

*Five-Year Economic Forecast  
and  
Revenue Projections*

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*2015-2019*

Appendix C

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Development Activity Highlights

Prepared by the Planning, Building and Code Enforcement Department

# **Development Activity Highlights and Five-Year Forecast (2015-2019)**



**Prepared by:**

**City of San Jose  
Department of Planning, Building and Code Enforcement  
February 2014**

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# **Development Activity Highlights and Five-Year Forecast (2015-2019)**

*For more information, please contact:*

**City of San Jose  
Department of Planning, Building and Code Enforcement  
Planning Division  
200 East Santa Clara Street  
San Jose, CA 95113  
(408) 535-3555**

*This report and other information can be found  
on the Planning Division website at:*

**<http://www.sanjoseca.gov/index.aspx?nid=2050>**

# Development Activity Highlights and Five-Year Forecast (2015-2019)

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# Development Activity Highlights and Five-Year Forecast (2015-2019)

## I. PURPOSE

The *Development Activity Highlights and Five-Year Forecast (2015-2019)* 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 clearly rebounded over the past few years alongside notable improvements in the local and regional economy. For example, recent news headlines reported that 80% of the employment gains throughout California in December 2013 occurred right here in the Bay Area. This job growth is creating the need for additional housing, and calendar years 2012 and 2013 taken together accounted for San Jose's highest rate of rental housing production in any 24-month period since 1980.

But this recovery has not yet translated into a comparable increase in non-residential activity that is commensurate with a full-fledged economic recovery. In particular, while in 2013 tenant improvements (alterations) reached their highest level since the "dot com" boom, aside from Samsung Semiconductor's 680,000-square foot headquarters in North San Jose there is yet to be built a significant amount of new retail or office space.

Fortunately, several high-profile economic development projects are now in the entitlement process, most notably the "First/Brokaw Campus" that proposes ten office buildings totaling two million square feet—the largest such project ever in San Jose. As well, a surge is clearly underway in the local hotel industry. Nonetheless, this forecast takes a conservative view of the future, estimating that activity levels beyond the current 2013/14 fiscal year will be moderate, amounting to an annual average of about \$850 million in construction valuation.

For context, this outlook differs from recoveries experienced during prior economic cycles over the past 15-20 years:

- Technology Boom (1996-2002), a robust era when annual construction valuation was generally in the \$1.5 to \$2.0 billion range (peaking at over \$2.2 billion in 2000); and,

- Housing Boom (2003-2008), a slower but steadier period when valuation averaged about \$1.0 billion per year, and strength in residential activity somewhat offset slack in non-residential activity.

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 (2015-2019).

### **Residential Development**

*PAST: 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 onset of the 2008/09 recession, activity dropped off sharply to an average of about 1,500 units per year. But in late-2010, apartment construction in particular began a strong rebound, returning activity to an overall average of 3,000 units per year, which pace has been sustained for the past several years.*

*PRESENT: In fiscal year 2013/14, staff forecasts that residential construction activity will peak at 3,250 units—the highest level in almost a decade. With considerable new rental supply coming to the market, the vacancy rate should rise and rent growth slow, tempering the appeal of additional near-term investment. Meanwhile, after five consecutive years of weakness, with the recent strong rebound in property values some for-sale development is beginning to reemerge.*

*FUTURE: Over the five-year forecast period, new construction activity is expected to continue at the relatively moderate pace of 2,500 units per year. High-density, multi-family housing should comprise roughly 90% of all units, and include more high-rise development in Downtown. With many reputable builders having used the recent downturn as an opportunity to position themselves for the future, it seems clear that momentum in new housing construction will continue over the near term.*

### **Commercial Development**

*PAST: 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 2012/13, commercial construction activity amounted to approximately \$200 million, with new construction at its lowest level in almost 20 years. Meanwhile, tenant improvements (alterations) have been quite strong, amounting to double the value of new construction for the third consecutive year.*

*PRESENT: Staff forecasts that commercial construction activity in fiscal year 2013/14 will reach a decade-plus high of \$375 million in total permit valuation. This activity is*

*primarily being driven by construction of the San Jose Earthquakes soccer stadium on Coleman Avenue and new retail development at the “Hitachi site” (former IBM facility along Cottle Road). As well, tenant improvements activity should remain steady and strong.*

*FUTURE: For the five-year forecast period, commercial construction activity is forecast to average about \$275 million, a modest slowdown from the strong pace in fiscal year 2013/14 but above most years in the post-dot-com era. Most notably, hotels have emerged as the latest development trend, with a handful of projects in North San Jose, the Airport vicinity, and Downtown totaling over 1,500 rooms having been submitted for City approval in the last 6-8 months.*

### **Industrial Development**

*PAST: 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 registered just a small fraction of that figure, dipping to sub-\$100 million lows following the 2008/09 recession. In fiscal year 2012/13, industrial activity was mixed—new construction remained slow, yet tenant improvements (alterations) rose to a twelve-year high. Overall, activity amounted to nearly \$250 million.*

*PRESENT: With Samsung Semiconductor’s construction of a 680,000-square foot headquarters in North San Jose, industrial activity is in the midst of a very solid rebound in fiscal year 2013/14, with total permit valuation expected to reach \$475 million—its highest level since the “dot com” boom. However, this is essentially the only near term new construction project that is anticipated, with the remainder of activity concentrated in ongoing strength in tenant improvements.*

*FUTURE: Based on past trends, industrial construction will likely remain low over the forecast period. As previously mentioned, the most promising development proposal is the two million square-foot “First/Brokaw Campus.” However, since a prospective tenant has not yet been publicly identified, the project is considered speculative and the forecast conservatively assumes it will not move forward within the forecast timeframe. As such, beyond the current fiscal year, tenant improvements are expected to outpace new construction, a pattern more typical of recessionary periods.*

### **III. FIVE-YEAR FORECAST (2015-2019)**

The Department of Planning, Building and Code Enforcement’s five-year forecast of development activity is summarized in Tables 1 and 2 (next page). Construction valuation is expected to surge over 50% from last year, totaling \$1.45 billion during fiscal year 2013/14. However, thereafter, activity is expected to moderate, amounting to an annual average of about \$850 million in construction valuation over the remainder of the forecast period.



**Table 1**  
**Construction Valuation: FY 08/09 to FY 18/19**

Fiscal Year	08/09	09/10	10/11	11/12	12/13	13/14	14/15	15/16	16/17	17/18	18/19
	<u>Actual Valuation<sup>1</sup> (in millions)</u>					<u>Projected Valuation (in millions)</u>					
<b><u>New Construction</u></b>											
Residential	\$133	\$91	\$323	\$444	\$413	\$525	\$400	\$325	\$325	\$325	\$325
Commercial	\$92	\$156	\$76	\$78	\$70	\$200	\$150	\$100	\$75	\$75	\$75
Industrial	\$144	\$70	\$8	\$11	\$60	\$300	\$100	\$50	\$25	\$25	\$25
Subtotal	\$369	\$317	\$408	\$533	\$543	\$1025	\$650	\$475	\$425	\$425	\$425
<b><u>Alterations</u></b>											
Residential	\$67	\$69	\$83	\$87	\$84	\$75	\$75	\$75	\$75	\$75	\$75
Commercial	\$148	\$127	\$156	\$172	\$142	\$175	\$150	\$150	\$150	\$150	\$150
Industrial	\$110	\$53	\$87	\$129	\$187	\$175	\$125	\$125	\$125	\$125	\$125
Subtotal	\$325	\$249	\$326	\$388	\$413	\$425	\$350	\$350	\$350	\$350	\$350
<b>GRAND TOTAL</b>	<b>\$694</b>	<b>\$566</b>	<b>\$733</b>	<b>\$921</b>	<b>\$956</b>	<b>\$1450</b>	<b>\$1000</b>	<b>\$825</b>	<b>\$775</b>	<b>\$775</b>	<b>\$775</b>
<b><u>Tax Exemptions</u></b>											
Residential	*	*	*	*	*	\$(50)	\$(50)	\$(50)	\$(50)	\$(50)	\$(50)
Commercial	*	*	*	*	*	\$(25)	\$(25)	\$(25)	\$(25)	\$(25)	\$(25)
Industrial	*	*	*	*	*	\$(25)	\$(25)	\$(25)	\$(25)	\$(25)	\$(25)
<b>Net Total (Taxable)</b>						<b>\$1350</b>	<b>\$900</b>	<b>\$725</b>	<b>\$675</b>	<b>\$675</b>	<b>\$675</b>

\*Note: Data on actual tax exemptions not available at the time of this report.

