

New Development Market Watch

SAN FRANCISCO Q2 2021

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

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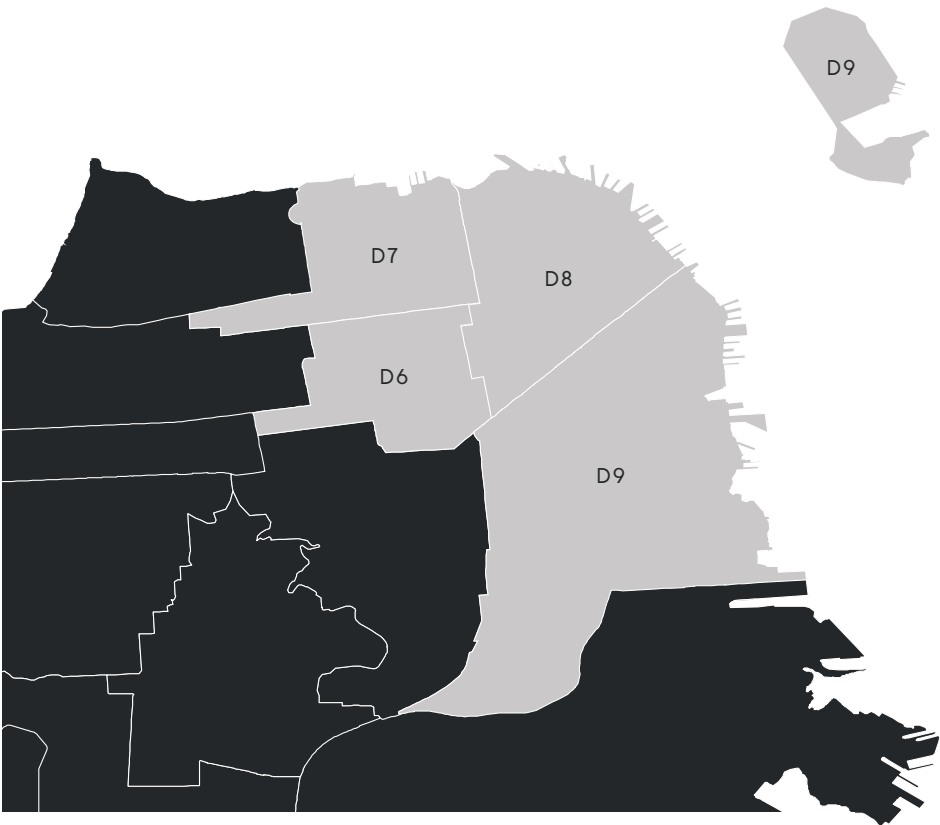
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SAN FRANCISCO DISTRICTS 6-9 SUMMARY

▲ 220.5%

Sales volume skyrocketed in Q2 2021 as buyer confidence returns to the downtown market. 827 deals were recorded, a strong improvement over the same period last year, jumping 220.5% YoY.

▲ 1.7%

Downtown San Francisco witnessed QoQ improvement in the average PPSF to \$1,164/SF, up 1.7% in Q2 2021, resulting from increased sales volume and buyer demand.

▼ 9.5%

Despite increased demand overall, the luxury condo market priced \$3M+ saw a drop in PPSF, down 9.5% YoY to \$1,636/SF, as luxury pricing has yet to meet demand.

With most of the restrictions lifted and the general population in San Francisco vaccinated, business, travel, and leisure witnessed a surge as residents returned to pre-pandemic activities in Q2 2021. With low inventory for single-family homes and buyer demand back into the core urban living downtown, Q2 fundamentals showed an upward momentum for the condo sector. Coupled with low-interest rates, a transition of renters to buyers, second homes purchases, and homeowners looking to cash out, upgrade existing space, or location.

However, buyers continued to look for deals in the market and while most of fundamentals suggest skyrocketing demand, pricing is slowly returning to pre pandemic levels. Values remained down year-over year; however, that delta is quickly closing. With most companies announcing return to work or allowing hybrid models, former renters and commuters have transitioned into first time homebuyers or second home buyers. The importance of shorter commutes, walkability to the office, and amenities like outdoor space, pools, gyms, and other perks are more important than ever before.

The pricing per square foot, on average, remained soft, down 3.4% YoY, albeit an increase of 1.7% QoQ to \$1,164/SF. New development sales volume in San Francisco skyrocketed 220.5% YoY and jumped 28.4% QoQ, recording 827 closings in Q2 2021. The average sales price was \$1.38M - an improvement of 2.8% QoQ. However, on a year over year basis, it is still down 2.6%.

The \$2M to \$3M price segment (Luxury Condo Market) saw the strongest demand in Q2 2021 with a sales volume increase of 305% YoY and 42.1% QoQ, recording 81 closings. The average sales price increased by 5.1% YoY and 3.8% QoQ, to \$2.425M. The average ppsf also increased 7.5% YoY and 4.5% QoQ, to \$1,313. District 7 represented as the Marina, Cow Hollow, Pacific Heights, and Presidio Heights markets saw the greatest momentum this quarter as sales volumes rose 190% from last year and the average sales price and PPSF rose 10.4% and 9.0%, respectively.

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. Each of these districts is broken down to paint a more granular picture of each sub-market.

On Page 14, 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

▲ **220.5%**

Sales volume in Q2 2021 for Districts 6-9 increased 220.5% YoY, with a total of 827 recorded closings.

▲ **2.8%**

The combined core Districts 6-9 in Q2 2021 recorded an increase in average sales price, to \$1.38M a 2.8% increased QoQ.

▲ **1.7%**

The average sales price per square foot in Districts 6-9 was \$1,164, up 1.7% QoQ.

▲ **56.5%**

\$3M+ price segment had a strong jump in sales volume, increasing 200% YoY and 56.5% QoQ, recording 36 closings.

