

New Development Market Watch

SAN FRANCISCO Q2 2022

COMPASS
DEVELOPMENT
MARKETING
GROUP





Compass Development Marketing Group's New Development Market Insights report provides an in-depth look at San Francisco's core downtown neighborhoods where new developments are most prevalent. 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 and sales conditions for new development properties as well as resales.

Quarterly San Francisco MarketWatch

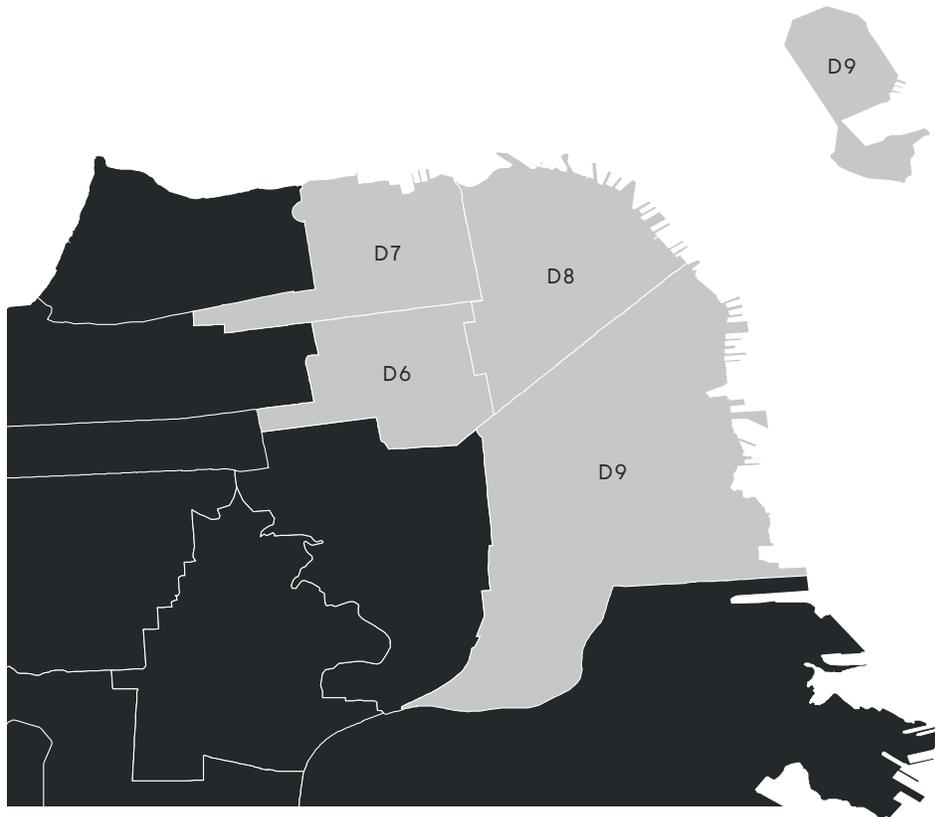
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New Development Pipeline Projects

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SAN FRANCISCO DISTRICTS 6-9 SUMMARY

▼ **32.2%**

Total number of sales YoY decreased in Q2 22 as momentum slowed across the core neighborhoods. 646 deals were recorded compared to 953 over the same period last year.

▼ **51.2%**

The luxury \$3M+ market witnessed YoY slowdowns in total sales count with 20 sales this quarter compared to 41 in Q1 2021.

▲ **1.9%**

Despite slowing absorption, the average sale price for San Francisco rose 1.9% YoY to \$1,412,801.

The Bay Area housing market saw fewer transactions in Q2 2022 as rising interest rates and economic uncertainty led total sales count to retreat from a record-breaking of Q2 2021. In fact, Q2 2022 sales count was the lowest second quarter reading in the past five years, typically a busy buying season. Yet despite cooling demand, prices remain steady and have resisted material discounts.

While difficult to predict short and long term impacts of interest rate and macro-economic headwinds, the Bay Area residential market is showing signs of slowing in Q2. Total number of sales was down across all districts compared to last year, however, pricing continues to increase albeit at a slower rate. In Q2 2022, overall price per square foot remained steady, up 0.6% to \$1,174 and the average sale price up 1.9% to \$1,412,801 YoY.

The luxury market defined as \$3M+ has continued to soften from Q1 2022 with sales count down 51.2% YoY. While affluent buyers are less dependent on interest rates and more sensitive to the financial markets, buyers may have paused plans as they await more clarity. The \$2M-\$3M market, however, saw modest growth with the average PPSF up 5.1% YoY to \$1,372 and sales count remaining steady.

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 providing a more granular picture of each sub-market.

On Page 14, we begin a citywide exploration of each currently selling new development project, including the most recent closings at each, followed by a brief overview of upcoming projects which are under construction or have yet to break ground.

For any inquiries regarding our research, please reach out to research.westcoast@compass.com.

SAN FRANCISCO DISTRICTS 6-9 SUMMARY

▲ **0.6%**

Average PPSF in Q2 2022 for Districts 6-9 remained steady, growing 0.6% YoY, with an average PPSF of \$1,174.

▼ **16.3%**

Product over \$3M in Districts 6-9 recorded a price decrease of 16.3% with an average price of \$3,514,750.

▼ **43.1%**

Sales count for product under \$1M in Districts 6-9 decreased 43.1%, however prices remained steady with +1.9% INCREASE to \$799,722 YoY.

0.0%

The \$1M-\$2M price segment saw values unchanged from Q2 2021 with an average price of \$1,384,409.

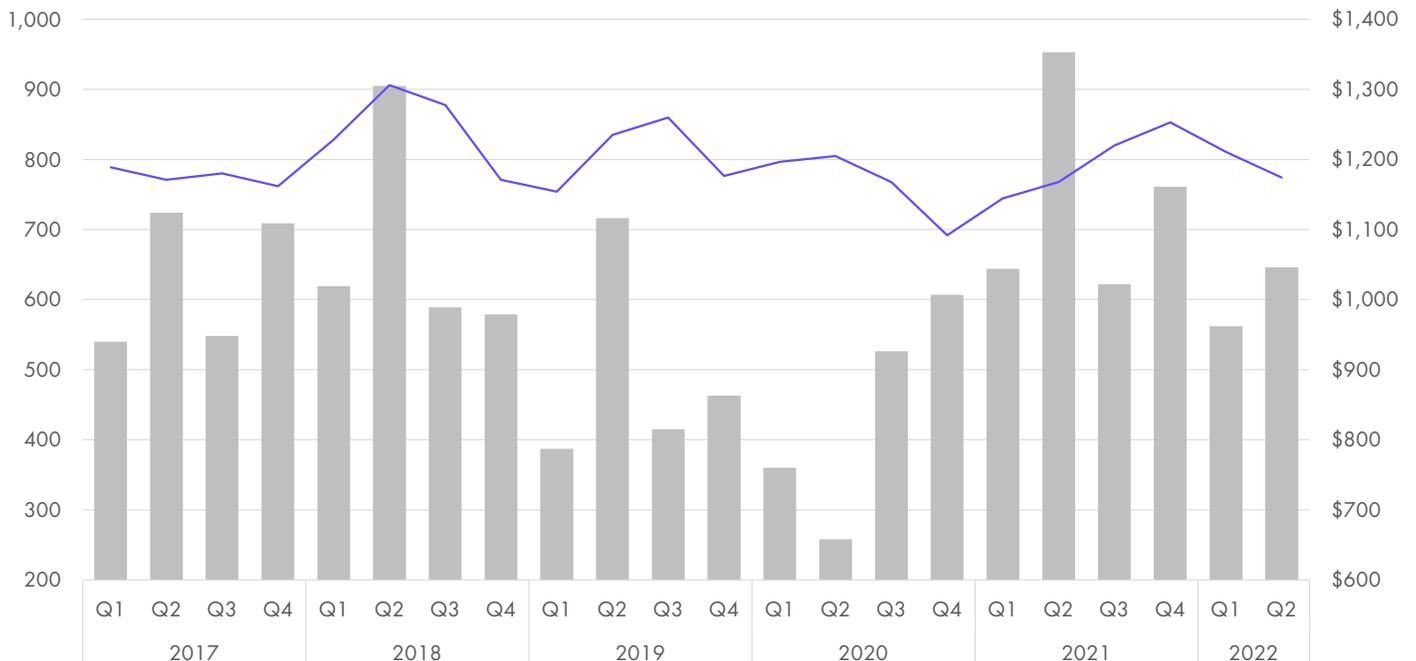
MARKET PERFORMANCE

CONDOS	Q2 22	YoY%	Q2 21	QoQ%	Q1 22
Avg. Sales Price	\$1,412,801	1.9%	\$1,385,957	-1.2%	\$1,430,402
Blended Avg. PPSF	\$1,174	0.6%	\$1,168	-3.1%	\$1,211
Number of Sales	646	-32.2%	953	14.9%	562
DOM	35	N/A	43	N/A	47

