

# New Development Market Watch

SAN FRANCISCO Q3 2022



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CDMG's New Development Market Insights report provides an in-depth look at San Francisco's neighborhoods districts 6-9 where new developments are most prevalent. Published quarterly and highlighting the city's vast condominium 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

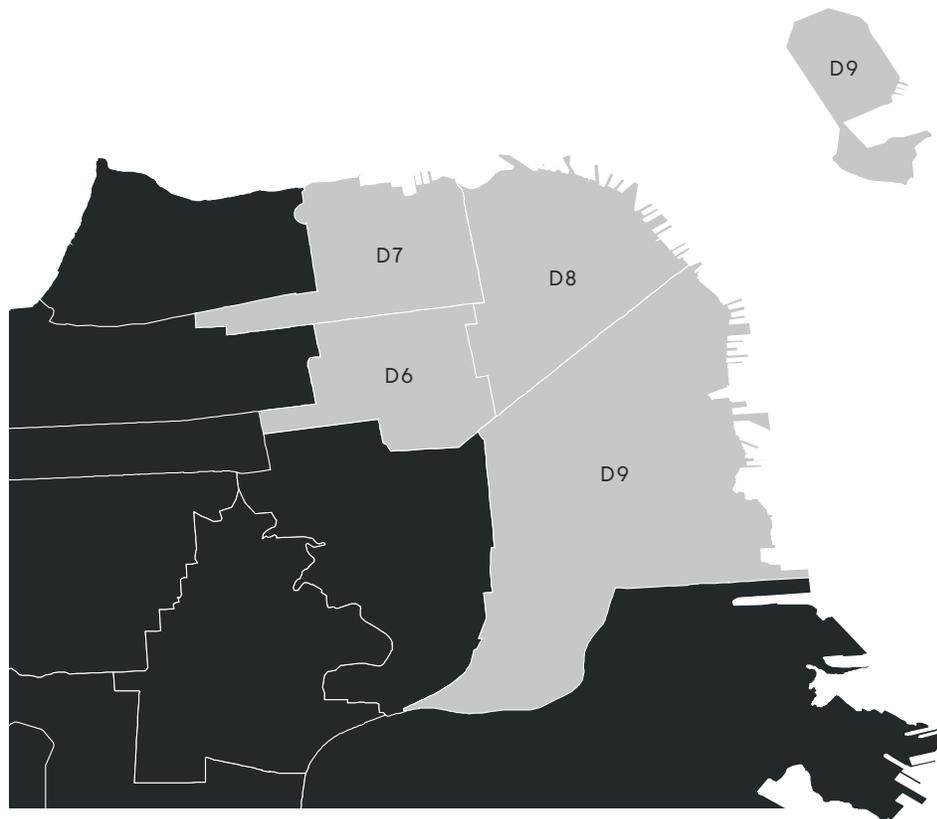
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## SAN FRANCISCO DISTRICTS 6-9 SUMMARY

▼ **33.9%**

Total number of sales declined YoY during Q3 '22 as marketwide momentum slowed across the city. 411 deals were recorded during the quarter, compared to 622 during the same period last year and the lowest since 2018.

▲ **15.2%**

The luxury market segment (condos valued \$3M+) clocked a strong 15.2% increase in average price to \$5.37M, despite total sales declining to only 15 deals – a 50% decrease.

▲ **1.5%**

Despite slowing sales volume and absorption, the average sale price rose 1.5% YoY to \$1.36M.

The San Francisco real estate market experienced extreme growth in late 2020 and all of 2021, when an overheated market produced record breaking prices and sales numbers across the city. Now, in Q3 '22, interest rate increases and the continued inflation threats are driving a market re-stabilization, which has been felt across the city. The number of condominium sales in San Francisco's districts 6-9 recorded its lowest third quarter in the past 5 years, with 411 sales closed in what is typically a busy season for buyers. The market experienced a steep QoQ decline with -36.4% fewer sales than Q2 '22. Yet despite cooling demand, prices remained less impacted while inventory remains low, and for now, sellers have resisted deep discounts.

Interest rates are at their highest in 15 years. The short term impact is fewer sales. While it's difficult to predict the longer term impacts of rate hikes and broadly based macro-economic headwinds, the Bay Area residential market has confirmed signs of sustained slowing in Q3 '22. Total number of sales was down across all districts compared to last year, however, pricing remains more steady. The average sales price was up 1.5% to \$1.36M YoY with the PPSF down 4.7% to \$1,163/SF.

The luxury market, defined as condo sales valued \$3M+, experienced the most significant YoY decline, with number of sales down 50% to 15 closings. While affluent buyers tend to be less tethered to interest rate changes and more sensitive to the financial markets, buyers may have hit 'pause' on their plans as they await more market clarity. However, those who are still buying have yet to see large discounts. The average price for condos over \$3M increased 15.2% YoY to \$5.37M.

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. From there, each district is assessed individually providing a more granular picture of the sub-market.

On Page 14, a citywide exploration of each currently selling new development project, including the most recent closings at each, is 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

▼ **12.2%**

Number of sales for product priced from \$2M-\$3M, a typical sweet spot in the SF market, experienced the smallest decline YoY, down 12.2% with 36 sales in Q3 '22.

▼ **61.3%**

The \$2M-\$3M price segment saw the largest number of sales plunge QoQ, down 61.3% in Q3 '22 with 36 sales, compared to 93 in Q2 '22.

▲ **1.0%**

Product priced from \$1M-\$2M in Districts 6-9 recorded a slight uptick in average price, up 1% YoY at \$1.37M.