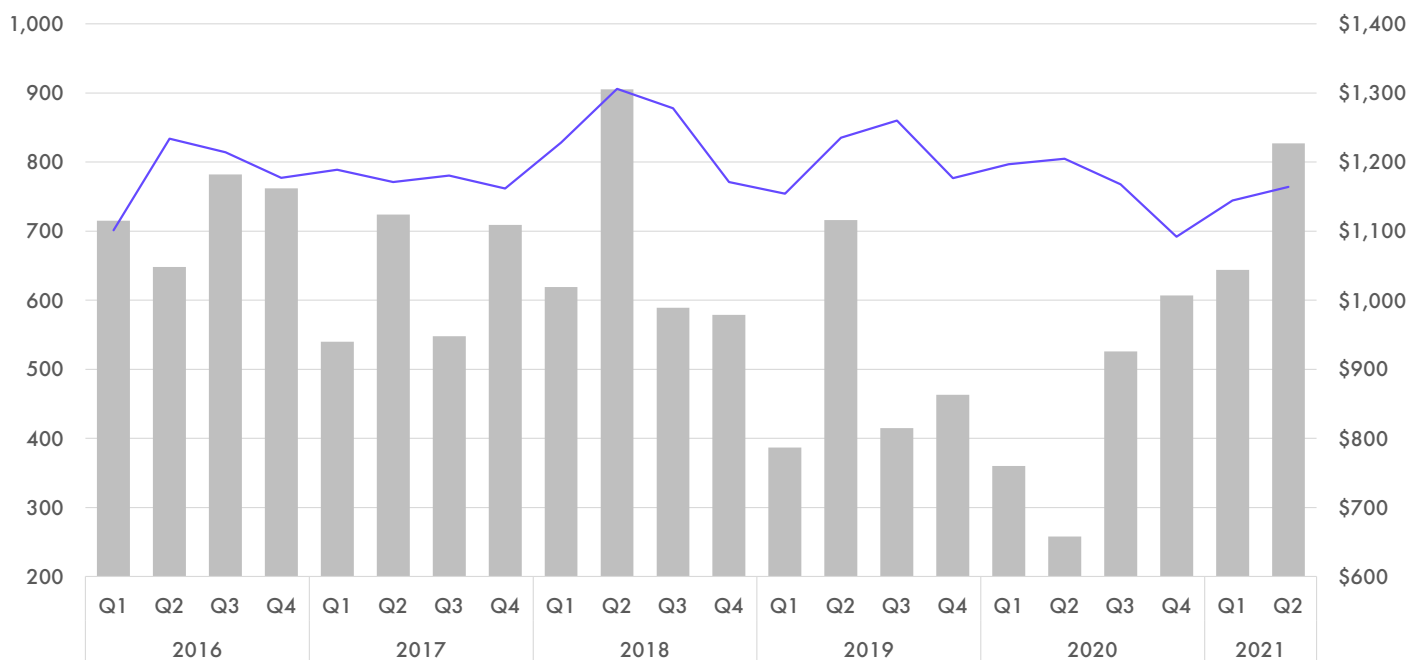
MARKET PERFORMANCE

CONDOS	Q2 21	YoY%	Q2 20	QoQ%	Q1 21
Avg. Sales Price	\$1,380,361	-2.6%	\$1,416,671	2.8%	\$1,343,224
Blended Avg. PPSF	\$1,164	-3.4%	\$1,205	1.7%	\$1,144
Number of Sales	827	220.5%	258	28.4%	644
DOM	45	N/A	41	N/A	62

ANNUAL PERFORMANCE	2020	YoY%	2019	YoY%	2018
Avg. Sales Price	\$1,377,767	-1.8%	\$1,403,721	-1.1%	\$1,419,181
Blended Avg. PPSF	\$1,152	-4.7%	\$1,209	-3.4%	\$1,252
Number of Sales	1,751	-11.6%	1,981	-26.4%	2,692
DOM	47	N/A	37	N/A	53

of Sales

Blended Avg. PPSF



SAN FRANCISCO DISTRICTS 6-9 SUMMARY

SALES BY PRICE POINT

UNDER \$1M	Q2 21	YoY%	Q2 20	QoQ%	Q1 21
Avg. Sales Price	\$782,354	-1.5%	\$794,407	0.4%	\$779,382
Avg. PPSF	\$1,013	-10.2%	\$1,128	0.0%	\$1,013
Number of Sales	307	265.5%	84	20.9%	254
DOM	52	N/A	30	N/A	61
\$1M-\$2M	Q2 21	YoY%	Q2 20	QoQ%	Q1 21
Avg. Sales Price	\$1,382,124	-0.1%	\$1,382,957	0.7%	\$1,372,533
Avg. PPSF	\$1,106	-1.3%	\$1,120	2.1%	\$1,083
Number of Sales	403	183.8%	142	30.0%	310
DOM	34	N/A	34	N/A	56
\$2M-\$3M	Q2 21	YoY%	Q2 20	QoQ%	Q1 21
Avg. Sales Price	\$2,425,272	5.1%	\$2,306,750	3.8%	\$2,335,718
Avg. PPSF	\$1,313	7.5%	\$1,222	4.5%	\$1,257
Number of Sales	81	305.0%	20	42.1%	57
DOM	46	N/A	44	N/A	55
\$3M+	Q2 21	YoY%	Q2 20	QoQ%	Q1 21
Avg. Sales Price	\$4,109,250	-12.3%	\$4,688,000	-12.9%	\$4,715,304
Avg. PPSF	\$1,636	-9.5%	\$1,808	-6.9%	\$1,757
Number of Sales	36	200.0%	12	56.5%	23
DOM	42	N/A	45	N/A	78

SAN FRANCISCO DISTRICT 6

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

▲ **110.7%**

Sales volume in District 6 skyrocketed 110.7% YoY, with 118 recorded closings during Q2 2021.

▼ **6.6%**

The average sales price per square foot for District 6 was \$1,102, down 6.6% YoY.

▲ **14.2%**

The average sales price for condos in District 6 increased to \$1.34M, up 14.2% YoY.

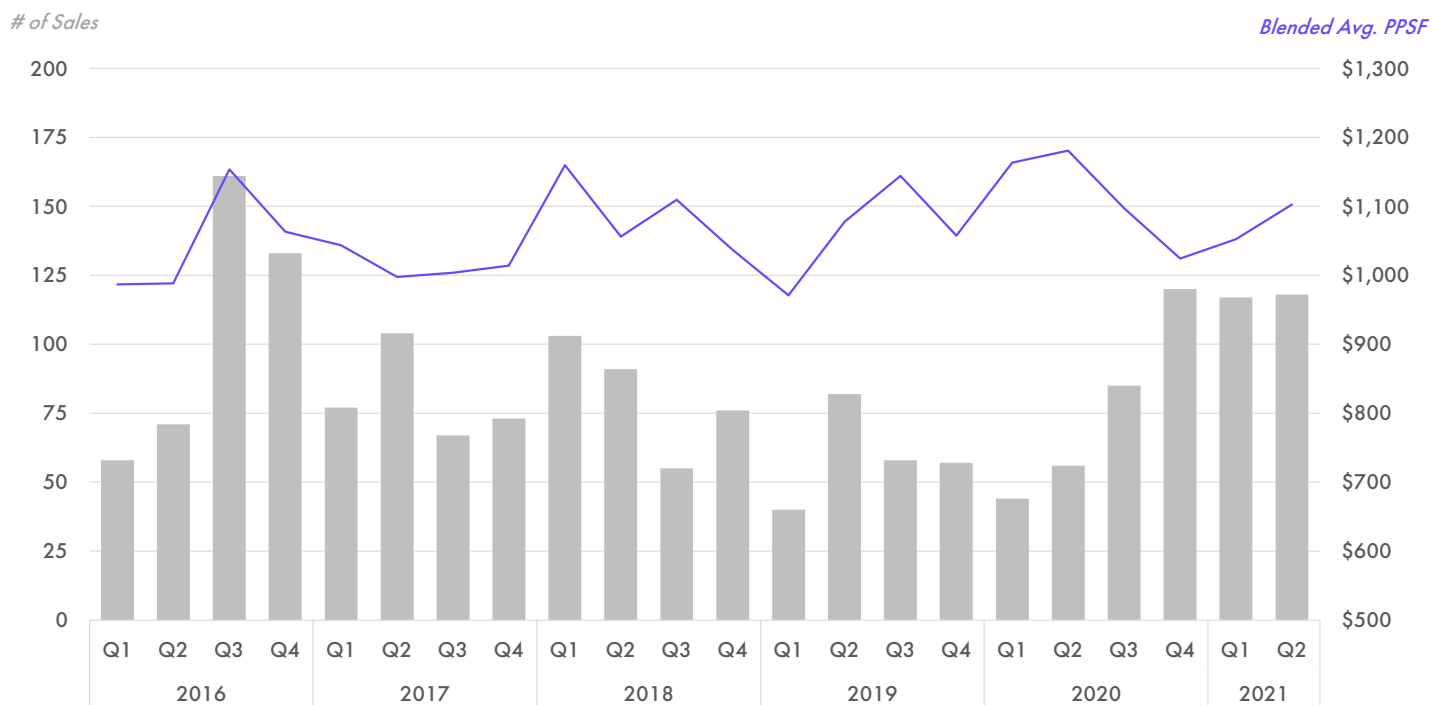
▲ **31.9%**

Activity in the \$2M to \$3M price segment for District 6 saw a healthy uptick in PPSF, up 31.9% YoY, to \$1,159/SF.