ANNUAL PERFORMANCE	2021	YoY%	2020	YoY%	2019
Avg. Sales Price	\$1,414,642	2.7%	\$1,377,767	-1.8%	\$1,403,721
Blended Avg. PPSF	\$1,196	3.8%	\$1,152	-4.7%	\$1,209
Number of Sales	2,980	70.2%	1,751	-11.6%	1,981
DOM	48	N/A	47	N/A	37

of Sales

Blended Avg. PPSF



SAN FRANCISCO DISTRICTS 6-9 SUMMARY

SALES BY PRICE POINT

UNDER \$1M	Q2 22	YoY%	Q2 21	QoQ%	Q1 22
Avg. Sales Price	\$799,722	1.9%	\$784,898	5.9%	\$755,497
Avg. PPSF	\$1,009	-0.9%	\$1,018	-2.5%	\$1,035
Number of Sales	199	-43.1%	350	-3.9%	207
DOM	43	N/A	51	N/A	52
\$1M-\$2M	Q2 22	YoY%	Q2 21	QoQ%	Q1 22
Avg. Sales Price	\$1,384,409	0.0%	\$1,384,396	-1.8%	\$1,410,135
Avg. PPSF	\$1,116	0.6%	\$1,110	-2.1%	\$1,140
Number of Sales	334	-28.6%	468	30.0%	257
DOM	32	N/A	32	N/A	36
\$2M-\$3M	Q2 22	YoY%	Q2 21	QoQ%	Q1 22
Avg. Sales Price	\$2,374,592	-1.3%	\$2,405,187	-1.9%	\$2,420,652
Avg. PPSF	\$1,372	5.1%	\$1,306	1.7%	\$1,350
Number of Sales	93	-1.1%	94	40.9%	66
DOM	29	N/A	43	N/A	46
\$3M+	Q2 22	YoY%	Q2 21	QoQ%	Q1 22
Avg. Sales Price	\$3,514,750	-16.3%	\$4,198,000	-10.3%	\$3,916,578
Avg. PPSF	\$1,579	-4.3%	\$1,650	-3.7%	\$1,639
Number of Sales	20	-51.2%	41	-37.5%	32
DOM	22	N/A	44	N/A	44

SAN FRANCISCO DISTRICT 6

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

▼ **20.9%**

Total number of sales in District 6 decreased 20.9% YOY, with 106 recorded closings during Q2 2022.

▲ **2.4%**

Despite softening absorption, the average price for District 6 was up 2.4% YoY to \$1,395,173.

▲ **1.4%**

The average PPSF for condos in District 6 increased to \$1,126, up 1.4% YoY.

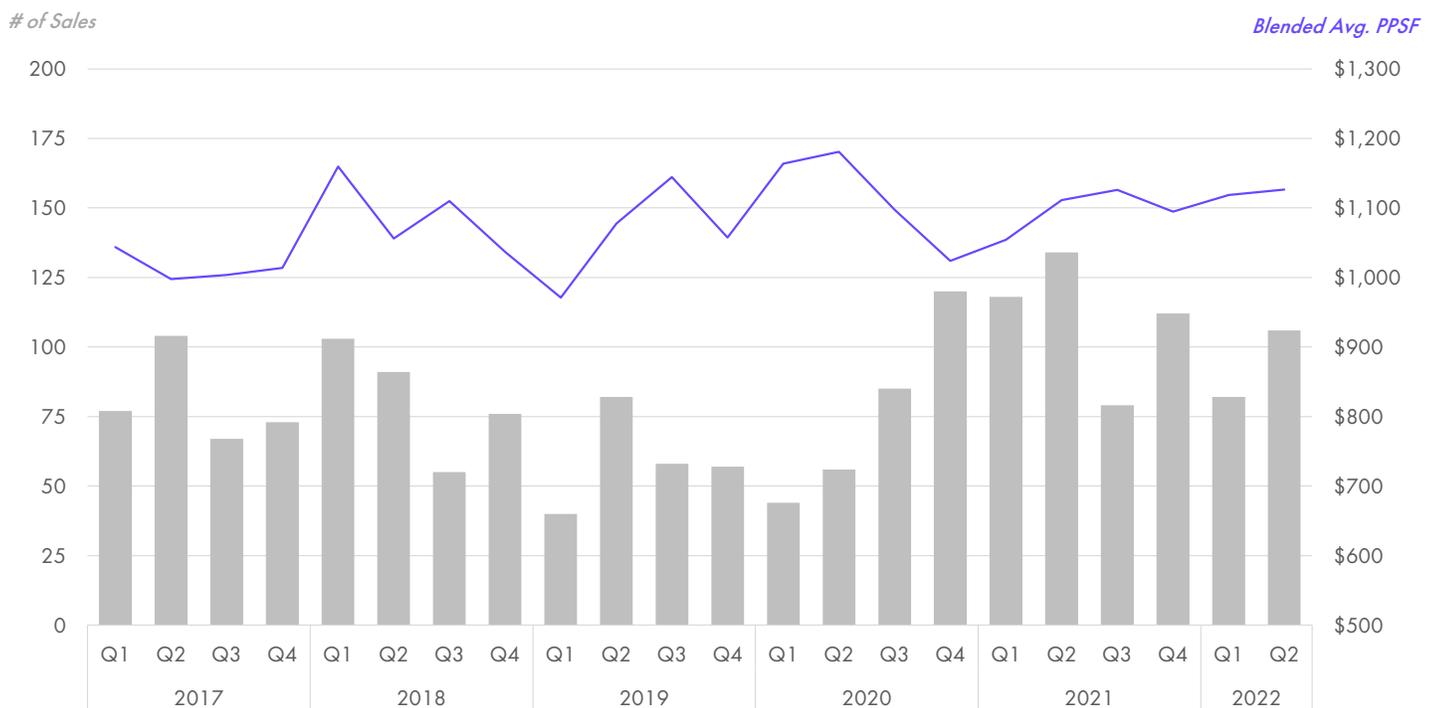
▲ **4.4%**

Product under \$1M in District 6 witnessed an increase of 4.4% in absolute pricing, reaching an average price of \$815,038.

MARKET PERFORMANCE

CONDOS	Q2 22	YoY%	Q2 21	QoQ%	Q1 22
Avg. Sales Price	\$1,395,173	2.4%	\$1,362,319	-0.1%	\$1,396,455
Blended Avg. PPSF	\$1,126	1.4%	\$1,111	0.7%	\$1,119
Number of Sales	106	-20.9%	134	29.3%	82
DOM	29	N/A	29	N/A	34

ANNUAL PERFORMANCE	2021	YoY%	2020	YoY%	2019
Avg. Sales Price	\$1,317,597	6.7%	\$1,234,443	-2.4%	\$1,264,780
Blended Avg. PPSF	\$1,095	0.4%	\$1,091	1.9%	\$1,070
Number of Sales	443	45.2%	305	28.7%	237
DOM	36	N/A	35	N/A	28



SAN FRANCISCO DISTRICT 6

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

SALES BY PRICE POINT

UNDER \$1M	Q2 22	YoY%	Q2 21	QoQ%	Q1 22
Avg. Sales Price	\$815,038	4.4%	\$780,348	3.5%	\$787,560
Avg. PPSF	\$1,105	7.0%	\$1,032	-4.1%	\$1,152
Number of Sales	26	-21.2%	33	4.0%	25
DOM	39	N/A	41	N/A	41
\$1M-\$2M	Q2 22	YoY%	Q2 21	QoQ%	Q1 22
Avg. Sales Price	\$1,435,022	2.4%	\$1,401,632	1.8%	\$1,409,439
Avg. PPSF	\$1,113	0.8%	\$1,104	3.5%	\$1,075
Number of Sales	68	-20.0%	85	54.5%	44
DOM	26	N/A	21	N/A	28
\$2M-\$3M	Q2 22	YoY%	Q2 21	QoQ%	Q1 22
Avg. Sales Price	\$2,369,626	2.8%	\$2,304,036	-2.2%	\$2,424,091
Avg. PPSF	\$1,168	-2.5%	\$1,198	-2.3%	\$1,196
Number of Sales	11	-26.7%	15	0.0%	11
DOM	19	N/A	27	N/A	26
\$3M+	Q2 22	YoY%	Q2 21	QoQ%	Q1 22
Avg. Sales Price	\$3,050,000	-1.6%	\$3,100,000	-0.7%	\$3,070,000
Avg. PPSF	\$1,439	22.3%	\$1,176	24.3%	\$1,157
Number of Sales	1	0.0%	1	-50.0%	2
DOM	60	N/A	0	N/A	18

SAN FRANCISCO DISTRICT 7

MARINA, COW HOLLOW, PACIFIC HEIGHTS, AND PRESIDIO HEIGHTS

▲ **8.0%**

The average PPSF for District 7 increased 8.0% YoY to \$1,386 bouyed by new development product coming on the market in this district.

▲ **2.5%**

The average sale price for District 7 increased 2.5% YoY to \$1,911,419.

▼ **27.6%**

District 7 saw less recorded deals YoY, down 27.6% from Q2 2021, which was a record breaking quarter for sales count.

▲ **15.2%**

The \$2M-\$3M price segment showed an increase in PPSF, up 15.2% YoY to \$1,462.