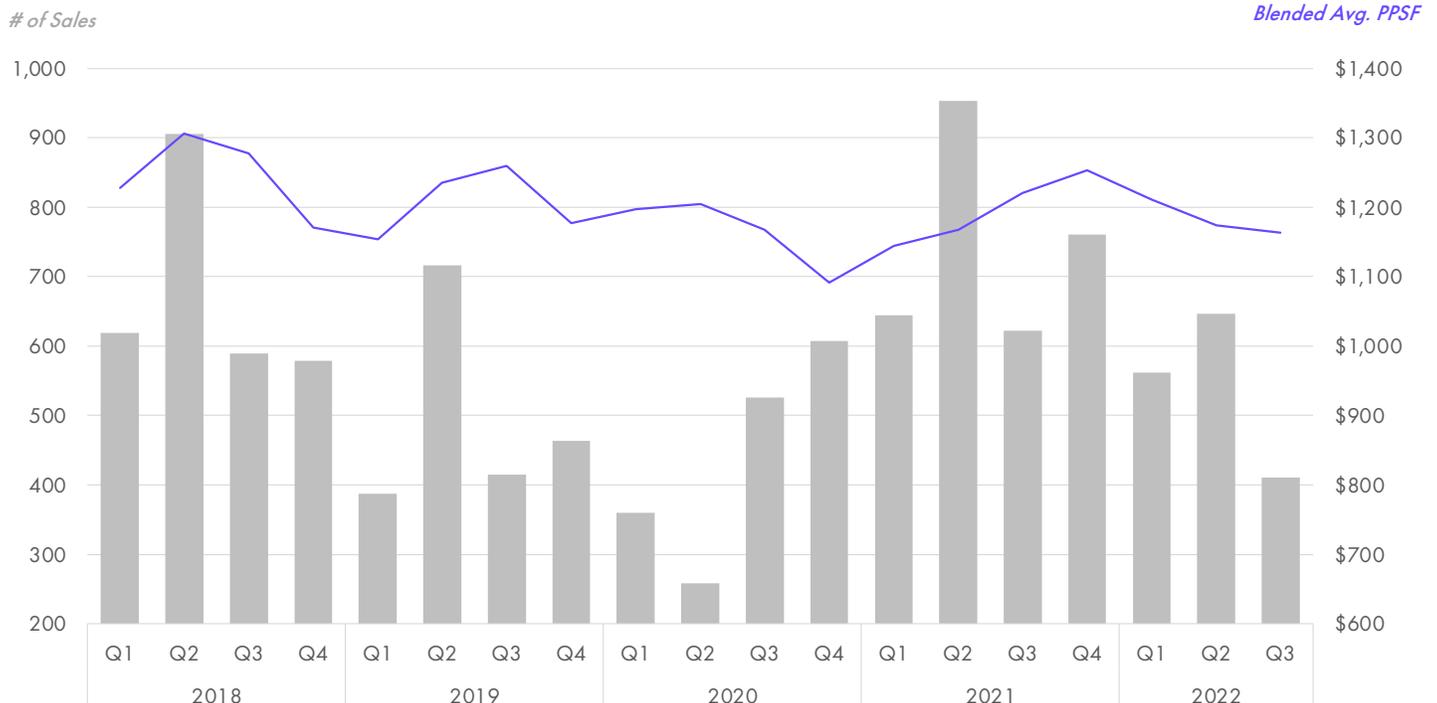
▲ **5.5%**

The luxury market over \$3M+ saw an increase of 5.5% in average PPSF, up to \$2,100/SF from \$1,900/SF, YoY.

## MARKET PERFORMANCE

CONDO	Q3-22	YoY%	Q3-21	QoQ%	Q2-22
Avg. Sales Price	\$1,361,175	1.5%	\$1,341,576	-3.7%	\$1,412,801
Blended Avg. PPSF	\$1,163	-4.7%	\$1,220	-1.0%	\$1,174
Number of Sales	411	-33.9%	622	-36.4%	646
DOM	50	N/A	47	N/A	35

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>Q3-22</b>	<b>YoY%</b>	<b>Q3-21</b>	<b>QoQ%</b>	<b>Q2-22</b>
Avg. Sales Price	\$738,015	-5.1%	\$777,287	-7.7%	\$799,722
Avg. PPSF	\$973	-4.3%	\$1,017	-3.5%	\$1,009
Number of Sales	158	-39.2%	260	-20.6%	199
DOM	52	N/A	51	N/A	43
<b>\$1M-\$2M</b>	<b>Q3-22</b>	<b>YoY%</b>	<b>Q3-21</b>	<b>QoQ%</b>	<b>Q2-22</b>
Avg. Sales Price	\$1,368,082	1.0%	\$1,353,942	-1.2%	\$1,384,409
Avg. PPSF	\$1,070	-5.8%	\$1,136	-4.1%	\$1,116
Number of Sales	202	-30.6%	291	-39.5%	334
DOM	43	N/A	37	N/A	32
<b>\$2M-\$3M</b>	<b>Q3-22</b>	<b>YoY%</b>	<b>Q3-21</b>	<b>QoQ%</b>	<b>Q2-22</b>
Avg. Sales Price	\$2,386,361	-0.7%	\$2,402,770	0.5%	\$2,374,592
Avg. PPSF	\$1,328	-8.1%	\$1,444	-3.3%	\$1,372
Number of Sales	36	-12.2%	41	-61.3%	93
DOM	55	N/A	43	N/A	29
<b>\$3M+</b>	<b>Q3-22</b>	<b>YoY%</b>	<b>Q3-21</b>	<b>QoQ%</b>	<b>Q2-22</b>
Avg. Sales Price	\$5,371,667	15.2%	\$4,661,833	52.8%	\$3,514,750
Avg. PPSF	\$2,100	5.5%	\$1,990	33.0%	\$1,579
Number of Sales	15	-50.0%	30	-25.0%	20
DOM	90	N/A	31	N/A	22

## SAN FRANCISCO DISTRICT 6

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

▼ **20.3%**

Total number of sales in District 6 decreased 20.3% YOY, with 63 recorded closings during Q3 '22.

▼ **6.5%**

The average price for District 6 was down 6.5% YoY to \$1.25M.

▼ **5.4%**

The average PPSF for condos in District 6 decreased to \$1,065/SF, down 5.4% YoY.

▲ **5.4%**

Product priced between \$1M-\$2M in District 6 recorded an increase of 5.4% in absolute pricing, reaching an average price of \$1.40M.

