Development Activity Highlights and Five-Year Forecast (2016-2020)

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February 2015

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Development Activity Highlights and Five-Year Forecast (2016-2020)

I. PURPOSE

The *Development Activity Highlights and Five-Year Forecast (2016-2020)* is a report issued annually by the Department of Planning, Building and Code Enforcement. The report serves three important functions, as follows:

1. Assists the Office of the City Manager in estimating future construction-related tax revenues that generate funds for the City's Capital Improvement Program;
2. Provides City policymakers and staff with key data for periodic assessment of the rate, type, and location of development activity in San Jose; and,
3. A tool for distributing information on major development projects to the public.

II. SUMMARY

Development in San Jose has increased significantly since the end of the Great Recession in mid 2009. In the 2013/2014 fiscal year, the valuation of new construction and tenant improvements (alterations) to existing development reached approximately $1.73B, a number the City has not seen since fiscal year 2000/2001 during what is known as the dot.com boom. Broken down by major sector, the total construction valuation for industrial has increased from the previous fiscal year by 85%, for commercial by 88%, and for residential by 68%.

A majority of this development was entitled prior to the recession. With the recent improvement in the economy, projects that were put on hold with the economic downturn have begun to break ground. The significant increase in construction activity over the last two years is primarily a result of pre-recession entitlements and projects entitled after the recession moving forward to construction simultaneously.

The increase in construction activity has not been evenly distributed between the residential, commercial, and industrial sectors. The majority of the construction activity has been occurring in the residential sector. While new construction and tentative improvements in the commercial and industrial sectors have been increasing, the total amount of activity for these two sectors combined only represents about half of the total construction valuation.

In fiscal year 2013/2014, the valuation of new industrial construction surpassed the valuation for tenant improvements. While most of the commercial activity continues to be in tenant improvements, the proportion that is new construction increased 150% from the previous year and was 44% of the total commercial construction activity. This is a significant shift from the prior 3 years, in which new construction on average only represented 32% of the total commercial construction. The high growth rate in new construction can be attributed to

decreasing vacancy rates, and therefore the need for new industrial and commercial space to accommodate expanding businesses.

The following summary discusses current development activity and trends for each major land use category (residential, commercial, and industrial), providing some insight as to what may occur over the forecast period (2016-2020).

Residential Development

- *New housing production in San Jose exceeded 4,000 dwelling units per year during the late-1990's, and then declined to an average of just over 3,000 units per year from 2001-2006. With the onset of the 2008/09 recession, activity dropped off sharply to an average of about 1,500 units per year; however in late-2010, residential activity, and apartment construction in particular, began a strong rebound, returning activity to an average of 3,000 units per year. This pace has been sustained for the past several years.*

- *In fiscal year 2013/14, the number of residential units built reached nearly 5,000 units, the highest number of units built in any of the last 15 years. As evidence of the strong market for high density residential development, over ninety percent of these units were multi-family.*

- *The record number of residential units constructed in fiscal year 2013/2014 is a result of both projects entitled prior to the recession and post-recession moving forward with construction. Staff anticipates that the residential market will remain strong but, as the number of pre-recession projects decrease, there is likely to be a leveling off residential development, with the total residential valuations projected to be $500 million a year, on average, over the next 5 years.*

Commercial Development

- *After a five-year-long boom in commercial construction activity that spanned the late-1990's to early 2000's, during which time total permit valuation averaged over $500 million per year, activity since has generally averaged less than half that level.*

- *In fiscal year 2013/14, commercial construction activity amounted to approximately $400 million, with a doubling of new construction from the previous year and a steady increase in tenant improvements. Most of the increase in commercial activity is the result of the completion of the San Jose Earthquake Stadium, adjacent Coleman Landings Shopping Center, and retail development at the "Hitachi Site" (former IBM facility along Cottle Road)*

- *While more of the construction activity is still in tenant improvements rather than in new construction, in fiscal year 2013/2014 the growth in new construction has outpaced the growth in tenant improvements, as the vacancy rate of commercial buildings has been steadily decreasing as part of the economic recovery.*

- *For the five-year forecast period, total commercial construction activity is forecasted to average about $230 million annually, a decrease from fiscal 2013/2014 but consistent with the annual average since the end of the dot.com boom in 2001. Hotel growth is anticipated to remain strong as several projects are under construction and/or have been approved in Downtown and North San José. Furthermore, there are additional hotels currently in the entitlement process. Construction activity for commercial office and retail is not expected to increase, but to remain steady.*

Industrial Development

- *Similar to commercial activity, industrial construction activity averaged nearly $500 million per year in permit valuation over the five-year period of 1997-2001. Since that time, however, activity has been just a small fraction of that figure, dipping to an annual average construction valuation of less than $100 million following the 2008/09 recession. With the recent improvement in the economy, there has been a noticeable increase in industrial construction activity.*

- *In fiscal year 2013/2014 the total valuation of new construction and building improvements in the industrial sector reached approximately $450 million. While the increase in construction activity was in both in new construction and tenant improvements, most of the increase was due to the recent construction of Samsung Semiconductor's 680,000-square foot campus located in North San José.*

- *Based on past trends, the valuation of tenant improvements is expected to remain steady over the forecast period, and will represent the majority of the industrial construction activity. In contrast, new construction is expected to decrease over the five year forecast period. Nevertheless, new construction is still projected to remain at a relatively high level over the next two fiscal years, primarily as a result of two large projects anticipated to move forward. These two projects are the SuperMicro campus at the old San José Mercury News headquarters located in North San Jose and the Trammel Crow project located in Alviso, which includes close to one million square feet of manufacturing, and research and development space.*

III. FIVE-YEAR FORECAST (2016-2020)

The Department of Planning, Building and Code Enforcement's five-year forecast of development activity is summarized in Tables 1 and 2 (next page). The construction valuation in fiscal year 2014/2015 is expected to remain similar to fiscal year 2013/2014, with the total valuation anticipated to be $1.29 billion. In fiscal year 2015/2016 development activity is anticipated to slow down, and then remain steady with an average of $947 million of annual construction valuation over the remainder of the forecast period.

Table 1
Construction Valuation: FY 09/10 to FY 19/20

Fiscal Year	09/10	10/11	11/12	12/13	13/14	14/15	15/16	16/17	17/18	18/19	19/20
	Actual Valuation[1] (in millions)					**Projected Valuation (in millions)**					
New Construction											
Residential	$93	$332	$456	$424	$748	$650	$525	$425	$500	$500	$325
Commercial	$160	$78	$80	$71	$181	$120	$100	$85	$75	$75	$75
Industrial	$72	$9	$11	$62	$266	$110	$100	$25	$25	$25	$25
Subtotal	$326	$419	$547	$557	$1196	$880	$725	$535	$600	$600	$425
Alterations											
Residential	$71	$85	$89	$87	$110	$130	$90	$85	$85	$85	$85
Commercial	$131	$160	$177	$145	$228	$140	$140	$140	$140	$140	$140
Industrial	$54	$89	$132	$192	$203	$140	$150	$150	$140	$140	$140
Subtotal	$255	$335	$398	$424	$542	$410	$380	$375	$365	$365	$365
GRAND TOTAL	**$581**	**$753**	**$945**	**$982**	**$1737**	**$1290**	**$1105**	**$910**	**$965**	**$965**	**$790**
Tax Exemptions											
Residential	*	*	*	*	*	$(50)	$(50)	$(50)	$(50)	$(50)	$(50)
Commercial	*	*	*	*	*	$(25)	$(25)	$(25)	$(25)	$(25)	$(25)
Industrial	*	*	*	*	*	$(25)	$(25)	$(25)	$(25)	$(25)	$(25)
Net Total (Taxable)						**$1190**	**$1005**	**$810**	**$865**	**$865**	**$690**

*Note: Data on actual tax exemptions not available at the time of this report.
[1]Valuation figures adjusted to 2014 dollars, per Bureau of Labor Statistics Consumer Price Index (CPI), San Jose-San Francisco-Oakland, all items index.

Table 2
Residential Units and Non-Residential Square Footage: FY 09/10 to FY 19/20

Fiscal Year	09/10	10/11	11/12	12/13	13/14	14/15	15/16	16/17	17/18	18/19	19/20
	Actual[1]					**Projected**					
Residential (Units)											
Single-Family	103	66	140	284	341	300	400	300	200	200	200
Multi-Family	470	2,142	2,833	2,418	4,383	3,900	3,000	2,400	3,000	3,000	1900
TOTAL	573	2,208	2,973	2,702	4,724	4,200	3,400	2,700	3,200	3,200	2,100
Non-Residential (sq.ft., in thousands)											
Commercial	750	500	500	250	1,400	675	575	475	400	400	400
Industrial	250	0	0	250	1,200	450	400	100	100	100	100
TOTAL	1,000	500	500	500	2,600	1,125	975	575	500	500	500

[1]NOTE: Data on residential units based on the Building Division's *Permit Fee Activity Report*.
Data on non-residential square footage estimated based on construction valuation in the Building Division's *Permit Fee Activity Report*.

IV. CONSTRUCTION TAXES AND EXEMPTIONS

The City of San Jose imposes a series of construction-related taxes that are generally used to finance the construction and improvement of facilities and infrastructure systems that provide capacity beyond the needs attributed to a particular development. These taxes are in addition to cost-recovery fees charged for processing and reviewing applications for development approvals and permits. The largest construction-related tax revenue sources are described below.

Building and Structure Construction Tax

The Building and Structure Construction Tax is imposed upon the construction, repair, or improvement of any building or structure where a building permit is required (except for authorized exemptions- see below). The proceeds from this tax are restricted in use to the provision of traffic capital improvements on major arterials and collectors, the acquisition of lands and interest in land, and the construction, reconstruction, replacement, widening, modification and alteration (but not maintenance) of City streets.

Construction Excise Tax

The Construction Excise Tax is imposed upon construction, alteration, repair, or improvement of any residential or commercial structure (except for authorized exemptions- see below). The tax does not apply to industrial development. This is a general purpose tax that may be used for any "usual current expenses" of the City. The City Council has historically used the majority of these funds for traffic infrastructure improvements.

Residential Construction Tax

The Residential Construction Tax is imposed upon any construction of a one-family dwelling unit or multi-family units or any mobile home lot in the City. This tax is collected and placed in a fund used to reimburse private entities that have constructed a portion of an arterial street that is wider than what is normally required in connection with residential development. The funds are also used to construct median landscaping and other street improvements.

Exemptions

Certain construction-related tax exemptions are provided in San Jose. These exemptions apply only in certain areas and/or to certain types of land uses, and are generally designed to accomplish one of the following objectives:

1. Reduce the economic constraints involved in the development of housing in high risk areas and/or housing for very-low income households;

2. Implement a separately administered funding arrangement that finances infrastructure and public service needs in an area only with revenue generated by development in such area (e.g., Evergreen Specific Plan Area); and,
3. Provide exemptions required by State or Federal law (e.g., hospitals, churches).

Planning staff estimates that $100 million in construction valuation will be exempted each year over the forecast period, or approximately 10% to 15% of total valuation during this time (see Table 1 on page 4).

V. MAJOR DEVELOPMENT ACTIVITY DATA

Planning staff has collected a significant amount of data on development activity, which is the foundation for the five-year forecast contained in Section III of this report. These data focus on recent "major" projects with the highest likelihood to have the most significant impact on the forecast. Major projects are defined as residential projects greater than 50 dwelling units, commercial projects greater than 25,000 square feet, and industrial projects greater than 75,000 square feet. This data collection effort has identified approximately 26,000 dwelling units and approximately 22 million square feet of commercial and industrial space submitted for Planning approval since January 1, 2008 that have been constructed or are likely to develop in the near future.

