Q4-20
Avg. Sales Price	\$3,425,000	2.3%	\$3,348,333	-39.7%	\$5,675,667
Avg. PPSF	\$1,271	-16.8%	\$1,528	-38.8%	\$2,077
Number of Sales	2	-33.3%	3	-33.3%	3
DOM	272	N/A	36	N/A	80

## SAN FRANCISCO DISTRICT 9

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

**+31.1%**

**SALES VOLUME INCREASED 31.1% YOY**, recording 240 closings over the same period last year, indicating a healthy signal in the densest condominium district.

**+2.4%**

The **AVERAGE SALES PRICE PER SQUARE FOOT INCREASED 2.4% QOQ** in District 9, to \$1,098.

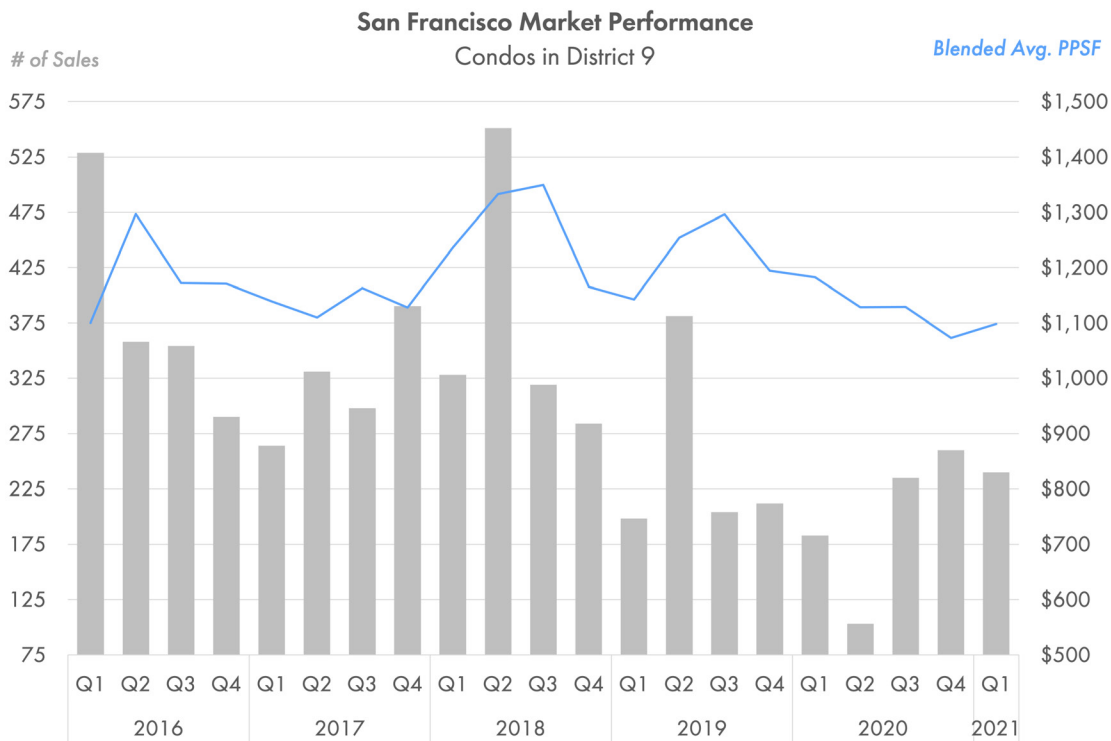
**+66.7%**

Condos in the **\$2M-\$3M** price segment recorded 15 **CLOSINGS**, an **INCREASE OF 66.7% QOQ**, showing signs of demand for homes in the price segment.

**+8.1%**

The **AVERAGE SALES PRICE** for the **\$2M-\$3M** price segment was \$2.4M, an **UPTICK OF 8.1% YOY** as deals were being made.

## MARKET PERFORMANCE



CONDO	Q1-21	YoY%	Q1-20	QoQ%	Q4-20
Avg. Sales Price	\$1,231,680	-8.6%	\$1,348,182	-3.9%	\$1,282,304
Blended Avg. PPSF	\$1,098	-7.1%	\$1,183	2.4%	\$1,073
Number of Sales	240	31.1%	183	-7.7%	260
DOM	67	N/A	40	N/A	60

ANNUAL PERFORMANCE	2020	YoY%	2019	YoY%	2018
Avg. Sales Price	\$1,299,967	-4.3%	\$1,358,448	-2.6%	\$1,394,407
Blended Avg. PPSF	\$1,122	-8.5%	\$1,226	-4.4%	\$1,282
Number of Sales	781	-21.5%	995	-32.9%	1,482
DOM	49	N/A	36	N/A	72

## SAN FRANCISCO DISTRICT 9

<\$1M

\$1M-\$2M

\$2M-\$3M

\$3M+

## SALES BY PRICE POINT

Under \$1M	Q1-21	YoY%	Q1-20	QoQ%	Q4-20
Avg. Sales Price	\$796,377	-6.1%	\$848,552	-3.7%	\$827,199
Avg. PPSF	\$967	-13.6%	\$1,118	3.3%	\$936
Number of Sales	116	152.2%	46	-2.5%	119
DOM	64	N/A	39	N/A	59
\$1M-\$2M	Q1-21	YoY%	Q1-20	QoQ%	Q4-20
Avg. Sales Price	\$1,364,937	0.5%	\$1,358,461	0.4%	\$1,359,423
Avg. PPSF	\$1,053	-7.1%	\$1,133	4.4%	\$1,009
Number of Sales	105	-13.2%	121	-16.7%	126
DOM	62	N/A	31	N/A	51
\$2M-\$3M	Q1-21	YoY%	Q1-20	QoQ%	Q4-20
Avg. Sales Price	\$2,346,333	8.1%	\$2,170,918	-4.0%	\$2,445,000
Avg. PPSF	\$1,307	-6.2%	\$1,394	-1.0%	\$1,320
Number of Sales	15	36.4%	11	66.7%	9
DOM	55	N/A	44	N/A	60
\$3M+	Q1-21	YoY%	Q1-20	QoQ%	Q4-20
Avg. Sales Price	\$6,177,500	59.0%	\$3,886,000	-11.1%	\$6,945,000
Avg. PPSF	\$2,336	38.8%	\$1,683	7.6%	\$2,170
Number of Sales	4	-20.0%	5	-33.3%	6
DOM	74	N/A	39	N/A	84