<sup>1</sup>Valuation figures adjusted to 2013 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 08/09 to FY 18/19**

Fiscal Year	08/09	09/10	10/11	11/12	12/13	13/14	14/15	15/16	16/17	17/18	18/19
	<u>Actual<sup>1</sup></u>					<u>Projected</u>					
<b><u>Residential (Units)</u></b>											
Single-Family	160	103	66	140	284	250	250	250	250	250	250
Multi-Family	911	470	2,142	2,833	2,418	3,000	2,750	2,250	2,250	2,250	2,250
TOTAL	1,071	573	2,208	2,973	2,702	3,250	3,000	2,500	2,500	2,500	2,500
<b><u>Non-Residential (sq.ft., in thousands)</u></b>											
Commercial	1,000	750	500	500	250	750	500	500	500	500	500
Industrial	500	250	0	0	250	750	500	500	250	250	250
TOTAL	1,500	1,000	500	500	500	1,500	1,000	1,000	750	750	750

<sup>1</sup>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 over 26,000 dwelling units and approximately 19 million square feet of non-residential space submitted for Planning approval since January 1, 2008.

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**

<b>File Number</b>	<b>Filing Date</b>	<b>Project Name</b>	<b>Tracking APN</b>	<b>Street Location</b>	<b>Planning Area</b>	<b>Housing Type</b>	<b>No. of Units</b>	<b>Proj. Mgr</b>	<b>Approval Date</b>
<b>Projects Completed</b>									
PDA07-006-03	12/12/08	Crescent Village Apts	097-33-113	SE/c Zanker & River Oaks	North	MF	1,750	MD	1/15/09
PD07-033	4/13/07	The Verdant/Latitude Apts	097-07-086	NW/c Zanker & Tasman	North	MF	704	JB	11/30/07
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
PD11-025	3/11/11	Rosemary Family/Senior Apts	235-05-012	SE/c N. 1st & Rosemary	North	MF	290	LX	8/26/11
PD07-088	10/9/07	Morrison Park Apts	261-01-054	SW/c Cinnabar & Stockton	Central	MF	250	LM	8/1/08
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
PD07-036	4/13/07	Enzo Apts	097-07-031	W/s Baypointe, 370' nly Tasman	North	MF	183	JB	11/30/07
PD08-023	3/11/08	121 Tasman Apts	097-07-072	NE/c Baypointe & Tasman	North	MF	174	JB	8/1/08
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
PD08-071	12/17/08	Santana Row (Levare)	277-40-011	NW/c Olin & Hatton	West Valley	MF	118	SZ	4/23/10
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
PD09-033	10/21/09	Ford Apts	678-53-004	N/s Ford, 550' ely Monterey	Edenvale	MF	95	LX	7/16/10
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
PD11-008	3/7/11	Westbury Homes	464-22-030	N/s Blossom Hill, 250' ely Cahalan	Edenvale	SF	86	LX	9/7/11
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
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
PD11-026	7/28/11	The Meridian at Willow Glen	447-05-012	NE/c Hillsdale & Yucca	Willow Glen	SF	51	ME	11/18/11
<b>Total</b>							<b>4,861</b>		
<b>Projects Under Construction</b>									
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
PD12-039	10/11/12	South Village (Hitachi)	706-04-013	NE/c Cottle & Hwy 85	Edenvale	SF/MF	836	JB	12/20/12
PD08-056	8/29/08	Epic Apts	097-15-026	SE/c River Oaks & Seely	North	MF	769	ES	1/23/09
PDA12-035-01	3/18/13	Ascent Apts (Hitachi)	706-04-013	NE/c Cottle & Hwy 85	Edenvale	MF	650	JB	5/3/13
PD11-030	9/8/11	Tasman Apts	097-52-013	NW/c Vista Montana & W. Tasman	North	MF	554	JH	10/14/11
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
PD08-001	1/7/08	Pepper Lane Mixed Use	254-15-072	SE/c Berryessa & Jackson	Alum Rock	MF	371	RM	10/10/08
H07-008	2/16/07	Centerra Apts	259-35-007	SW/c N. Almaden & W. St. John	Central	MF	347	MS	12/7/07
H12-022	1/9/13	One South Market Apts	259-40-093	SW/c Market & Santa Clara	Central	MF	312	SD	3/1/13
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

**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
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
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
PD08-027	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
PDA11-007-02	8/8/12	Orchard Park	237-03-070	SW/c E. Brokaw & Oakland	Berryessa	SF	240	LX	11/20/12
PD09-006	2/27/09	Meridian Mixed Use	277-20-006	SW/c W. San Carlos & Meridian	Central	MF	218	ES	6/8/09
PD12-040	9/14/12	Orvieto Family/Senior Apts <sup>1</sup>	455-09-064	W/s Monterey, 300' sly Umbarger	South	MF	198	LX	1/11/13
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
PD11-003	1/21/11	Cottages at Mirassou	659-57-010	SW/c Ruby & Aborn	Evergreen	SF/MF	104	LX	7/29/11
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
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
PD11-023	7/21/11	Centered on Capitol Townhomes	589-19-063	NE/c N. Capitol & Sierra	Berryessa	MF	94	LX	11/18/11
PD10-024	11/2/10	Brookside Homes	575-02-027	W/s Guadalupe Mines, 2000' sly Camden	Almaden	SF	89	LX	9/16/11
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
PD09-030	10/2/09	Westmount Homes	249-09-009	SE/c E. Mission & N. 10th	Central	SF	60	SZ	11/30/09

**Total**

**8,356**

**Approved Projects (Construction Not Yet Commenced)**

PDC09-006	1/27/09	Berryessa Crossing Mixed Use	241-04-006	Both sides Berryessa, wly UP railroad	Berry./Alum Rock	SF/MF	2,082	LX	10/20/09
PDC07-015	2/15/07	Newbury Park Mixed Use	254-04-076	NE/c N. King & Dobbin	Alum Rock	SF/MF	742	AB	12/18/07
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
PDC05-101	10/14/05	Vendome Place	259-05-024	NW/c N. 1st & Taylor	Central	MF	433	LX	4/17/12
PDC08-036	6/20/08	Libitzky Mixed Use	249-09-001	NW/c N. 10th & E. Taylor	Central	MF	403	LX	1/25/11
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
PDA08-029-01	9/13/12	Virginia Terrace Apts	472-18-051	SW/c E. Virginia & S. 6th	Central	MF	238	JR	4/19/13
H13-021	5/28/13	The Pierce Apts	264-32-087	SW/c S. Market & Pierce	Central	MF	234	RB	11/1/13
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
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
H09-004	2/11/09	Donner Lofts	467-20-018	SE/c E. St. John & N. 4th	Central	MF	156	SZ	10/9/09
CP11-034	5/10/11	North San Pedro Apts	259-23-016	NE/c Hwy 87 & Bassett	Central	MF	135	LX	12/14/11
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
PD11-011	3/14/11	Metropolitan Apts	477-23-021	E/s Monterey, 700' nly Tully	South	MF	102	LX	7/15/11
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