MARKET PERFORMANCE

CONDOS	Q2 21	YoY%	Q2 20	QoQ%	Q1 21
Avg. Sales Price	\$1,341,273	14.2%	\$1,174,560	13.6%	\$1,180,224
Blended Avg. PPSF	\$1,102	-6.6%	\$1,181	4.8%	\$1,052
Number of Sales	118	110.7%	56	0.9%	117
DOM	31	N/A	32	N/A	54

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

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

SALES BY PRICE POINT

UNDER \$1M	Q2 21	YoY%	Q2 20	QoQ%	Q1 21
Avg. Sales Price	\$778,919	1.0%	\$770,832	-1.7%	\$791,990
Avg. PPSF	\$1,034	-10.1%	\$1,150	-1.8%	\$1,053
Number of Sales	31	47.6%	21	-32.6%	46
DOM	42	N/A	17	N/A	55
\$1M-\$2M	Q2 21	YoY%	Q2 20	QoQ%	Q1 21
Avg. Sales Price	\$1,400,316	0.4%	\$1,395,380	0.9%	\$1,387,362
Avg. PPSF	\$1,103	-8.8%	\$1,211	3.8%	\$1,064
Number of Sales	75	120.6%	34	11.9%	67
DOM	23	N/A	19	N/A	47
\$2M-\$3M	Q2 21	YoY%	Q2 20	QoQ%	Q1 21
Avg. Sales Price	\$2,363,636	10.2%	\$2,145,000	8.7%	\$2,175,353
Avg. PPSF	\$1,159	31.9%	\$879	23.3%	\$940
Number of Sales	11	1000.0%	1	175.0%	4
DOM	34	N/A	64	N/A	36
\$3M+	Q2 21	YoY%	Q2 20	QoQ%	Q1 21
Avg. Sales Price	\$3,100,000	N/A	-	N/A	-
Avg. PPSF	\$1,176	N/A	-	N/A	-
Number of Sales	1	N/A	0	N/A	0
DOM	0	N/A	-	N/A	-

SAN FRANCISCO DISTRICT 7

MARINA, COW HOLLOW, PACIFIC HEIGHTS, AND PRESIDIO HEIGHTS

▲ **190.9%**

Sales volume for District 7 skyrocketed with 128 sales recorded, jumping 190.9% YoY.

▲ **9.0%**

District 7 recorded an average per square foot pricing of \$1,303, up 9.0% YoY; a strong indication that buyers are returning to the market.

▲ **250.0%**

The luxury market \$2M to \$3M price segment showed a strong increase in demand with 35 recorded sales, up 250% YoY.

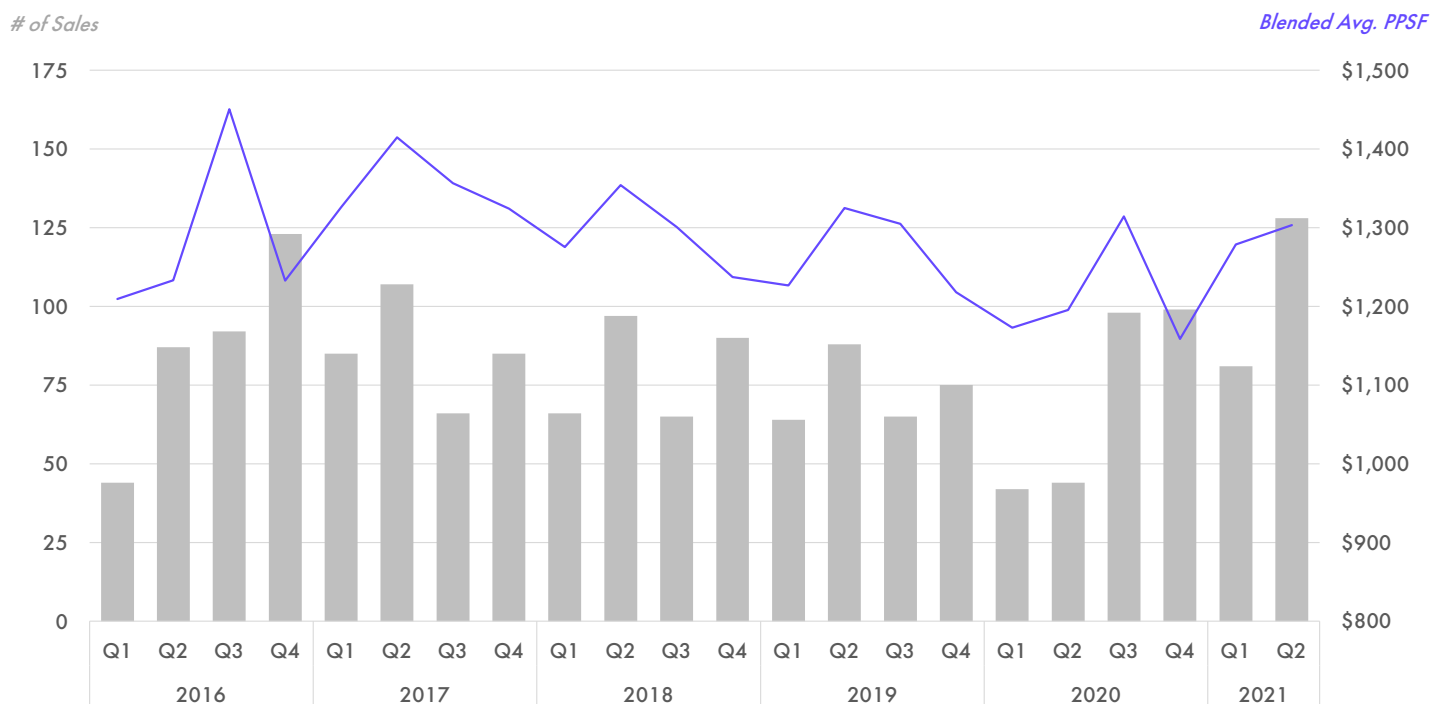
▲ **24.0%**

The ultra luxury \$3M+ price segment for District 7 recorded the strongest YoY increase in average sale price, increasing to \$4M, jumping 24.0% YoY.

MARKET PERFORMANCE

CONDOS	Q2 21	YoY%	Q2 20	QoQ%	Q1 21
Avg. Sales Price	\$1,892,279	10.4%	\$1,714,477	-0.8%	\$1,906,593
Blended Avg. PPSF	\$1,303	9.0%	\$1,195	1.9%	\$1,279
Number of Sales	128	190.9%	44	58.0%	81
DOM	38	N/A	39	N/A	53

ANNUAL PERFORMANCE	2020	YoY%	2019	YoY%	2018
Avg. Sales Price	\$1,800,850	-3.1%	\$1,858,568	5.3%	\$1,764,606
Blended Avg. PPSF	\$1,218	-4.1%	\$1,270	-1.7%	\$1,292
Number of Sales	283	-3.1%	292	-8.2%	318
DOM	42	N/A	35	N/A	27



SAN FRANCISCO DISTRICT 7

MARINA, COW HOLLOW, PACIFIC HEIGHTS, AND PRESIDIO HEIGHTS

SALES BY PRICE POINT

UNDER \$1M	Q2 21	YoY%	Q2 20	QoQ%	Q1 21
Avg. Sales Price	\$809,926	3.7%	\$781,333	1.7%	\$796,563
Avg. PPSF	\$1,107	4.1%	\$1,064	-6.7%	\$1,187
Number of Sales	27	350.0%	6	68.8%	16
DOM	56	N/A	48	N/A	60
\$1M-\$2M	Q2 21	YoY%	Q2 20	QoQ%	Q1 21
Avg. Sales Price	\$1,474,572	-1.1%	\$1,490,760	2.7%	\$1,435,108
Avg. PPSF	\$1,233	6.5%	\$1,157	9.7%	\$1,124
Number of Sales	52	108.0%	25	40.5%	37
DOM	24	N/A	33	N/A	53
\$2M-\$3M	Q2 21	YoY%	Q2 20	QoQ%	Q1 21
Avg. Sales Price	\$2,500,800	5.2%	\$2,378,000	5.0%	\$2,382,056
Avg. PPSF	\$1,309	8.5%	\$1,206	6.4%	\$1,231
Number of Sales	35	250.0%	10	94.4%	18
DOM	33	N/A	37	N/A	39
\$3M+	Q2 21	YoY%	Q2 20	QoQ%	Q1 21
Avg. Sales Price	\$4,009,857	24.0%	\$3,233,333	-12.3%	\$4,571,300
Avg. PPSF	\$1,516	6.0%	\$1,430	-7.3%	\$1,636
Number of Sales	14	366.7%	3	40.0%	10
DOM	42	N/A	17	N/A	44

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

▲ **234.6%**

District 8 recorded 174 closings, an increase of 234.6% YoY, suggesting buyer confidence in the market.