The development activity data on the following pages is first divided into three major land use categories-- residential, commercial, and industrial. Then, individual projects are divided into four subcategories based on project status— projects completed, projects under construction, approved projects (construction not yet commenced), and projects pending City approval.

Major Residential Development Activity
Projects of 50+ Dwelling Units, Submitted Since 1/1/08

File Number	Filing Date	Project Name	Tracking APN	Street Location	Planning Area	Housing Type	No. of Units	Proj. Mgr	Approval Date
Projects Completed									
H07-008	2/16/07	Centerra Apts	259-35-007	SW/c N. Almaden & W. St. John	Central	MF	347	MS	12/7/07
PD04-103	5/10/04	San Carlos Senior Apts	274-14-142	NW/c W. San Carlos & N. Willard	Central	MF	95	EM	8/25/04
PD07-025	3/26/07	Race Street	264-09-064	Race Street and Auzerias Avenue	Central	MF	386	RR	8/6/07
PD07-033	4/13/07	The Verdant/Latitude Apts	097-07-086	NW/c Zanker & Tasman	North	MF	704	JB	11/30/07
PD07-036	4/13/07	Enzo Apts	097-07-031	W/s Baypointe, 370' nly Tasman	North	MF	183	JB	11/30/07
PD07-088	10/9/07	Morrison Park Apts	261-01-054	SW/c Cinnabar & Stockton	Central	MF	250	LM	8/1/08
PD08-001	1/7/08	Pepper Lane Mixed Use	254-15-072	SE/c Berryessa & Jackson	Alum Rock	MF	371	RM	10/10/08
PD08-023	3/11/08	121 Tasman Apts	097-07-072	NE/c Baypointe & Tasman	North	MF	174	JB	8/1/08
PD08-027 / AD12-1006	4/4/08	Berryessa Crossing (Phase 1)	241-04-006	Both sides Berryessa, wly UP railroad	Berry./Alum Rock	SF	242	LX	12/15/10
PD08-056	8/29/08	Epic Apts	097-15-026	SE/c River Oaks & Seely	North	MF	769	ES	1/23/09
PD08-071	12/17/08	Santana Row (Levare)	277-40-011	NW/c Olin & Hatton	West Valley	MF	118	SZ	4/23/10
PD09-001	1/20/09	Brookwood Terrace Apts	472-05-075	S/s E. San Antonio, opp. S. 28th	Central	MF	84	SZ	6/15/09
PD09-006	2/27/09	Meridian Mixed Use	277-20-006	SW/c W. San Carlos & Meridian	Central	MF	218	ES	6/8/09
PD09-030	10/2/09	Westmount Homes	249-09-009	SE/c E. Mission & N. 10th	Central	SF	60	SZ	11/30/09
PD09-033	10/21/09	Ford Apts	678-53-004	N/s Ford, 550' ely Monterey	Edenvale	MF	95	LX	7/16/10
PD10-024	11/2/10	Brookside Homes	575-02-027	W/s Guadalupe Mines, 2000' sly Camden	Almaden	SF	89	LX	9/16/11
PD10-026	11/5/10	Celadon Townhomes (Phase 2)	254-06-037	SW/c N. Capitol & Mabury	Alum Rock	MF	77	JN	6/10/11
PD11-003	1/21/11	Cottages at Mirassou	659-57-010	SW/c Ruby & Aborn	Evergreen	SF/MF	104	LX	7/29/11
PD11-008	3/7/11	Westbury Homes	464-22-030	N/s Blossom Hill, 250' ely Cahalan	Edenvale	SF	86	LX	9/7/11
PD11-009	3/9/11	Vicino Townhomes	277-38-006	W/s S. Monroe, 450' nly Hwy 280	West Valley	SF	104	LX	9/30/11
PD11-023	7/21/11	Centered on Capitol Townhomes	589-19-063	NE/c N. Capitol & Sierra	Berryessa	MF	94	LX	11/18/11
PD11-025	3/11/11	Rosemary Family/Senior Apts	235-05-012	SE/c N. 1st & Rosemary	North	MF	290	LX	8/26/11
PD11-026	7/28/11	The Meridian at Willow Glen	447-05-012	NE/c Hillsdale & Yucca	Willow Glen	SF	51	ME	11/18/11
PD11-031	9/8/11	Domain Apts	097-52-028	W/s N. 1st, both sides Vista Montana	North	MF	444	JH	10/14/11
PD12-031	7/18/12	Berryessa Crossing (Phase 2)	241-04-006	Both sides Berryessa, wly UP railroad	Berry./Alum Rock	MF	494	LX	3/8/13
PD12-039 / PD14-010	10/11/12	South Village (Hitachi)	706-04-013	NE/c Cottle & Hwy 85	Edenvale	SF/MF	845	JB	12/20/12
PDA04-071-01	9/29/10	Mayfair Court Apts	481-18-013	W/s McCreery, 230' sly Alum Rock	Alum Rock	MF	93	JN	3/15/11
PDA05-066-01	11/3/11	Santana Row (Misora)	277-46-001	SE/c Winchester & Stevens Creek	West Valley	MF	220	LX	2/3/12
PDA07-006-03	12/12/08	Crescent Village Apts	097-33-113	SE/c Zanker & River Oaks	North	MF	1750	MD	1/15/09
PDA07-013-01	3/26/12	Parc 22 Townhomes	472-01-021	S/s William, 350' wly McLaughlin	Central	SF	67	LX	7/9/12
PDA08-039-01	7/7/09	University Villas Apts	230-14-026	N/s Campbell, 250' ely El Camino Real	West Valley	MF	138	LX	4/26/10
PDA08-036-01	11/4/08	River Oaks Apts (West)	097-33-036	NE/c Zanker & River Oaks	North	MF	293	MD	12/19/08
Total							**9,335**		

Major Residential Development Activity
Projects of 50+ Dwelling Units, Submitted Since 1/1/08

File Number	Filing Date	Project Name	Tracking APN	Street Location	Planning Area	Housing Type	No. of Units	Proj. Mgr	Approval Date
Projects Under Construction									
H09-004	2/11/09	Donner Lofts	467-20-018	SE/c E. St. John & N. 4th	Central	MF	156	SZ	10/9/09
H12-022	1/9/13	One South Market Apts	259-40-093	SW/c Market & Santa Clara	Central	MF	312	SD	3/1/13
H13-021	5/28/13	The Pierce Apts	264-32-087	SW/c S. Market & Pierce	Central	MF	234	RB	11/1/13
H13-023	6/7/13	San Jose Student Apts	467-57-080	E/s N. 6th, 100' nly Santa Clara	Central	MF	119	KT	11/22/13
PD07-007	1/10/07	Fruitdale Station (Phase 2)	284-02-008	SE/c Southwest Expwy & Fruitdale	Willow Glen	MF	256	SM	3/21/08
PD07-090	10/23/07	Brandon Park Apts	097-06-038	W/s N. 1st, 450' sly Rio Robles	North	MF	1,579	JB	4/4/08
PD08-015	2/11/08	Japantown Senior Apts	249-39-011	W/s N. 6th, 200' sly E. Taylor	Central	MF	85	SZ	5/7/10
PD08-029/ PDA08-029-01	9/13/12	Virginia Terrace Apts	472-18-063	E. Virgina, Martha St, S 5th Street and S. 6th	Central	MF	238	RM	1/14/09
PD11-011	3/14/11	Metropolitan Apts	477-23-021	E/s Monterey, 700' nly Tully	South	MF	102	LX	7/15/11
PD11-030 / PD07-091	9/8/11	Tasman Apts	097-52-013	NW/c Vista Montana & W. Tasman	North	MF	554	JH	10/14/11
PD12-002	1/17/12	Anton La Moraga Apts (Hitachi)	706-04-013	NE/c Cottle & Hwy 85	Edenvale	MF	275	JB	5/4/12
PD12-007	2/16/12	River Oaks Apts (East)	097-33-102	N/s River Oaks, 200' ely Research	North	MF	438	LX	5/25/12
PD12-008	3/1/12	Murano at Montecito Vista	455-09-060	W/s Monterey, 300' sly Umbarger	South	SF	100	JR	6/7/13
PD12-028	6/26/12	Cottle Station Mixed Use (Hitachi)	706-04-013	NE/c Cottle & Hwy 85	Edenvale	MF	234	JB	11/19/12
PD12-036	8/14/12	North Tenth Street Apts	249-08-004	W/s N. 10th, bet Vestal & E. Mission	Central	MF	166	JR	2/8/13
PD12-040	9/14/12	Orvieto Family/Senior Apts[1]	455-09-064	W/s Monterey, 300' sly Umbarger	South	MF	198	LX	1/11/13
PD13-023	6/25/13	Newbury Park Mixed Use	254-04-076	NW/c King & Dobbin	Alum Rock	MF	230	EL	1/2/13
PDA04-076-02	12/16/11	Ajisai Gardens Apts	249-37-006	SE/c E. Taylor & N. 7th	Central	MF	103	LX	6/1/12
PDA11-007-02	8/8/12	Orchard Park	237-03-070	SW/c E. Brokaw & Oakland	Berryessa	SF	240	LX	11/20/12
PDA12-035-01	3/18/13	Ascent Apts (Hitachi)	706-04-013	NE/c Cottle & Hwy 85	Edenvale	MF	650	JB	5/3/13
Total							**6,269**		
Approved Projects (Construction Not Yet Commenced)									
CP11-034	5/10/11	North San Pedro Apts	259-23-016	NE/c Hwy 87 & Bassett	Central	MF	135	LX	12/14/11
H12-020	1/16/13	San Pedro Square	259-32-044	SE/c Bassett & Terraine	Central	MF	406	BR	2/24/14
H13-041	10/31/13	Silvery Towers Apts	259-32-004	SW/c W. St. James & N. San Pedro	Central	MF	643	KT	2/26/14
H14-023	6/9/14	Post & San Pedro Tower	259-40-088	NW/c San Pedro & Post	Central	MF	182	EL	10/8/14
PD09-039	11/23/09	Edwards Mixed Use	264-37-060	SW/c Edwards & S. 1st	Central	MF	50	SZ	7/2/10
PD12-009	3/1/12	Verona at Montecito Vista	455-09-062	W/s Monterey, 300' sly Umbarger	South	MF	277	SD	11/30/12
PD13-027	7/1/13	Vicenza at Montecito Vista	455-09-062	W/s Monterey, 300' sly Umbarger	South	MF	162	AA	11/22/13
PD13-044	10/25/13	Santa Teresa Transit Village	706-04-013	NE/c Cottle & Hwy 85	Edenvale	SF/MF	543	PK	3/12/14
PD13-048	12/11/13	Century Center Mixed Use	230-29-022	SW/c N. 1st & Century Center	North	MF	378	RB	6/4/14
PD14-012	2/28/14	Fairfield at West San Carlos	264-15-062	SE/c W San Carlos & Sunol	Central	MF	315	EL	10/28/14

Major Residential Development Activity
Projects of 50+ Dwelling Units, Submitted Since 1/1/08