**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
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
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
PDC13-037	8/29/13	Race Street Terrace	261-42-072	Bet. Race & Grand, 300' sly Park	Central	MF	80	RB	12/17/13
PDC13-007	3/22/13	The Alameda Mixed Use	261-01-003	N/s The Alameda, 400' wly Stockton	Central	MF	70	JB	8/20/13
PD09-039	11/23/09	Edwards Mixed Use	264-37-060	SW/c Edwards & S. 1st	Central	MF	<u>50</u>	SZ	7/2/10

**Total**

**6,298**

**Projects Pending City Approval**

PDC13-009	3/15/13	Communications Hill (KB Home)	455-09-040	Hill bet Hwy 87 & Monterey, nly Hillsdale	South	SF/MF	2,200	BR	---
PDC12-028	11/21/12	Great Oaks Mixed Use	706-08-008	NW/c Monterey & Hwy 85	Edenvale	SF/MF	720	JB	---
H13-041	10/31/13	Silvery Towers Apts	259-32-004	SW/c W. St. James & N. San Pedro	Central	MF	643	KT	---
PD13-044	10/25/13	Santa Teresa Transit Village	706-04-013	NE/c Cottle & Hwy 85	Edenvale	SF/MF	543	PK	---
PDC13-004	2/27/13	Ohlone Mixed Use	264-14-131	SW/c W. San Carlos & Sunol	Central	MF	537	LX	---
PDC13-050	11/13/13	Santana Row (balance)	277-40-015	SE/c Winchester & Stevens Creek	West Valley	SF/MF	434	KT	---
H12-020	1/16/13	San Pedro Square	259-32-044	SE/c Bassett & Terraine	Central	MF	406	BR	---
PD13-048	12/11/13	Century Center Mixed Use	230-29-022	SW/c N. 1st & Century Center	North	MF	378	RB	---
PD12-013	3/29/12	Ohlone Mixed Use (Phase 1)	264-14-131	SW/c W. San Carlos & Sunol	Central	MF	263	LX	---
PD13-023	6/25/13	Newbury Park Mixed Use	254-04-076	NW/c King & Dobbin	Alum Rock	MF	230	EL	---
PDC13-046	10/24/13	505 Lincoln Apts	264-09-063	W/s Lincoln, 500' sly Auzerais	Central	MF	190	KT	---
PDC13-012	4/9/13	Park Family/Senior Apts	261-36-062	N/s Park, 450' ely Sunol	Central	MF	181	KT	---
PRE13-189	9/30/13	Post/San Pedro Apts	259-40-088	NW/c San Pedro & Post	Central	MF	156	EL	---
PDC13-034	8/16/13	Almaden Apts	455-21-050	W/s Almaden, 660' sly Willow Glen	South	MF	124	EL	---
PDC13-027	7/17/13	Balbach Condos	264-30-067	S/s Balbach, 100' ely Almaden	Central	MF	<u>100</u>	AA	---

**Total**

**7,105**

**GRAND TOTAL**

**26,620**

Footnotes: (1) Includes PD08-061 (92 units)

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
<b><u>Projects Completed</u></b>									
CP08-071	8/29/08	Hyatt House	097-03-138	SE/c N. 1st & Hwy 237	North	116,000	160	CB	12/10/08
CP08-057	6/26/08	Brokaw Commons	237-03-074	NW/c Oakland & Brokaw	Berryessa	102,000		ES	10/22/08
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
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
PD08-054	8/12/08	Samaritan Medical Center	421-37-012	NE/c Samaritan & S. Bascom	Cambrian/Pioneer	75,000		ES	3/24/09
PD09-021	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
PD09-018	5/7/09	Lincoln Office/Retail	429-06-070	SE/c Lincoln & Willow	Willow Glen	41,000		SZ	5/21/10
PD10-011	6/15/10	Bellarmine (Life Center/Gym)	261-11-005	NE/c Elm & Emory	Central	40,000		JN	1/14/11
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
PD07-033	4/13/07	The Verdant/Latitude Apts	097-07-086	NW/c Zanker & Tasman	North	25,000		JB	11/30/07
<b>Total</b>						<b>720,000</b>	<b>317</b>		
<b><u>Projects Under Construction</u></b>									
PD12-015	4/13/12	Village Oaks (Hitachi)	706-04-013	NE/c Cottle & Hwy 85	Edenvale	308,000		JB	9/27/12
SP09-057	9/16/09	Zero Waste Facility	015-38-005	N/s Los Esteros, term Grand	Alviso	283,000		RB	12/22/11
PDA07-049-01	12/28/11	Coleman Landings <sup>1</sup>	230-46-068	NW/c Coleman & Newhall	North	252,000		SD	2/3/12
PD11-002	1/20/11	Earthquakes Soccer Stadium	230-46-055	SW/c Coleman & Newhall	North	219,000		LX	2/22/12
PD08-062	6/23/08	Residence Inn/SpringHill Suites	230-29-109	SW/c N. 1st & Skyport	North	216,000	321	JD	2/10/09
H13-008	2/20/13	Orchard Supply Hardware	264-15-028	SW/c W. San Carlos & Royal	Central	49,000		RB	5/31/13
PD12-017	4/27/12	Whole Foods Market	261-01-098	NW/c The Alameda & Stockton	Central	33,000		JB	2/26/13
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
PD10-027	11/22/10	Chinmaya Mission	612-53-046	NE/c Clayton & Hickerson	Alum Rock	26,000		JC	3/21/11
PD11-013	5/5/11	Foxworthy Retail	451-06-066	NW/c Almaden & Hillsdale	Willow Glen	25,000		JN	7/15/11

**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
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
<b>Total</b>						<b>1,465,000</b>	<b>321</b>		

**Approved Projects (Construction Not Yet Commenced)**

PDC12-019	7/24/12	M8trix Casino/Hotel	230-29-065	SE/c Airport & Old Bayshore	North	709,000	600	SY	8/28/12
PD12-019	7/19/12	Coleman Highline Office	230-46-062	NW/c Coleman & Newhall	North	683,000		JB	6/10/13
PD13-012	3/20/13	237@First	015-39-006	NW/c N. 1st & Hwy 237	Alviso	615,000		RB	12/4/13
PD08-030	4/22/08	Kaiser Permanente	230-29-056	W/s N. 1st bet Skyport & Sonora	North	558,000		JB	8/8/08
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
PD11-024	7/20/11	Almaden Ranch	458-17-018	SE/c Almaden & Chynoweth	Cambrian/Pioneer	377,000		LX	5/19/12
PDC10-017	6/2/10	Harker School (Upper Campus)	303-25-001	NE/c Saratoga & Hwy 280	West Valley	316,000		JC	9/27/11
PDC09-006	1/27/09	Berryessa Crossing Mixed Use	241-04-006	Both sides Berryessa, wly UP railroad	Berry./Alum Rock	262,000		LX	10/20/09
PD13-015	4/19/13	Sun Garden Retail Center	477-07-013	E/s Monterey, 300' sly E. Alma	Central	257,000		JB	5/17/13
PD12-014	4/4/12	Santana Row	277-33-004	SE/c Winchester & Olsen	West Valley	230,000		LX	10/26/12
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
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
PD12-048	12/20/12	Aloft Hotel	015-45-026	NW/c Hwy 237 & Gold	Alviso	82,000	175	SD	4/12/13
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
PD08-001	1/7/08	Pepper Lane Mixed Use	254-15-072	SE/c Berryessa & Jackson	Alum Rock	30,000		RM	10/10/08
<b>Total</b>						<b>4,969,000</b>	<b>775</b>		