▼ **27.6%**

The average sale price for District 8 was \$1.27M, down 27.6% YoY.

▼ **0.1%**

Condos in District 8 saw only a slight downtick in price per square foot QoQ to \$1,175/SF, down 0.1% QoQ.

▲ **2.8%**

The \$1M to \$2M price segment for District 8 recorded an increase in average sale price, increasing to \$1.36M, an uptick of 2.8% YoY.

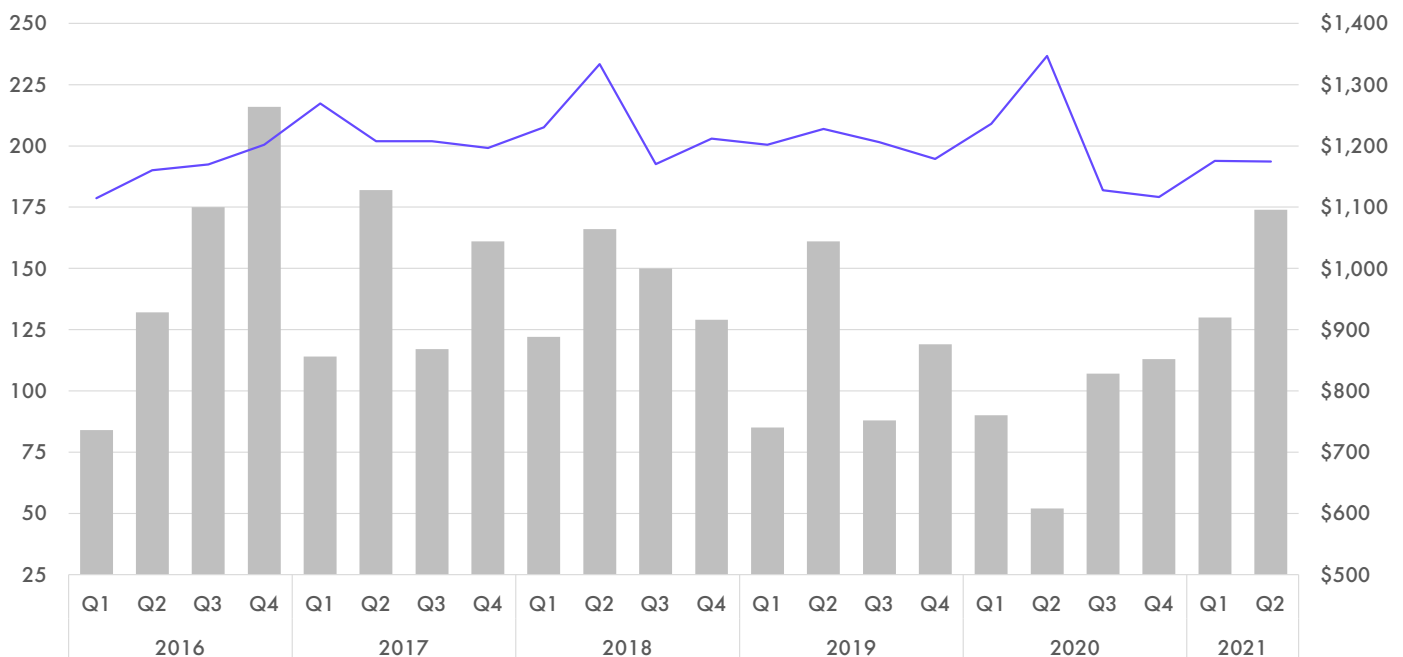
MARKET PERFORMANCE

CONDOS	Q2 21	YoY%	Q2 20	QoQ%	Q1 21
Avg. Sales Price	\$1,269,310	-27.6%	\$1,754,163	-5.3%	\$1,340,355
Blended Avg. PPSF	\$1,175	-12.8%	\$1,347	-0.1%	\$1,175
Number of Sales	174	234.6%	52	33.8%	130
DOM	49	N/A	55	N/A	75

ANNUAL PERFORMANCE	2020	YoY%	2019	YoY%	2018
Avg. Sales Price	\$1,337,825	3.7%	\$1,290,523	-6.3%	\$1,377,178
Blended Avg. PPSF	\$1,188	-1.3%	\$1,204	-3.1%	\$1,243
Number of Sales	362	-20.1%	453	-20.1%	567
DOM	56	N/A	45	N/A	43

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 21	YoY%	Q2 20	QoQ%	Q1 21
Avg. Sales Price	\$730,614	-1.8%	\$743,833	2.2%	\$714,878
Avg. PPSF	\$1,024	-8.5%	\$1,119	2.4%	\$999
Number of Sales	83	361.1%	18	72.9%	48
DOM	55	N/A	44	N/A	67
\$1M-\$2M	Q2 21	YoY%	Q2 20	QoQ%	Q1 21
Avg. Sales Price	\$1,356,200	2.8%	\$1,319,479	2.2%	\$1,327,088
Avg. PPSF	\$1,146	5.8%	\$1,083	3.1%	\$1,111
Number of Sales	70	191.7%	24	12.9%	62
DOM	40	N/A	43	N/A	61
\$2M-\$3M	Q2 21	YoY%	Q2 20	QoQ%	Q1 21
Avg. Sales Price	\$2,426,250	-1.1%	\$2,453,750	2.9%	\$2,358,500
Avg. PPSF	\$1,284	-3.9%	\$1,337	-0.6%	\$1,292
Number of Sales	12	200.0%	4	-20.0%	15
DOM	46	N/A	73	N/A	91
\$3M+	Q2 21	YoY%	Q2 20	QoQ%	Q1 21
Avg. Sales Price	\$4,018,889	-33.7%	\$6,057,500	-9.8%	\$4,455,000
Avg. PPSF	\$1,556	-17.9%	\$1,895	-12.9%	\$1,786
Number of Sales	9	50.0%	6	80.0%	5
DOM	47	N/A	70	N/A	161

SAN FRANCISCO DISTRICT 9

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

▲ **283.0%**

Sales volume increased 283% YoY, recording 406 closings over the same period last year, indicating a healthy signal in the densest condominium district.

▼ **1.9%**

The average sales price per square foot decreased 1.9% QoQ in District 9, to \$1,118.

▲ **360.0%**

Condos in the \$2M to \$3M price segment recorded 23 closings, an increase of 360% YoY, showing signs of demand for homes in the price segment.

