

# New Development Market Watch

SAN FRANCISCO Q2 2022



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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

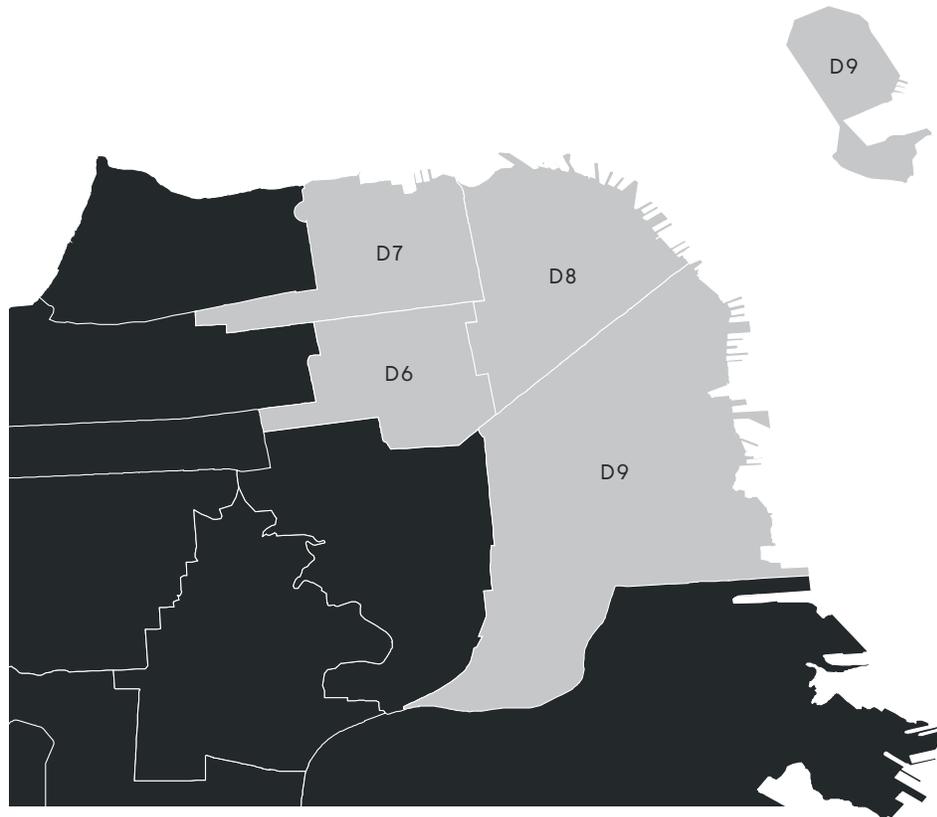
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## SAN FRANCISCO DISTRICTS 6-9 SUMMARY

### ▼ 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](mailto: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.