**Projects Pending City Approval**

PDC13-050	11/13/13	Santana Row (balance)	277-40-015	SE/c Winchester & Stevens Creek	West Valley	639,000		KT	---
PDC12-028	11/21/12	Great Oaks Mixed Use	706-08-008	NW/c Monterey & Hwy 85	Edenvale	414,000		JB	---



**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
PDC13-041	9/26/13	Skyport Plaza Hotel/Office	230-29-117	SE/c Skyport & Hwy 87	North	350,000	400	RB	---
PDC13-017	6/14/13	Bay 101 Casino/Hotel	235-01-019	SE/c N. 1st & Hwy 101	North	347,000	470	RB	---
H14-006	1/22/14	Hyatt House/Hyatt Place	101-05-002	Sly term. Karina	North	206,000	329	EL	---
PDC10-022	10/26/10	The Plaza at Evergreen	670-29-020	W/s Capitol, 1500' sly Quimby	Evergreen	200,000		JB	---
H13-048	12/16/13	Hampton Inn/Holiday Inn	237-17-067	E/s N. 1st, opp. Karina	North	173,000	284	PK	---
HA13-013-01	12/6/13	Hampton Inn	259-39-111	SE/c W. Santa Clara & Hwy 87	Central	128,000	208	RB	---
PDC13-009	3/15/13	Communications Hill (KB Home)	455-09-040	Hill bet Hwy 87 & Monterey, nly Hillsdale	South	67,500		BR	---
<b>Total</b>						<b>2,524,500</b>	<b>1,691</b>		
<b>GRAND TOTAL</b>						<b>9,678,500</b>	<b>3,104</b>		

Footnotes: (1) Includes PDA08-040-01 (17,750 sq.ft.)

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**

<b>File Number</b>	<b>Filing Date</b>	<b>Project Name</b>	<b>Tracking APN</b>	<b>Street Location</b>	<b>Planning Area</b>	<b>Square Footage (approx.)</b>	<b>Proj. Mgr</b>	<b>Approval Date</b>
<b><u>Projects Completed</u></b>								
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
SP11-046	11/29/11	Public Storage	477-22-028	SW/c Tully & Old Tully	South	<u>115,000</u>	JB	3/29/12
<b>Total</b>						<b>820,000</b>		
<b><u>Projects Under Construction</u></b>								
H13-001	1/3/13	Samsung Semiconductor	097-53-026	NW/c N. 1st & Tasman	North	<u>680,000</u>	SD	3/25/13
<b>Total</b>						<b>680,000</b>		
<b><u>Approved Projects (Construction Not Yet Commenced)</u></b>								
PD12-024	6/4/12	North First Campus	101-02-011	SW/c N. 1st & Component	North	2,350,000	JB	11/5/12
H12-008	5/17/12	101 Tech	101-03-007	Wly term. Atmel, 200' nly Hwy 101	North	666,000	SD	10/22/12
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
H09-002	1/14/09	Brocade (Phase 2)	097-03-139	SE/c N. 1st & Hwy 237	North	420,000	CB	10/9/09
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
H13-024	6/17/13	A-1 Self Storage	477-49-026	SW/c Phelan & Senter	South	<u>107,000</u>	RB	10/30/13
<b>Total</b>						<b>4,391,000</b>		
<b><u>Projects Pending City Approval</u></b>								
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	---
PD14-005	1/31/14	Hitachi Campus (Phase 1)	706-07-020	NE/c Cottle & Hwy 85	Edenvale	335,000	RB	---
PD13-046	10/29/13	Public Storage	462-19-013	N/s Capitol, 200' wly Snell	South	<u>123,000</u>	RA	---
<b>Total</b>						<b>3,603,000</b>		
<b>GRAND TOTAL</b>						<b>9,494,000</b>		

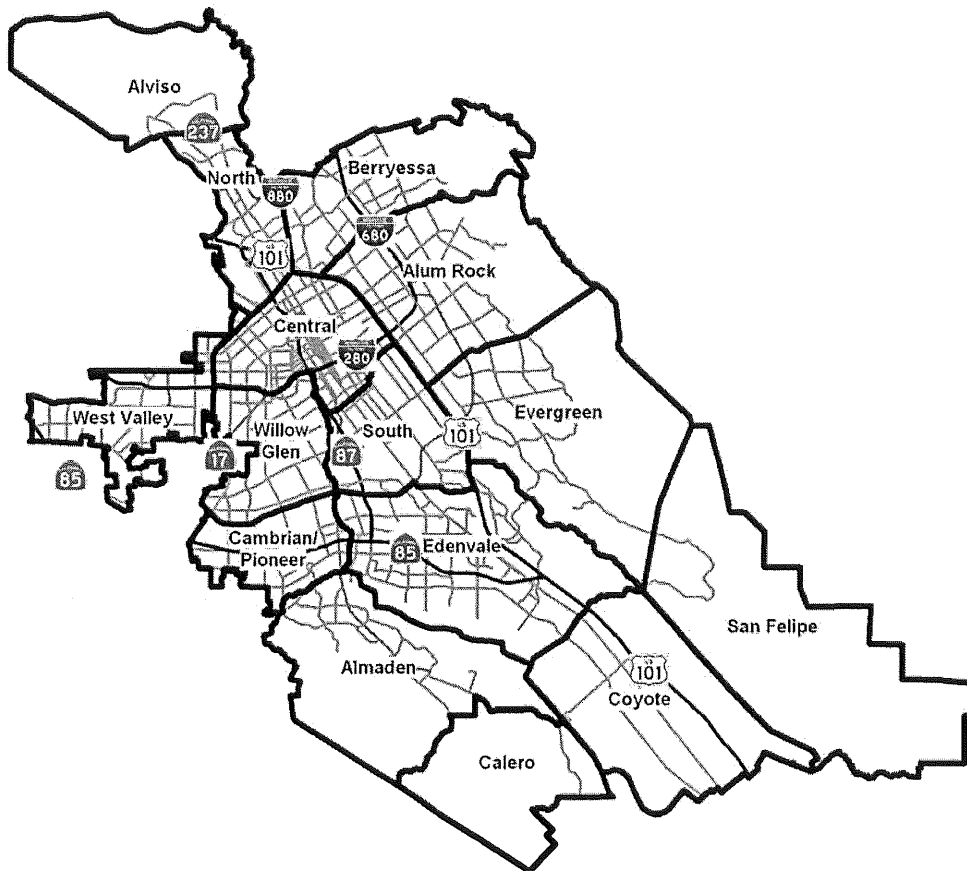
Footnotes:

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)