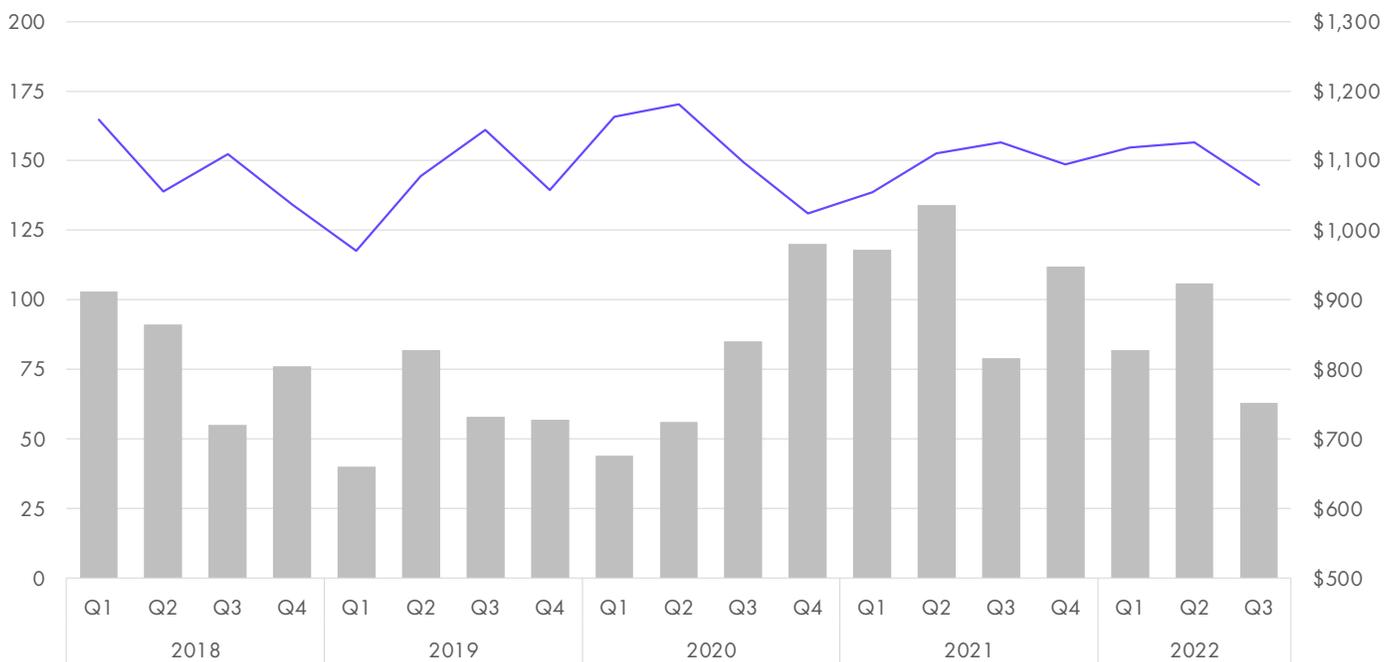
## MARKET PERFORMANCE

CONDOS	Q3-22	YoY%	Q3-21	QoQ%	Q2-22
Avg. Sales Price	\$1,254,083	-6.5%	\$1,341,218	-10.1%	\$1,395,173
Blended Avg. PPSF	\$1,065	-5.4%	\$1,126	-5.5%	\$1,126
Number of Sales	63	-20.3%	79	-40.6%	106
DOM	33	N/A	33	N/A	29

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>Q3-22</b>	<b>YoY%</b>	<b>Q3-21</b>	<b>QoQ%</b>	<b>Q2-22</b>
Avg. Sales Price	\$752,017	-7.7%	\$814,569	-7.7%	\$815,038
Avg. PPSF	\$997	3.3%	\$966	-9.7%	\$1,105
Number of Sales	20	0.0%	20	-23.1%	26
DOM	47	N/A	51	N/A	39
<b>\$1M-\$2M</b>	<b>Q3-22</b>	<b>YoY%</b>	<b>Q3-21</b>	<b>QoQ%</b>	<b>Q2-22</b>
Avg. Sales Price	\$1,404,918	5.4%	\$1,332,596	-2.1%	\$1,435,022
Avg. PPSF	\$1,050	-5.0%	\$1,106	-5.7%	\$1,113
Number of Sales	38	-24.0%	50	-44.1%	68
DOM	26	N/A	26	N/A	26
<b>\$2M-\$3M</b>	<b>Q3-22</b>	<b>YoY%</b>	<b>Q3-21</b>	<b>QoQ%</b>	<b>Q2-22</b>
Avg. Sales Price	\$2,116,000	-4.8%	\$2,221,667	-10.7%	\$2,369,626
Avg. PPSF	\$1,281	-3.6%	\$1,329	9.6%	\$1,168
Number of Sales	5	-16.7%	6	-54.5%	11
DOM	38	N/A	9	N/A	19
<b>\$3M+</b>	<b>Q3-22</b>	<b>YoY%</b>	<b>Q3-21</b>	<b>QoQ%</b>	<b>Q2-22</b>
Avg. Sales Price	-	-	\$3,235,000	-	\$3,050,000
Avg. PPSF	-	-	\$1,400	-	\$1,439
Number of Sales	0	-100.0%	3	-100.0%	1
DOM	-	N/A	25	N/A	60

## SAN FRANCISCO DISTRICT 7

MARINA, COW HOLLOW, PACIFIC HEIGHTS, AND PRESIDIO HEIGHTS

▼ **6.1%**

The average PPSF for District 7 decreased 6.1% YoY to \$1,258/SF.

▼ **9.9%**

The average sale price for District 7 decreased 9.9% YoY to \$1.59M.

▼ **29.7%**

District 7 saw fewer recorded deals YoY, down 29.7% from Q3 '21, and down -50.5% QoQ.

▲ **5.2%**

The \$3M+ price segment showed an increase in average price, up 5.2% YoY to \$370M.

## MARKET PERFORMANCE

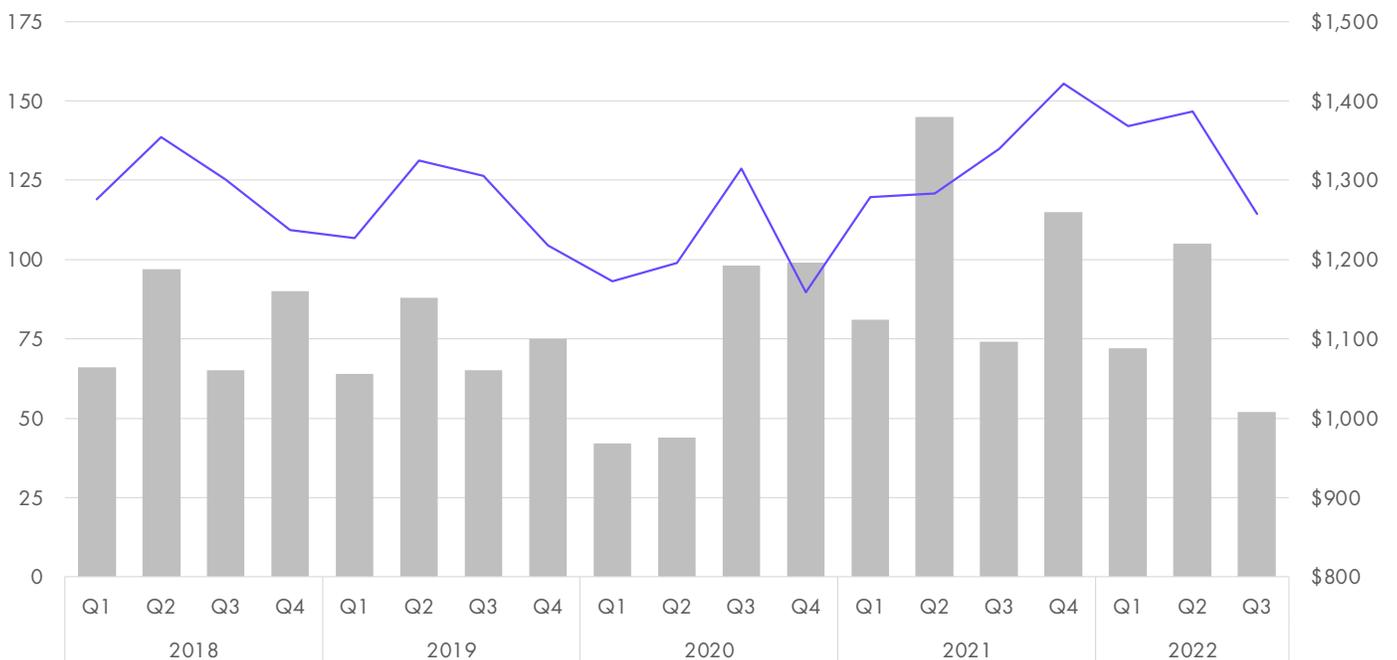
CONDOS	Q3-22	YoY%	Q3-21	QoQ%	Q2-22
Avg. Sales Price	\$1,588,904	-9.9%	\$1,763,050	-16.9%	\$1,911,419
Blended Avg. PPSF	\$1,258	-6.1%	\$1,339	-9.3%	\$1,386
Number of Sales	52	-29.7%	74	-50.5%	105
DOM	39	N/A	32	N/A	23