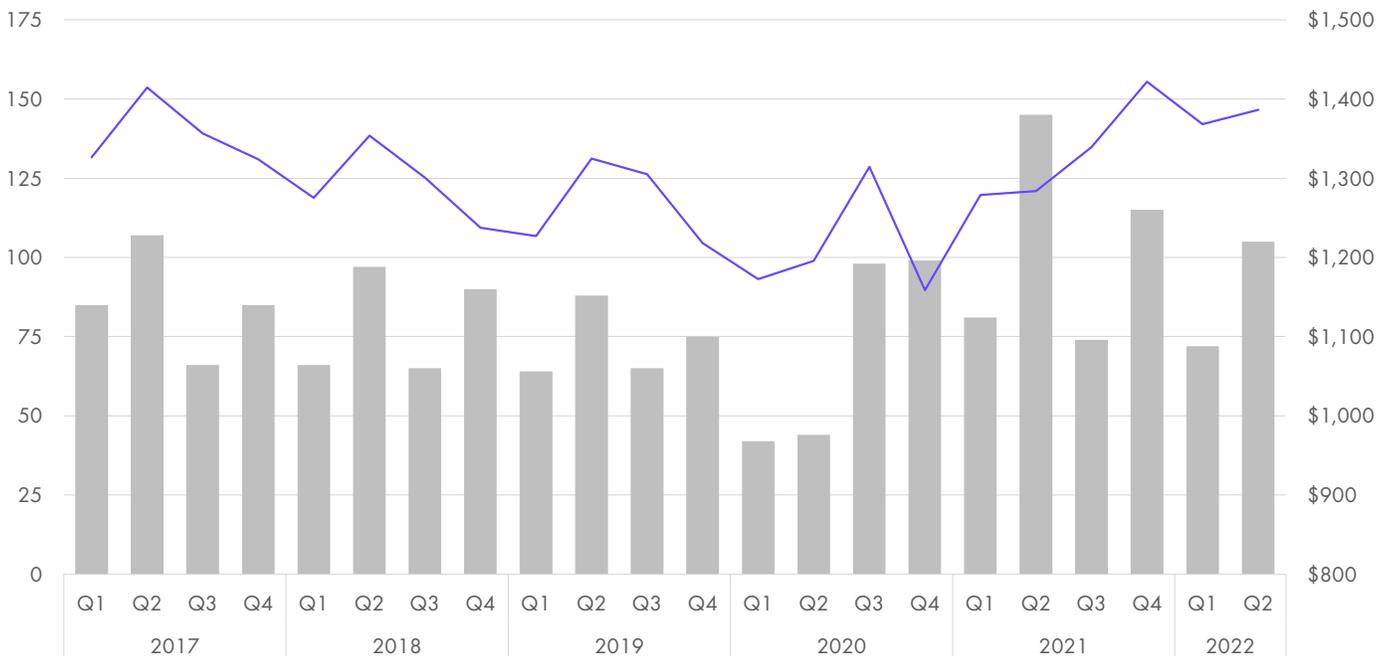
MARKET PERFORMANCE

CONDOS	Q2 22	YoY%	Q2 21	QoQ%	Q1 22
Avg. Sales Price	\$1,911,419	2.5%	\$1,864,747	-8.2%	\$2,082,240
Blended Avg. PPSF	\$1,386	8.0%	\$1,284	1.3%	\$1,368
Number of Sales	105	-27.6%	145	45.8%	72
DOM	23	N/A	37	N/A	42

ANNUAL PERFORMANCE	2021	YoY%	2020	YoY%	2019
Avg. Sales Price	\$1,985,777	10.3%	\$1,800,850	-3.1%	\$1,858,568
Blended Avg. PPSF	\$1,334	9.5%	\$1,218	-4.1%	\$1,270
Number of Sales	415	46.6%	283	-3.1%	292
DOM	40	N/A	42	N/A	35

of Sales

Blended Avg. PPSF



SAN FRANCISCO DISTRICT 7

MARINA, COW HOLLOW, PACIFIC HEIGHTS, AND PRESIDIO HEIGHTS

SALES BY PRICE POINT

UNDER \$1M	Q2 22	YoY%	Q2 21	QoQ%	Q1 22
Avg. Sales Price	\$836,846	2.6%	\$815,600	-1.8%	\$852,256
Avg. PPSF	\$1,130	-0.4%	\$1,135	10.6%	\$1,022
Number of Sales	13	-56.7%	30	44.4%	9
DOM	22	N/A	55	N/A	47
\$1M-\$2M	Q2 22	YoY%	Q2 21	QoQ%	Q1 22
Avg. Sales Price	\$1,448,361	-1.5%	\$1,470,633	0.1%	\$1,447,591
Avg. PPSF	\$1,245	1.4%	\$1,228	2.5%	\$1,215
Number of Sales	44	-29.0%	62	33.3%	33
DOM	28	N/A	23	N/A	39
\$2M-\$3M	Q2 22	YoY%	Q2 21	QoQ%	Q1 22
Avg. Sales Price	\$2,421,503	-3.5%	\$2,509,947	-2.1%	\$2,472,188
Avg. PPSF	\$1,462	15.2%	\$1,269	4.5%	\$1,400
Number of Sales	38	0.0%	38	137.5%	16
DOM	19	N/A	34	N/A	14
\$3M+	Q2 22	YoY%	Q2 21	QoQ%	Q1 22
Avg. Sales Price	\$3,407,500	-13.9%	\$3,957,533	-13.1%	\$3,923,250
Avg. PPSF	\$1,619	8.1%	\$1,497	1.6%	\$1,593
Number of Sales	10	-33.3%	15	-28.6%	14
DOM	11	N/A	40	N/A	36

SAN FRANCISCO DISTRICT 8

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

▼ **31.2%**

District 8 recorded 141 closings a decrease of 31.2% YoY, suggesting softening demand in this market.

▲ **4.4%**

The average sale price for District 8 increased to \$1,329,713, up 4.4% YoY.

▼ **1.0%**

PPSF in District 8 remained relatively unchanged to \$1,172, down 1.0% YoY.

▼ **21.7%**

The \$1M-\$2M segment for District 8 recorded a decrease in number of recorded sales to 65, down 21.7% YoY, but average price only dropped 2.1% to \$1,342,185.

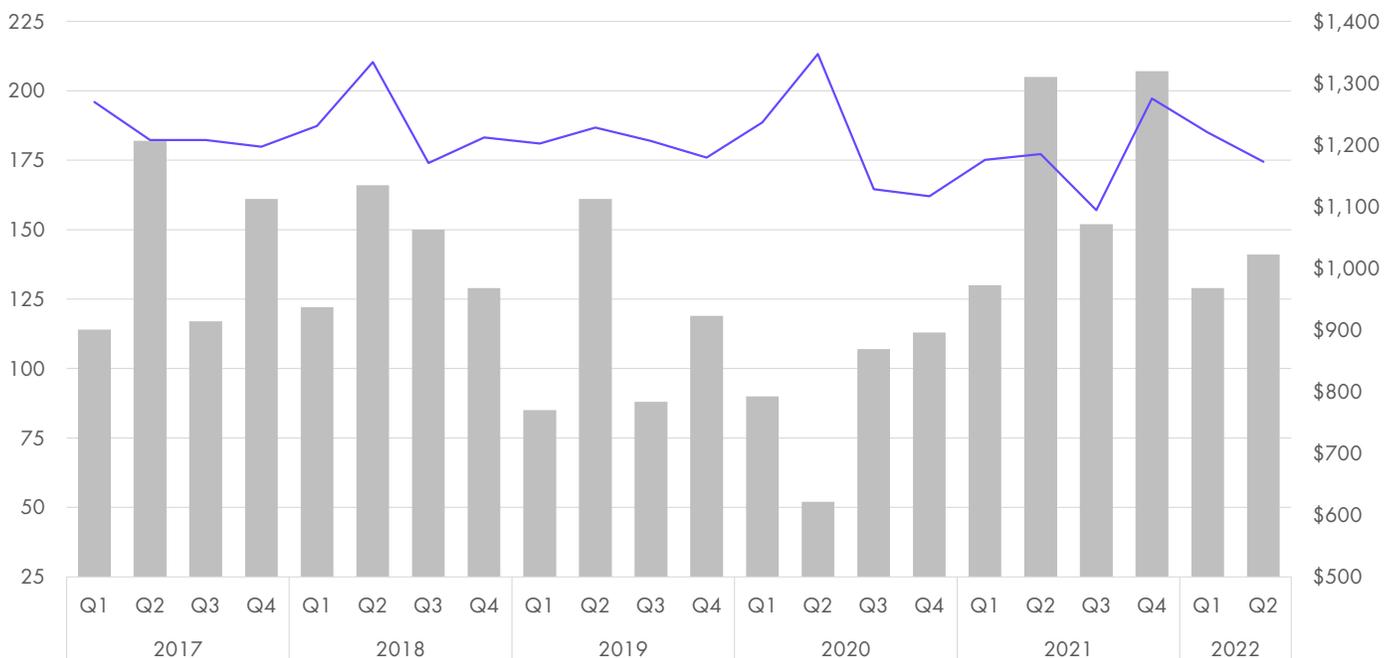
MARKET PERFORMANCE

CONDOS	Q2 22	YoY%	Q2 21	QoQ%	Q1 22
Avg. Sales Price	\$1,329,713	4.4%	\$1,273,600	4.5%	\$1,272,816
Blended Avg. PPSF	\$1,172	-1.0%	\$1,185	-3.9%	\$1,220
Number of Sales	141	-31.2%	205	9.3%	129
DOM	41	N/A	48	N/A	47