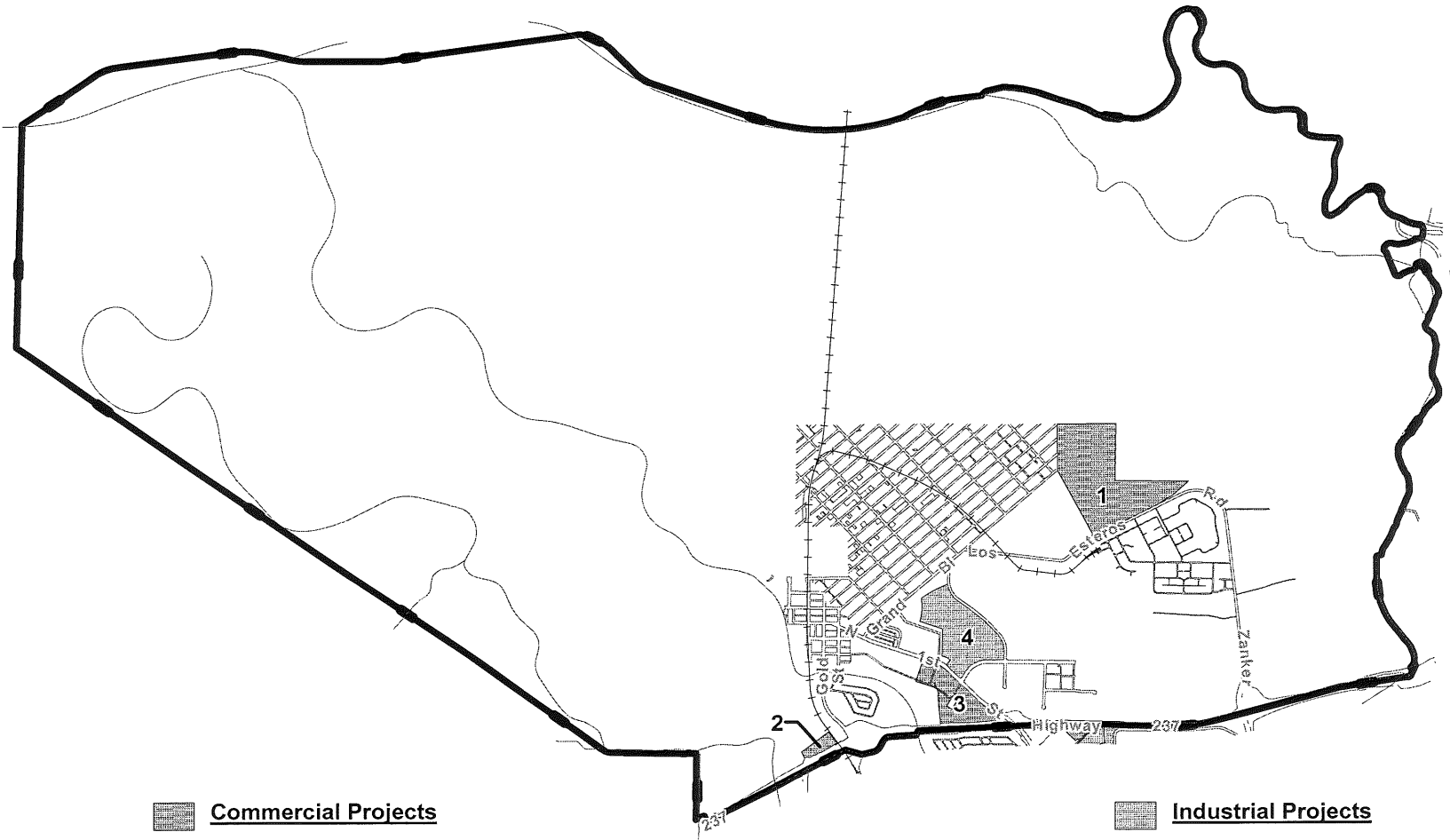
San Jose is divided into a total of fifteen (15) planning areas (see Figure 1, below). The individual planning area maps that follow include projects in all status categories submitted since January 1, 2008. These maps can be used in conjunction with the data contained in Section V of this report to 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