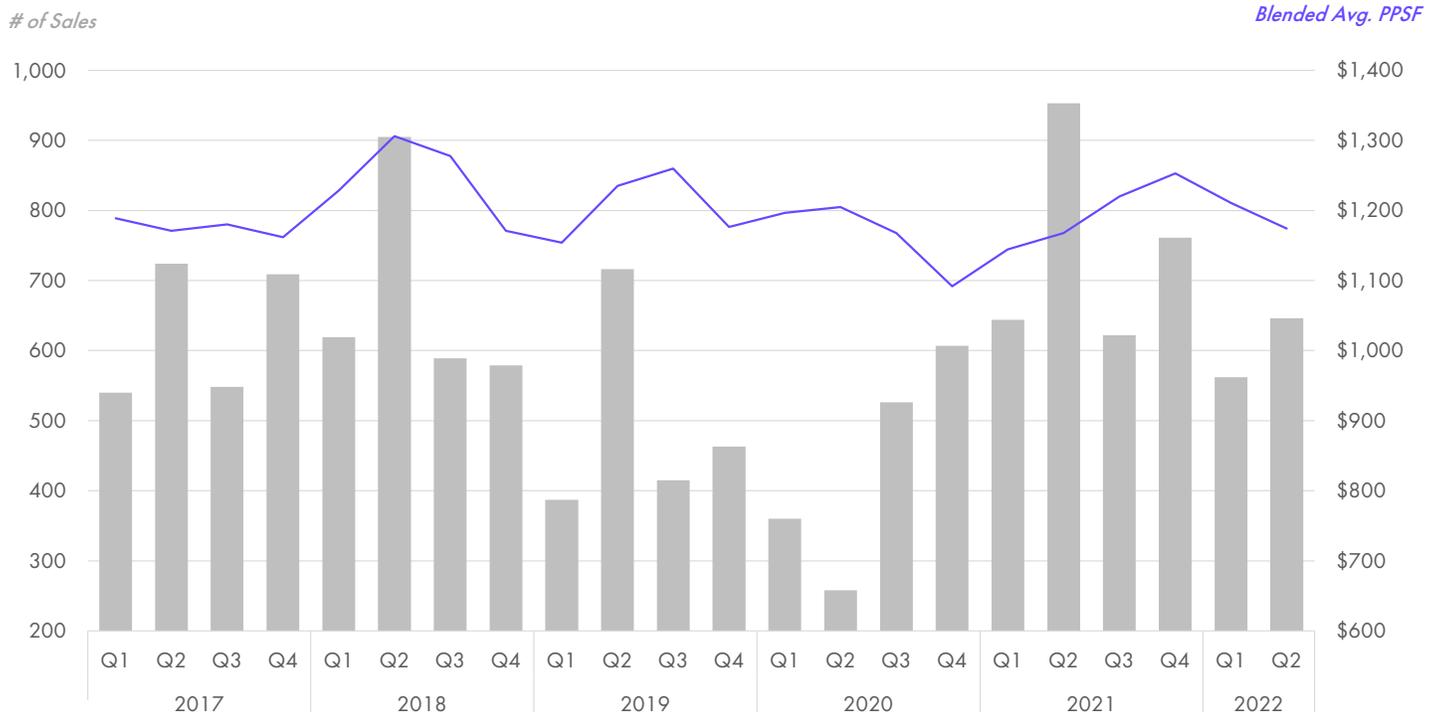
**0.0%**

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



## SAN FRANCISCO DISTRICTS 6-9 SUMMARY

### SALES BY PRICE POINT

<b>UNDER \$1M</b>	<b>Q2 22</b>	<b>YoY%</b>	<b>Q2 21</b>	<b>QoQ%</b>	<b>Q1 22</b>
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
<b>\$1M-\$2M</b>	<b>Q2 22</b>	<b>YoY%</b>	<b>Q2 21</b>	<b>QoQ%</b>	<b>Q1 22</b>
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
<b>\$2M-\$3M</b>	<b>Q2 22</b>	<b>YoY%</b>	<b>Q2 21</b>	<b>QoQ%</b>	<b>Q1 22</b>
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
<b>\$3M+</b>	<b>Q2 22</b>	<b>YoY%</b>	<b>Q2 21</b>	<b>QoQ%</b>	<b>Q1 22</b>
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.