## 1433 BUSH

### ADDRESS

1433 Bush Street, San Francisco, CA

### DEVELOPER

JS Sullivan Development

### 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 Q1 2021

**36**

CLOSED

**0**

IN CONTRACT

**4**

AVAILABLE

### Recent Sales (Q2 2020 - Present)

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

### Active Listings

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



## 181 FREMONT

### ADDRESS

181 Fremont Street, San Francisco, CA

### DEVELOPER

Jay Paul Company

### RESIDENCES

55 and 12 Accessory Suites

### AVERAGE HOA FEES

~\$3,000/month

### DATE ON MARKET

May 2016

### CLOSINGS COMMENCED

May 2018

### AVERAGE ABSORPTION

N/A



## SALES STATUS Q1 2021

**37**

CLOSED

**N/A**

IN CONTRACT

**N/A**

AVAILABLE

### Recent Sales (Q2 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	2	\$4,267,500	\$2,325
3-BR	1	\$6,600,000	\$2,852
4-BR+	0	-	-
Total/Avg.	3	\$5,045,000	\$2,529

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,700,000	\$2,179
2-BR	4	\$4,818,750	\$2,663
3-BR	2	\$5,940,000	\$2,805
4-BR+	0	-	-
Total/Avg.	7	\$4,693,571	\$2,682





## 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 2019

### AVERAGE ABSORPTION

2 units/month



## SALES STATUS Q1 2021

23

CLOSED

9

IN CONTRACT

82

AVAILABLE

### Recent Sales (Q2 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	1	\$665,000	\$1,279
1-BR	4	\$911,875	\$1,296
2-BR	3	\$1,477,833	\$1,378
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	8	\$1,093,250	\$1,335

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	1	\$740,000	\$1,474
1-BR	2	\$1,070,000	\$1,523
2-BR	1	\$1,395,000	\$1,422
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	4	\$1,068,750	\$1,480



## 950 TENNESSEE

### ADDRESS

950 Tennessee Street, San Francisco, CA

### DEVELOPER

Leap Development

### RESIDENCES

100

### AVERAGE HOA FEES

\$435 - \$700/month

### DATE ON MARKET

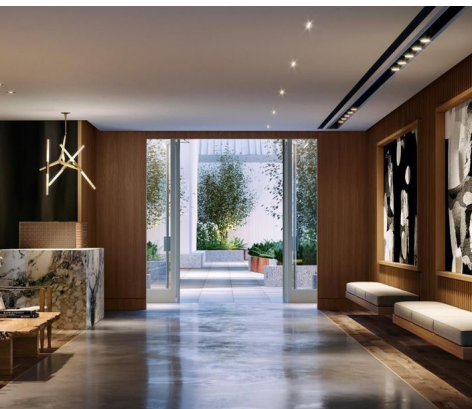
December 2019

### CLOSINGS COMMENCED

September 2020

### AVERAGE ABSORPTION

3 units/month



## SALES STATUS Q1 2021

23

CLOSED

20

IN CONTRACT

57

AVAILABLE

### Recent Sales (Q2 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	6	\$677,614	\$1,472
1-BR	5	\$925,000	\$1,178
2-BR	7	\$1,412,214	\$1,198
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	18	\$1,032,010	\$1,244

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	2	\$614,400	\$1,336
1-BR	2	\$1,074,000	\$1,279
2-BR	2	\$1,407,000	\$1,286
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	6	\$1,031,800	\$1,293





## 99 RAUSCH

### ADDRESS

99 Rausch Street, San Francisco, CA

### DEVELOPER

Belrich Partners / Pillar Capital

### RESIDENCES

112 (99 Market Rate)

### AVERAGE HOA FEES

\$520 - \$890/month

### DATE ON MARKET

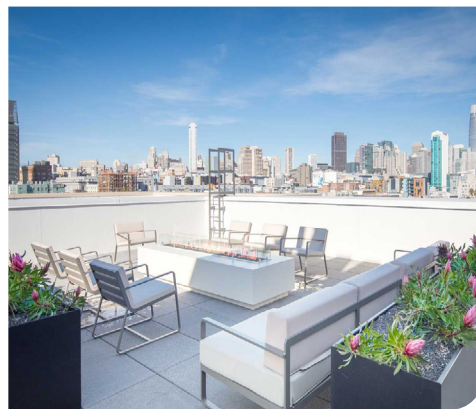
June 2017

### CLOSINGS COMMENCED

May 2018

### AVERAGE ABSORPTION

2 units/month



## SALES STATUS Q1 2021

**109**  
CLOSED

**0**  
IN CONTRACT

**3**  
AVAILABLE

### Recent Sales (Q2 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$800,000	\$1,220
2-BR	0	-	-
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	1	\$800,000	\$1,220

### 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

Q1 2021



## 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

TBD

### AVERAGE ABSORPTION

0 units/month



## SALES STATUS Q1 2021

**N/A**  
CLOSED

**1**  
IN CONTRACT

**54**  
AVAILABLE

### Recent Sales (Q2 2020 - Present)

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

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	4	\$733,972	\$1,148
2-BR	4	\$906,000	\$1,044
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	8	\$819,986	\$1,088





## FOUR SEASONS PRIVATE RESIDENCE

### 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 Q1 2021

4

CLOSED

N/A

IN CONTRACT

141

AVAILABLE

#### Recent Sales (Q2 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	0	-	-
3-BR	1	\$11,340,000	\$2,673
4-BR+	1	\$12,555,000	\$2,726
Total/Avg.	2	\$11,947,500	\$2,701