File Number	Filing Date	Project Name	Tracking APN	Street Location	Planning Area	Housing Type	No. of Units	Proj. Mgr	Approval Date
PD14-031	6/27/14	Balbach Condos	264-30-067	S/s Balbach, 100' ely Almaden	Central	MF	101	RB	12/27/14
PD14-022	4/17/14	505 Lincoln	264-09-063	W/s Lincoln 500' sly Auzerais	Central	MF	190	LS	11/5/14
PDC05-101	10/14/05	Vendome Place	259-05-024	NW/c N. 1st & Taylor	Central	MF	433	LX	4/17/12
PDC09-033	12/17/09	Senter Road Family Apts	497-41-098	E/s Senter, 600' sly Tully	South	MF	102	LX	9/21/10
PDC13-009	3/15/13	Communication Hill*	455-09-040	Hill bet Hwy 87 & Monterey, nly Hillsdale	South	SF/MF	2,200	MD	10/21/14
PDC13-037	8/29/13	Race Street Terrace	261-42-072	Bet. Race & Grand, 300' sly Park	Central	MF	80	RB	12/17/13
Total							**6,197**		
Projects Pending City Approval									
H14-009	2/18/14	Parkview Tower	467-01-008	NE/c 1st & St James	Central	MF	216	EL	---
H14-010	2/28/14	Marshall Square	467-21-018	SE/c 1st & E St. John	Central	MF	190	RB	---
H14-034	10/2/14	First and Reed	472-26-030	N/s Reed, 167' ely 1st	Central	MF	105	EL	---
H14-037	11/5/14	NSP3 Tower	259-24-008	Block W/ Terraine Street btwen Basset & Julian	Central	MF	313	ES	---
H15-007	1/23/15	Modera	259-35-042	W/s N San Pedro, 300' nly Santa Clara	Central	MF	204	ES	---
PD12-013	3/29/12	Ohlone Mixed Use (Phase 1)	264-14-131	SW/c W. San Carlos & Sunol	Central	MF	263	LX	---
PD14-044	9/3/14	King & Dobbin Transit Vilage Lot E	254-04-079	N/s Dobbin, 600' ely N King	Alum Rock	MF	67	ES	---
PD14-051	10/30/14	777 Park	261-36-062	NE/C Laurel Grove & Park	Central	MF	182	LS	---
PD14-054	11/12/14	King & Dobbin Transit Vilage Lot H	254-55-010	N/s Dobbin, 718' ely King	Alum Rock	SF	105	ES	---
PD15-003	1/27/15	785-807 The Alameda	261-01-003	N/s The Alameda, 400' wly Stockton	Central	MF	168	JT	---
PD15-004	2/2/15	Hanover Cannery	249-09-001	NW/c N 10th & E Taylor	Central	MF	403	JP	---
PD14-055	1/13/15	Lee Ave Apartments	284-32-014	SE/c Southwest & Leigh	Willow Glen	MF	64	JP	---
PDA07-094-01	1/13/15	2nd Street Studio	477-01-082	SE/c S 2nd Street & Keyes	Central	MF	135	JP	---
PDA14-035-01	8/21/14	Comm Hill (Phase 1)	455-28-017	Comm Hill & CalTrain Railway	South	SF	314	MD	---
PDC13-004	2/27/13	Ohlone Mixed Use (Balance)*	264-14-131	SW/c W. San Carlos & Sunol	Central	MF	537	LX	---
PDC13-012	4/9/13	Park Family/Senior Apts	261-36-062	N/s Park, 450' ely Sunol	Central	MF	181	KT	---
PDC13-034	8/16/13	Almaden Apts	455-21-050	W/s Almaden, 660' sly Willow Glen	South	MF	124	EL	---
PDC13-050	11/13/13	Santana Row (balance)	277-40-015	SE/c Winchester & Stevens Creek	West Valley	SF/MF	434	KT	---
Total							**4,005**		
GRAND TOTAL							**25,806**		

Footnote: *Balance, Remaining Development in Approved Zoning

File Number Prefixes: PDC= Planned Development Rezoning; PD= Planned Development Permit; H= Site Development Permit; CP= Conditional Use Permit

Major Commercial Development Activity
Projects of 25,000+ Square Feet, Submitted Since 1/1/08

File Number	Filing Date	Project Name	Tracking APN	Street Location	Planning Area	Square Footage (approx.)	Hotel Guest Rooms	Proj Mgr	Approval Date
Projects Completed									
CP08-057	6/26/08	Brokaw Commons	237-03-074	NW/c Oakland & Brokaw	Berryessa	102,000		ES	10/22/08
CP08-071	8/29/08	Hyatt House	097-03-138	SE/c N. 1st & Hwy 237	North	116,000	160	CB	12/10/08
CP10-059	11/9/10	Courtyard Marriott @ First	097-14-108	SE/c N. 1st & Hwy 237	North	99,000	157	JN	4/20/11
H10-018	9/17/10	First United Methodist Church	467-19-078	NE/c E. Santa Clara & N. 5th	Central	24,000		LX	4/8/11
H13-008	2/20/13	Orchard Supply Hardware	264-15-028	SW/c W. San Carlos & Royal	Central	49,000		RB	5/31/13
PD07-033	4/13/07	The Verdant/Latitude Apts	097-07-086	NW/c Zanker & Tasman	North	25,000		JB	11/30/07
PD07-049	12/28/11	Coleman Landings	230-46-068	NW/c Coleman & Newhall	North	245,000		SD	2/3/12
PD07-055	6/6/07	SBIA Evergreen Center/Mosque	652-13-001	E/s Ruby, 250' nly Murillo	Alum Rock	28,000		JB	3/21/08
PD08-054	8/12/08	Samaritan Medical Center	421-37-012	NE/c Samaritan & S. Bascom	Cambrian/Pioneer	75,000		ES	3/24/09
PD09-018	5/7/09	Lincoln Office/Retail	429-06-070	SE/c Lincoln & Willow	Willow Glen	41,000		SZ	5/21/10
PD09-021	6/11/09	Bellarmine (Academic Building)	261-11-005	NE/c Elm & Emory	Central	55,000		SD	11/13/09
PD09-040	12/2/09	Valley Christian Schools	684-05-019	Ely term. Skyway	Edenvale	50,000		JC	8/25/10
PD10-011	6/15/10	Bellarmine (Life Center/Gym)	261-11-005	NE/c Elm & Emory	Central	40,000		JN	1/14/11
PD10-025	11/5/10	M8trix Casino/Hotel (Phase 1)	230-29-065	SE/c Airport & Old Bayshore	North	89,000		JH	3/18/11
PD10-027	11/22/10	Chinmaya Mission	612-53-046	NE/c Clayton & Hickerson	Alum Rock	26,000		JC	3/21/11
PD11-002	1/20/11	Earthquakes Soccer Stadium	230-46-055	SW/c Coleman & Newhall	North	219,000		LX	2/22/12
PD11-013	5/5/11	Foxworthy Retail	451-06-066	NW/c Almaden & Hillsdale	Willow Glen	25,000		JN	7/15/11
PD11-027	9/2/11	Sun Garden Grocery	477-07-018	E/s Monterey, 300' sly E. Alma	Central	51,000		JC	11/2/11
PD12-015	4/13/12	Village Oaks (Hitachi)	706-04-013	NE/c Cottle & Hwy 85	Edenvale	308,000		JB	9/27/12
PD12-017	4/27/12	Whole Foods Market	261-01-098	NW/c The Alameda & Stockton	Central	33,000		JB	2/26/13
Total						**1,700,000**	**317**		
Projects Under Construction									
H13-039	10/4/13	San José Airport Terminals	230-03-101	Mineta Airport	North	278,500		PK	1/17/14
HA13-013-01	12/6/13	Hampton Inn	259-39-111	SE/c W. Santa Clara & Hwy 87	Central	128,000	208	RB	5/19/14
PD07-007	1/10/07	Fruitdale Station (Phase 2)	284-02-008	SE/c Southwest Expwy & Fruitdale	Willow Glen	30,000		SM	3/21/08
PD07-090	10/23/07	Brandon Park Commercial	097-06-038	W/s N. 1st, 450' sly Rio Robles	North	45,000		JB	4/4/08
PD08-062 / PD12-016	6/23/08	Residence Inn/SpringHill Suites	230-29-109	SW/c N. 1st & Skyport	North	216,000	321	JD	2/10/09
PD09-016	4/23/09	Regional Medical Center (Phase 2A)	481-05-021	SW/c McKee & N. Jackson	Alum Rock	161,000		SD	11/4/09
PD11-024	7/20/11	Almaden Ranch / Bass Pro	458-17-018	SE/c Almaden & Chynoweth	Cambrian/Pioneer	377,000		LX	5/19/12
PD12-014	4/4/12	Santana Row (Lot 11)	277-33-004	SE/c Winchester & Olsen	West Valley	230,000		LX	10/26/12
PD12-048	12/20/12	Aloft Hotel	015-45-026	NW/c Hwy 237 & Gold	Alviso	82,000	175	SD	4/12/13

Major Commercial Development Activity
Projects of 25,000+ Square Feet, Submitted Since 1/1/08

File Number	Filing Date	Project Name	Tracking APN	Street Location	Planning Area	Square Footage (approx.)	Hotel Guest Rooms	Proj Mgr	Approval Date
PD13-015	4/19/13	Sun Garden Retail Center	477-07-013	E/s Monterey, 300' sly E. Alma	Central	206,000		JB	5/17/13
Total						**1,753,500**	**704**		
Approved Projects (Construction Not Yet Commenced)									
CP13-059	08/08/13	Villa Sport	245-05-017	Betwn N Capitol & Hwy 680, 300' nly Berryesa	Berryessa	88,000		KT	05/07/14
CP13-081	11/05/13	Oakmont of San José	282-06-023	W/s Thorton, 260' nly Maywood	Willow Glen	60,000		EL	02/26/14
H14-006	1/22/14	Hyatt House/Hyatt Place	101-05-002	Sly term. Karina	North	206,000	329	EL	5/7/14
H14-011	3/7/14	Homewood Suites	015-39-053	NW/c Hwy 237 & N 1st	Alviso	106,000	145	RB	9/24/14
H14-029	8/14/14	2890 North 1st Street Office	101-30-006	Bound N 1st, Daggett, Zanker & Plumeria	North	42,000		RB	12/10/14
HA06-027-02	6/10/13	Valley Fair Shopping Center	274-43-035	NW/c Hwy 17 & Stevens Creek	West Valley	525,000		RB	10/30/13
PD08-001	1/7/08	Pepper Lane Mixed Use	254-15-072	SE/c Berryessa & Jackson	Alum Rock	30,000		RM	10/10/08
PD08-069	11/26/08	Berryessa Crossing Retail (North)	241-04-006	Both sides Berryessa, wly UP railroad	Berry./Alum Rock	119,000		PK	11/6/13
PD12-019	7/19/12	Coleman Highline Office	230-46-062	NW/c Coleman & Newhall	North	683,000		JB	6/10/13
PDC10-022	10/26/10	The Plaza at Evergreen	670-29-020	W/s Capitol, 1500' sly Quimby	Evergreen	200,000		JB	12/9/14
PDC13-009	3/15/13	Communications Hill (KB Home)	455-09-040	Hill bet Hwy 87 & Monterey, nly Hillsdale	South	68,000		BR	11/21/14
Total						**2,127,000**	**474**		
Projects Pending City Approval									
H13-048	12/16/13	Hampton Inn/Holiday Inn	237-17-067	E/s N. 1st, opp. Karina	North	173,000	284	PK	---
PD13-049	12/13/13	Bay 101 Casino/Hotel	235-01-020	NE/c N 1st & Matrix	North	245,000		RB	---
PD15-002	1/27/15	iStar Costco	706-08-023	W/s Greak Oak 1000' nly Hwy 85	Edenvale	148,000		RB	---
PDC13-041	9/26/13	Skyport Plaza Hotel/Office	230-29-117	SE/c Skyport & Hwy 87	North	350,000	400	RB	---
PDC13-050	11/13/13	Santana Row (balance)	277-40-015	SE/c Winchester & Stevens Creek	West Valley	639,000		KT	---
Total						**1,555,000**	**684**		
GRAND TOTAL						**7,135,500**	**2,179**		