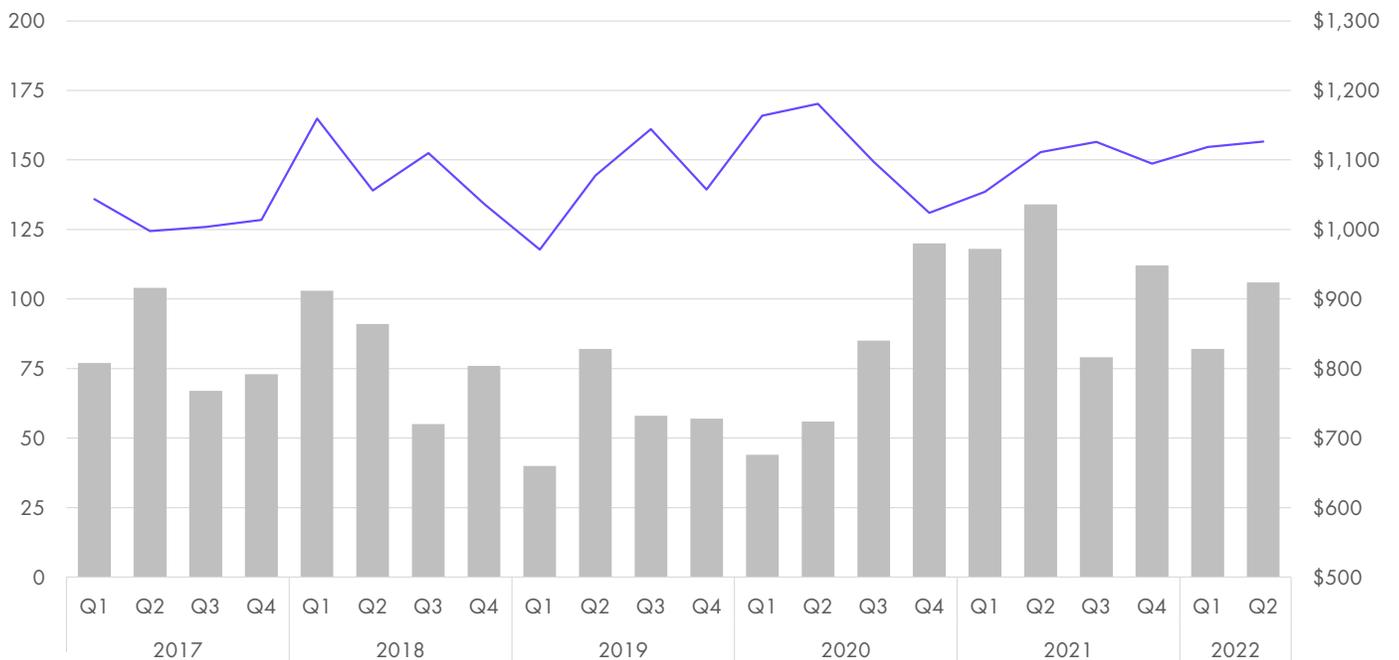
## MARKET PERFORMANCE

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

# of Sales

Blended Avg. PPSF



## SAN FRANCISCO DISTRICT 6

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

### SALES BY PRICE POINT

<b>UNDER \$1M</b>	<b>Q2 22</b>	<b>YoY%</b>	<b>Q2 21</b>	<b>QoQ%</b>	<b>Q1 22</b>
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
<b>\$1M-\$2M</b>	<b>Q2 22</b>	<b>YoY%</b>	<b>Q2 21</b>	<b>QoQ%</b>	<b>Q1 22</b>
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
<b>\$2M-\$3M</b>	<b>Q2 22</b>	<b>YoY%</b>	<b>Q2 21</b>	<b>QoQ%</b>	<b>Q1 22</b>
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
<b>\$3M+</b>	<b>Q2 22</b>	<b>YoY%</b>	<b>Q2 21</b>	<b>QoQ%</b>	<b>Q1 22</b>
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.