#### Active Listings

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





## FULTON 555

### ADDRESS

555 Fulton Street, San Francisco, CA

### DEVELOPER

Fulton Street Ventures, LLC

### RESIDENCES

139 (122 Market Rate)

### AVERAGE HOA FEES

\$560 - \$860/month

### DATE ON MARKET

June 2015 - Launch / July 2017 - Relaunch

### CLOSINGS COMMENCED

March 2020

### AVERAGE ABSORPTION

1 units/month - Launch  
2 units/month - Relaunch



## SALES STATUS Q1 2021

**90**  
CLOSED

**11**  
IN CONTRACT

**38**  
AVAILABLE

### Recent Sales (Q2 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	2	\$584,500	\$1,090
1-BR	38	\$760,704	\$1,169
2-BR	24	\$1,252,961	\$1,334
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	64	\$939,794	\$1,244

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$729,000	\$1,018
2-BR	2	\$1,169,000	\$1,227
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	3	\$1,022,333	\$1,170



## LUMINA

### ADDRESS

201 Folsom Street, San Francisco, CA

### DEVELOPER

Tishman Speyer Vanke

### RESIDENCES

656

### AVERAGE HOA FEES

\$995 - \$3,750/month

### DATE ON MARKET

October 2014

### CLOSINGS COMMENCED

September 2015

### AVERAGE ABSORPTION

8 units/month



## SALES STATUS Q1 2021

**646**  
CLOSED

**9**  
IN CONTRACT

**1**  
AVAILABLE

### Recent Sales (Q2 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	1	\$738,000	\$967
1-BR	9	\$1,087,111	\$1,240
2-BR	14	\$1,904,571	\$1,342
3-BR	1	\$4,200,000	\$1,565
4-BR+	1	\$4,600,000	\$1,709
Total/Avg.	26	\$1,768,692	\$1,357

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	8	\$1,172,000	\$1,322
2-BR	4	\$2,479,750	\$1,703
3-BR	3	\$6,850,000	\$1,820
4-BR+	0	-	-
Total/Avg.	15	\$2,656,333	\$1,646





## MAISON AU PONT

### ADDRESS

2448 Lombard Street, San Francisco, CA

### DEVELOPER

JS Sullivan Development

### RESIDENCES

43 (37 Market Rate)

### AVERAGE HOA FEES

\$570 - \$870/month

### DATE ON MARKET

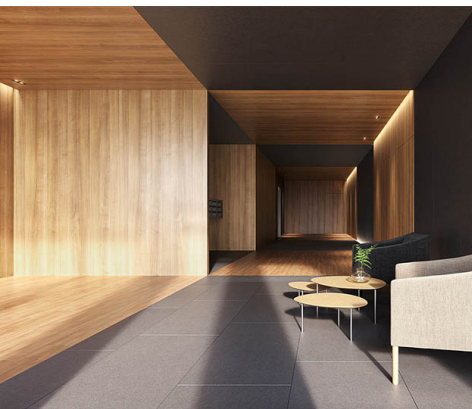
February 2020

### CLOSINGS COMMENCED

July 2020

### AVERAGE ABSORPTION

2 units/month



## SALES STATUS Q1 2021

**18**

CLOSED

**14**

IN CONTRACT

**11**

AVAILABLE

### Recent Sales (Q2 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	7	\$988,643	\$1,434
2-BR	3	\$1,489,333	\$1,456
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	10	\$1,138,850	\$1,442

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$899,000	\$1,617
2-BR	1	\$1,798,888	\$1,577
3-BR	1	\$2,498,000	\$1,205
4-BR+	1	\$3,475,000	\$1,701
Total/Avg.	4	\$2,167,722	\$1,492



## 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

4 units/month



## SALES STATUS Q1 2021

**116**

CLOSED

**3**

IN CONTRACT

**273**

AVAILABLE

### Recent Sales (Q2 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	1	\$875,000	\$1,310
1-BR	1	\$1,280,000	\$1,604
2-BR	8	\$1,549,034	\$1,316
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	10	\$1,454,727	\$1,337

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$1,000,000	\$1,390
2-BR	4	\$1,710,000	\$1,409
3-BR	2	\$3,445,000	\$1,934
4-BR+	0	-	-
Total/Avg.	8	\$1,966,250	\$1,596





## 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

TBD

### AVERAGE ABSORPTION

N/A



## SALES STATUS Q1 2021

**N/A**  
CLOSED

**0**  
IN CONTRACT

**22**  
AVAILABLE

### Recent Sales (Q2 2020 - Present)

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

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,095,000	\$1,523
2-BR	4	\$2,045,000	\$1,529
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	5	\$1,855,000	\$1,529





## ONE ELEVEN

### ADDRESS

588 Minna Street, San Francisco, CA

### DEVELOPER

Z&L Properties

### RESIDENCES

39

### AVERAGE HOA FEES

\$525 - \$640/month

### DATE ON MARKET

December 2019

### CLOSINGS COMMENCED

February 2021

### AVERAGE ABSORPTION

1 units/month



## SALES STATUS Q1 2021

6

CLOSED

5

IN CONTRACT

28

AVAILABLE

### Recent Sales (Q2 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	3	\$631,000	\$1,105
2-BR	3	\$1,089,000	\$1,109
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	6	\$860,000	\$1,107

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$749,000	\$1,123
2-BR	1	\$1,099,000	\$1,101
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	3	\$865,667	\$1,114



## 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

6 units/month



## SALES STATUS Q1 2021

**328**

CLOSED

**19**

IN CONTRACT

**3**

AVAILABLE

### Recent Sales (Q2 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	1	\$820,000	\$1,524
1-BR	5	\$1,031,698	\$1,256
2-BR	3	\$1,626,000	\$1,313
3-BR	1	\$2,220,000	\$1,354
4-BR+	0	-	-
Total/Avg.	10	\$1,307,649	\$1,308

