Cover Photo: Residential development near the Temporary Transbay Terminal. Source: Aksel Olsen
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WHAT IS THE PIPELINE?

The San Francisco consolidated pipeline consists of development projects that would add residential units or commercial space, applications for which have been formally submitted to the Planning Department or the Department of Building Inspection (DBI). Pipeline projects encompass various stages of development: from applications filed to entitlements secured, building permits issued to projects under construction. The pipeline includes only those projects with a land use or building permit application. It does not include projects undergoing preliminary Planning Department project review or projections based on area plan analysis. When a project is issued a Certificate of Final Completion by DBI, it is taken out of the pipeline.

To filter inactive projects, the current pipeline only includes projects filed during the last five years, projects approved in the last four years (with the exception of large projects, which are kept for seven years), and projects for which construction has begun during the past three years.

Data sources for the pipeline are chiefly the project databases maintained by the Planning Department and the Department of Building Inspection, respectively, but data is also periodically obtained from the (now Successor Agency to the) San Francisco Redevelopment Agency. Affordable housing projects sponsored by the Mayor’s Office of Housing figure in the pipeline database only after an application has been filed with either the Planning Department or the Department of Building Inspection.

The Pipeline Report measures housing production in terms of housing units. Non-residential development, on the other hand, is measured in terms of building square footage. Depending on the proposed development project, square footage can be added with new construction or expansion, reduced with demolition or alteration, or re-allocated with conversion to other uses. This report counts net change, or new space or units minus existing space lost through conversion or demolition.

Time Frame and Certainty of Development

As the pipeline spans the entire project development life cycle for small and large projects ranging from addition of an extra unit in the rear yard to multi-structure complexes of residential and commercial development needing environmental impact reports and transportation studies, it follows that the entitlement and ultimate actualization of some projects is several years and occasionally decades into the future, while some projects are abandoned altogether prior to receiving a permit or completion. The pipeline, then, represents a particular scenario that assumes that all proposed development projects are eventually entitled and all entitled development projects eventually built. In reality, this is not the case.

The Relevance of the Pipeline

The pipeline serves as a barometer of development trends in the medium to long term time horizon. It illustrates the location and scale of current and proposed future construction and reveals where new land uses are being established; it also records demolition and a partial listing of conversion of existing land uses. In sum, the pipeline provides a short- to medium-term picture of changing land uses, specifically tracking the changes to the city’s housing stock and commercial uses. This report is meant to be a short overview.

Accuracy and Timeliness

The pipeline is compiled and consolidated from different data sources and is subject to errors due to varying accuracy and currency of original sources. The data in this report is pulled from original sources current through September 30, 2014. While we make an effort to consolidate multiple permits for different components of the same project from different agencies, it is not possible to validate the accuracy of all projects. Should you find inaccuracies and omissions, please e-mail your comments to aksel.olsen@sfgov.org.
Map 1. General Overview of Magnitude and Location of Development, by Major Land Use Type
THE DEVELOPMENT PIPELINE

There are currently 958 projects in the pipeline. Of these, 75 percent are exclusively residential and 17 percent are mixed-use projects with both residential and commercial components. Only 8 percent of projects are non-residential developments. Map 1 (left) gives the general location and magnitude of this development across is many stages.

A net total of 50,600 new housing units would be added to the city’s housing stock according to current data. This is high relative to historical numbers and is largely due to the filing and entitlement of applications during the past five years for new large scale, long term development programs for Parkmerced, Treasure Island and the Bayview Waterfront. These projects, as well as their expected development over the course of decades must be kept in mind when considering the overall totals. The vast majority of pipeline projects, however, are small scale consisting of one to three units. The number of new projects slowed down during the Great Recession of 2007-2009 and beyond, but has since recovered in earnest as evidenced by both new project applications as well as the construction of projects with “older” entitlements. The “hot spot” for much of this development is Market Street at various sections of it. While this may seem a response to the recent acceleration of technology companies locating in the area, many development projects here predate the last recession, during which they were idle. As financing improved, many projects came back.

Projects by Overall Status

Table 1 breaks down projects, housing units and non-residential space by planning stage. First are non-entitled projects. A number of projects file building permit applications even as their projects have not cleared planning entitlements. The second major group include entitled projects; those which have completed the planning process and obtained necessary approvals. These are then divided into different stages of the building permitting process. Table 1 shows the following:

- Around 21 percent of all projects, representing 6,700 net added housing units and 5,400,000 sq ft of commercial space, are under construction.
- Around 20 percent of projects (with another 4,100 net units and 2,1 million sq ft of commercial space) have received building permit approvals. As of the time of writing, some may have moved to the construction phase.
- Around one in three projects (including 900 net new units and a net loss of 60,000 sq ft of commercial space) have filed building permit applications with the Department of Building Inspections. A small number of projects have filed applications but have yet to receive planning approvals.
- One in eight projects and 55 percent of the units and 37 percent of the non-residential space have received Planning Department approvals. These projects now must secure building permits.