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>Q3-22</b>	<b>YoY%</b>	<b>Q3-21</b>	<b>QoQ%</b>	<b>Q2-22</b>
Avg. Sales Price	\$814,250	0.6%	\$809,321	-2.7%	\$836,846
Avg. PPSF	\$1,115	-0.4%	\$1,120	-1.4%	\$1,130
Number of Sales	12	-14.3%	14	-7.7%	13
DOM	33	N/A	27	N/A	22
<b>\$1M-\$2M</b>	<b>Q3-22</b>	<b>YoY%</b>	<b>Q3-21</b>	<b>QoQ%</b>	<b>Q2-22</b>
Avg. Sales Price	\$1,317,615	-5.7%	\$1,397,949	-9.0%	\$1,448,361
Avg. PPSF	\$1,125	-8.5%	\$1,228	-9.7%	\$1,245
Number of Sales	26	-27.8%	36	-40.9%	44
DOM	46	N/A	43	N/A	28
<b>\$2M-\$3M</b>	<b>Q3-22</b>	<b>YoY%</b>	<b>Q3-21</b>	<b>QoQ%</b>	<b>Q2-22</b>
Avg. Sales Price	\$2,380,400	-4.0%	\$2,479,267	-1.7%	\$2,421,503
Avg. PPSF	\$1,400	-0.3%	\$1,405	-4.2%	\$1,462
Number of Sales	10	-33.3%	15	-73.7%	38
DOM	24	N/A	16	N/A	19
<b>\$3M+</b>	<b>Q3-22</b>	<b>YoY%</b>	<b>Q3-21</b>	<b>QoQ%</b>	<b>Q2-22</b>
Avg. Sales Price	\$3,697,500	5.2%	\$3,513,333	8.5%	\$3,407,500
Avg. PPSF	\$1,563	-1.9%	\$1,593	-3.5%	\$1,619
Number of Sales	4	-55.6%	9	-60.0%	10
DOM	45	N/A	16	N/A	11



## 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

▼ **35.5%**

District 8 recorded 98 closings, a decrease of 35.5% YoY, the lowest number of sales since Q2 '20.

▲ **46.1%**

The average sale price for District 8 increased to \$1.56M, up a considerable 46.1% YoY, due in large part to a \$17M and \$12M sale at 999 Green Street.

▲ **17.3%**

PPSF in District 8 also soared, up 17.3% YoY to \$1,283/SF.

▲ **83.3%**

The \$2M-\$3M segment for District 8 recorded an increase in number of recorded sales to 11, up 83.3% YoY.

## MARKET PERFORMANCE

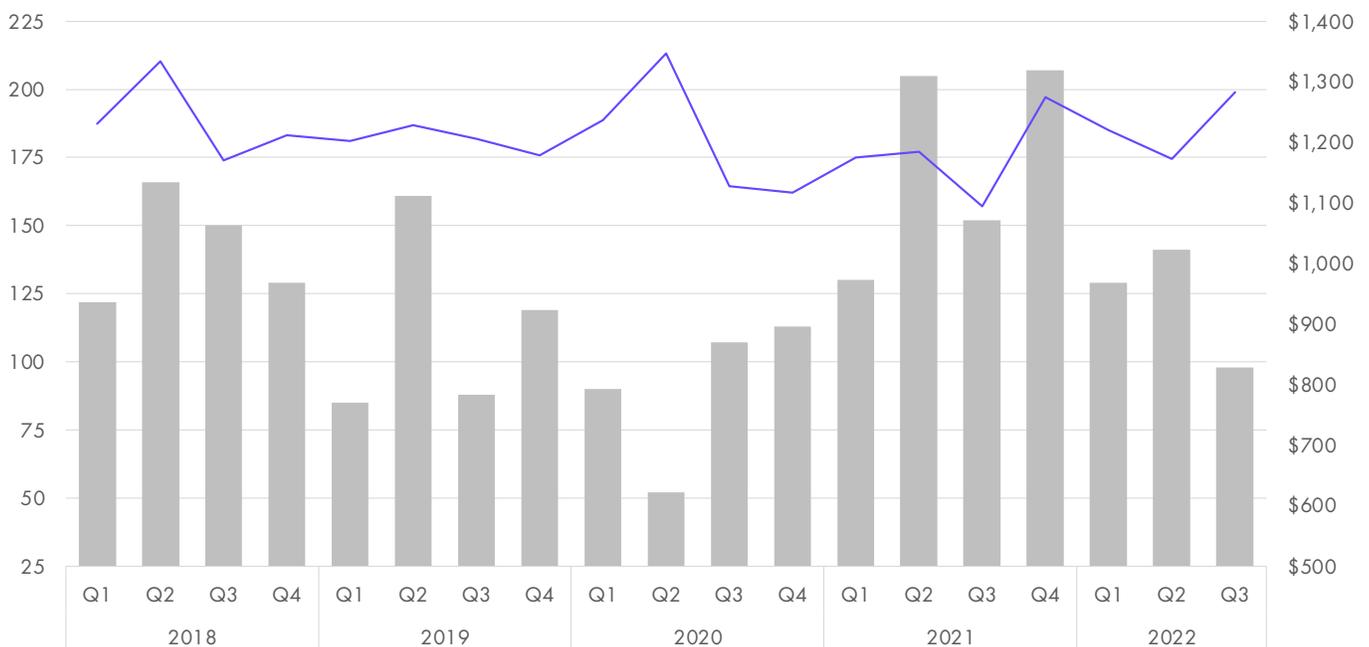
CONDOS	Q3-22	YoY%	Q3-21	QoQ%	Q2-22
Avg. Sales Price	\$1,563,566	46.1%	\$1,070,152	17.6%	\$1,329,713
Blended Avg. PPSF	\$1,283	17.3%	\$1,094	9.4%	\$1,172
Number of Sales	98	-35.5%	152	-30.5%	141
DOM	49	N/A	51	N/A	41