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	1	\$825,000	\$1,533
1-BR	1	\$1,038,000	\$1,251
2-BR	3	\$1,316,300	\$1,059
3-BR	1	\$2,998,000	\$1,641
4-BR+	0	-	-
Total/Avg.	6	\$1,468,317	\$1,273





## ONE STEUART LANE

### 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 Q1 2021

**N/A**  
CLOSED

**11**  
IN CONTRACT

**109**  
AVAILABLE

### Recent Sales (Q2 2020 - Present)

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

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$2,395,000	\$1,705
2-BR	2	\$4,462,000	\$2,735
3-BR	1	\$6,895,000	\$2,694
4-BR+	0	-	-
Total/Avg.	4	\$4,553,500	\$2,520



## THE 36

### ADDRESS

3620 Cesar Chavez Street, San Francisco, CA

### DEVELOPER

Vanguard Properties

### RESIDENCES

24

### AVERAGE HOA FEES

\$460 - \$620/month

### DATE ON MARKET

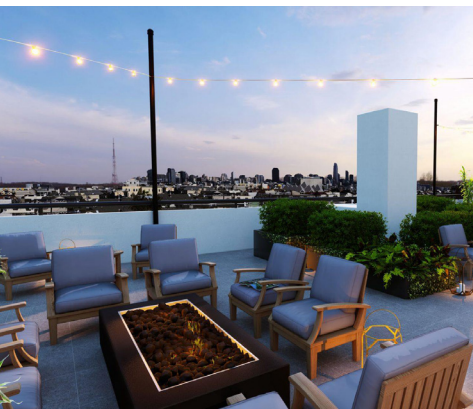
February 2020

### CLOSINGS COMMENCED

July 2020

### AVERAGE ABSORPTION

1 units/month



## SALES STATUS Q1 2021

12

CLOSED

2

IN CONTRACT

10

AVAILABLE

### Recent Sales (Q2 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$770,000	\$1,425
2-BR	11	\$1,198,818	\$1,100
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	13	\$1,132,846	\$1,127

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$745,000	\$1,385
2-BR	2	\$1,282,000	\$1,175
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	3	\$1,103,000	\$1,217





## 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

Sold Out



## SALES STATUS Q1 2021

**100**  
CLOSED

**0**  
IN CONTRACT

**0**  
AVAILABLE

### Recent Sales (Q2 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	1	\$770,000	\$1,209
1-BR	2	\$837,500	\$1,165
2-BR	4	\$1,532,500	\$1,343
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	7	\$1,225,000	\$1,291

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$945,000	\$1,532
2-BR	0	-	-
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	2	\$945,000	\$1,532





## THE AVERY

### ADDRESS

488 Folsom Street, San Francisco, CA

### DEVELOPER

Related

### RESIDENCES

118

### AVERAGE HOA FEES

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

### DATE ON MARKET

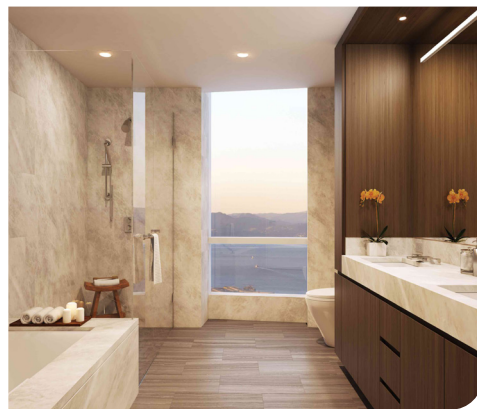
June 2018

### CLOSINGS COMMENCED

August 2019

### AVERAGE ABSORPTION

1 units/month



## SALES STATUS Q1 2021

**26**  
CLOSED

**0**  
IN CONTRACT

**92**  
AVAILABLE

### Recent Sales (Q2 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	4	\$2,598,750	\$1,586
3-BR	4	\$6,542,400	\$2,080
4-BR+	0	-	-
Total/Avg.	8	\$4,570,575	\$1,911

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$1,690,000	\$1,771
2-BR	5	\$2,944,000	\$1,844
3-BR	4	\$6,823,750	\$2,634
4-BR+	0	-	-
Total/Avg.	11	\$4,126,818	\$2,242



## THE BRISTOL

### ADDRESS

400 Bristol Court, San Francisco, CA

### DEVELOPER

Wilson Meany  
Stockbridge Real Estate Funds

### RESIDENCES

124 (110 Market Rate)

### AVERAGE HOA FEES

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

### DATE ON MARKET

March 2021

### CLOSINGS COMMENCED

TBD

### AVERAGE ABSORPTION

N/A



### SALES STATUS Q1 2021

**N/A**  
CLOSED

**0**  
IN CONTRACT

**124**  
AVAILABLE

#### Recent Sales (Q2 2020 - Present)

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

#### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	1	\$818,000	\$1,092
1-BR	1	\$1,152,000	\$1,194
2-BR	0	-	-
3-BR	1	\$3,150,000	\$1,691
4-BR+	0	-	-
Total/Avg.	3	\$1,706,667	\$1,431





## 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

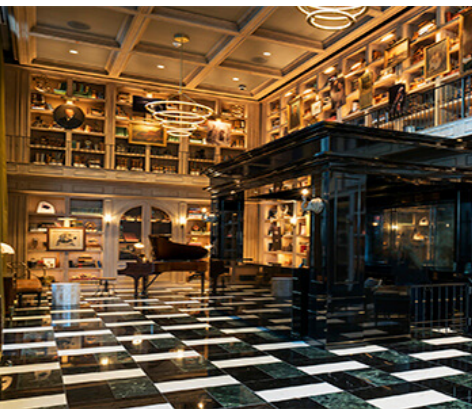
April 2016

### CLOSINGS COMMENCED

August 2016

### AVERAGE ABSORPTION

5 units/month



### SALES STATUS Q1 2021

**275**  
CLOSED

**N/A**  
IN CONTRACT

**21**  
AVAILABLE

#### Recent Sales (Q2 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	6	\$1,032,333	\$1,253
2-BR	10	\$1,932,000	\$1,508
3-BR	2	\$3,856,500	\$1,968
4-BR+	0	-	-
Total/Avg.	18	\$1,845,944	\$1,533

#### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	5	\$1,134,400	\$1,425
2-BR	7	\$2,381,714	\$1,800
3-BR	2	\$6,025,000	\$2,338
4-BR+	0	-	-
Total/Avg.	14	\$2,456,714	\$1,870





## UNION HOUSE

### ADDRESS

1515 Union Street, San Francisco, CA

### DEVELOPER

DM Development

### RESIDENCES

41

### AVERAGE HOA FEES

\$900 - \$1,680/month

### DATE ON MARKET

February 2020

### CLOSINGS COMMENCED

July 2020

### AVERAGE ABSORPTION

1 units/month



## SALES STATUS Q1 2021

13

CLOSED

0

IN CONTRACT

28

AVAILABLE

### Recent Sales (Q2 2020 - Present)

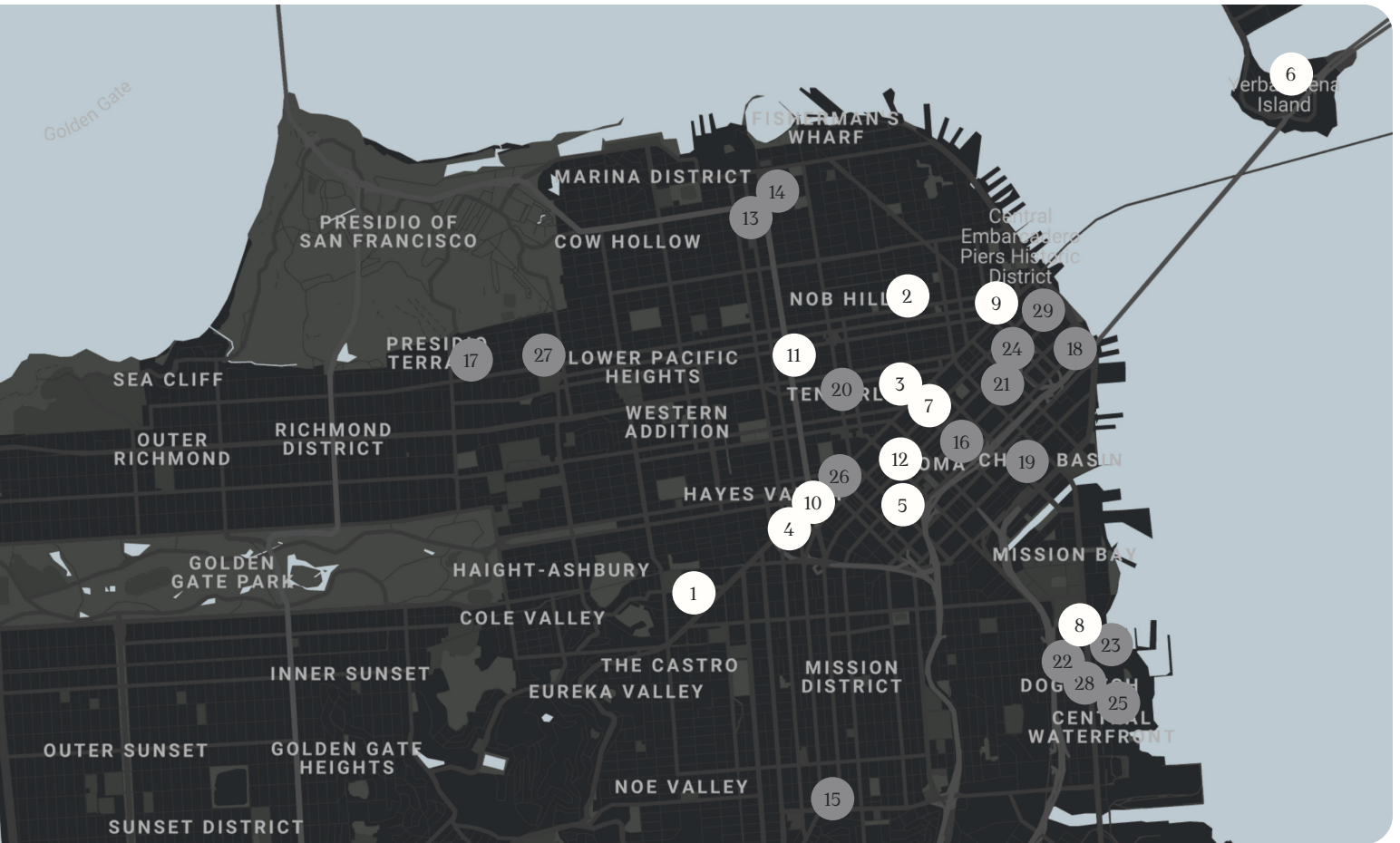
Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$1,475,000	\$1,606
2-BR	6	\$2,453,667	\$1,905
3-BR	1	\$6,075,000	\$3,015
4-BR+	0	-	-
Total/Avg.	9	\$2,512,200	\$2,011

### 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	\$5,500,000	\$2,835
4-BR+	0	-	-
Total/Avg.	3	\$3,101,667	\$2,346

# San Francisco Pipeline Overview

Q1 2021



1

2238 - 2240 MARKET



2

CRESCENT (875 CALIFORNIA)



3

SERIF (950 MARKET STREET)



4

THE OAK (1554 MARKET)



5

THE QUINN (349 8TH STREET)



6

YERBA BUENA ISLAND



7

5M (110 5TH STREET/925 MISSION)