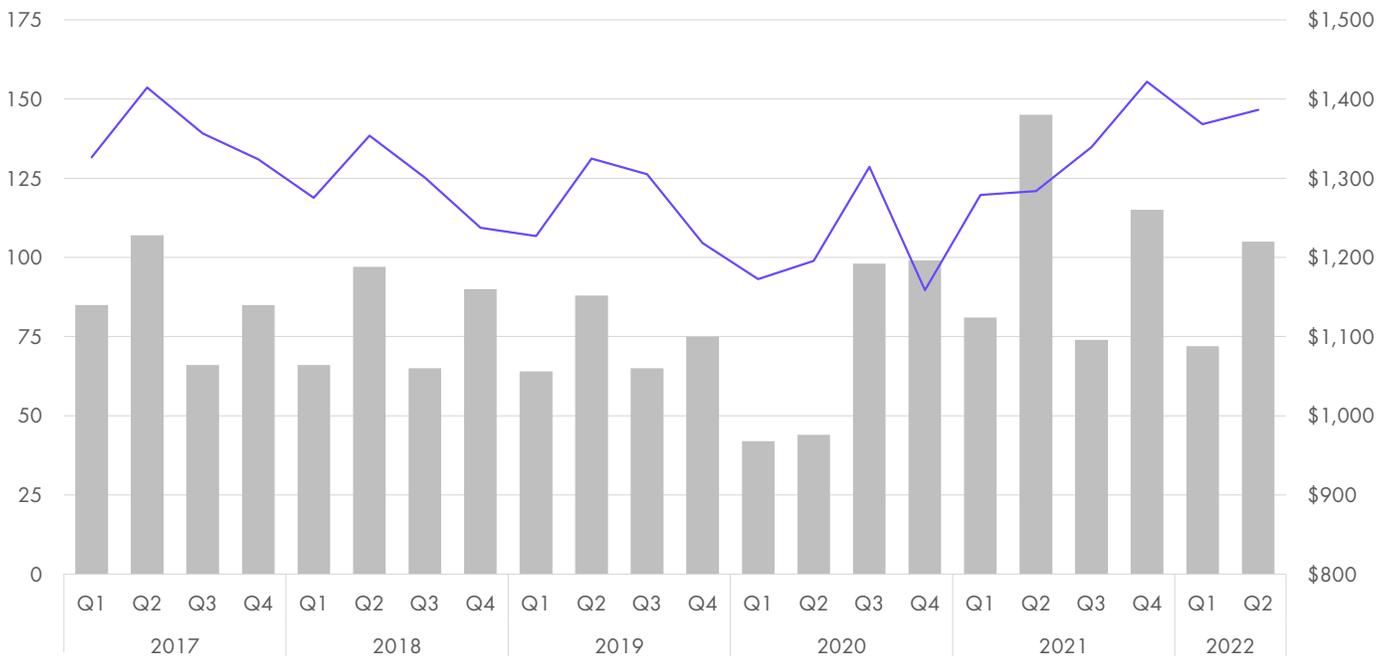
## MARKET PERFORMANCE

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

<b>UNDER \$1M</b>	<b>Q2 22</b>	<b>YoY%</b>	<b>Q2 21</b>	<b>QoQ%</b>	<b>Q1 22</b>
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
<b>\$1M-\$2M</b>	<b>Q2 22</b>	<b>YoY%</b>	<b>Q2 21</b>	<b>QoQ%</b>	<b>Q1 22</b>
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
<b>\$2M-\$3M</b>	<b>Q2 22</b>	<b>YoY%</b>	<b>Q2 21</b>	<b>QoQ%</b>	<b>Q1 22</b>