Table 1. Residential and Commercial Pipeline, by Pipeline Status and Land Use Category

<table>
<thead>
<tr>
<th>Entitlement Status</th>
<th>Status</th>
<th>Total No. of Projects</th>
<th>Net Housing Units</th>
<th>Net Comm’l Sq. Ft.</th>
<th>CIE</th>
<th>Medical</th>
<th>Office</th>
<th>PDR</th>
<th>Retail</th>
<th>Visitor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under Planning Review</td>
<td>Planning Filed</td>
<td>121</td>
<td>8,900</td>
<td>4,568,300</td>
<td>(20,200)</td>
<td>-</td>
<td>3,806,300</td>
<td>(444,400)</td>
<td>711,900</td>
<td>514,600</td>
</tr>
<tr>
<td></td>
<td>BP Filed</td>
<td>329</td>
<td>3,100</td>
<td>634,900</td>
<td>913,000</td>
<td>-</td>
<td>141,800</td>
<td>(98,800)</td>
<td>(56,300)</td>
<td>(264,800)</td>
</tr>
<tr>
<td></td>
<td>Total, Not Entitled</td>
<td>450</td>
<td>12,000</td>
<td>5,203,200</td>
<td>892,800</td>
<td>-</td>
<td>3,948,200</td>
<td>(543,200)</td>
<td>655,700</td>
<td>249,700</td>
</tr>
<tr>
<td>Approved by Planning</td>
<td>PL Approved</td>
<td>80</td>
<td>26,900</td>
<td>6,131,200</td>
<td>33,600</td>
<td>-</td>
<td>3,762,000</td>
<td>296,700</td>
<td>1,612,700</td>
<td>426,200</td>
</tr>
<tr>
<td></td>
<td>BP Approved/ Issued/ Re-Instated</td>
<td>183</td>
<td>4,100</td>
<td>2,055,500</td>
<td>111,300</td>
<td>20,000</td>
<td>1,325,700</td>
<td>7,900</td>
<td>463,400</td>
<td>127,200</td>
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<tr>
<td></td>
<td>Construction</td>
<td>215</td>
<td>6,700</td>
<td>5,405,900</td>
<td>567,800</td>
<td>1,767,400</td>
<td>2,986,700</td>
<td>(8,100)</td>
<td>86,600</td>
<td>5,400</td>
</tr>
<tr>
<td>Total, Entitled</td>
<td>508</td>
<td>38,600</td>
<td>13,531,100</td>
<td>707,000</td>
<td>1,787,400</td>
<td>8,054,900</td>
<td>238,400</td>
<td>2,201,000</td>
<td>542,500</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>958</td>
<td>50,600</td>
<td>18,734,300</td>
<td>1,599,800</td>
<td>1,787,400</td>
<td>12,002,900</td>
<td>(304,800)</td>
<td>2,856,500</td>
<td>792,300</td>
<td></td>
</tr>
</tbody>
</table>
The following land use inventory changes:

- 12 million sq ft of office space
- 2.9 million sq ft of retail space
- 800,000 sq ft of visitor-serving uses, such as hotels or hostels.
- 1.6 million sq ft of cultural, institutional, educational (CIE), and 1.8 million sq ft of medical space