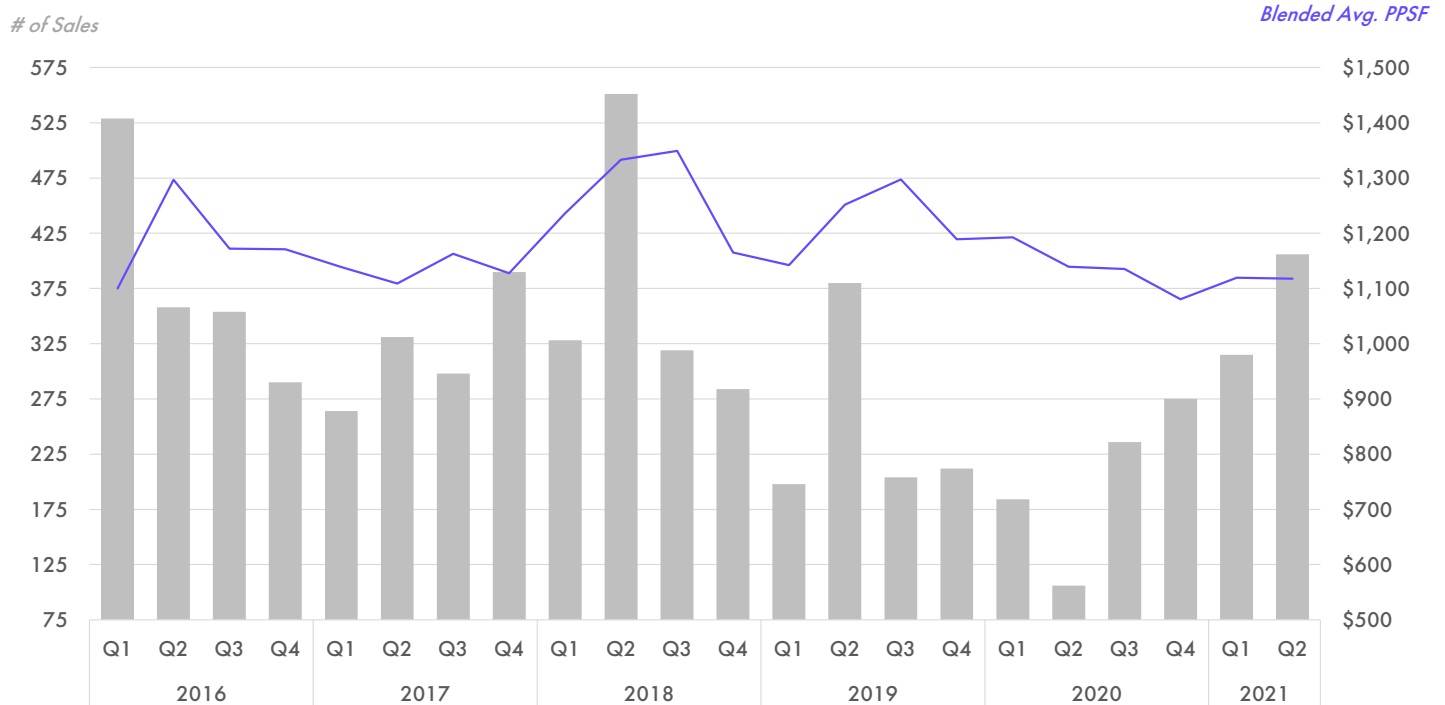
▲ **12.5%**

The average sales price for the \$2M to \$3M price segment was \$2.34M, an uptick of 12.5% YoY as deals were being made.

MARKET PERFORMANCE

CONDOS	Q2 21	YoY%	Q2 20	QoQ%	Q1 21
Avg. Sales Price	\$1,267,036	0.9%	\$1,255,399	0.6%	\$1,259,603
Blended Avg. PPSF	\$1,118	-1.9%	\$1,139	-0.1%	\$1,119
Number of Sales	406	283.0%	106	28.9%	315
DOM	49	N/A	38	N/A	62

ANNUAL PERFORMANCE	2020	YoY%	2019	YoY%	2018
Avg. Sales Price	\$1,300,913	-4.0%	\$1,355,288	-2.8%	\$1,394,407
Blended Avg. PPSF	\$1,130	-7.7%	\$1,224	-4.5%	\$1,282
Number of Sales	801	-19.4%	994	-32.9%	1,482
DOM	49	N/A	36	N/A	72



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 21	YoY%	Q2 20	QoQ%	Q1 21
Avg. Sales Price	\$804,380	-3.4%	\$832,455	1.2%	\$794,946
Avg. PPSF	\$991	-12.4%	\$1,131	0.2%	\$989
Number of Sales	166	325.6%	39	15.3%	144
DOM	51	N/A	28	N/A	60
\$1M-\$2M	Q2 21	YoY%	Q2 20	QoQ%	Q1 21
Avg. Sales Price	\$1,360,973	0.4%	\$1,355,941	-0.5%	\$1,368,242
Avg. PPSF	\$1,064	-0.6%	\$1,071	-0.5%	\$1,070
Number of Sales	206	249.2%	59	44.1%	143
DOM	38	N/A	39	N/A	59
\$2M-\$3M	Q2 21	YoY%	Q2 20	QoQ%	Q1 21
Avg. Sales Price	\$2,339,304	12.5%	\$2,079,000	1.3%	\$2,309,000
Avg. PPSF	\$1,429	13.7%	\$1,257	6.6%	\$1,340
Number of Sales	23	360.0%	5	15.0%	20
DOM	71	N/A	25	N/A	45
\$3M+	Q2 21	YoY%	Q2 20	QoQ%	Q1 21
Avg. Sales Price	\$4,247,727	24.8%	\$3,403,667	-16.0%	\$5,058,000
Avg. PPSF	\$1,911	-3.5%	\$1,979	0.7%	\$1,898
Number of Sales	11	266.7%	3	37.5%	8
DOM	47	N/A	22	N/A	67



1433 BUSH

SOLD OUT IN Q2 2021

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 Q2 2021

38

CLOSED

2

IN CONTRACT

0

AVAILABLE

Recent Sales (Q3 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	\$589,000	\$1,538
1-BR	0	-	-
2-BR	0	-	-
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	1	\$589,000	\$1,538



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

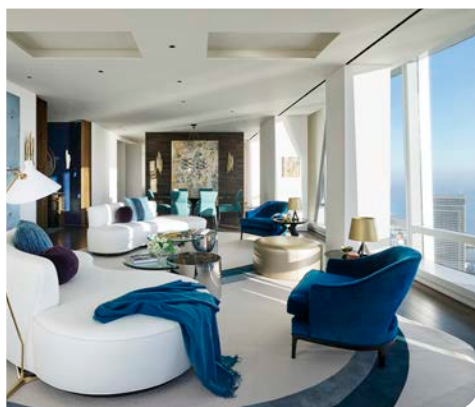
May 2016

CLOSINGS COMMENCED

May 2018

AVERAGE ABSORPTION

N/A



SALES STATUS Q2 2021

37
CLOSED

N/A
IN CONTRACT

N/A
AVAILABLE

Recent Sales (Q3 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	1	\$4,935,000	\$2,452
3-BR	1	\$6,600,000	\$2,852
4-BR+	0	-	-
Total/Avg.	2	\$5,767,500	\$2,666

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,700,000	\$2,179
2-BR	4	\$6,927,500	\$3,518
3-BR	2	\$5,940,000	\$2,805
4-BR+	0	-	-
Total/Avg.	7	\$5,898,571	\$3,203



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

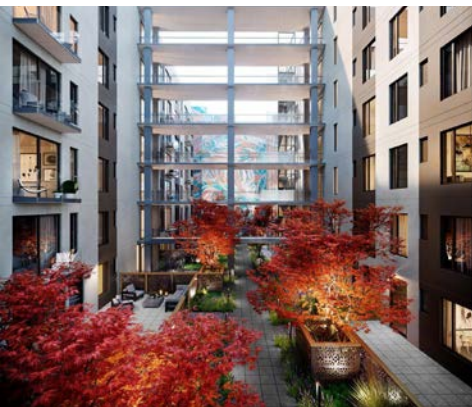
December 2019

CLOSINGS COMMENCED

September 2020

AVERAGE ABSORPTION

2 units/month



SALES STATUS Q2 2021

29

CLOSED

7

IN CONTRACT

78

AVAILABLE

Recent Sales (Q3 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	5	\$702,800	\$1,376
1-BR	12	\$971,875	\$1,357
2-BR	11	\$1,466,545	\$1,400
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	28	\$1,118,161	\$1,381

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$985,000	\$1,370
2-BR	3	\$1,781,333	\$1,503
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	4	\$1,582,250	\$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