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
<b>\$3M+</b>	<b>Q2 22</b>	<b>YoY%</b>	<b>Q2 21</b>	<b>QoQ%</b>	<b>Q1 22</b>
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

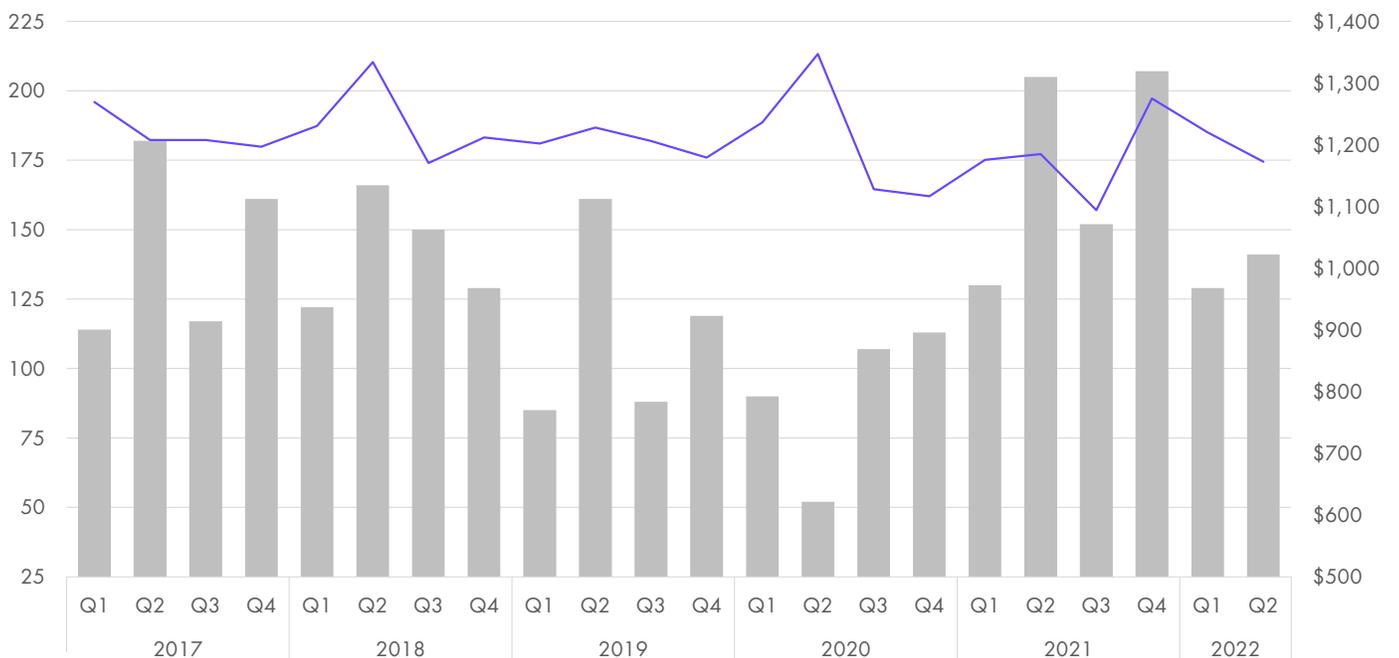
CONDOS	Q2 22	YoY%	Q2 21	QoQ%	Q1 22
Avg. Sales Price	\$1,329,713	4.4%	\$1,273,600	4.5%	\$1,272,816
Blended Avg. PPSF	\$1,172	-1.0%	\$1,185	-3.9%	\$1,220
Number of Sales	141	-31.2%	205	9.3%	129
DOM	41	N/A	48	N/A	47