### Table 2. Residential and Commercial Pipeline, by Neighborhood

<table>
<thead>
<tr>
<th>Neighborhood</th>
<th>Projects</th>
<th>Percent</th>
<th>Net Units</th>
<th>Percent</th>
<th>Avg Units / Project</th>
<th>Net Comm’l Sq. Ft.</th>
<th>Residential Rank</th>
<th>Commercial Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Balboa Park</td>
<td>5</td>
<td>1%</td>
<td>100</td>
<td>0%</td>
<td>20</td>
<td>9,180</td>
<td>25</td>
<td>18</td>
</tr>
<tr>
<td>Bernal Heights</td>
<td>44</td>
<td>5%</td>
<td>120</td>
<td>0%</td>
<td>3</td>
<td>165,930</td>
<td>22</td>
<td>12</td>
</tr>
<tr>
<td>Buena Vista</td>
<td>1</td>
<td>3%</td>
<td>60</td>
<td>0%</td>
<td>2</td>
<td>-150</td>
<td>26</td>
<td>25</td>
</tr>
<tr>
<td>BVHP Area A,B</td>
<td>35</td>
<td>4%</td>
<td>420</td>
<td>1%</td>
<td>13</td>
<td>418,000</td>
<td>18</td>
<td>10</td>
</tr>
<tr>
<td>Candlestick</td>
<td>3</td>
<td>0%</td>
<td>10,310</td>
<td>20%</td>
<td>3.438</td>
<td>4,110,000</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Central</td>
<td>78</td>
<td>8%</td>
<td>110</td>
<td>0%</td>
<td>1</td>
<td>5,320</td>
<td>24</td>
<td>21</td>
</tr>
<tr>
<td>Central Waterfront</td>
<td>19</td>
<td>2%</td>
<td>1,350</td>
<td>3%</td>
<td>71</td>
<td>-333,690</td>
<td>11</td>
<td>33</td>
</tr>
<tr>
<td>Downtown</td>
<td>44</td>
<td>5%</td>
<td>3,400</td>
<td>7%</td>
<td>85</td>
<td>1,684,280</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>East SoMa</td>
<td>36</td>
<td>4%</td>
<td>1,530</td>
<td>3%</td>
<td>42</td>
<td>621,070</td>
<td>10</td>
<td>8</td>
</tr>
<tr>
<td>Executive Park</td>
<td>1</td>
<td>0%</td>
<td>10</td>
<td>0%</td>
<td>12</td>
<td>0</td>
<td>32</td>
<td>22</td>
</tr>
<tr>
<td>Glen Park Compact</td>
<td>1</td>
<td>0%</td>
<td>0</td>
<td>0%</td>
<td>1</td>
<td>0</td>
<td>34</td>
<td>22</td>
</tr>
<tr>
<td>HP Shipyard</td>
<td>5</td>
<td>1%</td>
<td>50</td>
<td>0%</td>
<td>11</td>
<td>0</td>
<td>22</td>
<td>22</td>
</tr>
<tr>
<td>India Basin</td>
<td>4</td>
<td>0%</td>
<td>20</td>
<td>0%</td>
<td>6</td>
<td>-8,620</td>
<td>30</td>
<td>27</td>
</tr>
<tr>
<td>Ingleisde, Other</td>
<td>41</td>
<td>4%</td>
<td>120</td>
<td>0%</td>
<td>3</td>
<td>25,350</td>
<td>23</td>
<td>14</td>
</tr>
<tr>
<td>Inner Sunset</td>
<td>42</td>
<td>4%</td>
<td>100</td>
<td>0%</td>
<td>2</td>
<td>6,520</td>
<td>26</td>
<td>19</td>
</tr>
<tr>
<td>Japantown</td>
<td>3</td>
<td>0%</td>
<td>0</td>
<td>0%</td>
<td>1</td>
<td>13,400</td>
<td>33</td>
<td>17</td>
</tr>
<tr>
<td>Marina</td>
<td>33</td>
<td>3%</td>
<td>390</td>
<td>1%</td>
<td>12</td>
<td>-8,950</td>
<td>19</td>
<td>28</td>
</tr>
<tr>
<td>Market Octavia</td>
<td>50</td>
<td>5%</td>
<td>2,900</td>
<td>6%</td>
<td>58</td>
<td>-419,880</td>
<td>6</td>
<td>34</td>
</tr>
<tr>
<td>Mission</td>
<td>79</td>
<td>8%</td>
<td>1,210</td>
<td>2%</td>
<td>15</td>
<td>-62,370</td>
<td>12</td>
<td>30</td>
</tr>
<tr>
<td>Mission Bay</td>
<td>5</td>
<td>1%</td>
<td>450</td>
<td>1%</td>
<td>113</td>
<td>2,445,500</td>
<td>17</td>
<td>7</td>
</tr>
<tr>
<td>Northeast</td>
<td>49</td>
<td>5%</td>
<td>940</td>
<td>2%</td>
<td>19</td>
<td>-233,750</td>
<td>14</td>
<td>32</td>
</tr>
<tr>
<td>Other S Bayshore</td>
<td>21</td>
<td>2%</td>
<td>140</td>
<td>0%</td>
<td>7</td>
<td>5,840</td>
<td>21</td>
<td>20</td>
</tr>
<tr>
<td>Outer Sunset</td>
<td>33</td>
<td>3%</td>
<td>100</td>
<td>0%</td>
<td>3</td>
<td>20,000</td>
<td>26</td>
<td>15</td>
</tr>
<tr>
<td>Park Merced</td>
<td>2</td>
<td>0%</td>
<td>0</td>
<td>0%</td>
<td>1</td>
<td>0</td>
<td>34</td>
<td>22</td>
</tr>
<tr>
<td>Richmond</td>
<td>84</td>
<td>9%</td>
<td>230</td>
<td>0%</td>
<td>3</td>
<td>18,090</td>
<td>20</td>
<td>16</td>
</tr>
<tr>
<td>Rincon Hill</td>
<td>8</td>
<td>1%</td>
<td>2,370</td>
<td>5%</td>
<td>296</td>
<td>-94,530</td>
<td>7</td>
<td>31</td>
</tr>
<tr>
<td>Showp/Potrero</td>
<td>56</td>
<td>6%</td>
<td>4,070</td>
<td>8%</td>
<td>74</td>
<td>1,088,900</td>
<td>4</td>
<td>6</td>
</tr>
<tr>
<td>South Central, Other</td>
<td>70</td>
<td>7%</td>
<td>1,170</td>
<td>2%</td>
<td>17</td>
<td>93,130</td>
<td>13</td>
<td>13</td>
</tr>
<tr>
<td>South of Market, Other</td>
<td>4</td>
<td>0%</td>
<td>1,890</td>
<td>4%</td>
<td>631</td>
<td>2,043,630</td>
<td>8</td>
<td>4</td>
</tr>
<tr>
<td>TB Combo</td>
<td>10</td>
<td>1%</td>
<td>1,730</td>
<td>3%</td>
<td>173</td>
<td>5,275,150</td>
<td>9</td>
<td>1</td>
</tr>
<tr>
<td>Treasure Island</td>
<td>1</td>
<td>0%</td>
<td>7,800</td>
<td>15%</td>
<td>7,800</td>
<td>381,000</td>
<td>2</td>
<td>11</td>
</tr>
<tr>
<td>VisVal</td>
<td>4</td>
<td>0%</td>
<td>20</td>
<td>0%</td>
<td>5</td>
<td>-1,250</td>
<td>31</td>
<td>26</td>
</tr>
<tr>
<td>Western Addition</td>
<td>31</td>
<td>3%</td>
<td>880</td>
<td>2%</td>
<td>30</td>
<td>1,039,480</td>
<td>15</td>
<td>7</td>
</tr>
<tr>
<td>WSoMa</td>
<td>31</td>
<td>3%</td>
<td>880</td>
<td>2%</td>
<td>30</td>
<td>1,039,480</td>
<td>15</td>
<td>7</td>
</tr>
</tbody>
</table>