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>Q3-22</b>	<b>YoY%</b>	<b>Q3-21</b>	<b>QoQ%</b>	<b>Q2-22</b>
Avg. Sales Price	\$685,576	-5.5%	\$725,735	-4.3%	\$716,698
Avg. PPSF	\$949	-4.9%	\$998	-6.8%	\$1,019
Number of Sales	46	-47.7%	88	-13.2%	53
DOM	49	N/A	51	N/A	51
<b>\$1M-\$2M</b>	<b>Q3-22</b>	<b>YoY%</b>	<b>Q3-21</b>	<b>QoQ%</b>	<b>Q2-22</b>
Avg. Sales Price	\$1,379,086	4.9%	\$1,314,694	2.7%	\$1,342,185
Avg. PPSF	\$1,071	-2.4%	\$1,098	-3.4%	\$1,108
Number of Sales	35	-35.2%	54	-46.2%	65
DOM	44	N/A	38	N/A	33
<b>\$2M-\$3M</b>	<b>Q3-22</b>	<b>YoY%</b>	<b>Q3-21</b>	<b>QoQ%</b>	<b>Q2-22</b>
Avg. Sales Price	\$2,418,182	3.1%	\$2,345,000	0.9%	\$2,396,711
Avg. PPSF	\$1,212	-19.3%	\$1,501	-10.0%	\$1,347
Number of Sales	11	83.3%	6	-42.1%	19
DOM	49	N/A	93	N/A	37
<b>\$3M+</b>	<b>Q3-22</b>	<b>YoY%</b>	<b>Q3-21</b>	<b>QoQ%</b>	<b>Q2-22</b>
Avg. Sales Price	\$7,804,167	127.3%	\$3,433,750	86.6%	\$4,181,250
Avg. PPSF	\$2,443	89.7%	\$1,287	47.7%	\$1,654
Number of Sales	6	50.0%	4	50.0%	4
DOM	54	N/A	13	N/A	7

## SAN FRANCISCO DISTRICT 9

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

### ▼ 37.5%

Sales decreased 37.5% YoY, recording 198 closings, indicating a further softening in the densest condominium district in the Bay Area. This is the lowest sales volume since Q2 '20.

### ▼ 12.9%

The average PPSF decreased 12.9% YoY in District 9, to \$1,103/SF; this figure is unchanged QoQ.

### ▼ 10.1%

The average sales price decreased by 10.1% YoY in District 9, to \$1.24M,

### ▼ 37.4%

The \$3M+ ultra luxury segment for District 9 saw the deepest discounts with the average sales price down 37.4% to \$3.79M.

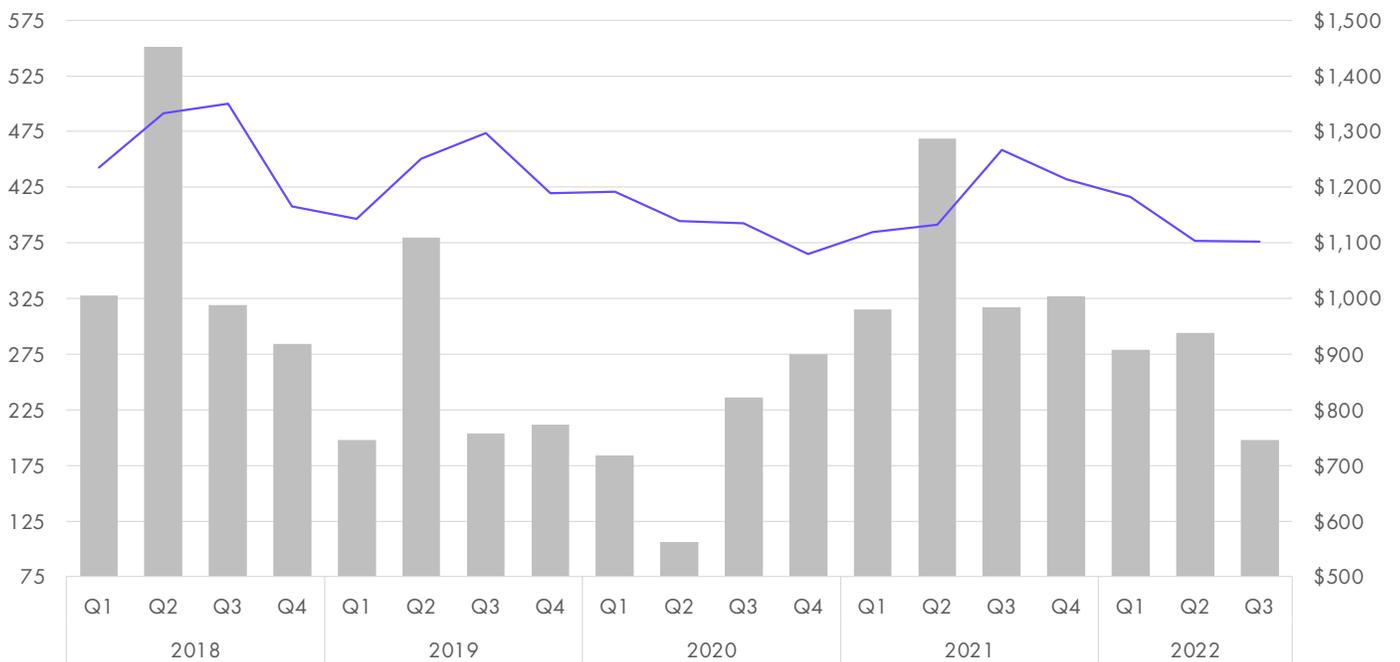
## MARKET PERFORMANCE

CONDOS	Q3-22	YoY%	Q3-21	QoQ%	Q2-22
Avg. Sales Price	\$1,235,268	-10.1%	\$1,373,424	-3.6%	\$1,280,927
Blended Avg. PPSF	\$1,103	-12.9%	\$1,266	0.0%	\$1,103
Number of Sales	198	-37.5%	317	-32.7%	294
DOM	58	N/A	52	N/A	40