2 units/month



SALES STATUS Q2 2021

36

CLOSED

11

IN CONTRACT

53

AVAILABLE

Recent Sales (Q3 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	12	\$653,224	\$1,396
1-BR	8	\$988,625	\$1,201
2-BR	16	\$1,333,965	\$1,201
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	36	\$1,030,309	\$1,238

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	2	\$637,000	\$1,427
1-BR	1	\$1,206,000	\$1,363
2-BR	1	\$1,755,000	\$1,237
3-BR	1	\$2,043,000	\$1,445
4-BR+	0	-	-
Total/Avg.	5	\$1,255,600	\$1,362



99 RAUSCH

SOLD OUT IN Q2 2021

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 Q2 2021

109
CLOSED

3
IN CONTRACT

0
AVAILABLE

Recent Sales (Q3 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	-	-



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

TBD

AVERAGE ABSORPTION

N/A



SALES STATUS Q2 2021

N/A
CLOSED

N/A
IN CONTRACT

44
AVAILABLE

Recent Sales (Q3 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	\$1,490,000	\$1,950
2-BR	2	\$2,585,000	\$1,772
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	3	\$2,220,000	\$1,809



ELEVANT

ADDRESS

555 Golden Gate Avenue,
San Francisco, CA

DEVELOPER

JS Sullivan Development

RESIDENCES

55 (48 Market Rate)

AVERAGE HOA FEES

\$550 - \$650/month

DATE ON MARKET

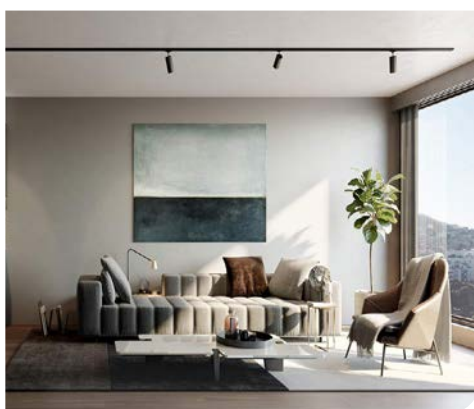
December 2020

CLOSINGS COMMENCED

April 2021

AVERAGE ABSORPTION

2 units/month



SALES STATUS Q2 2021

9

CLOSED

3

IN CONTRACT

43

AVAILABLE

Recent Sales (Q3 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	3	\$691,000	\$1,095
2-BR	4	\$922,750	\$1,038
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	7	\$823,429	\$1,058

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	3	\$742,333	\$1,171
2-BR	4	\$988,750	\$1,113
3-BR	1	\$1,848,000	\$1,362
4-BR+	0	-	-
Total/Avg.	8	\$1,003,750	\$1,179



FOUR SEASONS PRIVATE RESIDENCES

ADDRESS

706 Mission Street, San Francisco, CA

DEVELOPER

Westbrook Partners

RESIDENCES

146

AVERAGE HOA FEES

\$3,180 - \$4,300/month

DATE ON MARKET

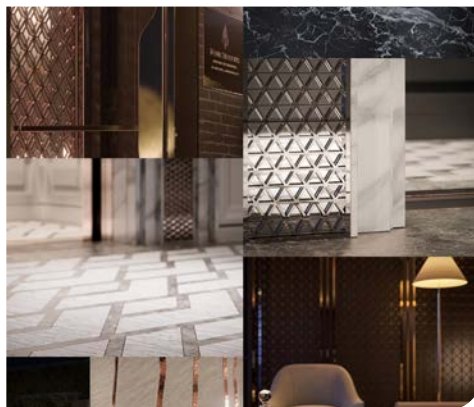
June 2019

CLOSINGS COMMENCED

December 2020

AVERAGE ABSORPTION

0 units/month



SALES STATUS Q2 2021

6

CLOSED

0

IN CONTRACT

140

AVAILABLE

Recent Sales (Q3 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	1	\$5,770,000	\$2,076
3-BR	1	\$11,340,000	\$2,673
4-BR+	1	\$12,555,000	\$2,726
Total/Avg.	3	\$9,888,333	\$2,551

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

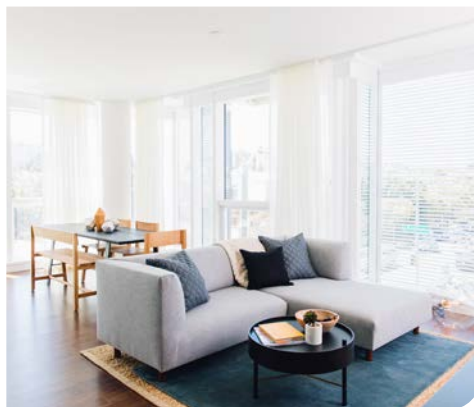
CLOSINGS COMMENCED

March 2020

AVERAGE ABSORPTION

2 units/month - Launch

2 units/month - Relaunch



SALES STATUS Q2 2021

110
CLOSED

3
IN CONTRACT

26
AVAILABLE

Recent Sales (Q3 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	2	\$584,500	\$1,090
1-BR	34	\$777,362	\$1,147
2-BR	26	\$1,211,813	\$1,229
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	62	\$953,330	\$1,189

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$940,000	\$1,317
2-BR	1	\$1,552,000	\$1,491
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	2	\$1,246,000	\$1,420



LUMINA

SOLD OUT IN Q2 2021

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 Q2 2021

649

CLOSED

7

IN CONTRACT

0

AVAILABLE

Recent Sales (Q3 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	1	\$738,000	\$967
1-BR	15	\$1,109,600	\$1,222
2-BR	24	\$1,911,833	\$1,356
3-BR	3	\$4,144,667	\$1,283
4-BR+	1	\$4,600,000	\$1,709
Total/Avg.	44	\$1,825,000	\$1,325

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	6	\$1,250,667	\$1,348
2-BR	3	\$2,582,833	\$1,782
3-BR	2	\$5,241,944	\$1,400
4-BR+	1	\$6,800,000	\$1,302
Total/Avg.	12	\$2,711,366	\$1,438



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 Q2 2021

38

CLOSED

1

IN CONTRACT

4

AVAILABLE

Recent Sales (Q3 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	3	\$836,667	\$1,784
1-BR	13	\$987,423	\$1,454
2-BR	11	\$1,557,364	\$1,485
3-BR	1	\$2,468,000	\$1,191
4-BR+	0	-	-
Total/Avg.	28	\$1,248,054	\$1,465

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,049,000	\$1,459
2-BR	0	-	-
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	1	\$1,049,000	\$1,459



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

6 units/month



SALES STATUS Q2 2021

193
CLOSED

12
IN CONTRACT

187
AVAILABLE

Recent Sales (Q3 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	1	\$875,000	\$1,310
1-BR	4	\$1,085,921	\$1,414
2-BR	4	\$1,611,250	\$1,369
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	9	\$1,295,965	\$1,381

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$1,499,500	\$1,891
2-BR	7	\$1,779,000	\$1,368
3-BR	2	\$3,797,500	\$1,992
4-BR+	0	-	-
Total/Avg.	11	\$2,095,182	\$1,589



MISSION MODERN

ADDRESS

3620 Cesar Chavez Street,
San Francisco, CA

DEVELOPER

Vanguard Properties

RESIDENCES

24

AVERAGE HOA FEES

\$460 - \$620/month

DATE ON MARKET

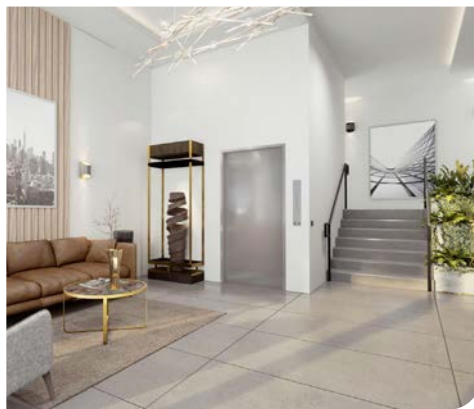
February 2020

CLOSINGS COMMENCED

July 2020

AVERAGE ABSORPTION

1 units/month



SALES STATUS Q2 2021

21
CLOSED

2
IN CONTRACT

1
AVAILABLE

Recent Sales (Q3 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	4	\$755,000	\$1,397
2-BR	17	\$1,243,647	\$1,147
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	21	\$1,150,571	\$1,173