8

603 TENNESSEE



9

OCEANWIDE CENTER (50 1ST ST)



10

ONE OAK (1540 MARKET STREET)



11

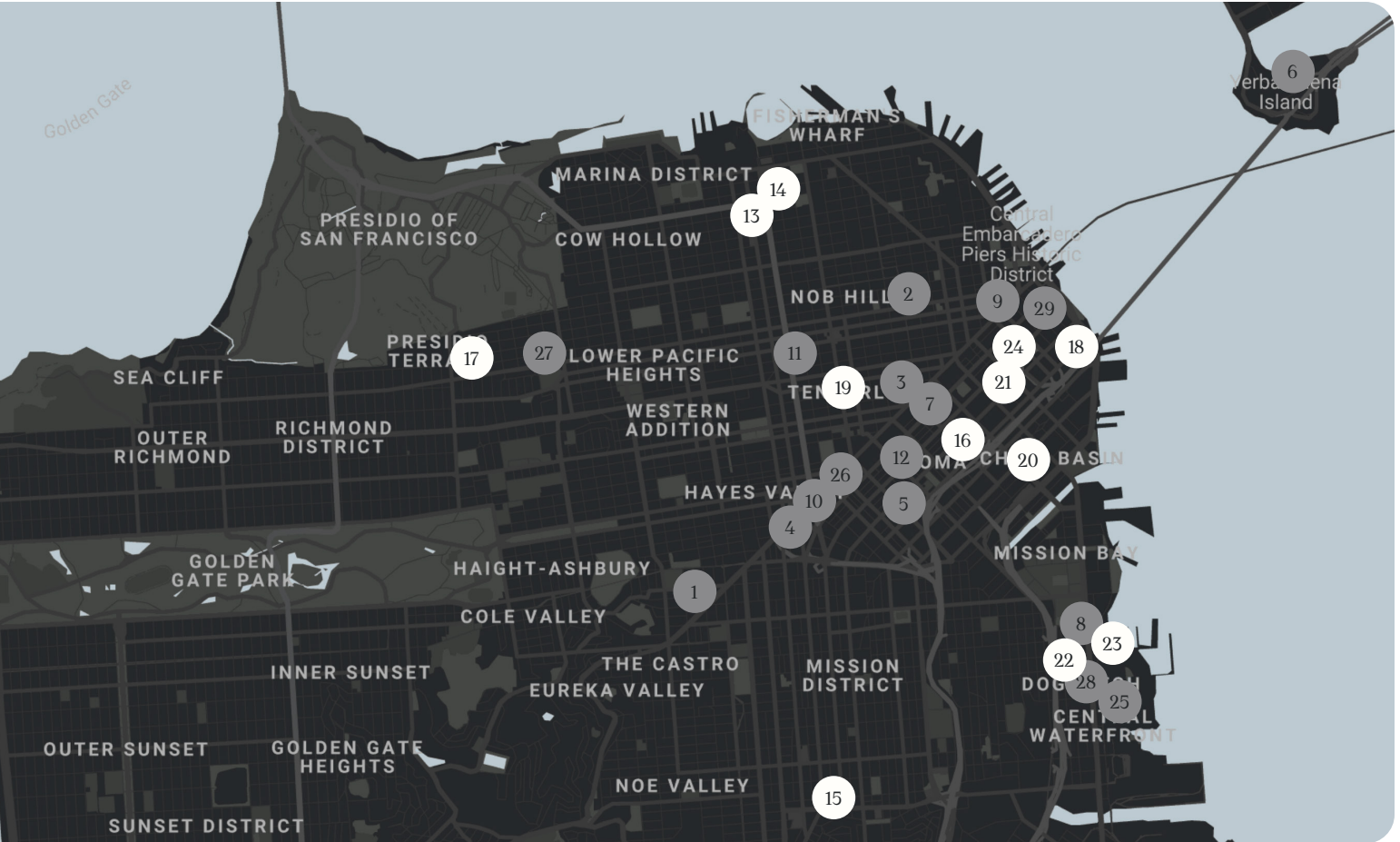
1200 VAN NESS



12

230 7TH STREET





13

2525 VAN NESS



14

2601 VAN NESS



15

3314 CESAR CHAVEZ



16

360 5TH STREET



17

3700 CALIFORNIA



18

430 MAIN



19

469 EDDY



20

655 4TH STREET



21

655 FOLSOM



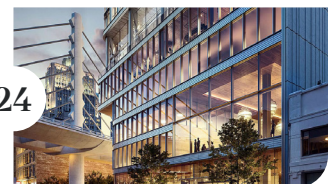
22

888 TENNESSEE



23

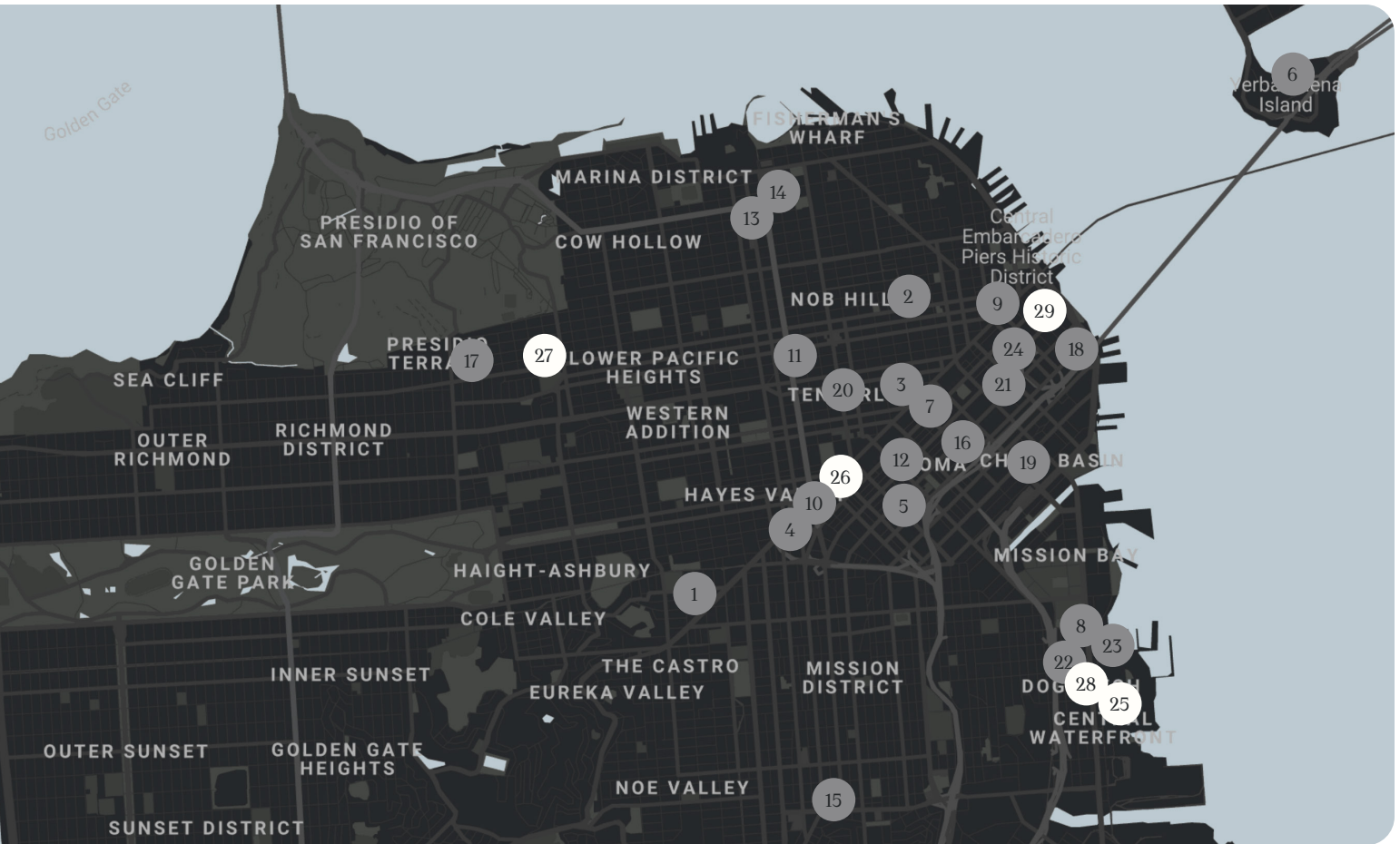
PARCEL D - PIER 70



24

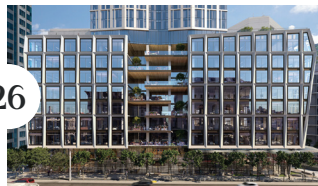
PARCEL F (542 - 550 HOWARD)





25

PARCEL K NORTH - PIER 70



26

30 VAN NESS



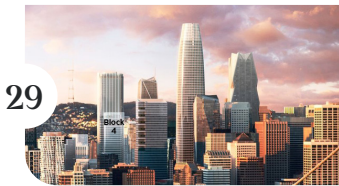
27

3333 CALIFORNIA



28

600 20TH STREET / 888 ILLINOIS



29

TRANSBAY BLOCK 4 (201 HOWARD)



## 2238 - 2240 Market 2238 - 2240 MARKET STREET

<b>NEIGHBORHOOD</b>	Duboce Triangle
<b>DEVELOPER</b>	Prado Group
<b>ARCHITECT</b>	BDE Architecture
<b>RESIDENCES &amp; STORIES</b>	42 residences & 5 stories
<b>PRICE RANGE</b>	TBD
<b>COMPLETION DATE</b>	Spring 2021
<b>ADDITIONAL INFO</b>	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,



## Crescent 875 CALIFORNIA STREET

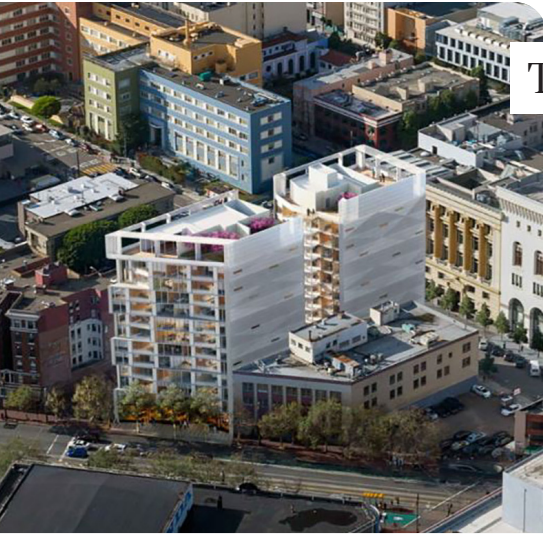
<b>NEIGHBORHOOD</b>	Nob Hill
<b>DEVELOPER</b>	Grosvenor Americas