# Alviso Planning Area Major Development Activity

A-15



 **Commercial Projects**

- 1 Zero Waste Facility
- 2 Aloft Hotel
- 3 237@First

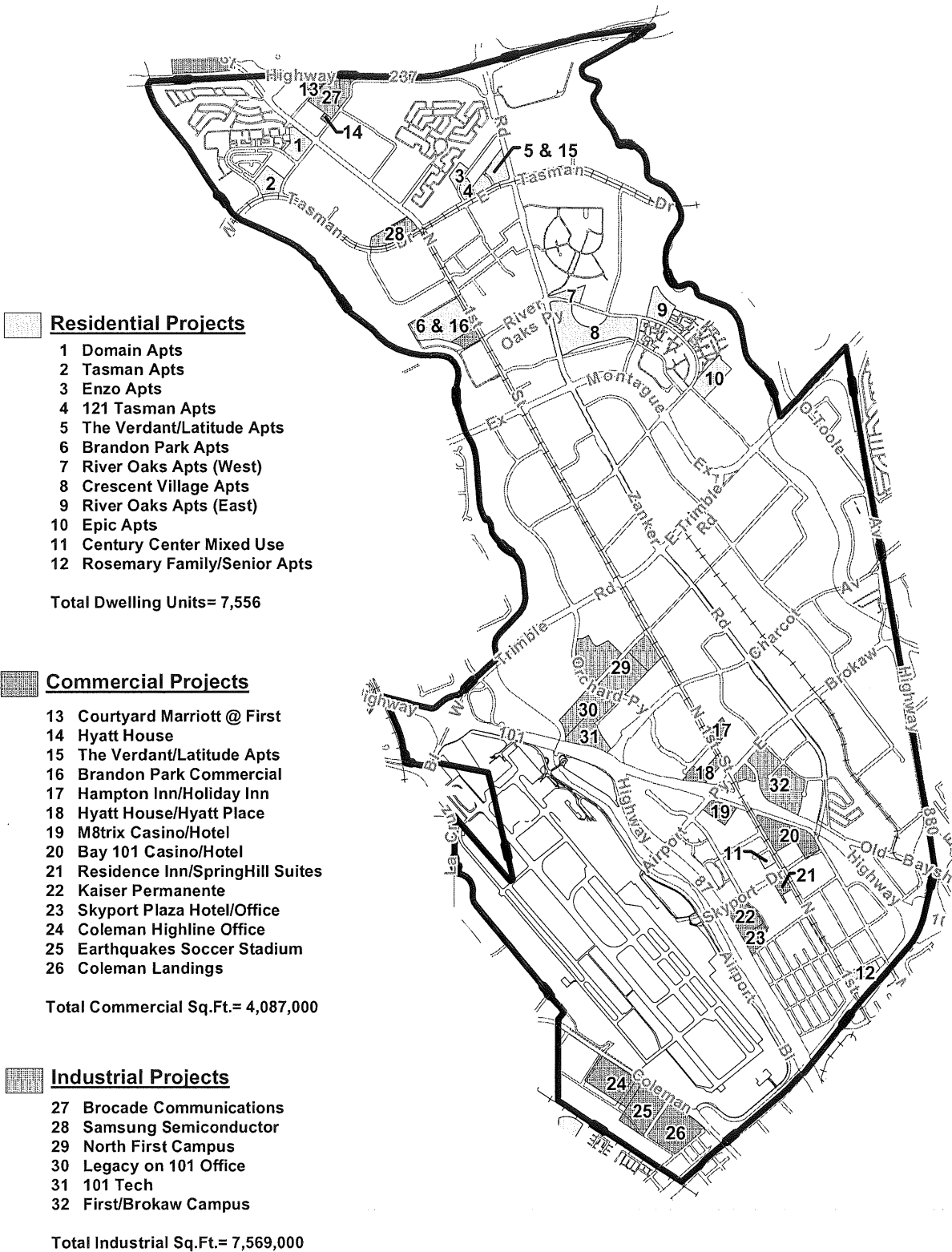
Total Commercial Sq.Ft.= 980,000

 **Industrial Projects**

- 4 Midpoint at 237

Total Industrial Sq.Ft.= 1,120,000

# North Planning Area Major Development Activity

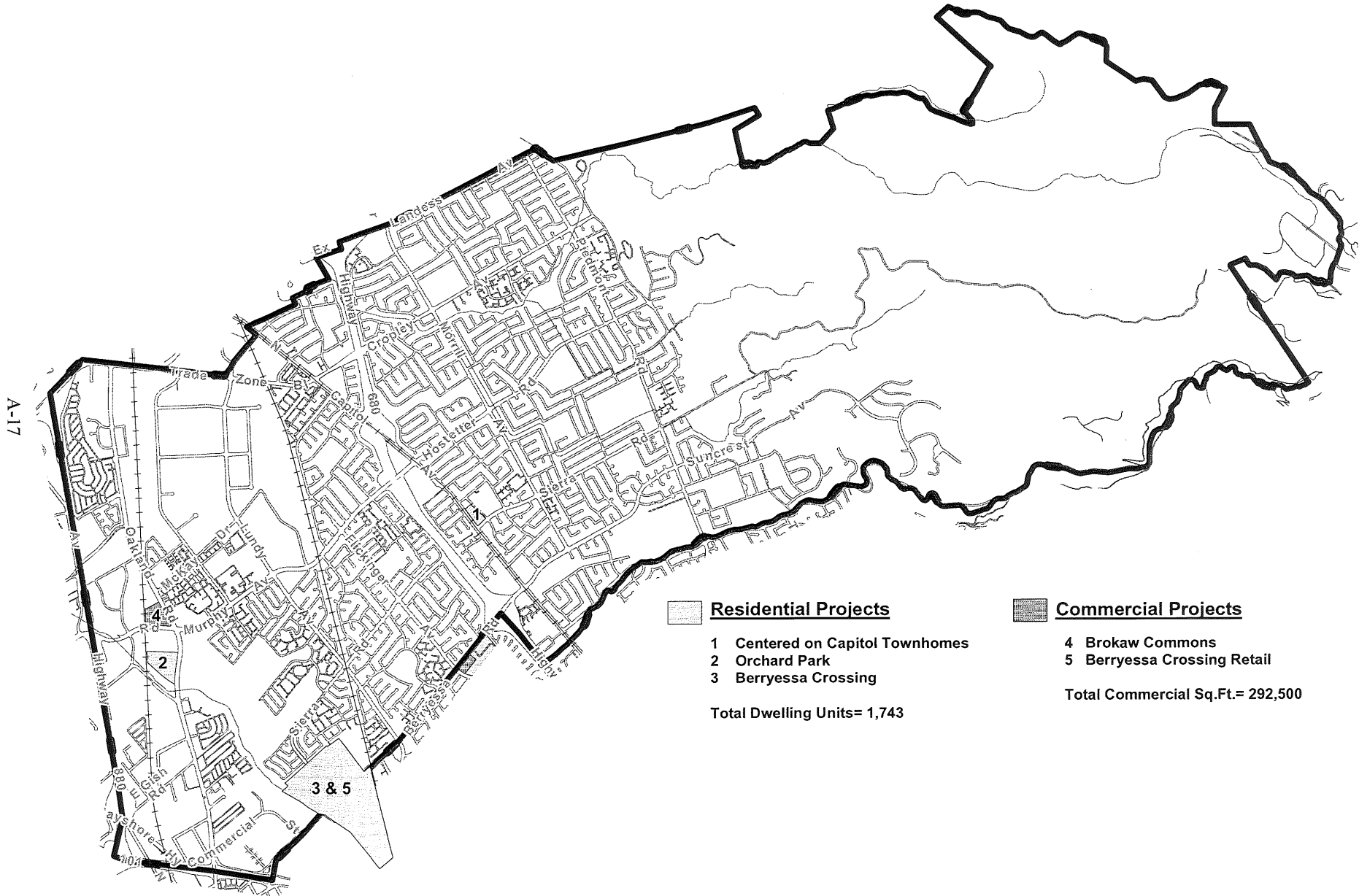


- Residential Projects**
- 1 Domain Apts
  - 2 Tasman Apts
  - 3 Enzo Apts
  - 4 121 Tasman Apts
  - 5 The Verdant/Latitude Apts
  - 6 Brandon Park Apts
  - 7 River Oaks Apts (West)
  - 8 Crescent Village Apts
  - 9 River Oaks Apts (East)
  - 10 Epic Apts
  - 11 Century Center Mixed Use
  - 12 Rosemary 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 Hampton Inn/Holiday Inn
  - 18 Hyatt House/Hyatt Place
  - 19 M8trix Casino/Hotel
  - 20 Bay 101 Casino/Hotel
  - 21 Residence Inn/SpringHill Suites
  - 22 Kaiser Permanente
  - 23 Skyport Plaza Hotel/Office
  - 24 Coleman Highline Office
  - 25 Earthquakes Soccer Stadium
  - 26 Coleman Landings
- Total Commercial Sq.Ft.= 4,087,000


- Industrial Projects**
- 27 Brocade Communications
  - 28 Samsung Semiconductor
  - 29 North First Campus
  - 30 Legacy on 101 Office
  - 31 101 Tech
  - 32 First/Brokaw Campus
- Total Industrial Sq.Ft.= 7,569,000

# Berryessa Planning Area Major Development Activity




# Central Planning Area Major Development Activity



 **Residential Projects**

- |                           |                            |
|---------------------------|----------------------------|
| 1 North Tenth Street Apts | 16 Post/San Pedro Apts     |
| 2 Libitzky Mixed Use      | 17 Brookwood Terrace Apts  |
| 3 Westmount Homes         | 18 Parc 22 Townhomes       |
| 4 Vendome Place           | 19 San Carlos Senior Apts  |
| 5 Japantown Senior Apts   | 20 Meridian Mixed Use      |
| 6 Ajisai Gardens Apts     | 21 Race Street Terrace     |
| 7 North San Pedro Apts    | 22 Park Family/Senior Apts |
| 8 San Pedro Square        | 23 Ohlone Mixed Use        |
| 9 Donner Lofts            | 24 505 Lincoln Apts        |
| 10 San Jose Student Apts  | 25 Balbach Condos          |
| 11 Silvery Towers Apts    | 26 The Pierce Apts         |
| 12 Centerra Apts          | 27 Virginia Terrace Apts   |
| 13 One South Market Apts  | 28 Edwards Mixed Use       |
| 14 Morrison Park Apts     |                            |
| 15 The Alameda Mixed Use  |                            |
- Total Dwelling Units= 6,181**