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	1	\$1,199,000	\$1,048
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	1	\$1,199,000	\$1,048



MURANO

ADDRESS

3131 Pierce Street, San Francisco, CA

DEVELOPER

DM Development

RESIDENCES

22

AVERAGE HOA FEES

\$890 - \$1,240/month

DATE ON MARKET

January 2021

CLOSINGS COMMENCED

TBD

AVERAGE ABSORPTION

N/A



SALES STATUS Q2 2021

N/A
CLOSED

1
IN CONTRACT

21
AVAILABLE

Recent Sales (Q3 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	3	\$1,615,667	\$1,527
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	4	\$1,485,500	\$1,526



ONE ELEVEN

ADDRESS

588 Minna Street, San Francisco, CA

DEVELOPER

Z&L Properties

RESIDENCES

39

AVERAGE HOA FEES

\$525 - \$640/month

DATE ON MARKET

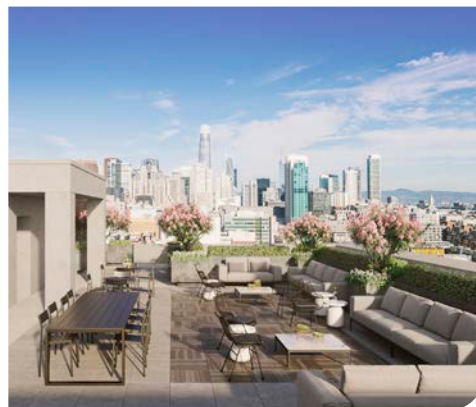
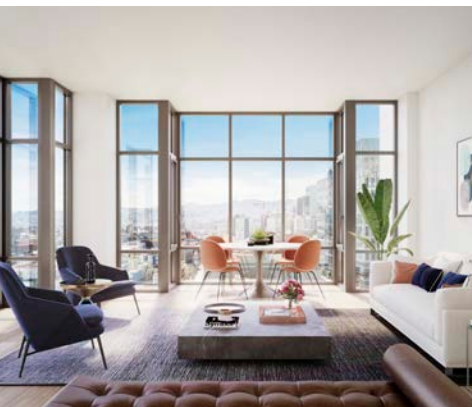
December 2019

CLOSINGS COMMENCED

February 2021

AVERAGE ABSORPTION

1 units/month



SALES STATUS Q2 2021

11

CLOSED

1

IN CONTRACT

27

AVAILABLE

Recent Sales (Q3 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	7	\$645,714	\$1,109
2-BR	4	\$1,066,500	\$1,081
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	11	\$798,727	\$1,096

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	1	\$699,000	\$1,013
1-BR	1	\$649,000	\$1,008
2-BR	1	\$1,099,000	\$1,120
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	3	\$815,667	\$1,057



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 Q2 2021

329
CLOSED

18
IN CONTRACT

3
AVAILABLE

Recent Sales (Q3 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	7	\$1,011,329	\$1,263
2-BR	8	\$1,461,611	\$1,233
3-BR	2	\$2,100,000	\$1,281
4-BR+	0	-	-
Total/Avg.	17	\$1,351,306	\$1,251

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	1	\$825,000	\$1,533
1-BR	2	\$1,074,000	\$1,359
2-BR	3	\$1,561,667	\$1,287
3-BR	1	\$2,998,000	\$1,641
4-BR+	0	-	-
Total/Avg.	7	\$1,522,286	\$1,405



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

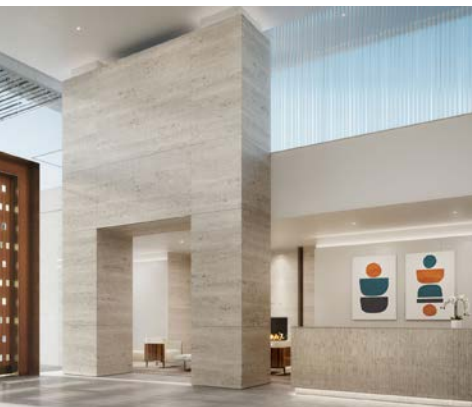
February 2020

CLOSINGS COMMENCED

TBD

AVERAGE ABSORPTION

1 units/month



SALES STATUS Q2 2021

N/A
CLOSED

12
IN CONTRACT

108
AVAILABLE

Recent Sales (Q3 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	\$1,850,000	\$1,710
2-BR	0	-	-
3-BR	1	\$8,950,000	\$3,830
4-BR+	0	-	-
Total/Avg.	2	\$5,400,000	\$3,159

New Construction Project Overview

Q2 2021



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

N/A

AVERAGE ABSORPTION

1 units/month



SALES STATUS Q2 2021

N/A
CLOSED

1
IN CONTRACT

241
AVAILABLE

Recent Sales (Q3 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	-	-



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 2021

37

CLOSED

0

IN CONTRACT

81

AVAILABLE

Recent Sales (Q3 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	8	\$2,796,875	\$1,672
3-BR	8	\$5,403,075	\$2,078
4-BR+	0	-	-
Total/Avg.	16	\$4,099,975	\$1,919

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,750,000	\$1,773
2-BR	4	\$2,953,750	\$1,865
3-BR	6	\$6,181,667	\$2,557
4-BR+	0	-	-
Total/Avg.	11	\$4,605,000	\$2,321



THE BRISTOL YERBA BUENA ISLAND

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 Q2 2021

N/A
CLOSED

5
IN CONTRACT

119
AVAILABLE

Recent Sales (Q3 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	2	\$1,422,500	\$1,401
2-BR	2	\$2,501,500	\$1,502
3-BR	1	\$3,150,000	\$1,691
4-BR+	0	-	-
Total/Avg.	6	\$1,969,333	\$1,482



THE FLATS

YERBA BUENA ISLAND

ADDRESS

290 Meadow Drive, San Francisco, CA

DEVELOPER

Wilson Meany
Stockbridge Real Estate Funds

RESIDENCES

55

AVERAGE HOA FEES

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

DATE ON MARKET

March 2021

CLOSINGS COMMENCED

TBD

AVERAGE ABSORPTION

N/A



SALES STATUS Q2 2021

N/A
CLOSED

0
IN CONTRACT

55
AVAILABLE

Recent Sales (Q3 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	2	\$3,840,000	\$1,546
4-BR+	0	-	-
Total/Avg.	2	\$3,840,000	\$1,546



THE TOWNHOMES YERBA BUENA ISLAND

ADDRESS

Meadow Drive, San Francisco, CA

DEVELOPER

Wilson Meany
Stockbridge Real Estate Funds

RESIDENCES

71

AVERAGE HOA FEES

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

DATE ON MARKET

March 2021

CLOSINGS COMMENCED

TBD

AVERAGE ABSORPTION

N/A



SALES STATUS Q2 2021

N/A
CLOSED

0
IN CONTRACT

71
AVAILABLE

Recent Sales (Q3 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	1	\$3,601,000	\$1,454
3-BR	1	\$3,825,000	\$1,608
4-BR+	0	-	-
Total/Avg.	2	\$3,713,000	\$1,529