File Number Prefixes: H= Site Development Permit; CP= Conditional Use Permit; PDC= Planned Development Rezoning; PD= Planned Development Permit

Major Industrial Development Activity
Projects of 75,000+ Square Feet, Submitted Since 1/1/08

File Number	Filing Date	Project Name	Tracking APN	Street Location	Planning Area	Square Footage (approx.)	Proj. Mgr	Approval Date
Projects Completed								
H09-002	1/14/09	Brocade (Phase 1)	097-03-139	SE/c N. 1st & Hwy 237	North	580,000	CB	10/9/09
SP08-046	8/14/08	Equinix (Phase 1)	706-09-102	NW/c Great Oaks & Hwy 85	Edenvale	125,000	SD	10/9/09
SP09-057	9/16/09	Zero Waste Facility	015-38-005	N/s Los Esteros, term Grand	Alviso	283,000	RB	12/22/11
SP11-046	11/29/11	Public Storage	477-22-028	SW/c Tully & Old Tully	South	115,000	JB	3/29/12
Total						**1,103,000**		
Projects Under Construction								
H13-001	1/3/13	Samsung Semiconductor	097-53-026	NW/c N. 1st & Tasman	North	680,000	SD	3/25/13
H13-024	6/17/13	A-1 Self Storage	477-49-026	SW/c Phelan & Senter	South	107,000	RB	10/30/13
H14-020	5/20/14	SuperMicro	237-05-036	SW/c Ridder Park & Schallenberger	Berryessa	182,000	RB	9/13/2014
Total						**969,000**		
Approved Projects (Construction Not Yet Commenced)								
H09-002	1/14/09	Brocade (Phase 2)	097-03-139	SE/c N. 1st & Hwy 237	North	420,000	CB	10/9/09
H12-008	5/17/12	101 Tech	101-03-007	Wly term. Atmel, 200' nly Hwy 101	North	666,000	SD	10/22/12
H13-040	10/16/13	Peery Arrillaga	23716071	W/ Bering between E Brokaw & Crane	North	1,949,000	RB	3/19/14
H14-008	2/14/14	Self Storage	235-16-001	SE/c N 10th Street & Horning	Central	84,000	AA	6/25/14
H14-027	7/2/14	Silicon Valley Industrial Center	678-08-051	W/s Piercy, 2070' nly Silicon Valley	Edenvale	243,000	RB	12/17/14
H14-029	8/14/14	2890 North 1st Street Office	101-30-006	Bound N 1st, Daggett, Zanker & Plumeria	North	42,000	RB	12/10/14
PD07-081	9/18/07	Legacy on 101 Office	101-02-015	W/s Orchard, 750' nly Charcot	North	398,000	JB	12/21/07
PD07-081 / AD11-423	9/18/07	Legacy on 101	101-02-015	W/s Orchard Parkway	North	398,000	JB	1/2/08
PD08-030	4/22/08	Kaiser Permanente	230-29-056	W/s N. 1st bet Skyport & Sonora	North	558,000	JB	8/8/08
PD12-024	6/4/12	North First Campus	101-02-011	SW/c N. 1st & Component	North	2,350,000	JB	11/5/12
PD13-007	2/14/13	North First Campus (Phase 1)	101-02-011	SW/c N. 1st & Component	North	450,000	JB	12/4/13
PD13-012	3/20/13	237 At First Street	015-39-006	NW/c N. 1st & Hwy 237	Alviso	615,000	RB	12/4/13
PD13-039	9/16/13	Trammel Crow (R&D and Office Buildings)	015-44-011	NW/c Nortech & Disk	Alviso	415,000	RB	4/23/14
PD14-005	1/31/14	HGST Great Oaks Campus	706-07-020	Bound Cottle, Monterey, Hwy 85 & Manassas	Edenvale	335,000	RB	6/4/14
PD14-007	2/14/14	Trammel Crow (Manufacture Buildings)	015-44-011	NW/c Nortech & Disk	Alviso	563,760	RB	6/17/14
Total						**9,486,760**		

Major Industrial Development Activity
Projects of 75,000+ Square Feet, Submitted Since 1/1/08

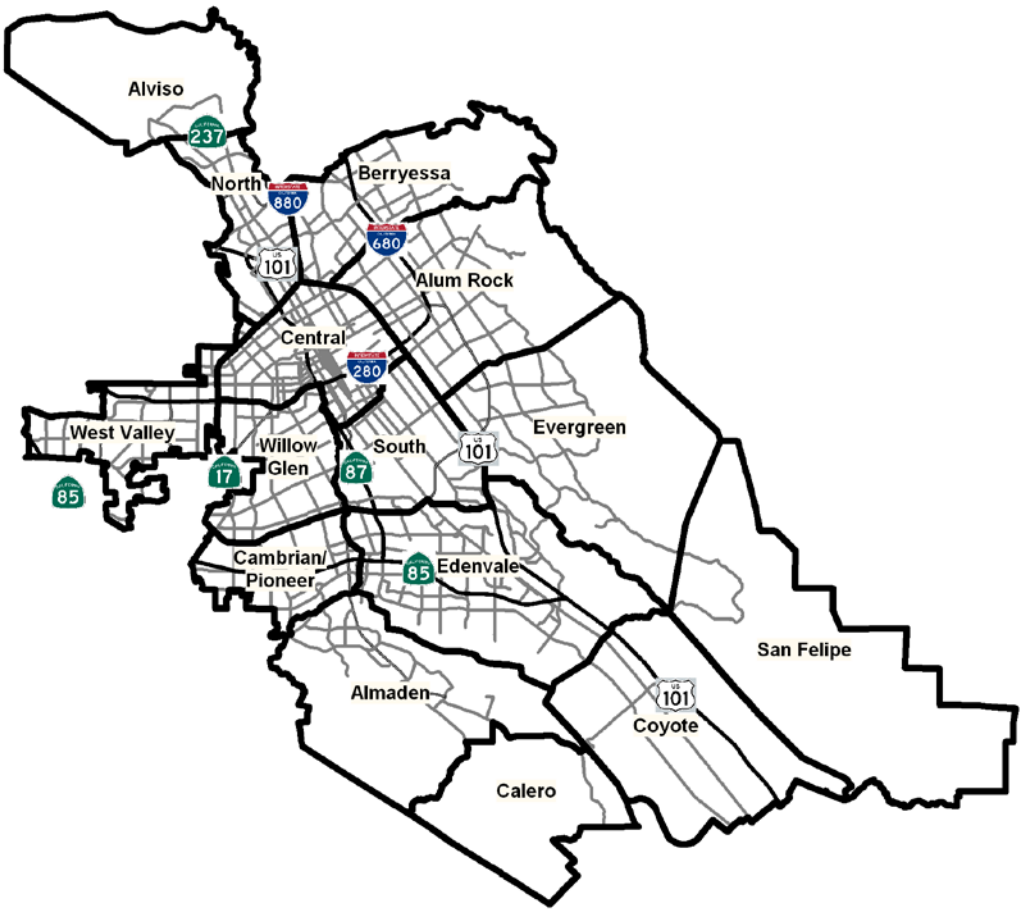
File Number	Filing Date	Project Name	Tracking APN	Street Location	Planning Area	Square Footage (approx.)	Proj. Mgr	Approval Date
Projects Pending City Approval								
H13-040	10/16/13	First/Brokaw Campus	237-16-073	SE/c N. First & Brokaw	North	2,025,000	RB	---
PD13-039	9/16/13	Midpoint at 237	015-39-006	Both sides N. First bet Hwy 237 & Grand	Alviso	1,120,000	RB	---
PD13-046	10/29/13	Public Storage	462-19-013	N/s Capitol, 200' wly Snell	South	123,000	RA	---
PD14-005	1/31/14	Hitachi Campus (Phase 1)	706-07-020	NE/c Cottle & Hwy 85	Edenvale	335,000	RB	---
PD14-013	3/4/14	Samaritian Court Medical Office	421-38-007	S/s terminum Samaritan	Cambrian/Pioneer	69,000	LS	---
Total						**3,672,000**		
GRAND TOTAL						**15,230,760**		

File Number Prefixes: H= Site Development Permit; CP= Conditional Use Permit; PDC= Planned Development Rezoning; PD= Planned Development Permit

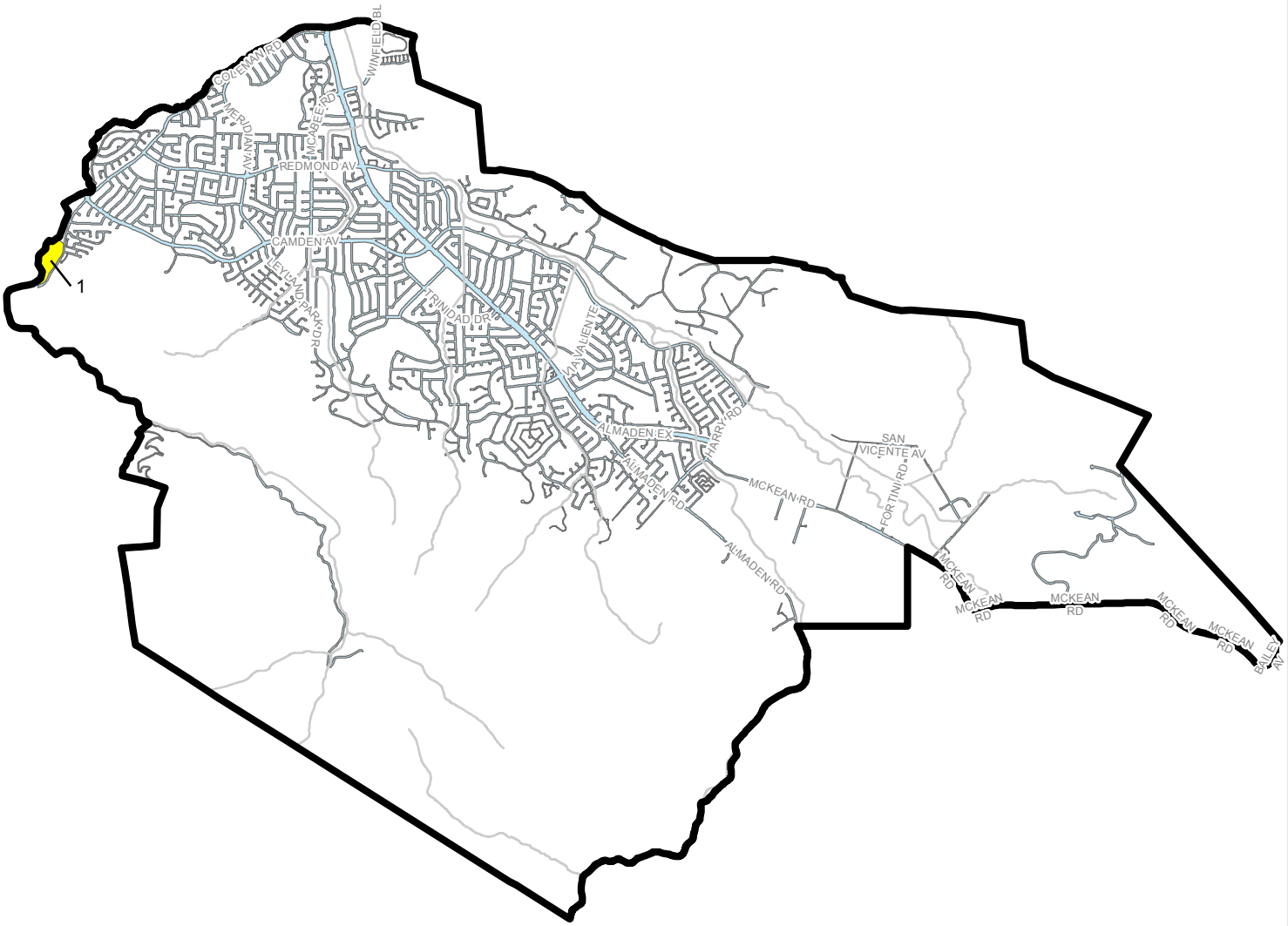
VI. MAJOR DEVELOPMENT ACTIVITY MAPS (PLANNING AREAS)

San Jose is divided into a total of fifteen (15) planning areas (see Figure 1, below). The individual planning area maps that follow include projects in all status categories submitted since January 1, 2008. These maps can be used in conjunction with the data contained in Section V of this report to allow closer analysis of the rate, type, and location of major development activity in the City. (Note: map exhibits are not provided for the Calero, Coyote, or San Felipe planning areas, as no major development activity occurred there and/or these areas are outside the City's Urban Service Area and Urban Growth Boundary).