ANNUAL PERFORMANCE	2021	YoY%	2020	YoY%	2019
Avg. Sales Price	\$1,301,643	-2.7%	\$1,337,825	3.7%	\$1,290,523
Blended Avg. PPSF	\$1,194	0.4%	\$1,188	-1.3%	\$1,204
Number of Sales	694	91.7%	362	-20.1%	453
DOM	54	N/A	56	N/A	45

of Sales

Blended Avg. PPSF



SAN FRANCISCO DISTRICT 8

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

SALES BY PRICE POINT

UNDER \$1M	Q2 22	YoY%	Q2 21	QoQ%	Q1 22
Avg. Sales Price	\$716,698	-2.4%	\$734,541	0.4%	\$713,842
Avg. PPSF	\$1,019	-0.8%	\$1,027	0.3%	\$1,016
Number of Sales	53	-45.9%	98	-18.5%	65
DOM	51	N/A	55	N/A	58
\$1M-\$2M	Q2 22	YoY%	Q2 21	QoQ%	Q1 22
Avg. Sales Price	\$1,342,185	-2.1%	\$1,370,337	-4.8%	\$1,409,859
Avg. PPSF	\$1,108	-3.9%	\$1,154	-7.6%	\$1,200
Number of Sales	65	-21.7%	83	41.3%	46
DOM	33	N/A	37	N/A	32
\$2M-\$3M	Q2 22	YoY%	Q2 21	QoQ%	Q1 22
Avg. Sales Price	\$2,396,711	0.5%	\$2,385,357	5.2%	\$2,277,273
Avg. PPSF	\$1,347	2.4%	\$1,315	-2.4%	\$1,380
Number of Sales	19	35.7%	14	72.7%	11
DOM	37	N/A	41	N/A	37
\$3M+	Q2 22	YoY%	Q2 21	QoQ%	Q1 22
Avg. Sales Price	\$4,181,250	-0.4%	\$4,197,000	4.9%	\$3,984,286
Avg. PPSF	\$1,654	3.7%	\$1,595	-1.1%	\$1,673
Number of Sales	4	-60.0%	10	-42.9%	7
DOM	7	N/A	43	N/A	35

SAN FRANCISCO DISTRICT 9

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

▼ 37.3%

Sales count decreased 37.3% YoY, recording 294 closings, indicating a softening in the densest condominium district.

▼ 2.6%

The average PPSF decreased 2.6% YoY in District 9, to \$1,103.

▼ 1.0%

The average sales price decreased by 1.0% YoY in District 9, to \$1,280,927.

▼ 27.1%

The \$3M+ ultra luxury segment for District 9 saw the deepest discounts with the average sales price down 27.1% to \$3,289,000.

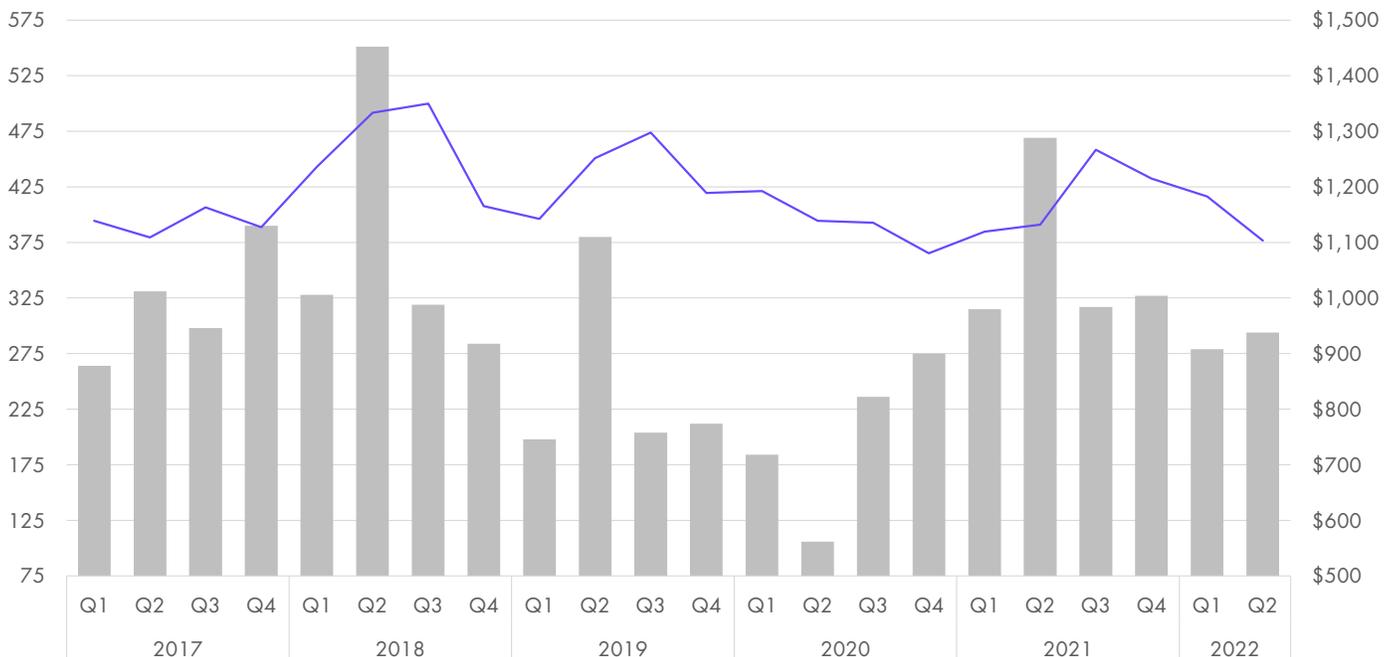
MARKET PERFORMANCE

CONDOS	Q2 22	YoY%	Q2 21	QoQ%	Q1 22
Avg. Sales Price	\$1,280,927	-1.0%	\$1,293,795	-4.8%	\$1,345,026
Blended Avg. PPSF	\$1,103	-2.6%	\$1,132	-6.7%	\$1,182
Number of Sales	294	-37.3%	469	5.4%	279
DOM	40	N/A	47	N/A	51

ANNUAL PERFORMANCE	2021	YoY%	2020	YoY%	2019
Avg. Sales Price	\$1,333,683	2.5%	\$1,300,913	-4.0%	\$1,355,288
Blended Avg. PPSF	\$1,178	4.2%	\$1,130	-7.7%	\$1,224
Number of Sales	1,428	78.3%	801	-19.4%	994
DOM	51	N/A	49	N/A	36

of Sales

Blended Avg. PPSF



SAN FRANCISCO DISTRICT 9

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

SALES BY PRICE POINT

UNDER \$1M	Q2 22	YoY%	Q2 21	QoQ%	Q1 22
Avg. Sales Price	\$832,613	3.2%	\$806,929	8.8%	\$765,081
Avg. PPSF	\$972	-2.3%	\$995	-4.9%	\$1,022
Number of Sales	107	-43.4%	189	-0.9%	108
DOM	43	N/A	50	N/A	51
\$1M-\$2M	Q2 22	YoY%	Q2 21	QoQ%	Q1 22
Avg. Sales Price	\$1,362,047	0.1%	\$1,360,678	-2.8%	\$1,401,235
Avg. PPSF	\$1,088	1.8%	\$1,068	-3.3%	\$1,125
Number of Sales	157	-34.0%	238	17.2%	134
DOM	35	N/A	36	N/A	39
\$2M-\$3M	Q2 22	YoY%	Q2 21	QoQ%	Q1 22
Avg. Sales Price	\$2,288,660	-1.5%	\$2,324,222	-6.4%	\$2,446,179
Avg. PPSF	\$1,367	-4.7%	\$1,435	-0.9%	\$1,379
Number of Sales	25	-7.4%	27	-10.7%	28
DOM	44	N/A	68	N/A	76
\$3M+	Q2 22	YoY%	Q2 21	QoQ%	Q1 22
Avg. Sales Price	\$3,289,000	-27.1%	\$4,512,333	-18.6%	\$4,041,667
Avg. PPSF	\$1,461	-22.9%	\$1,894	-19.6%	\$1,817
Number of Sales	5	-66.7%	15	-44.4%	9
DOM	47	N/A	57	N/A	76



1288 HOWARD

ADDRESS

1288 Howard Street, San Francisco, CA

DEVELOPER

March Capital Management

RESIDENCES

112 (17 Market Rate)

AVERAGE HOA FEES

~\$400 - \$460/month

DATE ON MARKET

January 2022

CLOSINGS COMMENCED

TBD

AVERAGE ABSORPTION

0 units/month



SALES STATUS Q2 2022

N/A
CLOSED

0
IN CONTRACT

129
AVAILABLE

Recent Sales (Q2 2021 - Present)

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

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	1	\$599,900	\$1,085
1-BR	2	\$702,000	\$1,078
2-BR	3	\$1,338,967	\$1,246
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	6	\$1,003,467	\$1,185



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 Q2 2022

42

CLOSED

N/A

IN CONTRACT

N/A

AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	4	\$3,687,250	\$2,165
3-BR	1	\$7,600,000	\$3,193
4-BR+	0	-	-
Total/Avg.	5	\$4,469,800	\$2,432