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

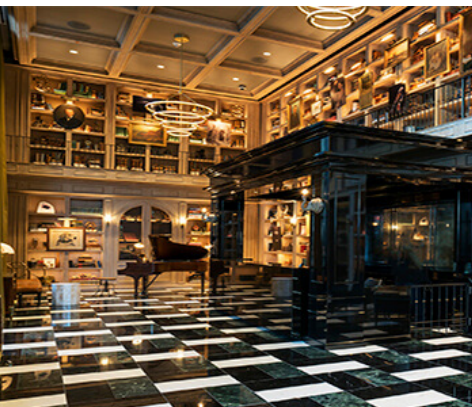
April 2016

CLOSINGS COMMENCED

August 2016

AVERAGE ABSORPTION

4 units/month



SALES STATUS Q2 2021

279
CLOSED

N/A
IN CONTRACT

18
AVAILABLE

Recent Sales (Q3 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	11	\$1,067,091	\$1,311
2-BR	18	\$1,968,056	\$1,520
3-BR	2	\$3,856,500	\$1,968
4-BR+	0	-	-
Total/Avg.	31	\$1,770,194	\$1,517

Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	5	\$1,267,800	\$1,517
2-BR	5	\$2,213,800	\$1,725
3-BR	1	\$7,800,000	\$2,427
4-BR+	0	-	-
Total/Avg.	11	\$2,291,636	\$1,825



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 2021

16

CLOSED

0

IN CONTRACT

25

AVAILABLE

Recent Sales (Q3 2020 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	5	\$1,460,800	\$1,639
2-BR	6	\$2,567,833	\$1,966
3-BR	2	\$4,187,500	\$2,187
4-BR+	0	-	-
Total/Avg.	13	\$2,250,400	\$1,880

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

New Development Pipeline Projects

Q2 2021



2238 - 2240 MARKET



THE OAK (1554 MARKET)



THE QUINN (349 8TH STREET)



YERBA BUENA ISLAND



198 VALENCIA STREET



2525 VAN NESS



360 5TH STREET



5M (110 5TH STREET/925 MISSION)



603 TENNESSEE



MAISON A SOMA (230 7TH ST)



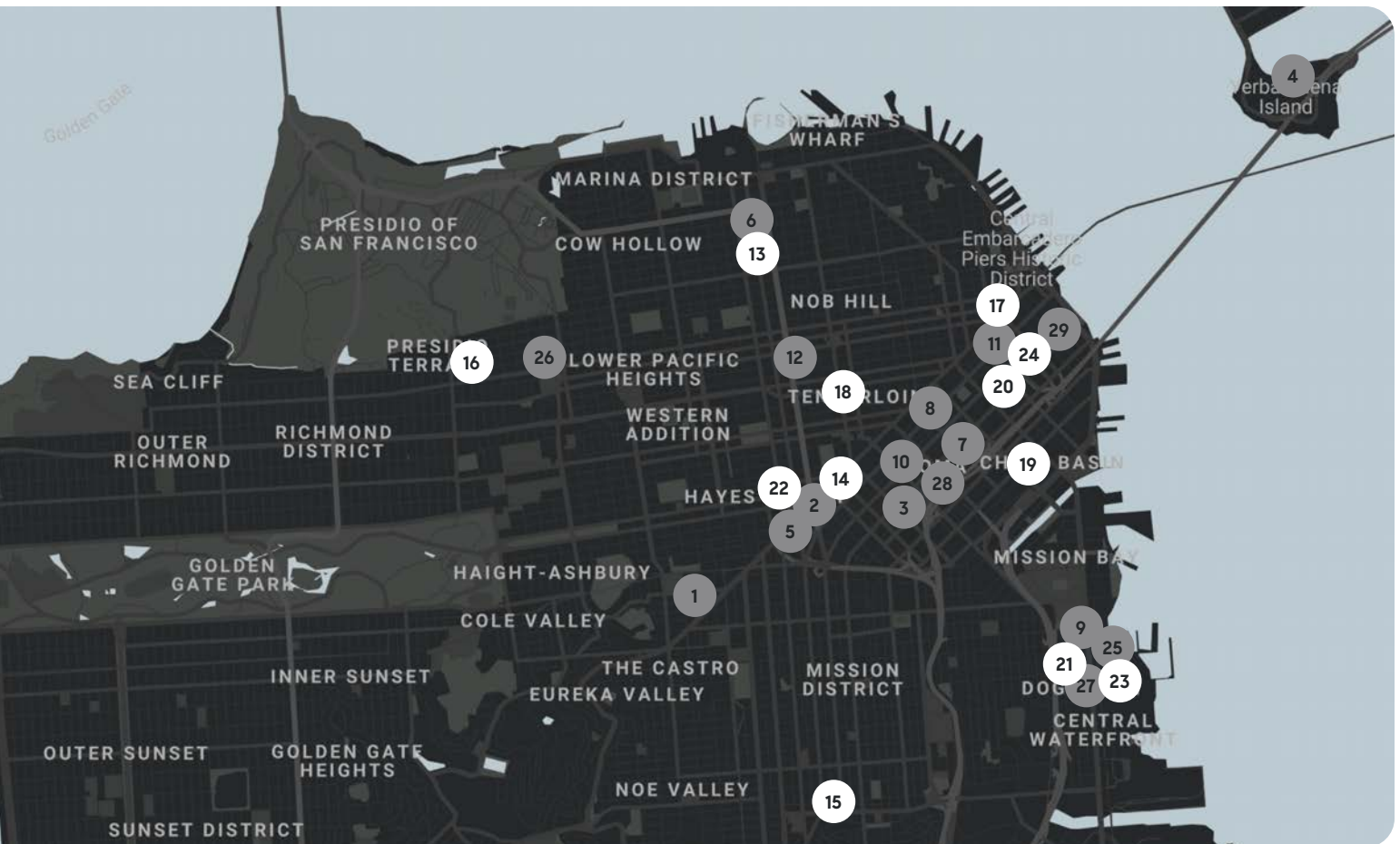
OCEANWIDE CENTER (50 1ST ST)



1200 VAN NESS

New Development Pipeline Projects

Q2 2021



13

2601 VAN NESS



14

30 VAN NESS



15

3314 CESAR CHAVEZ



16

3700 CALIFORNIA



17

430 MAIN



18

469 EDDY



19

655 4TH STREET



20

655 FOLSOM



21

888 TENNESSEE



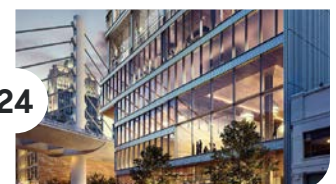
22

ONE OAK (1540 MARKET STREET)



23

PARCEL D - PIER 70



24

PARCEL F (542 - 550 HOWARD)

New Development Pipeline Projects

Q2 2021



25

PARCEL K NORTH - PIER 70



26

3333 CALIFORNIA



27

600 20TH STREET / 888 ILLINOIS



28

988 HARRISON STREET



29

TRANSBAY BLOCK 4 (201 HOWARD)



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	Summer 2021
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.



The Oak 1554 MARKET STREET

COMING SOON

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 \$600K's
COMPLETION DATE	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

COMING SOON

NEIGHBORHOOD	SoMa
DEVELOPER	Presidio Bay Ventures
ARCHITECT	RG Architecture
RESIDENCES & STORIES	38 residences (32 market-rate) & 5 floors
PRICE RANGE	Pricing starting from the \$600K'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 Courtyard Townhomes

The Estate Homesites YERBA BUENA ISLAND

COMING SOON

NEIGHBORHOOD	Yerba Buena Island
DEVELOPER	Wilson Meany – Stockbridge Real Estate Funds
ARCHITECT	BDE Architecture / Hart Howerton
RESIDENCES & STORIES	16 units
PRICE RANGE	Pricing starting from \$5 million
COMPLETION DATE	Phase II: 2022+ (Townhomes & Estates)
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.



198 Valencia 198 VALENCIA STREET

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



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	1,600+ 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



Maison a SoMa 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



Oceanwide Center 50 1ST STREET / 512 MISSION ST.

NEIGHBORHOOD	Rincon Hill / Yerba Buena	ON-HOLD
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	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



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	Arquitectonica
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	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..



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 2021

Contact

891 BEACH STREET
SAN FRANCISCO, CA 94109

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