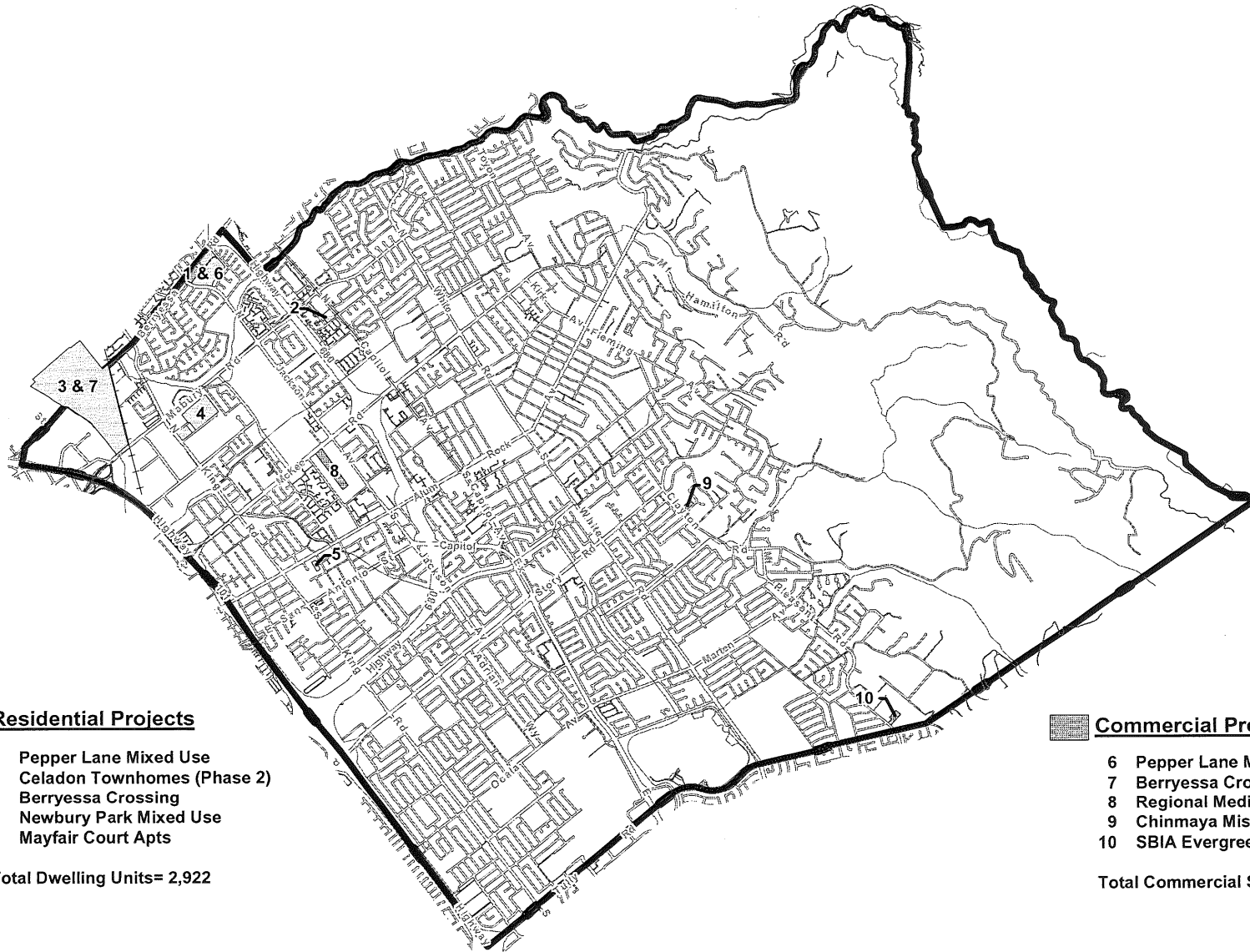
 **Commercial Projects**

- |                                   |
|-----------------------------------|
| 29 Bellarmine College Preparatory |
| 30 First United Methodist Church  |
| 31 Whole Foods Market             |
| 32 Hampton Inn                    |
| 33 Orchard Supply Hardware        |
| 34 Sun Garden Retail Center       |

**Total Commercial Sq.Ft.= 586,000**

# Alum Rock Planning Area Major Development Activity

A-19



## Residential Projects

- 1 Pepper Lane Mixed Use
- 2 Celadon Townhomes (Phase 2)
- 3 Berryessa Crossing
- 4 Newbury Park Mixed Use
- 5 Mayfair Court Apts

Total Dwelling Units= 2,922

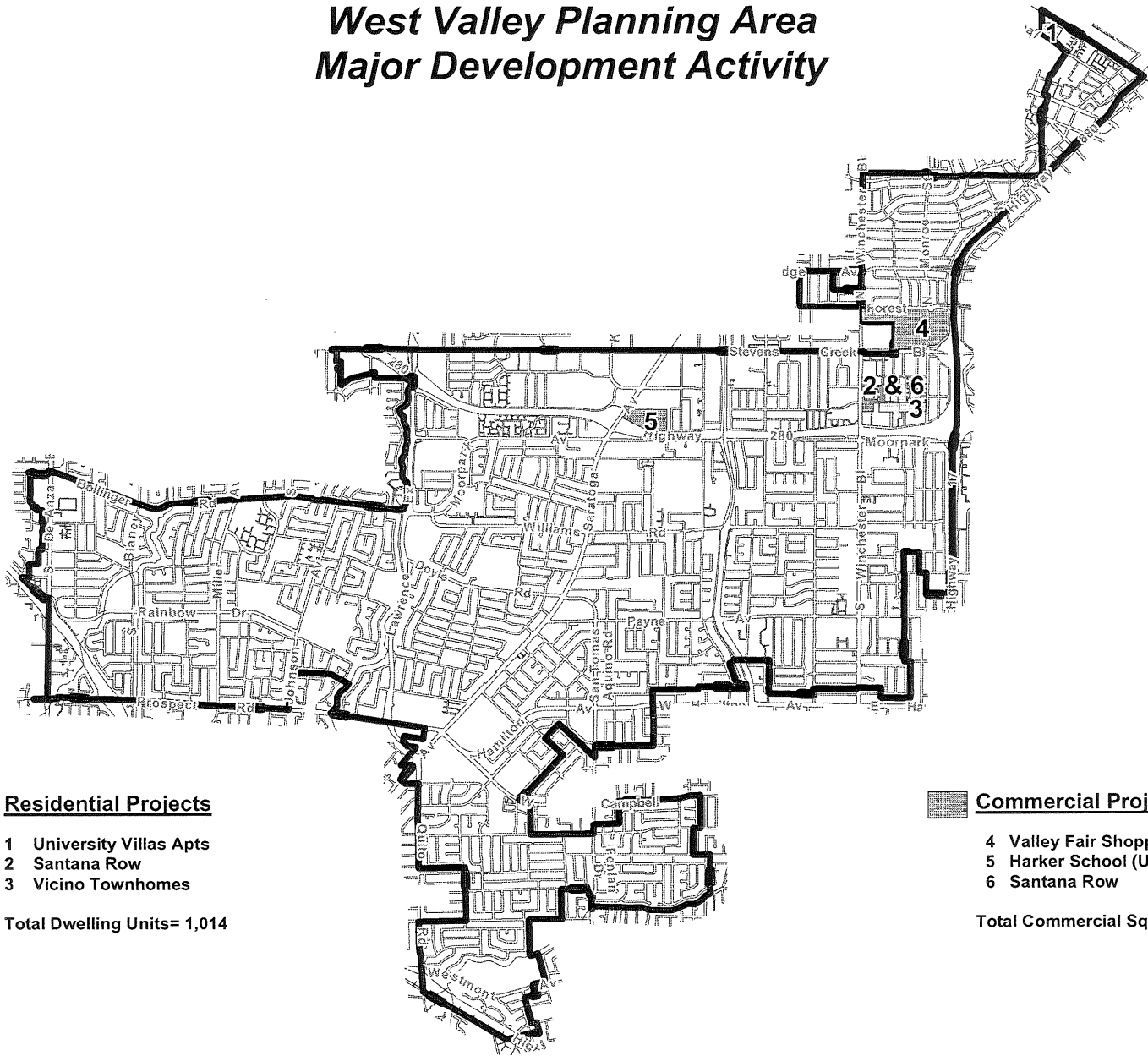
## Commercial Projects

- 6 Pepper Lane Mixed Use
- 7 Berryessa Crossing Retail
- 8 Regional Medical Center
- 9 Chinmaya Mission
- 10 SBIA Evergreen Center/Mosque

Total Commercial Sq.Ft.= 435,500



# West Valley Planning Area Major Development Activity



## **Residential Projects**

- 1 University Villas Apts
- 2 Santana Row
- 3 Vicino Townhomes

Total Dwelling Units= 1,014

## **Commercial Projects**

- 4 Valley Fair Shopping Center
- 5 Harker School (Upper Campus)
- 6 Santana Row

Total Commercial Sq.Ft.= 1,710,000

# Willow Glen Planning Area Major Development Activity



**Residential Projects**

- 1 Fruitdale Station (Phase 2)
- 2 The Meridian at Willow Glen

Total Dwelling Units= 307

**Commercial Projects**

- 3 Fruitdale Station (Phase 2)
- 4 Lincoln Office/Retail
- 5 Foxworthy Retail

Total Commercial Sq.Ft.= 96,000

# South Planning Area Major Development Activity



**Residential Projects**

- 1 Almaden Apts
- 2 Metropolitan Apts
- 3 Senter Road Family Apts
- 4 Communications Hill (KB Home)
- 5 Montecito Vista Mixed Use
- 6 Orvieto Family/Senior Apts