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,700,000	\$2,179
2-BR	3	\$8,766,667	\$3,550
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	4	\$7,000,000	\$3,420



2177 THIRD

ADDRESS

2177 Third Street, San Francisco, CA

DEVELOPER

Align Real Estate

RESIDENCES

114 (106 Market Rate)

AVERAGE HOA FEES

~\$740 - \$1,100/month

DATE ON MARKET

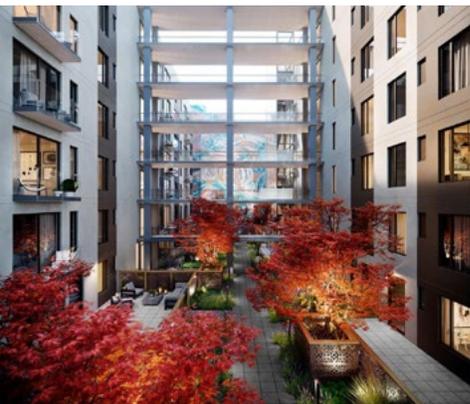
December 2019

CLOSINGS COMMENCED

September 2020

AVERAGE ABSORPTION

2 units/month



SALES STATUS Q2 2022

56

CLOSED

0

IN CONTRACT

58

AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	2	\$699,000	\$1,368
1-BR	7	\$983,750	\$1,395
2-BR	7	\$1,441,786	\$1,449
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	16	\$1,153,938	\$1,422

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	1	\$750,000	\$1,494
1-BR	1	\$925,000	\$1,414
2-BR	3	\$1,613,333	\$1,361
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	5	\$1,303,000	\$1,383



950 TENNESSEE

ADDRESS

950 Tennessee Street, San Francisco, CA

DEVELOPER

Leap Development

RESIDENCES

100

AVERAGE HOA FEES

\$435 - \$770/month

DATE ON MARKET

December 2019

CLOSINGS COMMENCED

September 2020

AVERAGE ABSORPTION

2 units/month



SALES STATUS Q2 2022

59

CLOSED

0

IN CONTRACT

41

AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	13	\$625,385	\$1,359
1-BR	7	\$1,089,571	\$1,257
2-BR	8	\$1,293,875	\$1,235
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	28	\$932,429	\$1,278

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$1,215,500	\$1,492
2-BR	1	\$1,447,000	\$1,487
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	3	\$1,292,667	\$1,490



CRESCENT

ADDRESS

875 California Street, San Francisco, CA

DEVELOPER

Grosvenor Americas

RESIDENCES

44

AVERAGE HOA FEES

\$1,840/month

DATE ON MARKET

March 2021

CLOSINGS COMMENCED

September 2021

AVERAGE ABSORPTION

0 units/month



SALES STATUS Q2 2022

6

CLOSED

0

IN CONTRACT

38

AVAILABLE

Recent Sales (Q2 2021 - Present)

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

Active Listings

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



ELEVANT

ADDRESS

555 Golden Gate Avenue,
San Francisco, CA

DEVELOPER

JS Sullivan Development

RESIDENCES

55 (48 Market Rate)

AVERAGE HOA FEES

\$550 - \$730/month

DATE ON MARKET

December 2020

CLOSINGS COMMENCED

April 2021

AVERAGE ABSORPTION

2 units/month



SALES STATUS Q2 2022

37

CLOSED

1

IN CONTRACT

17

AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	9	\$725,111	\$1,205
2-BR	17	\$1,005,786	\$1,149
3-BR	3	\$1,898,667	\$1,420
4-BR+	0	-	-
Total/Avg.	29	\$1,011,047	\$1,207

Active Listings

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



FOUR SEASONS PRIVATE RESIDENCES

ADDRESS

706 Mission Street, San Francisco, CA

DEVELOPER

Westbrook Partners

RESIDENCES

146

AVERAGE HOA FEES

\$3,180 - \$5,400/month

DATE ON MARKET

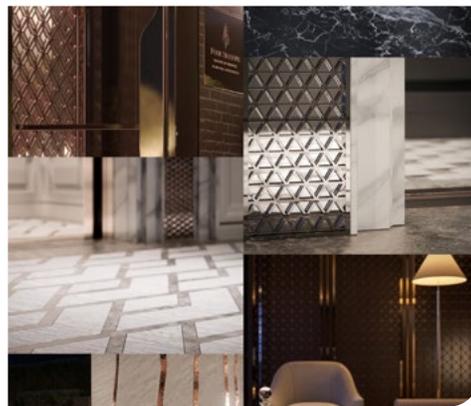
June 2019

CLOSINGS COMMENCED

December 2020

AVERAGE ABSORPTION

0 units/month



SALES STATUS Q2 2022

13
CLOSED

0
IN CONTRACT

133
AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	3	\$3,860,000	\$1,934
3-BR	2	\$8,250,000	\$2,428
4-BR+	0	-	-
Total/Avg.	5	\$5,616,000	\$2,196

Active Listings

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



FULTON 555

ADDRESS

555 Fulton Street, San Francisco, CA

DEVELOPER

Fulton Street Ventures, LLC

RESIDENCES

139 (122 Market Rate)

AVERAGE HOA FEES

\$560 - \$860/month

DATE ON MARKET

June 2015 - Launch

July 2017 - Relaunch

CLOSINGS COMMENCED

March 2020

AVERAGE ABSORPTION

1 units/month - Launch

2 units/month - Relaunch



SALES STATUS Q2 2022

122
CLOSED

1
IN CONTRACT

16
AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	11	\$767,818	\$1,126
2-BR	17	\$1,241,382	\$1,225
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	28	\$1,055,339	\$1,195

Active Listings

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



LE CENTRE

ADDRESS

42 Otis Street, San Francisco, CA

DEVELOPER

Vanguard Properties

RESIDENCES

24 (21 Market Rate)

AVERAGE HOA FEES

\$350 - \$355/month

DATE ON MARKET

January 2022

CLOSINGS COMMENCED

TBD

AVERAGE ABSORPTION

0 units/month



SALES STATUS Q2 2022

N/A
CLOSED

0
IN CONTRACT

24
AVAILABLE

Recent Sales (Q2 2021 - Present)

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

Active Listings

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



MAISON A SOMA

ADDRESS

230 7th Street, San Francisco, CA

DEVELOPER

JS Sullivan Development

RESIDENCES

40 (35 Market Rate)

AVERAGE HOA FEES

\$410 - \$530/month

DATE ON MARKET

October 2021

CLOSINGS COMMENCED

TBD

AVERAGE ABSORPTION

3 units/month



SALES STATUS Q2 2022

21
CLOSED

3
IN CONTRACT

16
AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	10	\$790,162	\$1,121
2-BR	5	\$1,243,000	\$1,190
3-BR	2	\$1,611,000	\$1,401
4-BR+	0	-	-
Total/Avg.	17	\$1,019,919	\$1,190

Active Listings

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



MIRA

ADDRESS

280 Spear Street, San Francisco, CA

DEVELOPER

Tishman Speyer

RESIDENCES

392 (235 Market Rate)

AVERAGE HOA FEES

\$1,075 - \$1,560/month

DATE ON MARKET

November 2018

CLOSINGS COMMENCED

June 2020

AVERAGE ABSORPTION

7 units/month



SALES STATUS Q2 2022

300

CLOSED

3

IN CONTRACT

89

AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	1	\$999,000	\$1,450
1-BR	4	\$1,029,125	\$1,417
2-BR	28	\$1,918,250	\$1,457
3-BR	1	\$1,645,000	\$1,129
4-BR+	0	-	-
Total/Avg.	34	\$1,778,574	\$1,443

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	1	\$1,049,999	\$1,560
1-BR	1	\$1,345,000	\$1,688
2-BR	4	\$2,035,000	\$1,448
3-BR	4	\$3,173,750	\$1,900
4-BR+	0	-	-
Total/Avg.	10	\$2,323,000	\$1,687



MISSION MODERN

ADDRESS

3620 Cesar Chavez Street,
San Francisco, CA

DEVELOPER

Vanguard Properties

RESIDENCES

24

AVERAGE HOA FEES

\$460 - \$620/month

DATE ON MARKET

February 2020

CLOSINGS COMMENCED

July 2020

AVERAGE ABSORPTION

1 units/month



SALES STATUS Q2 2022

23

CLOSED

0

IN CONTRACT

1

AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$735,000	\$1,366
2-BR	6	\$1,261,667	\$1,175
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	7	\$1,186,429	\$1,190

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	-	-



MURANO

ADDRESS

3131 Pierce Street, San Francisco, CA

DEVELOPER

DM Development

RESIDENCES

22

AVERAGE HOA FEES

\$890 - \$1,390/month

DATE ON MARKET

January 2021

CLOSINGS COMMENCED

June 2021

AVERAGE ABSORPTION

1 units/month

SALES STATUS Q2 2022

18
CLOSED

0
IN CONTRACT

4
AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	3	\$1,097,667	\$1,471
2-BR	14	\$1,625,857	\$1,399
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	17	\$1,532,647	\$1,408

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	4	\$2,097,000	\$1,426
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	4	\$2,097,000	\$1,426