- Twelve percent of projects, representing 8,900 units and 4.6 million commercial square feet are under initial Planning Department review.

**Amount and Type of Net New Commercial Space**

Projects in the current pipeline as noted also represent a potential net addition of 18.7 million sq ft of commercial development that would result in the
An overall loss of around 300,000 sq ft of space for production, distribution and repair (PDR).

**Location of New Development**

Table 2 shows the three most active areas for residential development include Bayview/Hunter’s Point/Candlestick (where the Bayview Waterfront Project is located), Treasure Island and Parkmerced. All these projects have now been entitled. Full realization of these three projects will be decades into the future. These three areas would account for around 25,800 net units or about half of all net additional units in the pipeline. (See Map 3 for area boundaries used.)

Other areas with active residential development include Downtown, Market & Octavia, and Rincon Hill.

On the commercial side, more than 90 percent of the new space would be added in the Bayview/Candlestick, Downtown districts, Mission Bay, and Transbay areas. Of these, the bulk of this space would take place in Bayview and Downtown C-3 districts.
Figure 2. Residential Pipeline Size Distribution, by Zoning Category

![Bar chart showing residential pipeline size distribution by zoning category]

Figure 3. Non-Residential Pipeline Size Distribution, by Zoning Category

![Bar chart showing non-residential pipeline size distribution by zoning category]

Note: Figure 2 and Figure 3 show each project plotted along an axis showing project size, by general zoning type. Projects plotted are truncated to the 99th percentile for readability.
It is perhaps worth noting how geographically concentrated development is, for both residential and commercial uses. In both cases, the majority of potential development would happen in a handful of projects, in a handful of districts.

**Pipeline Projects by Current Zoning Category**

There is considerable variation on project sizes between--but also within--zoning district categories. Some zoning districts display similarly typed and sized projects, while others are host to a great variety of project sizes and types.

**Table 3. Residential and Commercial Pipeline by Generalized Zoning Category**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Residential</td>
<td>RH</td>
<td>433</td>
<td>744</td>
<td>155,060</td>
<td>-59,000</td>
<td>215,000</td>
<td>-5,000</td>
<td>-19,000</td>
<td>21,000</td>
<td>-27,000</td>
</tr>
<tr>
<td>Residentia</td>
<td>RM</td>
<td>85</td>
<td>8,894</td>
<td>328,620</td>
<td>38,000</td>
<td>103,000</td>
<td>-9,000</td>
<td>485,000</td>
<td>-300,000</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>RTO</td>
<td>37</td>
<td>272</td>
<td>-8,000</td>
<td>0</td>
<td>-21,000</td>
<td>19,000</td>
<td>24,000</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>High Density Residential</td>
<td>DTR</td>
<td>8</td>
<td>1,775</td>
<td>-94,530</td>
<td>0</td>
<td>0</td>
<td>-36,000</td>
<td>-71,000</td>
<td>12,000</td>
<td>0</td>
</tr>
<tr>
<td>Grand Total</td>
<td></td>
<td>958</td>
<td>50,556</td>
<td>18,734,210</td>
<td>1,600,000</td>
<td>1,787,000</td>
<td>12,003,000</td>
<td>-305,000</td>
<td>2,857,000</td>
<td>792,000</td>
</tr>
</tbody>
</table>