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>Q3-22</b>	<b>YoY%</b>	<b>Q3-21</b>	<b>QoQ%</b>	<b>Q2-22</b>
Avg. Sales Price	\$753,231	-6.0%	\$801,508	-9.5%	\$832,613
Avg. PPSF	\$960	-6.4%	\$1,026	-1.2%	\$972
Number of Sales	80	-42.0%	138	-25.2%	107
DOM	57	N/A	54	N/A	43
<b>\$1M-\$2M</b>	<b>Q3-22</b>	<b>YoY%</b>	<b>Q3-21</b>	<b>QoQ%</b>	<b>Q2-22</b>
Avg. Sales Price	\$1,363,491	-0.1%	\$1,364,555	0.1%	\$1,362,047
Avg. PPSF	\$1,066	-6.5%	\$1,140	-2.0%	\$1,088
Number of Sales	103	-31.8%	151	-34.4%	157
DOM	48	N/A	39	N/A	35
<b>\$2M-\$3M</b>	<b>Q3-22</b>	<b>YoY%</b>	<b>Q3-21</b>	<b>QoQ%</b>	<b>Q2-22</b>
Avg. Sales Price	\$2,492,500	2.9%	\$2,423,183	8.9%	\$2,288,660
Avg. PPSF	\$1,424	-6.2%	\$1,519	4.2%	\$1,367
Number of Sales	10	-28.6%	14	-60.0%	25
DOM	101	N/A	64	N/A	44
<b>\$3M+</b>	<b>Q3-22</b>	<b>YoY%</b>	<b>Q3-21</b>	<b>QoQ%</b>	<b>Q2-22</b>
Avg. Sales Price	\$3,792,000	-37.4%	\$6,056,786	15.3%	\$3,289,000
Avg. PPSF	\$1,946	-24.6%	\$2,582	33.3%	\$1,461
Number of Sales	5	-64.3%	14	0.0%	5
DOM	170	N/A	51	N/A	47



## 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 Q3 2022

**4**

CLOSED

**0**

IN CONTRACT

**125**

AVAILABLE

### Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	3	\$714,000	\$1,199
2-BR	1	\$1,145,000	\$1,133
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	4	\$821,750	\$1,175

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$675,000	\$1,151
2-BR	3	\$1,095,667	\$1,202
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	5	\$927,400	\$1,187



## 181 FREMONT

### ADDRESS

181 Fremont Street, San Francisco, CA

### DEVELOPER

Jay Paul Company

### RESIDENCES

55 and 12 Accessory Suites

### AVERAGE HOA FEES

~\$3,000/month

### DATE ON MARKET

May 2016

### CLOSINGS COMMENCED

May 2018

### AVERAGE ABSORPTION

N/A



### SALES STATUS Q3 2022

**44**

CLOSED

**0**

IN CONTRACT

**N/A**

AVAILABLE

### Recent Sales (Q3 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	3	\$5,266,667	\$2,522
4-BR+	0	-	-
Total/Avg.	7	\$4,364,143	\$2,336

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	1	\$1,700,000	\$2,179
2-BR	4	\$4,072,000	\$2,483
3-BR	2	\$6,805,000	\$3,142
4-BR+	0	-	-
Total/Avg.	7	\$4,514,000	\$2,707



## 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 Q3 2022

**56**

CLOSED

**0**

IN CONTRACT

**58**

AVAILABLE

### Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	3	\$695,333	\$1,369
1-BR	6	\$983,750	\$1,424
2-BR	6	\$1,469,167	\$1,467
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	15	\$1,129,733	\$1,439

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	1	\$700,000	\$1,394
1-BR	2	\$912,000	\$1,405
2-BR	4	\$1,608,500	\$1,333
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	7	\$1,279,714	\$1,352



## 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 Q3 2022

**59**

CLOSED

**0**

IN CONTRACT

**41**

AVAILABLE

### Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	12	\$629,250	\$1,368
1-BR	5	\$1,103,600	\$1,263
2-BR	4	\$1,333,500	\$1,205
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	21	\$876,333	\$1,285

### 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

September 2021

### AVERAGE ABSORPTION

0 units/month



## SALES STATUS Q3 2022

**6**

CLOSED

**0**

IN CONTRACT

**38**

AVAILABLE

### Recent Sales (Q3 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 Q3 2022

**37**

CLOSED

**1**

IN CONTRACT

**17**

AVAILABLE

### Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	6	\$742,167	\$1,265
2-BR	13	\$1,031,336	\$1,184
3-BR	3	\$1,898,667	\$1,420
4-BR+	0	-	-
Total/Avg.	22	\$1,070,744	\$1,250

### 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

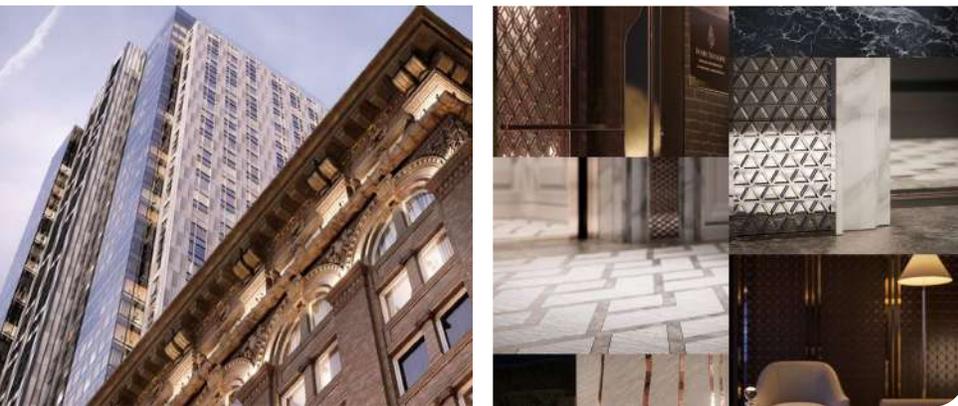
June 2019

### CLOSINGS COMMENCED

December 2020

### AVERAGE ABSORPTION

0 units/month



## SALES STATUS Q3 2022

**13**  
CLOSED

**0**  
IN CONTRACT

**133**  
AVAILABLE

### Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	2	\$2,905,000	\$1,811
3-BR	2	\$8,250,000	\$2,428
4-BR+	0	-	-
Total/Avg.	4	\$5,577,500	\$2,230

### 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 Q3 2022

**122**  
CLOSED

**1**  
IN CONTRACT

**16**  
AVAILABLE

### Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	8	\$767,250	\$1,150
2-BR	6	\$1,284,083	\$1,261
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	14	\$988,750	\$1,209