Figure 1: San Jose Planning Areas



Almaden Planning Area
Major Development Activity

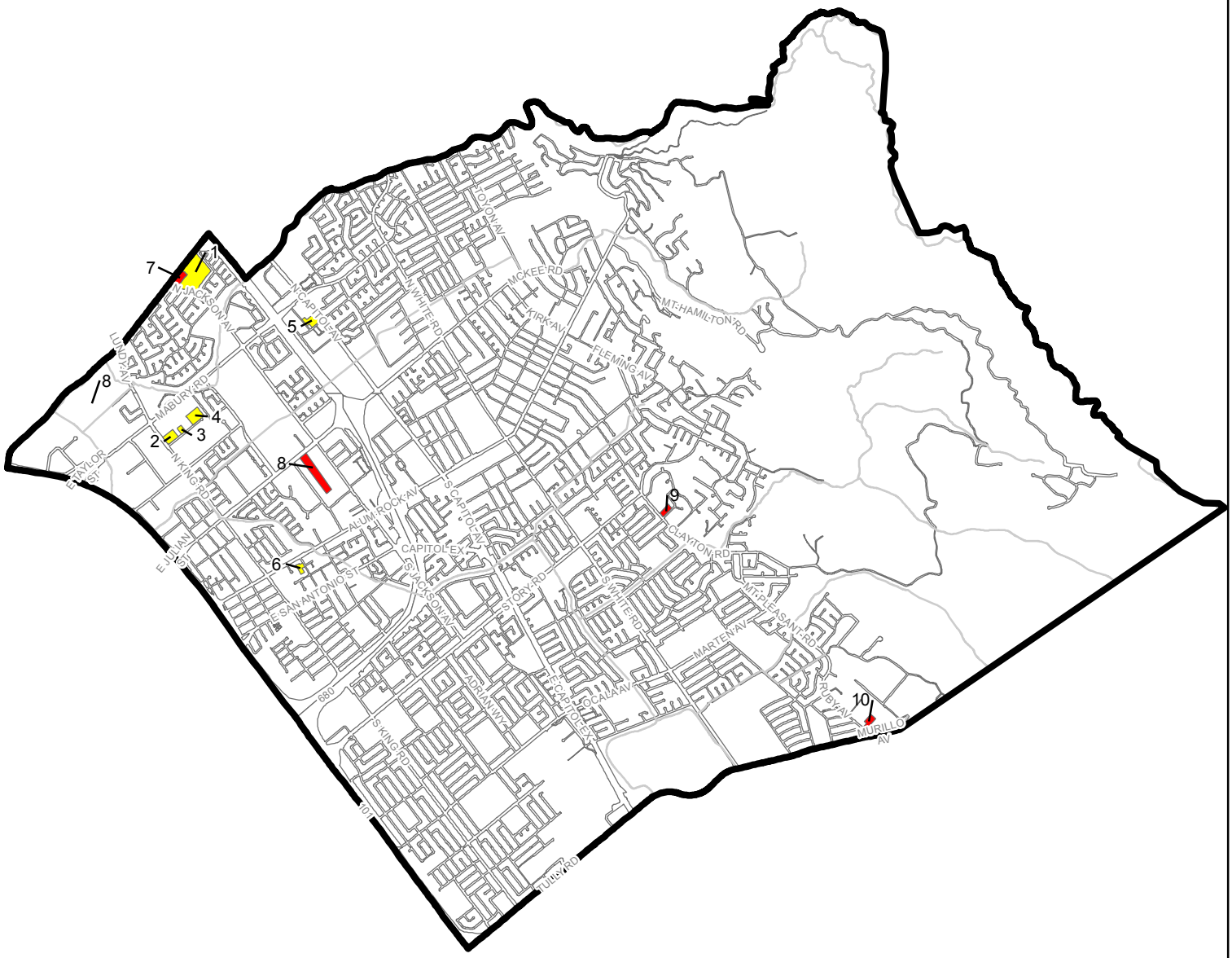


Residential Projects

1 Brooksides Home

Total Dwelling Units = 89

Alum Rock Planning Area
Major Development Activity



Residential Projects

1 Pepper Lane Mixed Use
2 Newbury Park Mixed Use
3 King & Dobbin Transit village Lot E
4 King & Dobbin Transit Village Lot H
5 Celadon Townhomes (Phase 2)
6 Mayfair Court Apts