**Residential Pipeline**

Figure 2 and Figure 3 give details on the size distribution for residential and non-residential projects, respectively, using plots where the position of each vertical bar represents the size of a development project, measured in square feet (a more rightward position means a larger project).
Per the top panel, the largest projects are found in mixed use, commercial and residential zone classes. While these projects have large projects, there is tremendous variation within these districts as well, as seen by the distance between the vertical lines. Projects in residential districts, on the other hand, are far more evenly sized, with the vast majority of projects consisting of fewer than 5 units. In the residential districts, there are a number of projects substantially larger than the rest, as seen from the outliers.

The lower panel analogously shows the size distribution for commercial projects, with lands zoned “public” accounting for the largest sizes, but note that this includes only a handful of projects.

Table 3 also shows the overall pipeline distribution by zoning categories, but with more detail. The vast majority of the residential pipeline falls on four land zoning classes: Public, Residential, Mixed Use, and Commercial. Two large projects are situated on parcels classified as “Public Land”: the Bayview Waterfront project, most of which is at Candlestick Point, and the Treasure Island redevelopment project. These projects could add more than 18,900 units.

Residential projects on residentially zoned lots, representing the largest number of projects, account for 9,900 units, or the second largest class. Two thirds of these units, however, are in the Parkmerced redesign project and a couple of large San Francisco Housing Authority projects (one in the Potrero Hill area, the other on Sunnydale Ave as part of the Hope SF program). The remainder of projects on residentially zoned parcels are relatively small with about a quarter of projects being single family housing projects. Small scale projects of one to nine units account for some 90 percent of the residential projects. Only a handful are larger and thus account for the majority of units.

The mixed use districts, a diverse group ranging from Eastern Neighborhoods districts to Chinatown, account for 10,100 units in 229 projects.

Residential projects on downtown commercial zoned lots would add 6,000 new units in 60 projects, although the count here also includes commercial only projects. Another 2,300 units are pending on industrially zoned lands. About a third of these projects are mixed use projects with a commercial component. The added residential units in industrial areas are typically accompanied by loss of PDR space and addition of retail space (see Table 5).

Projects in neighborhood commercial districts would add 1,500 units in 53 projects. Also of note, the high-density, transit-accessible downtown neighborhoods of Rincon Hill and Transbay which account for a fraction of one percent of the city’s land area, nonetheless account for more than four percent of all units in the pipeline in a handful of projects. These projects would add 1,800 units.

In contrast, residential projects in the low-density residential (RH) districts are by per zoning requirements relatively small scaled, in-fill developments, accounting for some 45 percent of proposed projects but just 2 percent of the total units (or 744 net units) in the pipeline. Projects on RM-zoned (multi-family) lots, in turn, account for 9 percent of projects and 18 percent of units, again largely because of a large project, the Parkmerced re-design project. In terms of land area, residential zoning districts form the largest group, comprising 46 percent of the city land area.

**Commercial Pipeline**

Non-residential development is predominantly allowed in commercial and mixed use districts; thus the majority of commercial space are proposed to be added in these land classes.

The commercial pipeline (counting by project type, not zoning district) in general is characterized by 77 projects, but also 161 mixed use projects which contain both residential and non-residential components. The commercial component in the 161 mixed use district projects are, in general also small, with half of projects being smaller than 5,000 gross square feet, respectively. (Some of these projects in mixed use districts are exclusively residential.)

The largest concentration of potential commercial development is in a small number of projects classified under public zoning. Development here would...
add some net 6.7 million square feet, or 43 percent
of all proposed commercial development, in just 11
projects. The largest of these projects is the Bayview
Waterfront Project which would add millions of
commercial square feet over a 20+ year period.

Downtown Commercial districts account for a
sizable concentration of non-residential develop-
ment, with 2.7 million square feet in 56 projects.
The mixed use districts account for a larger number
of projects (even if this count may include projects
that are exclusively residential) totalling 3.1
million square feet. Industrial districts would add
another 3 million square feet. Remaining districts
account for only a minor portion of non-residential
development.