### 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 Q3 2022

**N/A**  
CLOSED

**0**  
IN CONTRACT

**24**  
AVAILABLE

#### Recent Sales (Q3 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

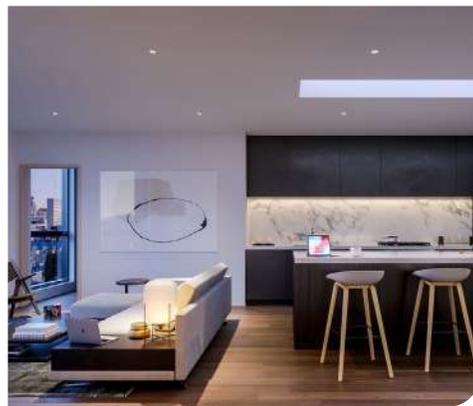
October 2021

### CLOSINGS COMMENCED

TBD

### AVERAGE ABSORPTION

3 units/month



## SALES STATUS Q3 2022

**25**

CLOSED

**0**

IN CONTRACT

**12**

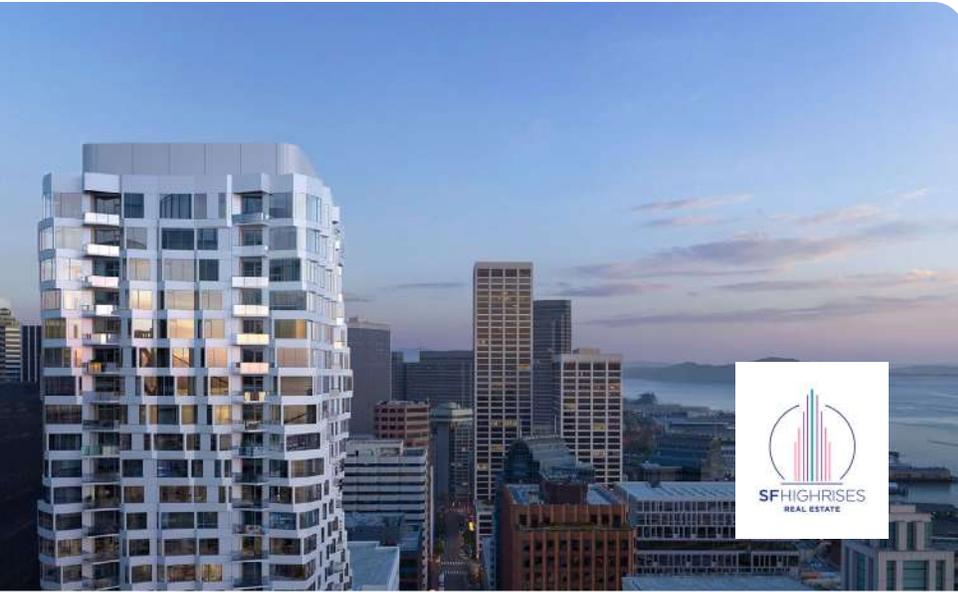
AVAILABLE

### Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	10	\$790,162	\$1,121
2-BR	7	\$1,237,571	\$1,136
3-BR	3	\$1,603,333	\$1,283
4-BR+	0	-	-
Total/Avg.	20	\$1,068,731	\$1,160

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	2	\$1,040,500	\$963
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	2	\$1,040,500	\$963



## 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 Q3 2022

**302**

CLOSED

**1**

IN CONTRACT

**87**

AVAILABLE

### Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	1	\$999,000	\$1,450
1-BR	2	\$1,137,000	\$1,573
2-BR	30	\$1,923,533	\$1,446
3-BR	1	\$1,645,000	\$1,129
4-BR+	0	-	-
Total/Avg.	34	\$1,841,882	\$1,440

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$1,157,500	\$1,566
2-BR	5	\$1,726,000	\$1,466
3-BR	3	\$2,556,667	\$1,618
4-BR+	0	-	-
Total/Avg.	10	\$1,861,500	\$1,538



## 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 Q3 2022

**23**

CLOSED

**0**

IN CONTRACT

**1**

AVAILABLE

### Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	3	\$1,205,000	\$1,123
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	3	\$1,205,000	\$1,123

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	1	\$1,175,000	\$1,027
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	1	\$1,175,000	\$1,027



## 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 Q3 2022

**19**  
CLOSED

**0**  
IN CONTRACT

**3**  
AVAILABLE

### Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	3	\$1,097,667	\$1,471
2-BR	15	\$1,610,467	\$1,384
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	18	\$1,525,000	\$1,393

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	2	\$2,245,000	\$1,516
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	2	\$2,245,000	\$1,516



## 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 Q3 2022

**15**  
CLOSED

**0**  
IN CONTRACT

**24**  
AVAILABLE

### Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	3	\$680,100	\$1,023
2-BR	2	\$1,252,750	\$1,101
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	5	\$957,300	\$1,062

### 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	-	-



## ONE MISSION BAY

**SOLD OUT**

### 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 Q3 2022

**350**

CLOSED

**0**

IN CONTRACT

**0**

AVAILABLE

SOLD OUT

### Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	2	\$731,000	\$1,398
1-BR	12	\$1,020,552	\$1,290
2-BR	16	\$1,483,219	\$1,256
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	30	\$1,248,004	\$1,272

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$1,019,000	\$1,182
2-BR	2	\$1,504,500	\$1,212
3-BR	1	\$2,750,000	\$1,505
4-BR+	0	-	-
Total/Avg.	5	\$1,559,400	\$1,292



## 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 Q3 2022

**27**

CLOSED

**0**

IN CONTRACT

**93**

AVAILABLE

### Recent Sales (Q3 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	3	\$2,628,333	\$1,540
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	4	\$2,326,250	\$1,495



## 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 Q3 2022

**34**

CLOSED

**7**

IN CONTRACT

**201**

AVAILABLE

### Recent Sales (Q3 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	\$514,000	\$1,351
1-BR	4	\$749,500	\$1,200
2-BR	2	\$1,355,750	\$1,271
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	8	\$842,188	\$1,250



## 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 Q3 2022

**62**

CLOSED

**1**

IN CONTRACT

**55**

AVAILABLE

### Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	3	\$1,718,333	\$1,866
2-BR	13	\$2,641,538	\$1,780
3-BR	9	\$4,978,333	\$2,225
4-BR+	0	-	-
Total/Avg.	25	\$3,372,000	\$1,998

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$1,740,000	\$1,894
2-BR	3	\$3,111,667	\$1,855
3-BR	3	\$4,408,333	\$2,114
4-BR+	0	-	-
Total/Avg.	8	\$3,255,000	\$1,984



## 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 Q3 2022

**32**

CLOSED

**8**

IN CONTRACT

**84**

AVAILABLE

### Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	1	\$855,000	\$1,402
1-BR	8	\$1,360,559	\$1,390
2-BR	6	\$1,923,083	\$1,436
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	15	\$1,551,865	\$1,413