<b>ARCHITECT</b>	Robert A.M. Stern Architects
<b>RESIDENCES &amp; STORIES</b>	44 residences & 8 stories
<b>PRICE RANGE</b>	Pricing starting from \$1.325 Million
<b>COMPLETION DATE</b>	2021
<b>ADDITIONAL INFO</b>	48 off-street parking spaces. 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



## Serif 950 MARKET STREET

<b>NEIGHBORHOOD</b>	Mid-Market
<b>DEVELOPER</b>	L37 Partners
<b>ARCHITECT</b>	Handel Architects
<b>RESIDENCES &amp; STORIES</b>	242 residences & 12 stories
<b>PRICE RANGE</b>	Pricing starting from the \$500k's
<b>COMPLETION DATE</b>	2021
<b>ADDITIONAL INFO</b>	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 STREET

NEIGHBORHOOD	Hayes Valley
DEVELOPER	Z&L Properties
ARCHITECT	Handel Architects
RESIDENCES & STORIES	109 residences (96 market-rate) & 12 stories (2 buildings)
PRICE RANGE	Pricing starting from the \$500K's
COMPLETION DATE	April 2021
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



## The Quinn 349 8TH STREET

NEIGHBORHOOD	SoMa
DEVELOPER	Presidio Bay Ventures
ARCHITECT	RG Architecture
RESIDENCES & STORIES	38 residences (32 market-rate) & 5 floors
PRICE RANGE	Pricing starting from the \$800K's
COMPLETION DATE	2021
ADDITIONAL INFO	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.