Table 4. Projects by Neighborhood and Building Size

<table>
<thead>
<tr>
<th>Neighborhood</th>
<th>Single Family</th>
<th>2-9 Units</th>
<th>10-19 Units</th>
<th>20-49 Units</th>
<th>50-99 Units</th>
<th>100-249 Units</th>
<th>Above 250</th>
<th>Grand Total</th>
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<td>0</td>
<td>24</td>
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<tr>
<td>Ingleside, Other</td>
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<td>56</td>
<td>11</td>
<td>53</td>
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<td>182</td>
<td>232</td>
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<td>994</td>
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<td>56</td>
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<td>South of Market, Other</td>
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<td>1,500</td>
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<td>68</td>
<td>65</td>
<td>249</td>
<td>0</td>
<td>900</td>
</tr>
</tbody>
</table>

Grand Total: 153,154, 506,1,858, 3,398, 6,715, 43,669, 57,873

Notes:
/1/ Housing unit counts are not rounded.
/2/ As the table categorizes by building size, numbers here represent total units as opposed to net units (subtracting replaced units), for which reason the unit count is higher than in other summary tables.
Figure 4. Residential Pipeline, by Status & Building Size

Residential Project Size

- 1 – 2 Units
- 3 – 10 Units
- 11 – 49 Units
- 50 – 250 Units
- Above 250 Units

Figure 5. Non-Residential Pipeline, by Status & Building Size

Non-Residential Project Size

- Less than 10,000 SF
- 10,000 – 24,999 SF
- 25,000 – 249,999 SF
- 250,000 – 999,999 SF
- Above 1,000,000 SF
High density residential districts will see some loss of commercial square footage as some of these spaces are converted to residential uses.

Also of note the UCSF hospital project in Mission Bay is currently undergoing construction, expected to be done early 2015.\footnote{State projects are not subject to Planning Department review and is thus not a part of the standard permit stream this reports build on. The project was added manually to the construction list in early 2014.}

**Residential Pipeline by Project Size**

Table 4 shows the residential pipeline by neighborhood, and offers detail on the project size. In most cases this is measures the number of units in the building. However, a handful of projects include more than one building thus making this accounting an approximation.

Project sizes vary by area. Thus we see that, for instance, Downtown will get the bulk of its units in large projects (50-99 units, 100-249 units, above 249 units). This is also the case for areas like Market Octavia, Showplace Square, and in particular the Transbay area and Rincon Hill. Conversely, for Inner Sunset, the largest addition come in projects of two to nine units and single family projects.

For the city as a whole, roughly three out of every four units come in a relative small number of projects. This implies most areas of the city have ‘modest’ amounts of development, given its relative concentration.

By the same token, if we sum the units of the bottom half of all pipeline projects would contribute 3,500 units, or seven percent of the total number of pipeline units. Summing just the five neighborhoods with the biggest number of proposed units yields some 63 percent of all proposed development.

Perhaps except for Parkmerced, development in residentially zoned areas in the western part of the city is limited in scope and consists chiefly of small-scale in-fill projects. The majority of units, and the vast majority of projects are in buildings of 1, or 2 to 9 units.

Figure 4 on page 10 shows the residential pipeline by building size and pipeline status. The residential pipeline shows that:

- Of the 4,100 units with building permits approved or issued, five out of every eight units are in buildings of 250 units and above, underlin-

\footnote{Numbers represented here differ from those reported in Table 1. Table 1 represents the net change of all projects whereas numbers here are limited to the specific projects representing conversions or demolitions resulting in a net loss of PDR space (Table 5) and office space (Table 6).}

\footnote{Table 5 shows only projects that include the conversion or loss of PDR space to residential use. Table 1 shows a net loss of 305,000 sq ft as it is a net tally of all projects that add, convert or demolish PDR space while this table only counts the loss side of the ledger.}

\footnote{Single family homes constitute a fraction of one percent of the total units in the pipeline.}

- Only three percent of the residential pipeline will be in buildings with nine units or less across all entitlement stages.

- Single family homes constitute a fraction of one percent of the total units in the pipeline.

**Project Size and Status of Development**

Per Figure 4 and Figure 5, there is some variation in project size by stage of development. Currently, a sizeable share of residential construction falls in the largest size category, reflecting in part that a significant number of large projects have been entitled for years and construction deferred during the Great Recession. Once economic conditions improved, these projects entered construction. The pattern on the non-residential side is somewhat less “top heavy,” with bigger projects found in earlier stages of development, likely attributable to the focus on residential rather than commercial development in recent years.

**Conversion of Commercial to Residential Use**

There are 50 projects in the current pipeline database proposing demolition or conversion of existing production, distribution and repair-use (PDR) buildings to residential use. The corresponding figure for the conversion of office space is 25 projects. These projects, adding up to 3,600 units and 2,900 units, respectively, comprise about one in seven of the total number of residential units in the pipeline.