ONE ELEVEN

ADDRESS

588 Minna Street, San Francisco, CA

DEVELOPER

Z&L Properties

RESIDENCES

39

AVERAGE HOA FEES

\$525 - \$680/month

DATE ON MARKET

December 2019

CLOSINGS COMMENCED

February 2021

AVERAGE ABSORPTION

1 units/month



SALES STATUS Q2 2022

14

CLOSED

0

IN CONTRACT

25

AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	6	\$669,000	\$1,074
2-BR	2	\$1,252,750	\$1,101
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	8	\$829,188	\$1,084

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$699,000	\$1,048
2-BR	3	\$1,212,333	\$1,117
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	5	\$1,007,000	\$1,097



ONE MISSION BAY

ADDRESS

110 Channel Street / 1000 3rd Street,
San Francisco, CA

DEVELOPER

CIM Group / Strada Investment Group

RESIDENCES

350

AVERAGE HOA FEES

\$710 - \$1,100/month

DATE ON MARKET

May 2016

CLOSINGS COMMENCED

November 2017

AVERAGE ABSORPTION

5 units/month



SALES STATUS Q2 2022

350

CLOSED

0

IN CONTRACT

0

AVAILABLE

SOLD OUT

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	2	\$731,000	\$1,398
1-BR	13	\$1,018,971	\$1,295
2-BR	16	\$1,481,149	\$1,260
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	31	\$1,238,936	\$1,277

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$1,049,000	\$1,318
2-BR	2	\$1,588,000	\$1,395
3-BR	1	\$2,950,000	\$1,615
4-BR+	0	-	-
Total/Avg.	5	\$1,644,800	\$1,444



ONE STEUART LANE

ADDRESS

1 Steuart Lane, San Francisco, CA

DEVELOPER

SRE Group LTD / Paramount Group

RESIDENCES

120

AVERAGE HOA FEES

\$2,500 - \$3,000/month

DATE ON MARKET

February 2020

CLOSINGS COMMENCED

August 2021

AVERAGE ABSORPTION

1 units/month



SALES STATUS Q2 2022

27

CLOSED

0

IN CONTRACT

93

AVAILABLE

Recent Sales (Q2 2021 - Present)

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

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,420,000	\$1,290
2-BR	2	\$2,495,000	\$1,551
3-BR	1	\$6,995,000	-
4-BR+	0	-	-
Total/Avg.	4	\$3,351,250	\$1,431



SERIF

ADDRESS

960 Market Street, San Francisco, CA

DEVELOPER

L37 Partners

RESIDENCES

242

AVERAGE HOA FEES

\$600 - \$1,100/month

DATE ON MARKET

June 2021

CLOSINGS COMMENCED

October 2021

AVERAGE ABSORPTION

4 units/month



SALES STATUS Q2 2022

34

CLOSED

7

IN CONTRACT

201

AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	16	\$583,021	\$1,469
1-BR	9	\$906,756	\$1,445
2-BR	7	\$1,674,000	\$1,591
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	32	\$912,723	\$1,508

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	2	\$622,500	\$1,423
1-BR	1	\$869,000	\$1,411
2-BR	1	\$1,430,000	\$1,616
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	4	\$886,000	\$1,492



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 Q2 2022

62

CLOSED

1

IN CONTRACT

55

AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	3	\$1,718,333	\$1,866
2-BR	15	\$2,682,667	\$1,765
3-BR	13	\$4,693,077	\$2,162
4-BR+	0	-	-
Total/Avg.	31	\$3,432,419	\$1,978

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,685,000	\$1,840
2-BR	5	\$3,036,000	\$1,902
3-BR	4	\$4,153,750	\$2,095
4-BR+	0	-	-
Total/Avg.	10	\$3,348,000	\$1,990



THE BRISTOL YERBA BUENA ISLAND

ADDRESS

1 Bristol Court, San Francisco, CA

DEVELOPER

Wilson Meany
Stockbridge Real Estate Funds

RESIDENCES

124 (110 Market Rate)

AVERAGE HOA FEES

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

DATE ON MARKET

March 2021

CLOSINGS COMMENCED

TBD

AVERAGE ABSORPTION

N/A



SALES STATUS Q2 2022

8

CLOSED

24

IN CONTRACT

92

AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	5	\$1,513,175	\$1,486
2-BR	3	\$2,063,667	\$1,519
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	8	\$1,719,609	\$1,501

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	1	\$738,000	\$1,206
1-BR	1	\$1,105,000	\$1,188
2-BR	0	-	-
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	2	\$921,500	\$1,195



THE HARRISON

ADDRESS

401 Harrison Street, San Francisco, CA

DEVELOPER

Rockpoint Group
Maximus Real Estate Partners

RESIDENCES

298

AVERAGE HOA FEES

\$1,025 - \$1,900/month

DATE ON MARKET

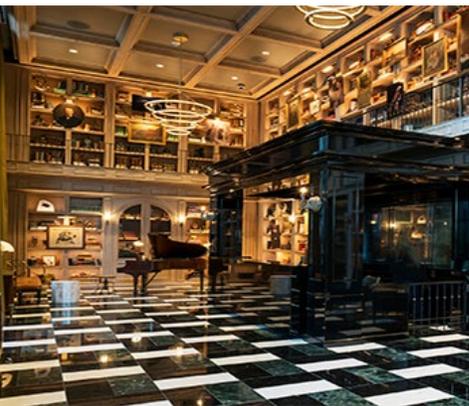
April 2016

CLOSINGS COMMENCED

August 2016

AVERAGE ABSORPTION

4 units/month



SALES STATUS Q2 2022

293
CLOSED

N/A
IN CONTRACT

3
AVAILABLE

Recent Sales (Q2 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	16	\$1,121,813	\$1,414
2-BR	21	\$2,036,524	\$1,522
3-BR	1	\$7,600,000	\$2,365
4-BR+	0	-	-
Total/Avg.	38	\$1,797,789	\$1,552

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,156,000	\$1,525
2-BR	3	\$2,416,667	\$1,918
3-BR	1	\$3,595,000	\$1,845
4-BR+	0	-	-
Total/Avg.	5	\$2,400,200	\$1,850



THE OAK

ADDRESS

55 Oak Street, San Francisco, CA

DEVELOPER

Z&L Properties

RESIDENCES

109 (96 Market Rate)

AVERAGE HOA FEES

\$705 - \$1,180/month

DATE ON MARKET

August 2021

CLOSINGS COMMENCED

TBD

AVERAGE ABSORPTION

1 units/month



SALES STATUS Q2 2022

N/A
CLOSED

11
IN CONTRACT

98
AVAILABLE

Recent Sales (Q2 2021 - Present)

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

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	2	\$640,250	\$1,296
1-BR	5	\$1,028,800	\$1,254
2-BR	3	\$1,537,667	\$1,467
3-BR	1	\$1,798,000	\$1,241
4-BR+	0	-	-
Total/Avg.	11	\$1,166,864	\$1,325



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 Q2 2022

25
CLOSED

1
IN CONTRACT

15
AVAILABLE

Recent Sales (Q2 2021 - Present)

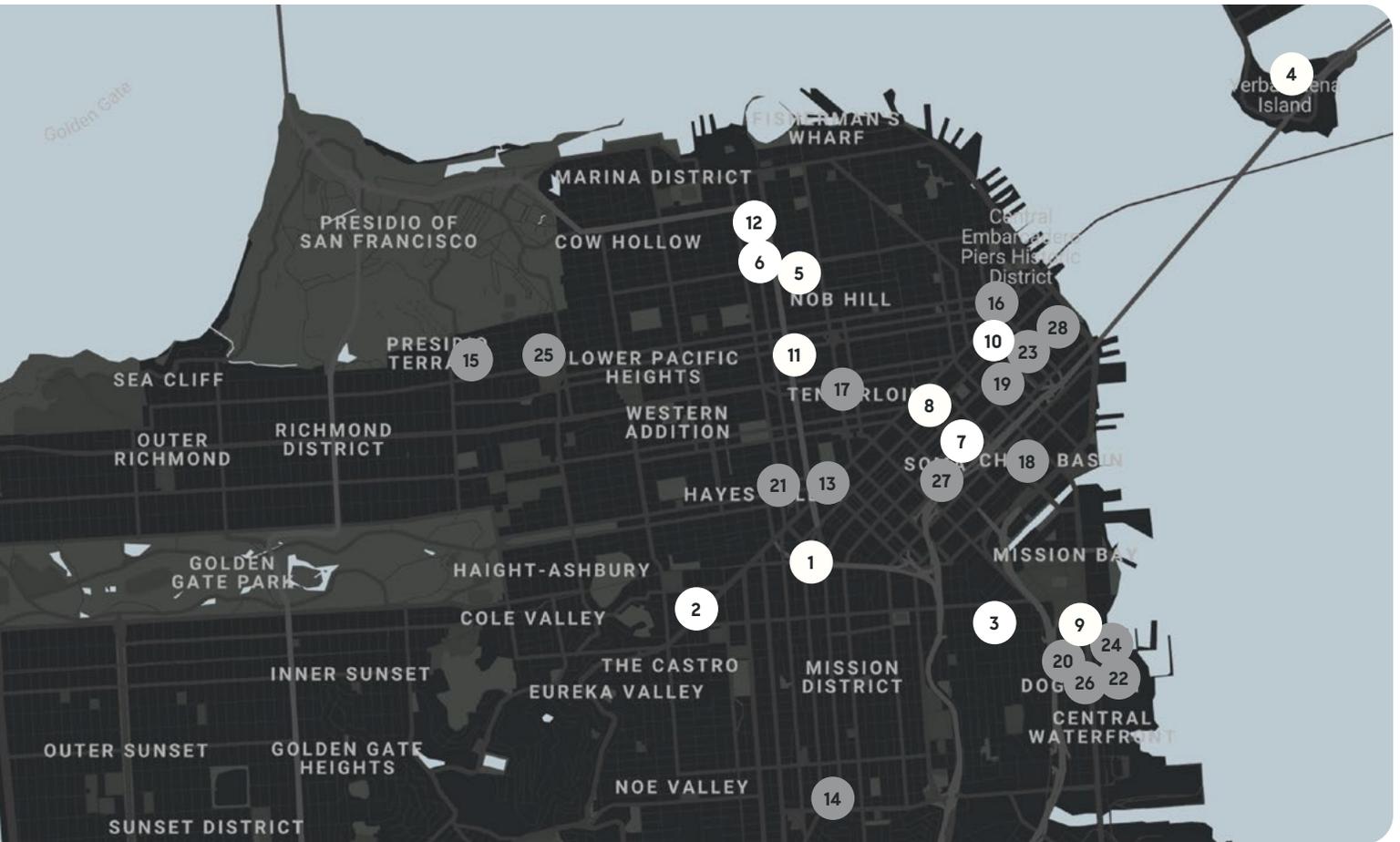
Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,610,000	\$1,825
2-BR	8	\$2,723,625	\$1,923
3-BR	2	\$4,837,500	\$2,526
4-BR+	0	-	-
Total/Avg.	11	\$3,006,727	\$2,061