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	1	\$738,000	\$1,206
1-BR	2	\$1,244,500	\$1,222
2-BR	2	\$1,658,000	\$1,199
3-BR	1	\$3,866,000	\$1,891
4-BR+	0	-	-
Total/Avg.	6	\$1,734,833	\$1,396



## 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 Q3 2022

**294**  
CLOSED

**N/A**  
IN CONTRACT

**2**  
AVAILABLE

### Recent Sales (Q3 2021 - Present)

Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	12	\$1,147,083	\$1,447
2-BR	20	\$2,088,350	\$1,542
3-BR	2	\$5,425,000	\$2,101
4-BR+	0	-	-
Total/Avg.	34	\$1,952,412	\$1,589

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$1,077,500	\$1,349
2-BR	3	\$2,114,667	\$1,648
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	5	\$1,699,800	\$1,560



## THE OAK

ON HOLD

### 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

Project on Hold

### CLOSINGS COMMENCED

TBD

### AVERAGE ABSORPTION

1 units/month



### SALES STATUS Q2 2022

**N/A**  
CLOSED

**N/A**  
IN CONTRACT

**N/A**  
AVAILABLE



## 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 Q3 2022

**25**

CLOSED

**1**

IN CONTRACT

**15**

AVAILABLE

### Recent Sales (Q3 2021 - Present)

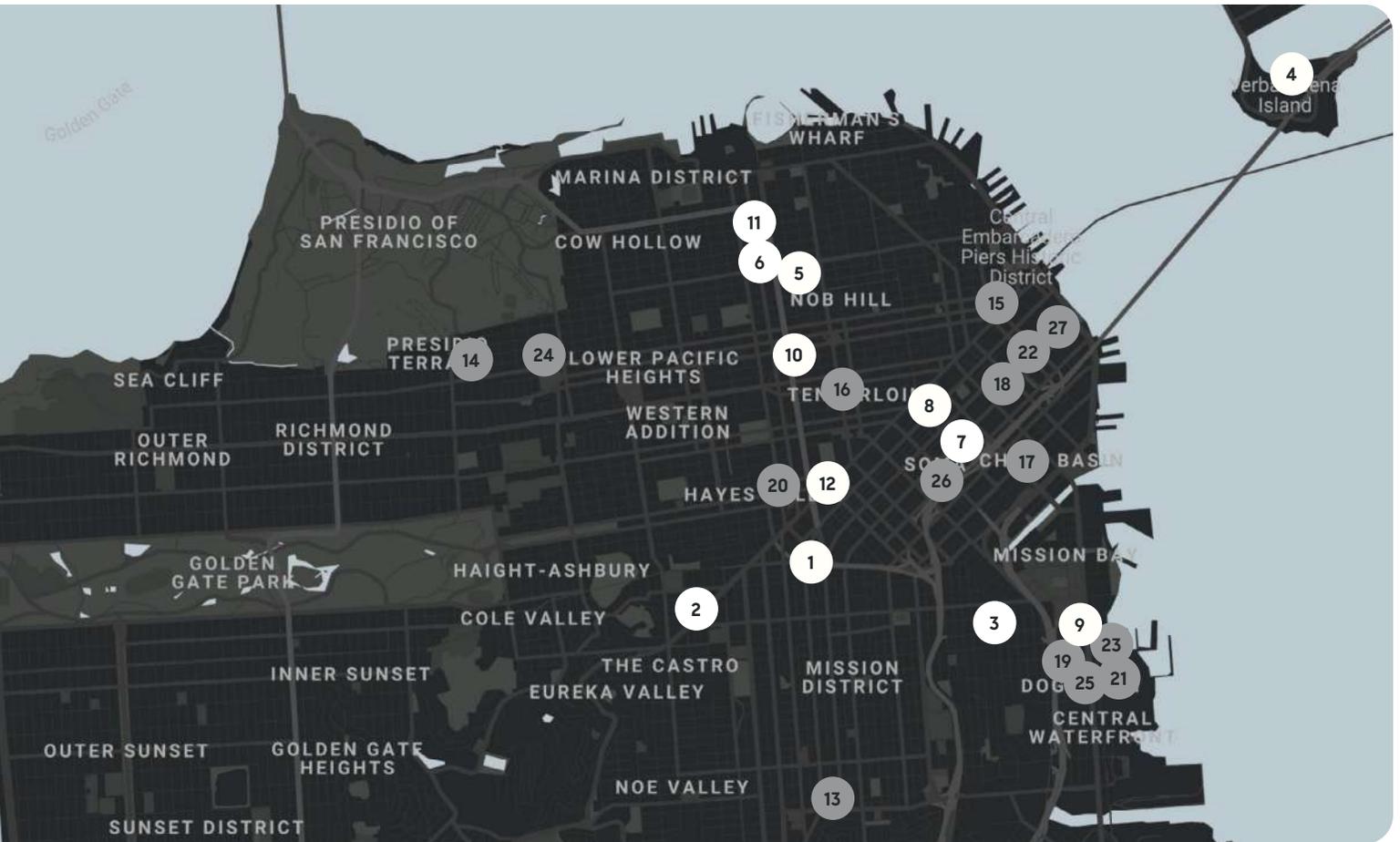
Unit Type	# Sales	Avg. Sales Price	Avg. \$/SF
Studio	0	-	-
1-BR	0	-	-
2-BR	7	\$2,759,143	\$1,912
3-BR	1	\$7,375,000	\$3,660
4-BR+	0	-	-
Total/Avg.	8	\$3,336,125	\$2,203

### Active Listings

Listings	# Listings	Avg. Listing Price	Avg. \$/SF
Studio	0	-	-
1-BR	2	\$1,295,000	\$1,490
2-BR	2	\$2,747,000	\$1,832
3-BR	0	-	-
4-BR+	0	-	-
Total/Avg.	4	\$2,021,000	\$1,707

# New Development Pipeline Projects

Q3 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 1200 VAN NESS



11 2601 VAN NESS



12 30 VAN NESS



# New Development Pipeline Projects

Q3 2022



13

3314 CESAR CHAVEZ



14

3700 CALIFORNIA



15

430 MAIN



16

469 EDDY



17

655 4TH STREET



18

655 FOLSOM



19

888 TENNESSEE



20

ONE OAK (1540 MARKET STREET)



21

PARCEL D - PIER 70



22

PARCEL F (542 - 550 HOWARD)



23

PARCEL K NORTH - PIER 70



24

3333 CALIFORNIA



# New Development Pipeline Projects

Q3 2022



25

600 20TH STREET / 888 ILLINOIS



26

988 HARRISON STREET



27

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



## 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 Q3 2022



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