**Conversion of PDR Space**

Table 5 provides a measure of how many units are produced relative to the lost PDR space.

- If the pipeline were developed as proposed, about 800,000 sq ft of PDR space would be lost to conversion or demolition.\footnote{The Table 5 shows only projects that include the conversion or loss of PDR space to residential use. Table 1 shows a net loss of 305,000 sq ft as it is a net tally of all projects that add, convert or demolish PDR space while this table only counts the loss side of the ledger.} It would be replaced with residential units (3,600) and/or other commercial uses.
Most of the PDR to residential conversions are found in Central Waterfront, Showplace Square / Potrero Hill, Downtown, Mission and Rincon Hill districts, accounting together for eight out of 10 converted square feet. The loss of PDR space in these neighborhoods would in turn bring in 2,900 net new housing units.

Conversion of Office Space

Approximately 900,000 sq ft of office space is proposed to be converted to residential and/or other commercial use. This loss of office space is mainly taking place in the northeastern part of the city due to the concentration there. Table 6 shows that Market Octavia could see a loss of 600,000 square feet of office. This is predominantly due to the conversion of the Triple-A buildings to residential use. For the neighborhood as a whole, 1,400 new units could result from conversion.

Nearly all units replacing office uses are in mid- to high-rise residential structures of 20 to 500 housing units in high density zoning districts. These projects are mostly concentrated in the eastern half of the city: Rincon Hill, East SoMa,
Showplace Square & Potrero Hill, Transbay, Mission and Downtown.

- These conversions of a number of individual office buildings reported here notwithstanding, taken together with other commercial developments in the pipeline as shown in Table 1, the overall result would still be a net addition of office space. As reported in Table 1, the net addition of office amounts to 11.6 million sq ft citywide.

INCLUSIONARY HOUSING

The San Francisco Planning Code § 415.5 contains the provisions for the Inclusionary Affordable Housing Program, requiring developments with 10 units or more to contribute to the development of housing affordable to middle-income households in the City.\(^7\) Project sponsors can mainly fulfill this requirement either by contributing to a fund, providing units on-site, dedicating land, or building on a different site.

The affordable housing pipeline can be thought of in stages: First, affordable housing production per the inclusionary program is a function of fees on market rate housing development and/or direct provision of affordable units. Such market rate development can be thought of as “parent projects,” leading to derived units now (on site) or later (through fees paid). The second stage, then, is when monies are pooled, a site identified, and the affordable housing built, typically by a non-profit developer. To stay with the parent analogy, these downstream projects may accordingly be thought of as “children.” For economy of scale reasons, there are relatively few--currently three--such projects. Conversely, 50 projects (Table 7, first row) will provide on-site affordable units. These projects, along with the BMR stand-alone projects, are shown on Map 2.

\(^7\) This data and section was last updated at the end of quarter 1, 2014.

### Table 7. Inclusionary Housing Pipeline, by Type

<table>
<thead>
<tr>
<th>Type</th>
<th>Declaration</th>
<th>Projects</th>
<th>Total Units</th>
<th>BMR On-Site</th>
<th>BMR Off-Site</th>
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</thead>
<tbody>
<tr>
<td>On Site Provision</td>
<td>50</td>
<td>6,241</td>
<td>906</td>
<td>-</td>
<td>-</td>
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<tr>
<td>In Lieu Fee</td>
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<td>404</td>
<td>164</td>
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<td>-</td>
<td>-</td>
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<td>Land Dedication</td>
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<td>353</td>
<td>-</td>
<td>-</td>
<td>-</td>
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<td>203</td>
<td>-</td>
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<td><strong>18,103</strong></td>
<td><strong>1,276</strong></td>
<td><strong>743</strong></td>
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</table>

Notes:

\(1\)/ BMR unit counts are estimated at 15% of the Total unit count, assumed to be off site.

\(2\)/ BMR unit counts are estimated at 12% of the Total unit count, assumed to be off site. Some of these may be on-site once a declaration is issued.

Map 2. Inclusionary Affordable Housing Pipeline, By Type and Size
RECENT ACTIVITY

Project Application Filings During q3 2014

A total of 24 planning applications were filed in the third quarter of 2014, down from last quarter, consistent with a seasonal slowdown. Corresponding to these 24 projects is a count of 250 residential units and 279,000 sq ft of non-residential development.

Projects approved during any given quarter shows a time lag relative to the projects filed curve. A project is often approved in another quarter than the one in which it was filed, particularly for projects needing environmental review and/or conditional use authorization, while others are abandoned altogether before approval. As such, nearly 800 units were entitled during the quarter.