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,495,000	\$1,695
2-BR	2	\$2,073,000	\$1,594
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	3	\$1,880,333	\$1,633

New Development Pipeline Projects

Q2 2022



1

198 VALENCIA STREET



2

2238 - 2240 MARKET



3

88 AT THE PARK (88 ARKANSAS)



4

YERBA BUENA ISLAND



5

2030 POLK STREET



6

2525 VAN NESS



7

360 5TH STREET



8

5M (110 5TH STREET/925 MISSION)



9

603 TENNESSEE



10

OCEANWIDE CENTER (50 1ST ST)



11

1200 VAN NESS

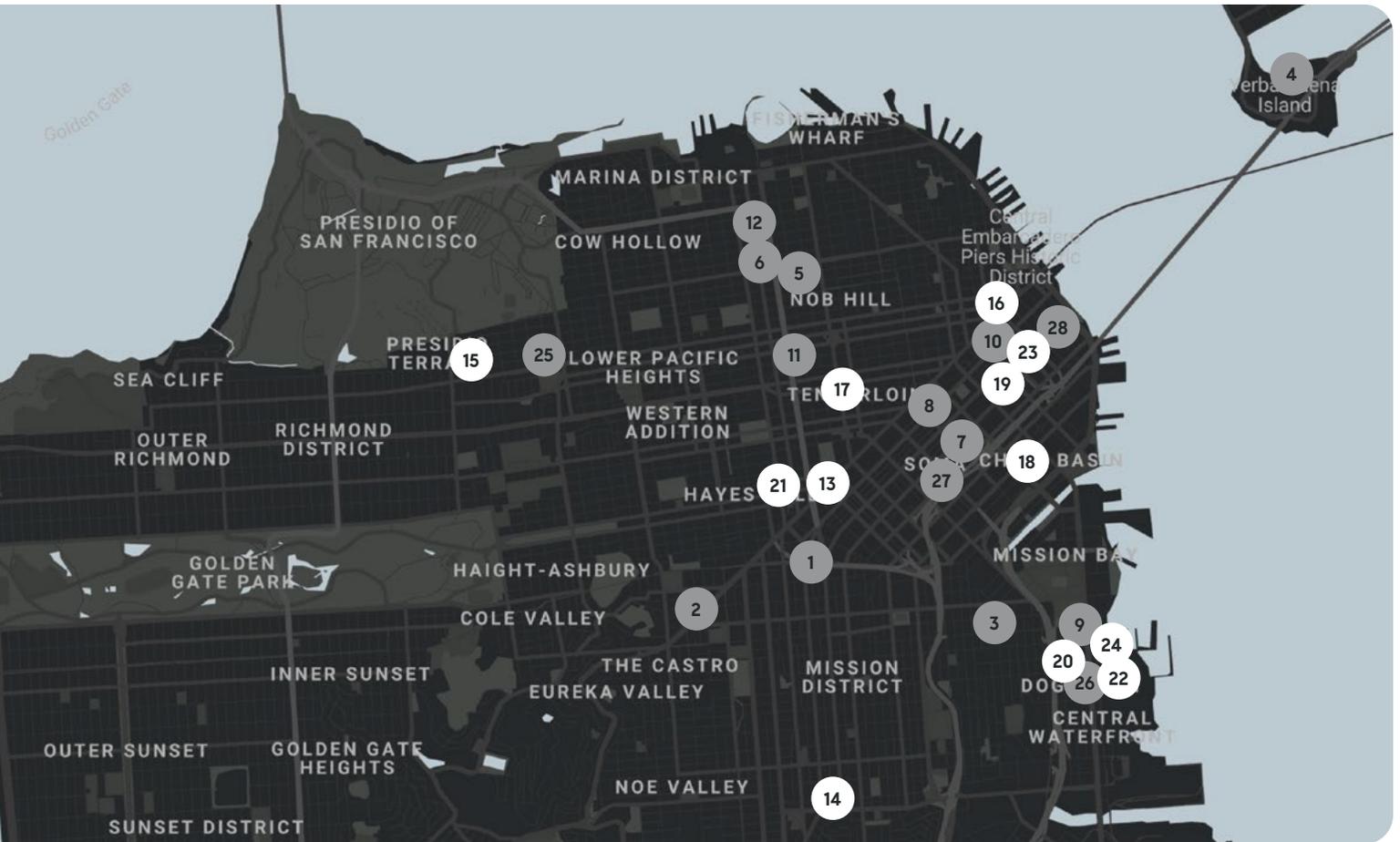


12

2601 VAN NESS

New Development Pipeline Projects

Q2 2022



13

30 VAN NESS



14

3314 CESAR CHAVEZ



15

3700 CALIFORNIA



16

430 MAIN



17

469 EDDY



18

655 4TH STREET



19

655 FOLSOM



20

888 TENNESSEE



21

ONE OAK (1540 MARKET STREET)



22

PARCEL D - PIER 70



23

PARCEL F (542 - 550 HOWARD)