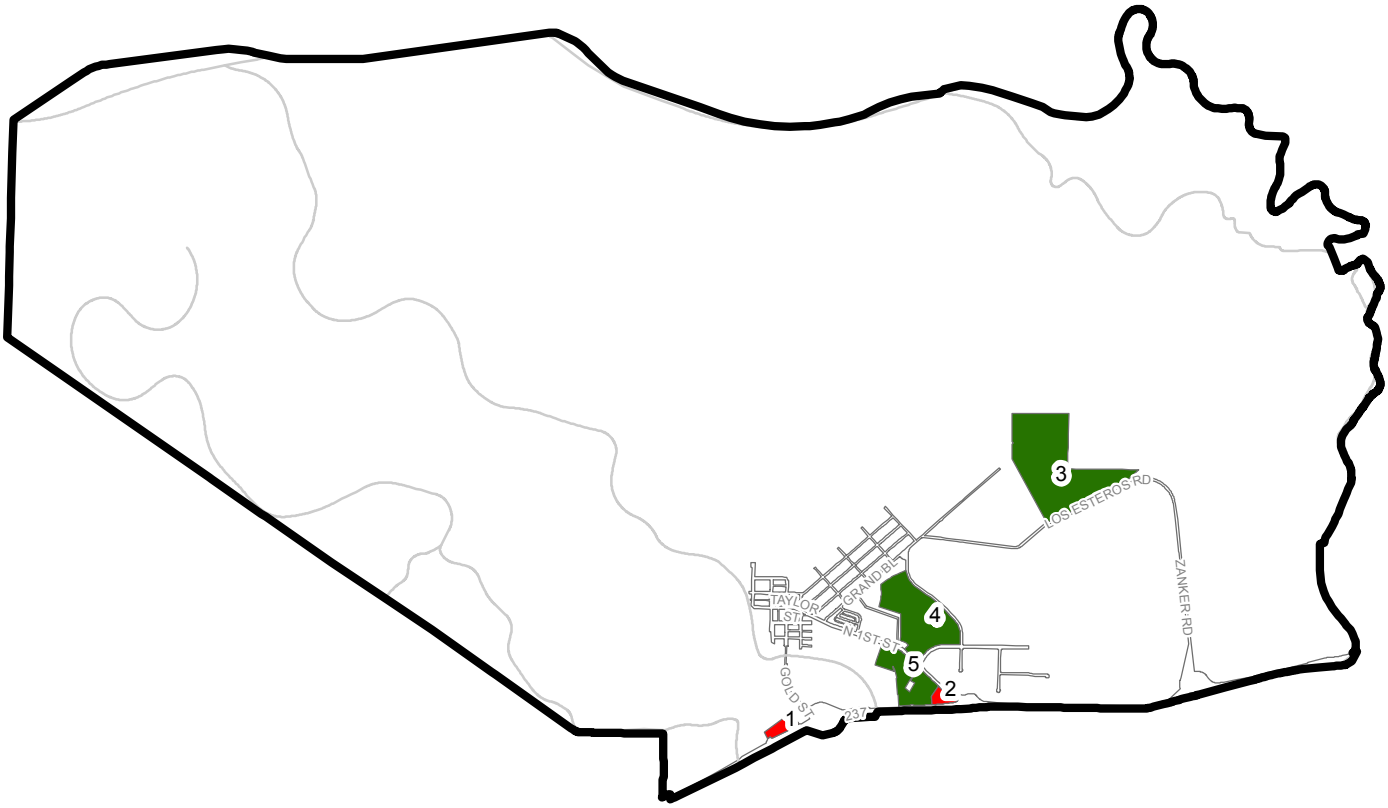
Total Dwelling Units = 943

Commercial Projects

7 Pepper Lane Mixed Use
8 Regional Medical Center (Phase 2A)
9 Chinmaya Mission
10 SBIA Evergreen Center/Mosque

Total Commercial Sq. Feet = 245,000

Alviso Planning Area
Major Development Activity



Commercial Projects

1 Aloft Hotel
2 Homewood Suites Hotel

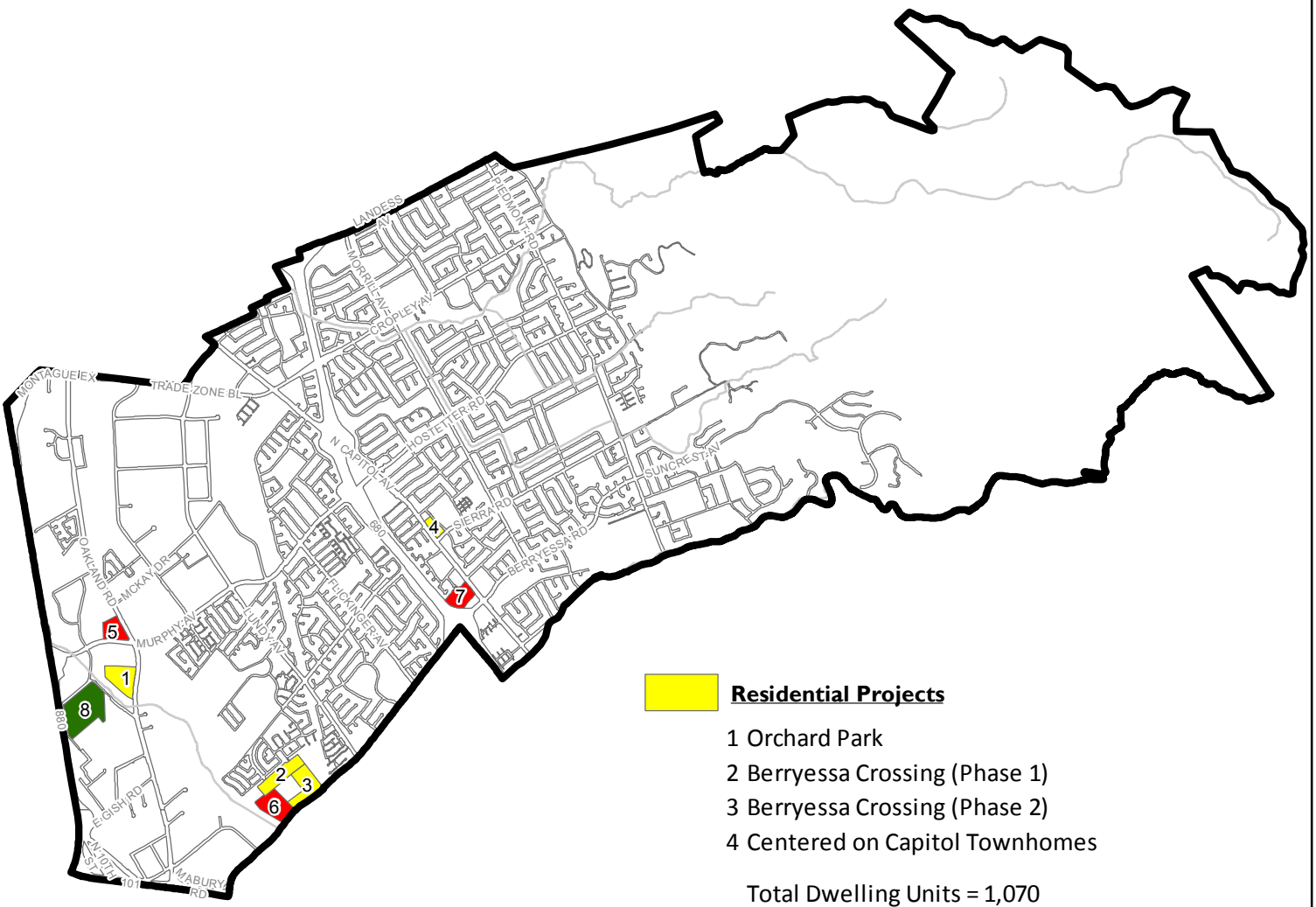
Total Commercial Sq. Feet = 188,000

Industrial Projects

3 Zero Waste Facility
4 Trammel Crow (R&D/Office/Manufacture)
5 237 At First Street

Total Industrial Sq. Feet = 1,313,000

Berryessa Planning Area
Major Development Activity



Residential Projects

1 Orchard Park
2 Berryessa Crossing (Phase 1)
3 Berryessa Crossing (Phase 2)
4 Centered on Capitol Townhomes

Total Dwelling Units = 1,070

Commercial Projects

5 Brokaw Commons
6 Berryessa Crossing Retail (North)
7 Villa Sport

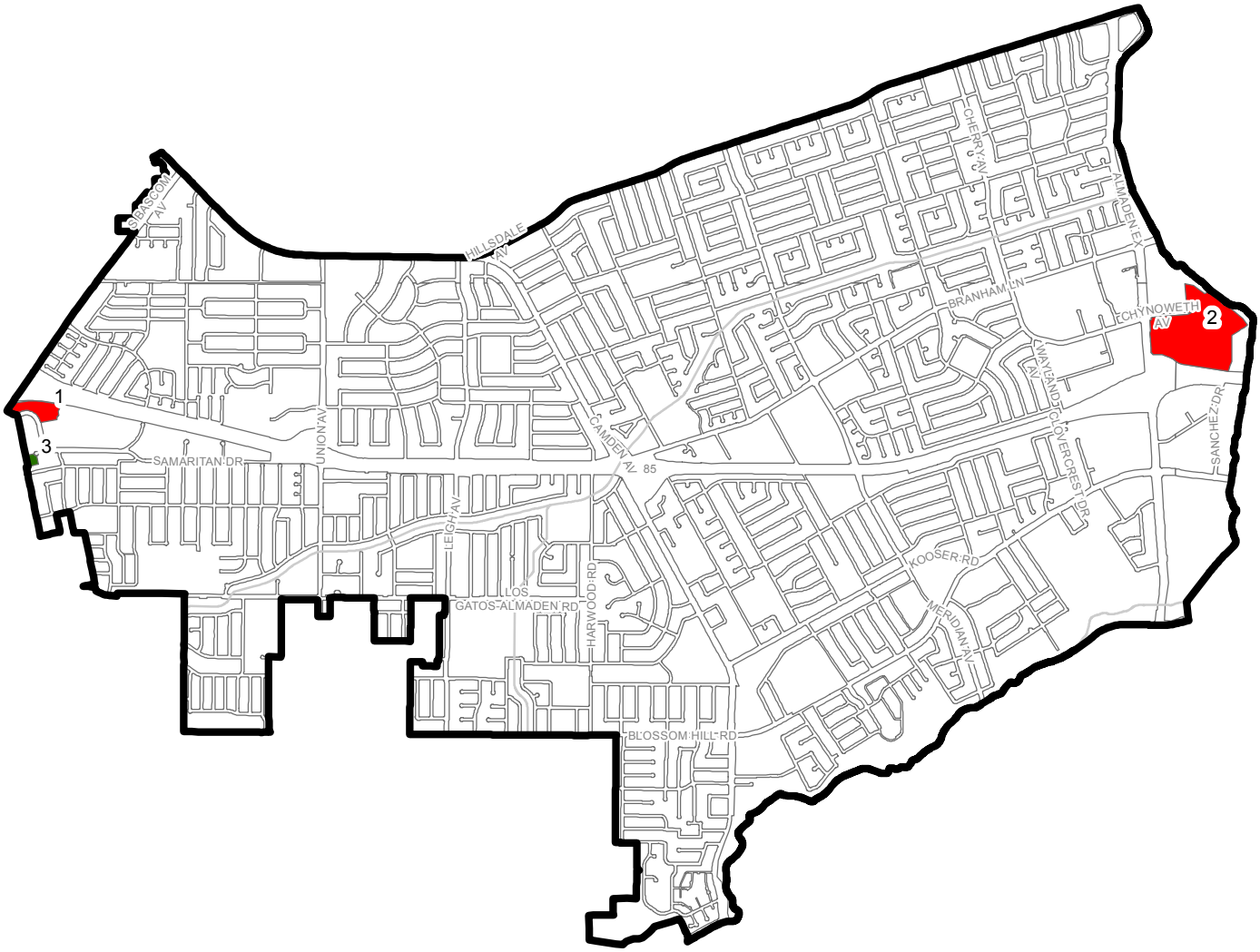
Total Commercial Sq. Feet = 309,000

Industrial Projects

8 SuperMicro

Total Industrial Sq. Feet = 182,000

Cambrian/Pioneer Planning Area
Major Development Activity



Commercial Projects

1 Samaritan Medical Center
2 Almaden Ranch / Bass Pro

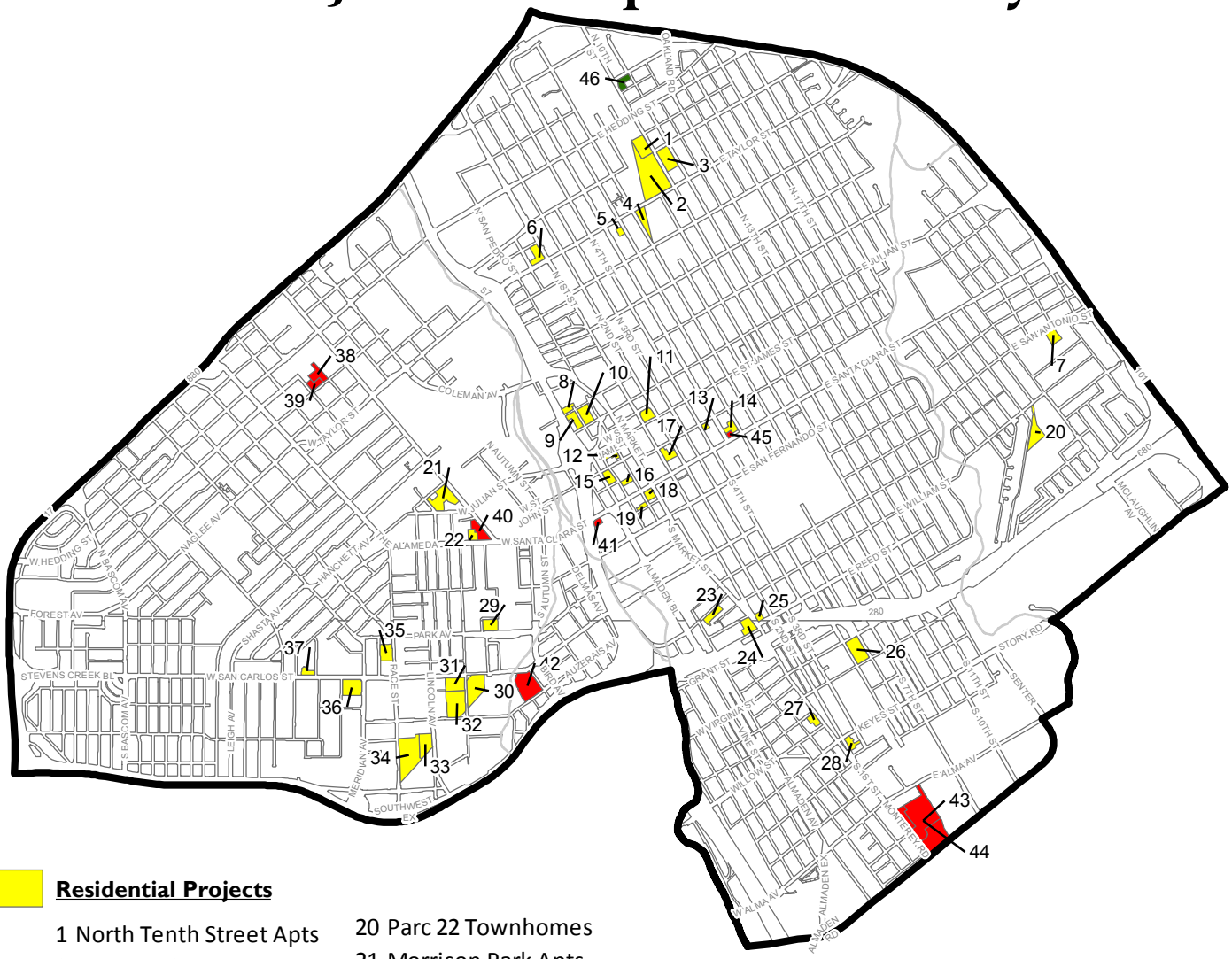
Total Commercial Sq. Feet = 452,000

Industrial Projects

3 Samaritan Court Medical Office

Total Industrial Sq. Feet = 69,000

Central Planning Area
Major Development Activity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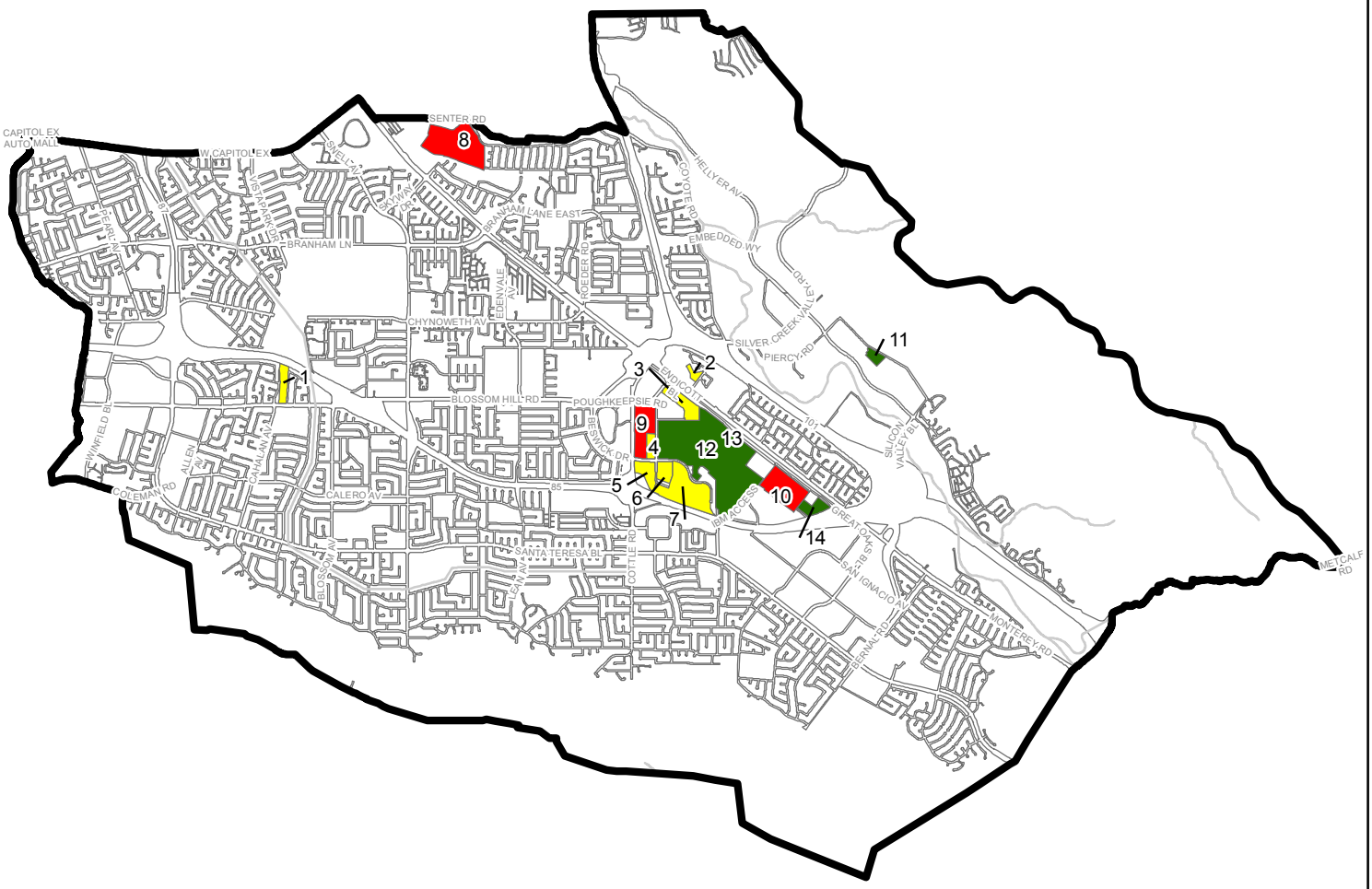
Edenvale Planning Area
Major Development Activity



Residential Projects

1 Westbury Homes