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

<b>UNDER \$1M</b>	<b>Q2 22</b>	<b>YoY%</b>	<b>Q2 21</b>	<b>QoQ%</b>	<b>Q1 22</b>
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
<b>\$1M-\$2M</b>	<b>Q2 22</b>	<b>YoY%</b>	<b>Q2 21</b>	<b>QoQ%</b>	<b>Q1 22</b>
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
<b>\$2M-\$3M</b>	<b>Q2 22</b>	<b>YoY%</b>	<b>Q2 21</b>	<b>QoQ%</b>	<b>Q1 22</b>
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
<b>\$3M+</b>	<b>Q2 22</b>	<b>YoY%</b>	<b>Q2 21</b>	<b>QoQ%</b>	<b>Q1 22</b>
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.

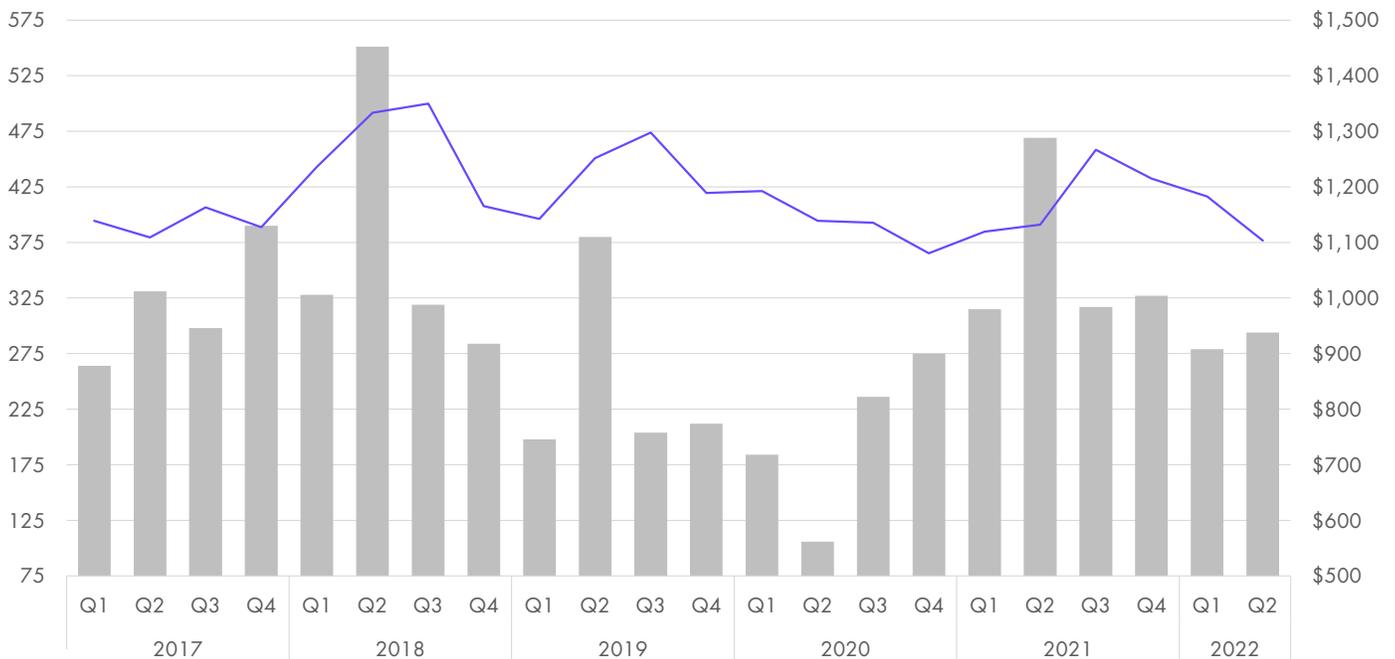
## MARKET PERFORMANCE

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

<b>UNDER \$1M</b>	<b>Q2 22</b>	<b>YoY%</b>	<b>Q2 21</b>	<b>QoQ%</b>	<b>Q1 22</b>
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
<b>\$1M-\$2M</b>	<b>Q2 22</b>	<b>YoY%</b>	<b>Q2 21</b>	<b>QoQ%</b>	<b>Q1 22</b>
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
<b>\$2M-\$3M</b>	<b>Q2 22</b>	<b>YoY%</b>	<b>Q2 21</b>	<b>QoQ%</b>	<b>Q1 22</b>
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
<b>\$3M+</b>	<b>Q2 22</b>	<b>YoY%</b>	<b>Q2 21</b>	<b>QoQ%</b>	<b>Q1 22</b>
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

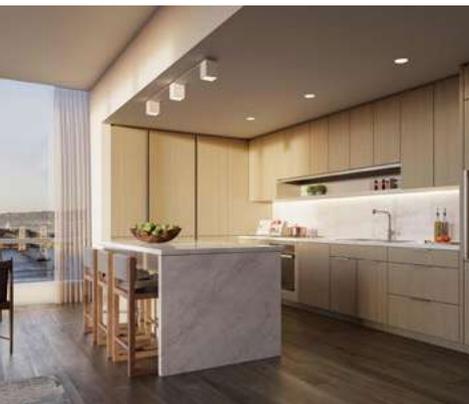
June 2018

### 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)



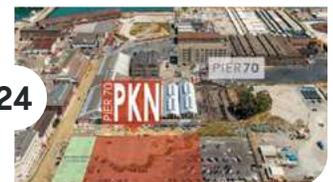
22

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

<b>NEIGHBORHOOD</b>	Yerba Buena Island
<b>DEVELOPER</b>	Wilson Meany – Stockbridge Real Estate Funds
<b>ARCHITECT</b>	BDE Architecture / Hart Howerton
<b>RESIDENCES &amp; STORIES</b>	137 units
<b>PRICE RANGE</b>	TBD
<b>COMPLETION DATE</b>	Phase II: 2022+ (Townhomes & Flats)
<b>ADDITIONAL INFO</b>	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

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



## 2525 Van Ness 2525 VAN NESS AVENUE

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



## 360 5th Street 360 5TH STREET

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

<b>NEIGHBORHOOD</b>	Civic Center
<b>DEVELOPER</b>	Lendlease
<b>ARCHITECT</b>	Solomon, Cordwell, Buenz (SCB)
<b>RESIDENCES &amp; STORIES</b>	333 residences & 47 stories
<b>PRICE RANGE</b>	TBD
<b>COMPLETION DATE</b>	2025
<b>ADDITIONAL INFO</b>	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

<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



## 3700 California 3700 CALIFORNIA STREET

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



## 430 Main 430 MAIN STREET

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

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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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