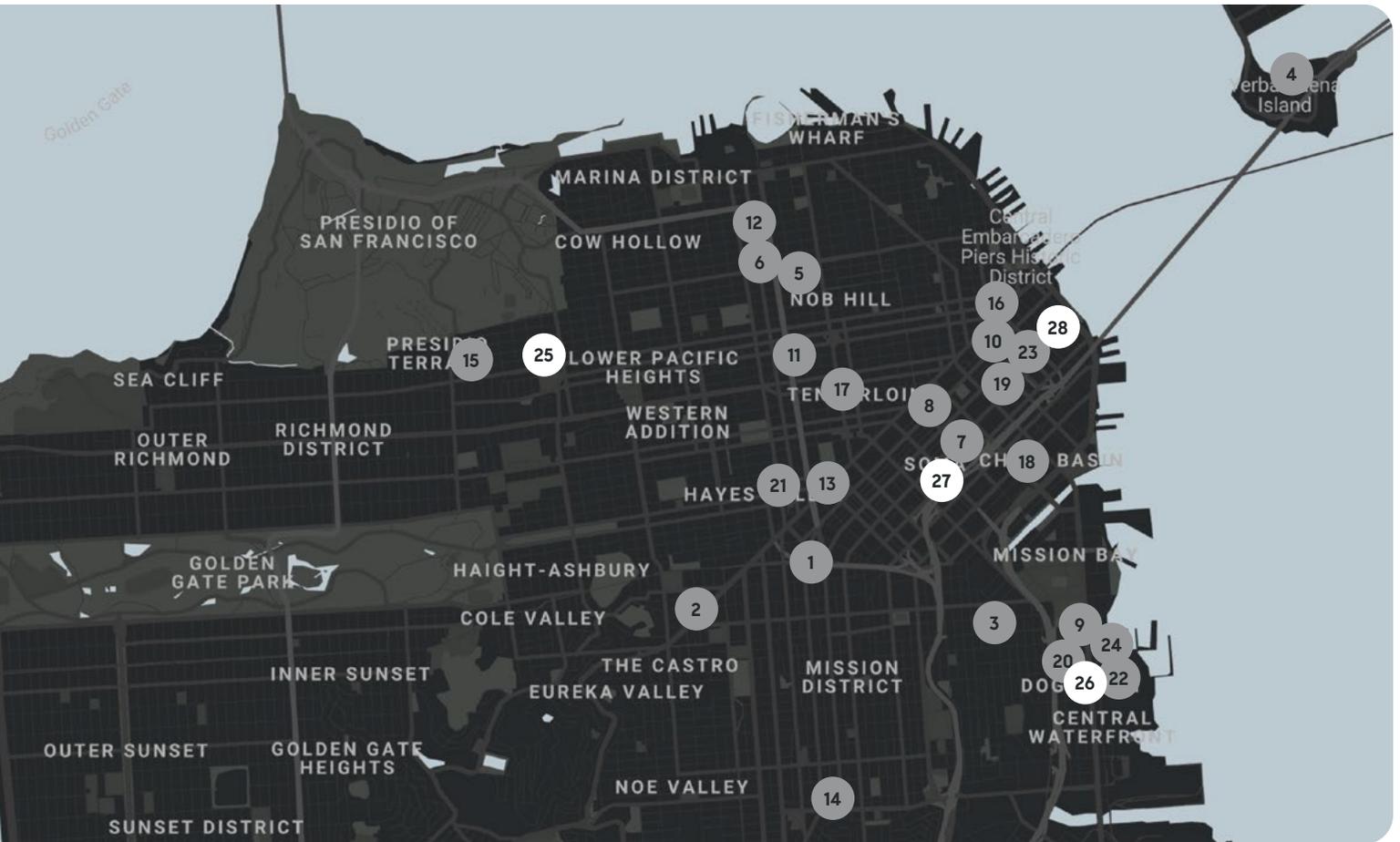


24

PARCEL K NORTH - PIER 70

New Development Pipeline Projects

Q2 2022



25

3333 CALIFORNIA



26

600 20TH STREET / 888 ILLINOIS



27

988 HARRISON STREET



28

TRANSBAY BLOCK 4 (201 HOWARD)



198 Valencia 198 VALENCIA STREET

COMING SOON

NEIGHBORHOOD	Mission
DEVELOPER	JS Sullivan Development
ARCHITECT	RG Architecture
RESIDENCES & STORIES	29 units & 5 floors
PRICE RANGE	TBD
COMPLETION DATE	2022
ADDITIONAL INFO	2K+ total sqft for two commercial units



2238 - 2240 Market 2238 - 2240 MARKET STREET

COMING SOON

NEIGHBORHOOD	Duboce Triangle
DEVELOPER	Prado Group
ARCHITECT	BDE Architecture
RESIDENCES & STORIES	42 residences & 5 stories
PRICE RANGE	TBD
COMPLETION DATE	2022
ADDITIONAL INFO	Rooftop terrace with open-air lounge space, outdoor kitchen and dining area, lobby and arrival experience, package and refrigerated grocery reception, bike repair room with secured storage, pet spa, EV-parking and secured parking,



88 at The Park 88 ARKANSAS STREET

COMING SOON

NEIGHBORHOOD	Mission
DEVELOPER	Zhuguang Group
ARCHITECT	BAR Architects
RESIDENCES & STORIES	127 units (102 market-rate) & 5 stories
PRICE RANGE	TBD
COMPLETION DATE	2022
ADDITIONAL INFO	Amenities include roof deck with outdoor kitchen, fire pit, and bocce court, lobby lounge and seating, front desk attendant, landscaped courtyard, bicycle storage and repair station, dog wash station, parcel storage room, storage lockers, EV charging stations, and car share



The Residences YERBA BUENA ISLAND

COMING SOON

NEIGHBORHOOD	Yerba Buena Island
DEVELOPER	Wilson Meany – Stockbridge Real Estate Funds
ARCHITECT	BDE Architecture / Hart Howerton
RESIDENCES & STORIES	137 units
PRICE RANGE	TBD
COMPLETION DATE	Phase II: 2022+ (Townhomes & Flats)
ADDITIONAL INFO	Home interiors are designed by Meyer Davis. The Courtyard Townhomes have private interior courtyards that connect the main residence to the private guest house; additional features include a dedicated entrance, attached garage, and private balconies.



2030 Polk 23 POLK STREET

NEIGHBORHOOD	Nob Hill
DEVELOPER	JS Pacific Street Partners / JS Sullivan Development
ARCHITECT	RG Architecture
RESIDENCES & STORIES	53 units & 6 floors
PRICE RANGE	TBD
COMPLETION DATE	TBD
ADDITIONAL INFO	3 Retail spaces for a combined 7,260 sqft.



2525 Van Ness 2525 VAN NESS AVENUE

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



360 5th Street 360 5TH STREET

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



5M 110 5TH STREET / 925 MISSION STREET

NEIGHBORHOOD	SoMa / Mid-Market
DEVELOPER	Brookfield Properties / Hearst Corp.
ARCHITECT	Kohn Pederson Fox Associates
RESIDENCES & STORIES	702 residences (400 condos & 302 apts) & 45 floors
PRICE RANGE	TBD
COMPLETION DATE	Phase 1: Late 2021 / Phase 2: 2022+
ADDITIONAL INFO	470-ft condo tower, 200-ft apt building, 395-ft office tower w/ 640K-sqft office space, renovated historic buildings (SF Chronicle / Camelline and Dempster), 23K-sqft rooftop public park at Chronicle and 26K-sqft Mary Court public park w/ dog-run and children's playground



603 Tennessee 603 TENNESSEE STREET

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



Oceanwide Center 50 1ST STREET / 512 MISSION ST.

ON-HOLD

NEIGHBORHOOD	Rincon Hill / Yerba Buena
DEVELOPER	Oceanwide Holdings
ARCHITECT	Foster + Partners
RESIDENCES & STORIES	265 residences (109 units at 1st St & 156 units at Mission St) / 2 towers (52 & 61 floors)
PRICE RANGE	TBD
COMPLETION DATE	2023+
ADDITIONAL INFO	135-million-sqft of office space, 169-room hotel, ground floor retail space and privately-owned public open spaces



1200 Van Ness 1200 VAN NESS AVENUE

NEIGHBORHOOD	Polk Gulch
DEVELOPER	Van Ness Post Center LLC
ARCHITECT	Woods Bagot
RESIDENCES & STORIES	107 residences & 13 floors
PRICE RANGE	TBD
COMPLETION DATE	TBD
ADDITIONAL INFO	Rooftop garden, fitness / yoga studio, multi-functional spaces, pet grooming area. 135K-sqft commercial / retail space



2601 Van Ness 2601 VAN NESS AVENUE

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



30 Van Ness 30 VAN NESS AVENUE

NEIGHBORHOOD	Civic Center
DEVELOPER	Lendlease
ARCHITECT	Solomon, Cordwell, Buenz (SCB)
RESIDENCES & STORIES	333 residences & 47 stories
PRICE RANGE	TBD
COMPLETION DATE	2025
ADDITIONAL INFO	Office, retail, apartments, condos are TBD. 234,100 sqft. of office space, 20,920 sqft. of retail space, 1,560 sqft. of public open space, and 151 stacker parking spaces. 3 Outdoor deck spaces to include lounging, al-fresco dining, and a dog run. Interior amenities to include a fitness center, coworking lounge, socializing room, solarium, and game room.



3314 Cesar Chavez 3314 CESAR CHAVEZ STREET

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



3700 California 3700 CALIFORNIA STREET

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



430 Main 430 MAIN STREET

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



469 Eddy 469 EDDY STREET

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



655 4th Street 655 4TH STREET

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



655 Folsom 650 FOLSOM STREET

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



888 Tennessee 888 TENNESSEE STREET

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



One Oak 1540 MARKET STREET

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



Parcel D - Pier 70 PIER 70

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



Parcel F 542 - 550 HOWARD STREET

NEIGHBORHOOD	SoMa
DEVELOPER	Hines / Urban Pacific Development / Broad Street Principal Investments
ARCHITECT	Pelli Clark Pelli
RESIDENCES & STORIES	170 units & 61 stories
PRICE RANGE	TBD
COMPLETION DATE	2026
ADDITIONAL INFO	180-room hotel, 250K-sqft office space, 9K-sqft retail space, and 20K-sqft of open space



Parcel K North PIER 70

NEIGHBORHOOD	Dogpatch
DEVELOPER	TMG Partners / Presidio Bay Ventures
ARCHITECT	Handel Architects
RESIDENCES & STORIES	250 residences & 6 stories
PRICE RANGE	TBD
COMPLETION DATE	TBD
ADDITIONAL INFO	Common terrace. Ground floor retail / commercial space..



3333 California 3333 CALIFORNIA STREET

NEIGHBORHOOD	Presidio Heights
DEVELOPER	Prado Group / SKS Partners
ARCHITECT	BAR Architects Jensen Architects Solomon Cordwell Buenz Architects (SCB)
RESIDENCES & STORIES	744 residences
PRICE RANGE	TBD
COMPLETION DATE	TBD
ADDITIONAL INFO	~34.5K-sqft retail space and ~14.7K-sqft childcare space.



600 20th Street / 888 Illinois Street

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



988 Harrison Street 988 HARRISON STREET

NEIGHBORHOOD	SoMa
DEVELOPER	JS Sullivan Development
ARCHITECT	Kerman Morris Architects / Workshop 1
RESIDENCES & STORIES	90 units & 8 stories
PRICE RANGE	TBD
COMPLETION DATE	TBD
ADDITIONAL INFO	Common roof deck and 2.9K+ sqft ground floor retail space



Transbay Block 4 201 - 299 HOWARD STREET

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

New Development Market Insights

SAN FRANCISCO Q2 2022

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