2 Ford Apts
3 Santa Teresa Transit Village
4 Cottle Station Mixed Use (Hitachi)
5 Ascent Apts (Hitachi)
6 Anton La Moraga Apts (Hitachi)
7 South Village (Hitachi)

Total Dwelling Units = 2,849

Commercial Projects

8 Valley Christian Schools
9 Village Oaks (Hitachi)
10 iStar Costco

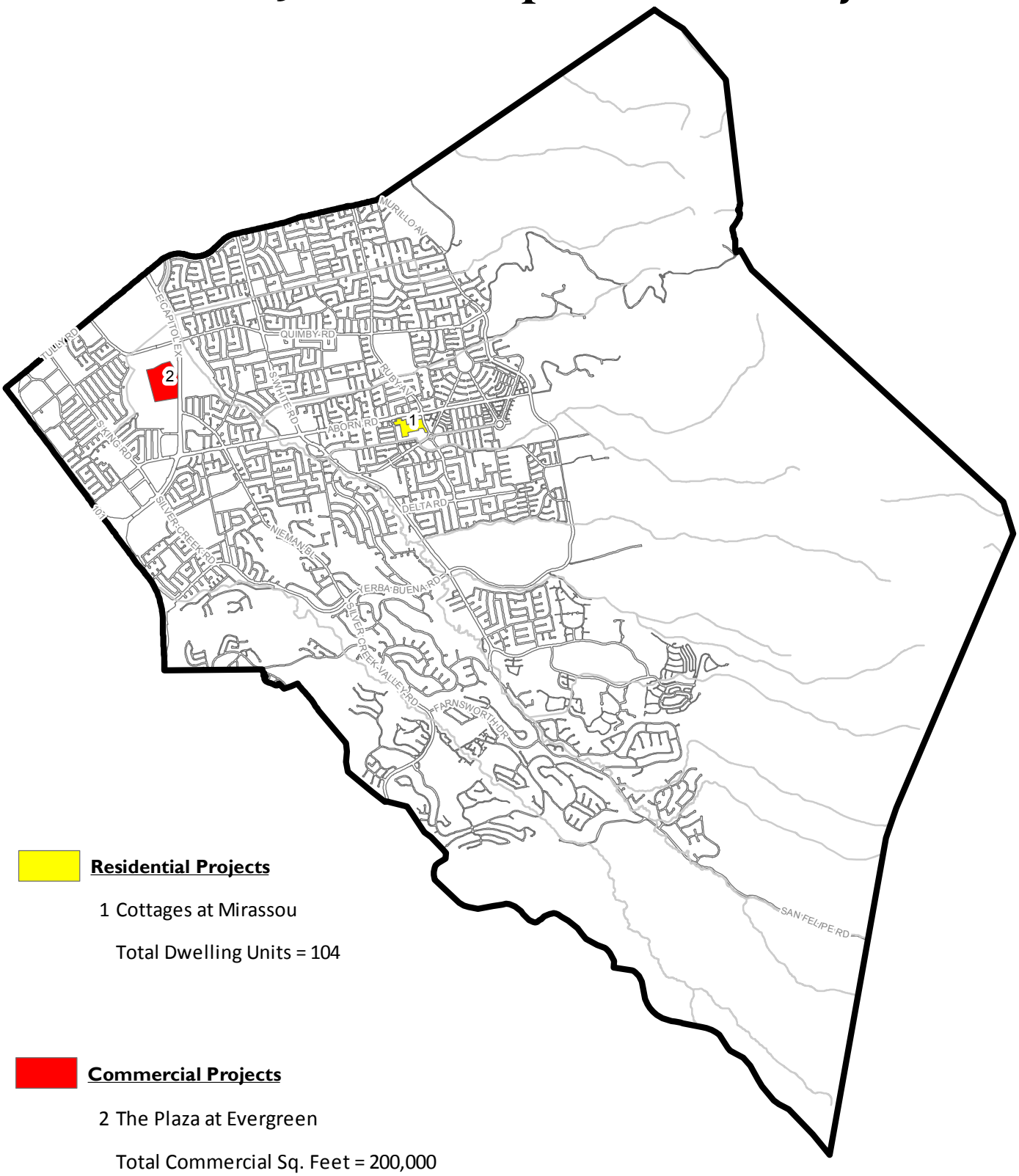
Total Commercial Sq. Feet = 506,000

Industrial Projects

11 Silicon Valley Industrial Center
12 HGST Greak Oaks Campus
13 Hitachi Campus (Phase 1)
14 Equinix (Phase 1)

Total Industrial Sq. Feet = 84,000

Evergreen Planning Area
Major Development Activity



Residential Projects

1 Cottages at Mirassou

Total Dwelling Units = 104

Commercial Projects

2 The Plaza at Evergreen

Total Commercial Sq. Feet = 200,000

North Planning Area
Major Development Activity

Residential Projects

1 Domain Apts
2 Tasman Apts
3 Enzo Apts
4 121 Tasman Apts
5 The Verdant/Latitude Apts
6 Brandon Park Apts
7 River Oaks Apts (West)
8 Crescent Village Apts
9 River Oaks Apts (East)
10 Epic Apts
11 Century Center Mixed Use
12 Rosemary Family/Senior Apts

Total Dwelling Units = 7,556

Commercial Projects

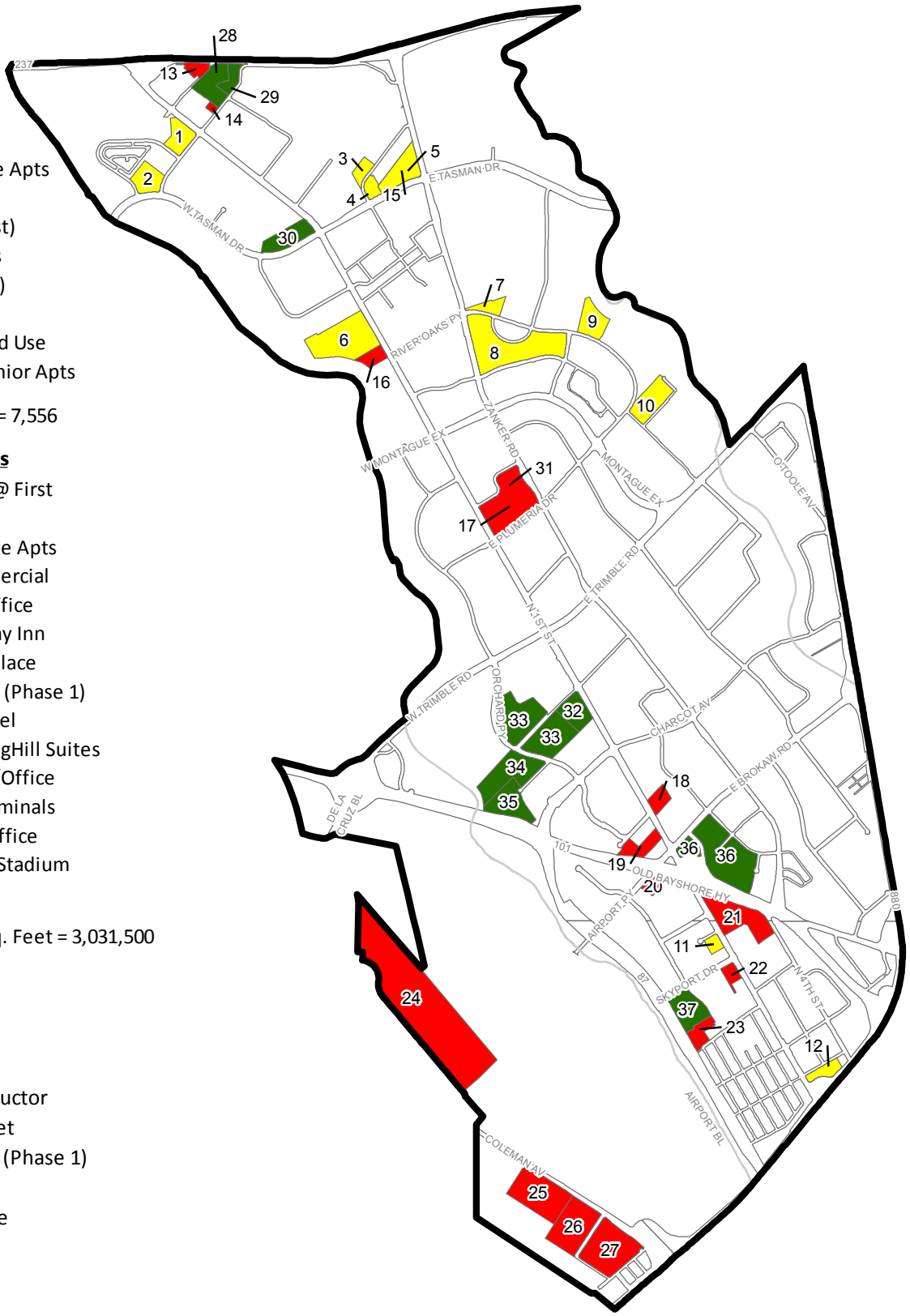
13 Courtyard Marriott @ First
14 Hyatt House
15 The Verdant/Latitude Apts
16 Brandon Park Commercial
17 2890 N. 1st Street Office
18 Hampton Inn/Holiday Inn
19 Hyatt House/Hyatt Place
20 M8trix Casino/Hotel (Phase 1)
21 Bay 101 Casino / Hotel
22 Residence Inn/SpringHill Suites
23 Skyport Plaza Hotel/Office
24 San Jose Airport Terminals
25 Coleman Highline Office
26 Earthquakes Soccer Stadium
27 Coleman Landings