## The Flats / Townhomes YERBA BUENA ISLAND

NEIGHBORHOOD	Yerba Buena Island
DEVELOPER	Wilson Meany / Stockbridge Real Estate Funds
ARCHITECT	BDE Architecture / Hart Howerton
RESIDENCES & STORIES	142 residences
PRICE RANGE	Pricing starting from \$3 million
COMPLETION DATE	Phase II: 2022+ (Flats & Townhomes)
ADDITIONAL INFO	Home interiors are designed by Meyer Davis. Each unit at The Flats is serviced by a personal private elevator. The Townhomes have private entrances, attached garages, bay windows and terraces; many townhomes will also feature elevators.





## 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 apartments) & 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 STREET

<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



## One Oak 1540 MARKET STREET

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



## 1200 Van Ness 1200 VAN NESS AVENUE

NEIGHBORHOOD	Polk Gulch
DEVELOPER	Van Ness Post Center LLC
ARCHITECT	Woods Bagot
RESIDENCES & STORIES	96 residences & 13 floors
PRICE RANGE	TBD
COMPLETION DATE	TBD
ADDITIONAL INFO	Rooftop garden, fitness / yoga studio, multi-functional spaces, pet grooming area. 95K-sqft commercial / retail space



## 230 7th Street 230 7TH STREET

NEIGHBORHOOD	SoMa
DEVELOPER	JS Sullivan Development
ARCHITECT	RG Architecture
RESIDENCES & STORIES	40 residences & 6 stories
PRICE RANGE	TBD
COMPLETION DATE	TBD
ADDITIONAL INFO	2K-sqft ground floor commercial space





## 2525 Van Ness 2525 VAN NESS AVENUE

<b>NEIGHBORHOOD</b>	Cow Hollow
<b>DEVELOPER</b>	Executive Group Development
<b>ARCHITECT</b>	Studio N & Chris Dikeakos Architects Inc.
<b>RESIDENCES &amp; STORIES</b>	28 residences & 6 stories
<b>PRICE RANGE</b>	TBD
<b>COMPLETION DATE</b>	TBD
<b>ADDITIONAL INFO</b>	1,600+ sqft retail space. Rooftop terrace for lounging, dining, and green space.



## 2601 Van Ness 2601 VAN NESS AVENUE

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



## 3314 Cesar Chavez 3314 CESAR CHAVEZ STREET

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





## 360 5th Street 360 5TH STREET

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



## 3700 California 3700 CALIFORNIA STREET

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



## 430 Main 430 MAIN STREET

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



## 469 Eddy 469 EDDY STREET

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



## 655 4th Street 655 4TH STREET

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



## 655 Folsom 650 FOLSOM STREET

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





## 888 Tennessee 888 TENNESSEE STREET

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



## Parcel D - Pier 70 PIER 70

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



## Parcel F 542 - 550 HOWARD STREET

NEIGHBORHOOD	SoMa
DEVELOPER	Hines / Urban Pacific Development / Broad Street Principal Investments
ARCHITECT	Pelli Clark Pelli
RESIDENCES & STORIES	165 residences & 61 stories
PRICE RANGE	TBD
COMPLETION DATE	TBD
ADDITIONAL INFO	189-room hotel, 275K-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..



## 30 Van Ness 30 VAN NESS AVENUE

NEIGHBORHOOD	Civic Center
DEVELOPER	Lendlease
ARCHITECT	Solomon, Cordwell, Buenz (SCB)
RESIDENCES & STORIES	333 residences & 47 stories
PRICE RANGE	TBD
COMPLETION DATE	TBD
ADDITIONAL INFO	Office, retail, apartments, condos are TBD. Outdoor space to include lounging space, outdoor dining tables, and a dog run. Interior amenities to include a fitness center, coworking lounge, socializing room, solarium, and game room



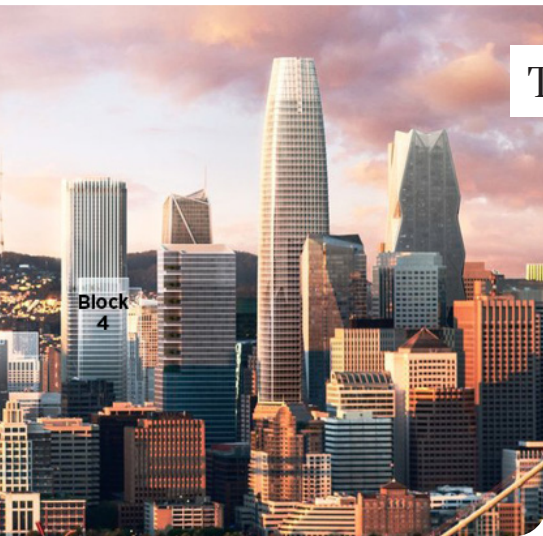
## 3333 California 3333 CALIFORNIA STREET

NEIGHBORHOOD	Presidio Heights
DEVELOPER	Prado Group / SKS Partners
ARCHITECT	Jensen Architects
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

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



## Transbay Block 4 201 - 299 HOWARD STREET

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

# New Development Market Insights

SAN FRANCISCO Q1 2021

## Contact

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SAN FRANCISCO, CA 94109

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COMPASS.COM/DEVELOPMENT

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