A few of the larger projects filed during the third quarter of 2014 include:

- At 1095 Market Street, a proposal would change occupancy from office to hotel use, with 202 rooms, and add a new roof deck.
- At 230 7th Street, the proposed project would demolish a 14,230 sq ft single-story garage parking building and construct two new buildings with an at-grade inner court between the two buildings with an underground parking garage with 29 spaces. The new building along the 7th Street frontage would be a six-story building a small commercial space on the ground floor and 27 residential units. The building along Langton Street would be a four-story building containing 17 residential units.
- At 198 Valencia Street, sponsor would erect a five story, no basement, 28 unit residential condo building with ground floor commercial space.
- At 768 Harrison Street, the proposed project entails the demolition of an existing 2-story building and the construction of a new 9-story building with retail on the ground floor and mezzanine and residential uses above. The project would have 26 residential units and no off-street parking.
**Completed projects during the past four quarters**

Table 8 shows that the past four quarters resulted in a net addition of 3,090 units to the city’s housing stock, while there was a net addition of 280,000 sq ft of non-residential space. The median time to completion for these projects from the first filing was 43 months. Projects less than 10,000 sq ft had a median completion time of 30 months. Such projects tend to be less complex than larger ones, as evidenced in completion times as sizes increase. The trend is broken down by zoning district in Figure 7: Particularly residential districts exhibit substantial variation in time to completion without much change in project size, suggesting other factors than size are at play.

Projects sized between 10,000 and 24,999 sq ft, 25,000 - 249,999 sq ft had median completion times of 52 and 71 months, respectively.

The largest group, sized 250,000 - 999,000 sq ft took 53 months from the initial filing to project completion.\(^8\) For some of the projects, the long completion times may well reflect a strong recession effect (project sponsors waiting due to financial uncertainty) on the current completion cohort, although the smaller projects are by now predominantly filed after the slowdown ended. However, there is tremendous variation in how long it takes from conception to completion.

Figure 7 details the relationship between project size and time to completion. All other things equal, bigger, more complex projects can be expected to take longer to complete. They need more layers of review and refine, and financing may be more uncertain. The chart shows that this relationship is much stronger in some types of zoning districts than others. The association one might expect between project size and completion time, per this chart, is

---

\(^8\) Certificates of Final Completions will occasionally lag the actual completion time and/or may be recorded on a different permit application finalizing work authorized per an older permit, so these figures should be taken as approximations.

---

### Table 8. Projects Completed Past Year, By Use Type

<table>
<thead>
<tr>
<th>Land Use</th>
<th>Projects</th>
<th>Net Units</th>
<th>Net Comm’l Sq. Ft.</th>
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<td>1,200</td>
<td>-13,000</td>
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<tr>
<td>Resident</td>
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<td>-72,000</td>
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<tr>
<td>MIPS</td>
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<td>-20</td>
<td>309,000</td>
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<td>Visitor</td>
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---
Map 3. Magnitude and Location of Past Year’s Completed Development, by Major Land Use Type

not strongly borne out by the data for residential districts. The connection is a little stronger for mixed use projects, which may differ both in terms of the neighborhoods they are located in as well as the type of financing available. For projects in neighborhood commercial districts, the smaller projects took the longest to complete.
Map 4. Neighborhood Designation for Pipeline Report

Boundaries shown here are designated solely for the purposes of summarizing pipeline data and don’t necessarily coincide with other boundary designations, nor are they intended to delineate jurisdiction (port property or otherwise).
Map 5. Generalized Zoning Districts

Generalized Zoning Districts

- Residential
- High Density Residential
- Mixed Use
- Neighborhood Commercial
- Commercial
- Industrial
- Open Space
- Public

Marin County

San Mateo County
## DATA DICTIONARY

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### Quarter 3, 2014

**Subset of pipeline where project adds either more than 10 units or 10,000 GSF**

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Friday, December 19, 2014  Quarter 3, 2014 List, Page 4 of 9
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Friday, December 19, 2014  Quarter 3, 2014 List, Page 7 of 9
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</table>
ACKNOWLEDGEMENTS

Mayor

Edwin M. Lee

Board of Supervisors

David Chiu, President
John Avalos
London Breed
David Campos
Malia Cohen
Mark Farrell
Jane Kim
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Katy Tang
Scott Wiener
Norman Yee

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Rodney Fong, Vice President
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Christine Johnson
Kathrin Moore
Dennis Richards

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Gil Kelly, Director, Citywide Planning Division
Joshua Switzky, Acting Director of Citywide Planning
Teresa Ojeda, Manager, Information and Analysis Group
Aksel Olsen, Project Manager
Alton Chinn, Programmer Analyst
Gary Chen, Graphic Design

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Chandra Egan, Inclusionary Housing Program Manager

Department of Building Inspections

Hemalatha Nekkanti, Development Division Manager