Total Commercial Sq. Feet = 3,031,500

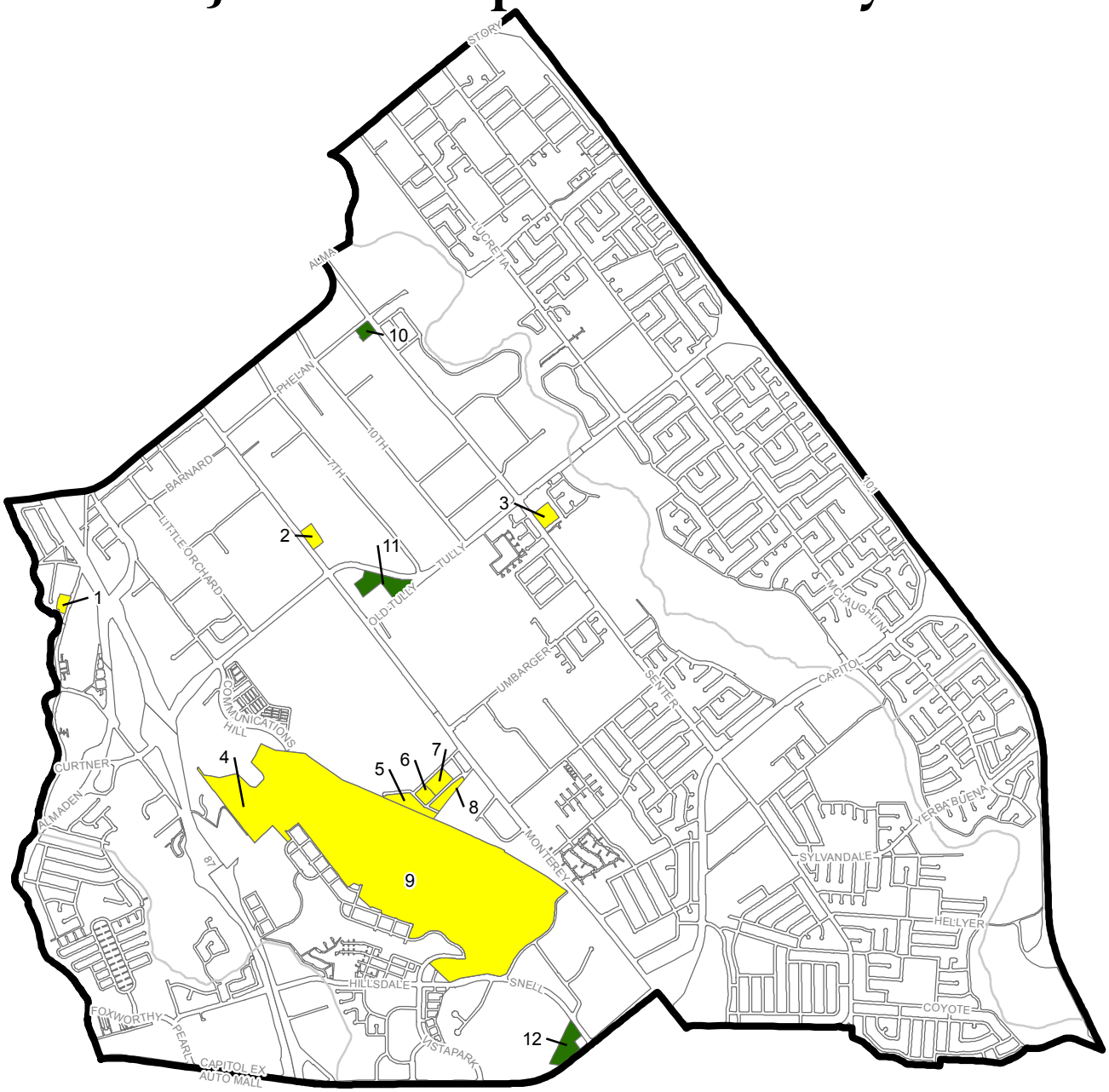
Industrial Projects

28 Brocade (Phase 1)
29 Brocade (Phase 2)
30 Samsung Semiconductor
31 2890 North 1st Street
32 North First Campus (Phase 1)
33 North First Campus
34 Legacy on 101 Office
35 101 Tech
36 Peery Arrillaga
37 Kaiser Permanente

Total Industrial Sq. Feet = 8,169,000



South Planning Area
Major Development Activity



Residential Projects

1 Almaden Apts
2 Metropolitan Apts
3 Senter Road Family Apts
4 Communications Hill (Balance)
5 Murano at Montecito Vista
6 Vicenza at Montecito Vista
7 Verona at Montecito Vista
8 Orvieto Family/Senior Apts

Total Dwelling Units = 2,951

Commercial Projects

9 Communications Hill

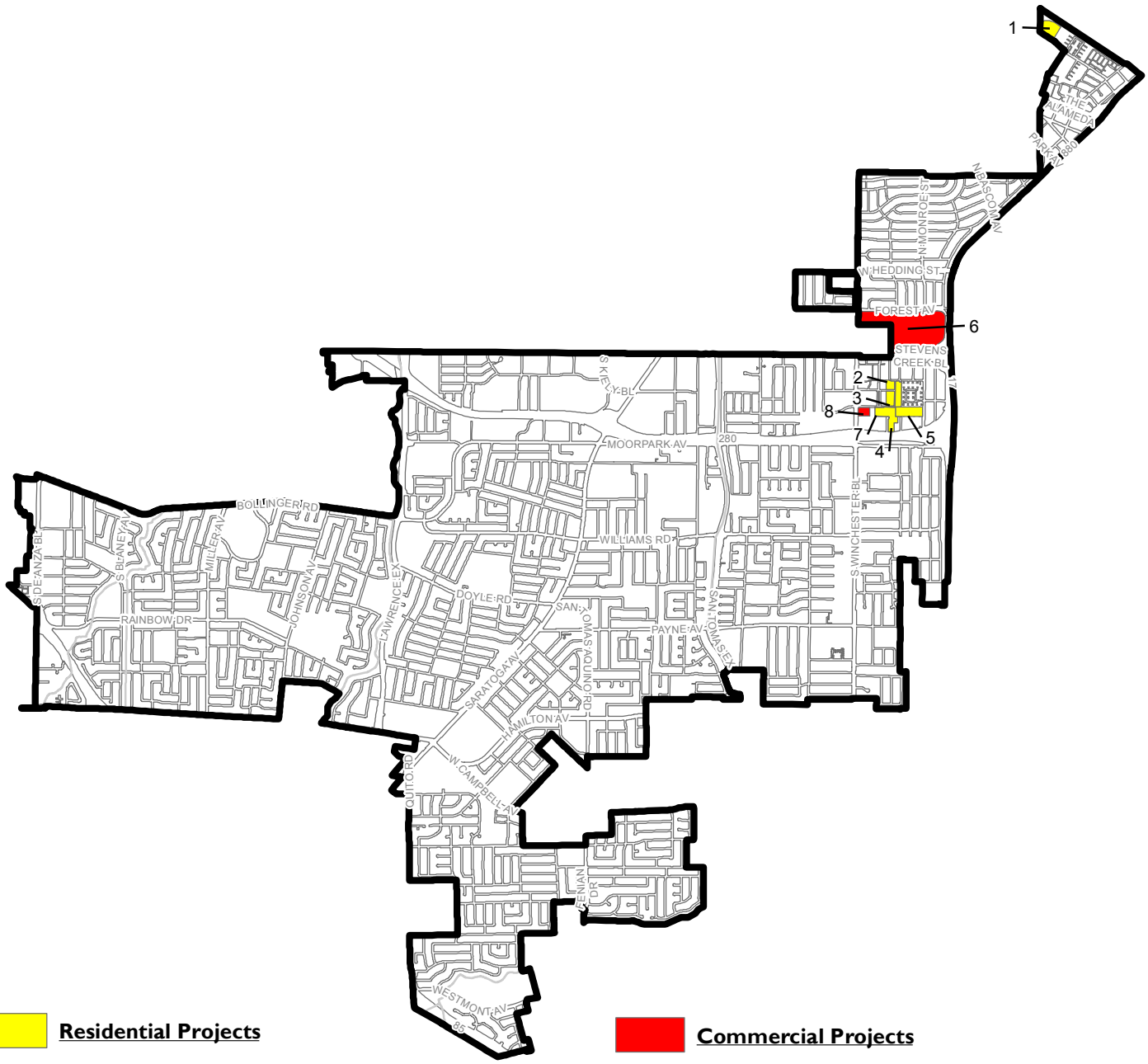
Total Commercial Sq. Feet =67,500

Industrial Projects

10 A-1 Self Storage
11 Public Storage
12 Public Storage

Total Industrial Sq. Feet = 345,000

West Valley Planning Area
Major Development Activity



Residential Projects

1 University Villas Apts
2 Santana Row (Levare)
3 Santana Row (Misora)
4 Santana Row (balance)
5 Vicino Townhomes

Total Dwelling Units = 1,014

Commercial Projects

6 Valley Fair Shopping Center
7 Santana Row (balance)
8 Santana Row (Lot 11)

Total Commercial Sq. Feet = 1,394,000

Willow Glen Planning Area
Major Development Activity

Residential Projects

1 Fruitdale Station (Phase 2)
2 Lee Ave Apartments
3 The Meridian at Willow Glen

Total Dwelling Units = 371

Commercial Projects

4 Oakmont of San Jose
5 Fruitdale Station (Phase 2)
6 Lincoln Office/Retail
7 Foxworthy Retail

Total Commercial Sq. Feet = 156,000

VII. APPENDIX: SOURCES

The Department of Planning, Building and Code Enforcement utilized a variety of information sources in the preparation of this report. These sources are described below.

Data Collection and Analysis

The Department's development project database was the primary initial resource for information on applications submitted to the City. Spreadsheets and Geographic Information Systems (GIS) were also used to manage and display this empirical information in a more readily comprehended format. Architectural drawings, aerial photographs, and fieldwork were also used to evaluate site-specific issues that could have affected the anticipated cost or timing of a project's construction.

Planning staff conducted and/or participated in a series of interviews/discussions with people with a variety of perspectives, including City staff processing development applications, developers or their representatives, and others working in the development industry or related fields, such as the City's Housing Department and Office of Economic Development. These discussions surfaced important information on specific development projects as well as provided a forum for review of the economic assumptions underlying the report's five-year forecast.

Review of Publications

Planning staff consulted several publications that made an important contribution to the preparation of this report, including: the Silicon Valley Business Journal, The Registry Real Estate Journal, the San Jose Mercury News, Joint Venture Silicon Valley Network's *2015 Index of Silicon Valley*, the Association of Bay Area Government's *Regional Housing Need Plan (2014-2022)*, the U.S. Census Bureau's *Census 2010* and *American Community Survey*, Marcus & Millichap's *Market Research Reports*, and Urban Land Institute's 2015 Emerging Trends in Real Estate.