Total Dwelling Units= 3,265

**Commercial Projects**

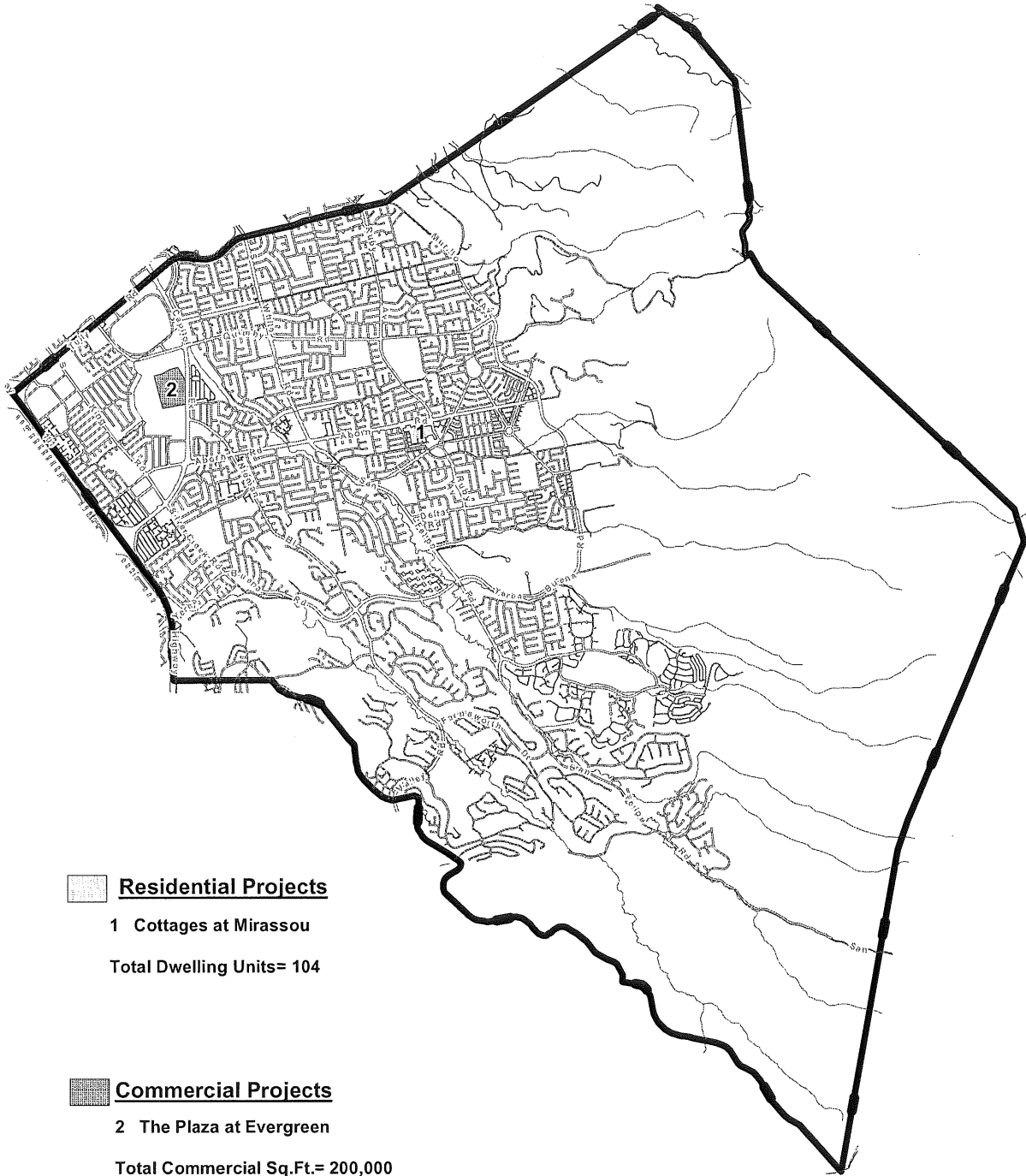
- 7 Communications Hill (KB Home)
- Total Commercial Sq.Ft.= 67,500

**Industrial Projects**

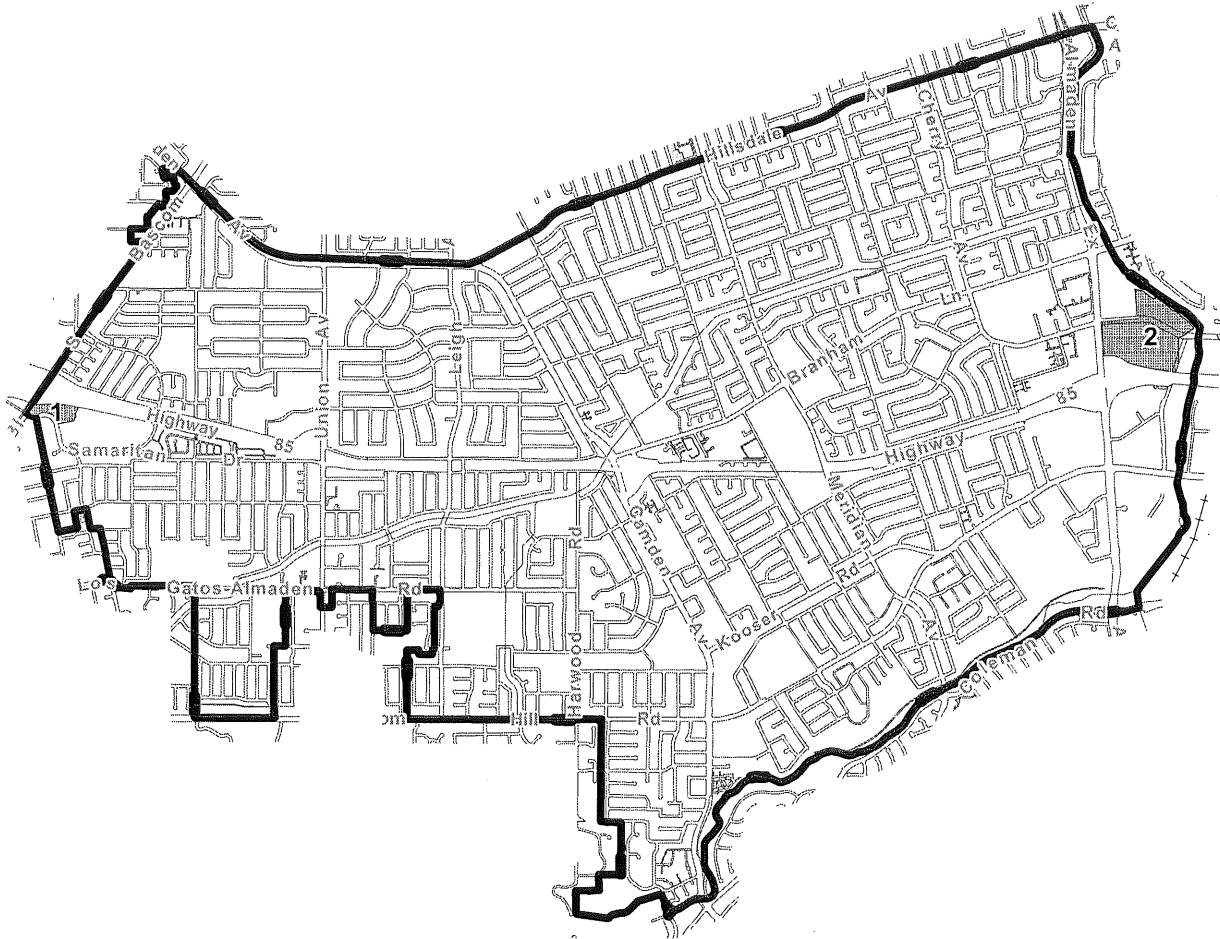
- 8 A-1 Self Storage
- 9 Public Storage
- 10 Public Storage

Total Industrial Sq.Ft.= 345,000

# *Evergreen Planning Area Major Development Activity*



# Cambrian/Pioneer Planning Area Major Development Activity

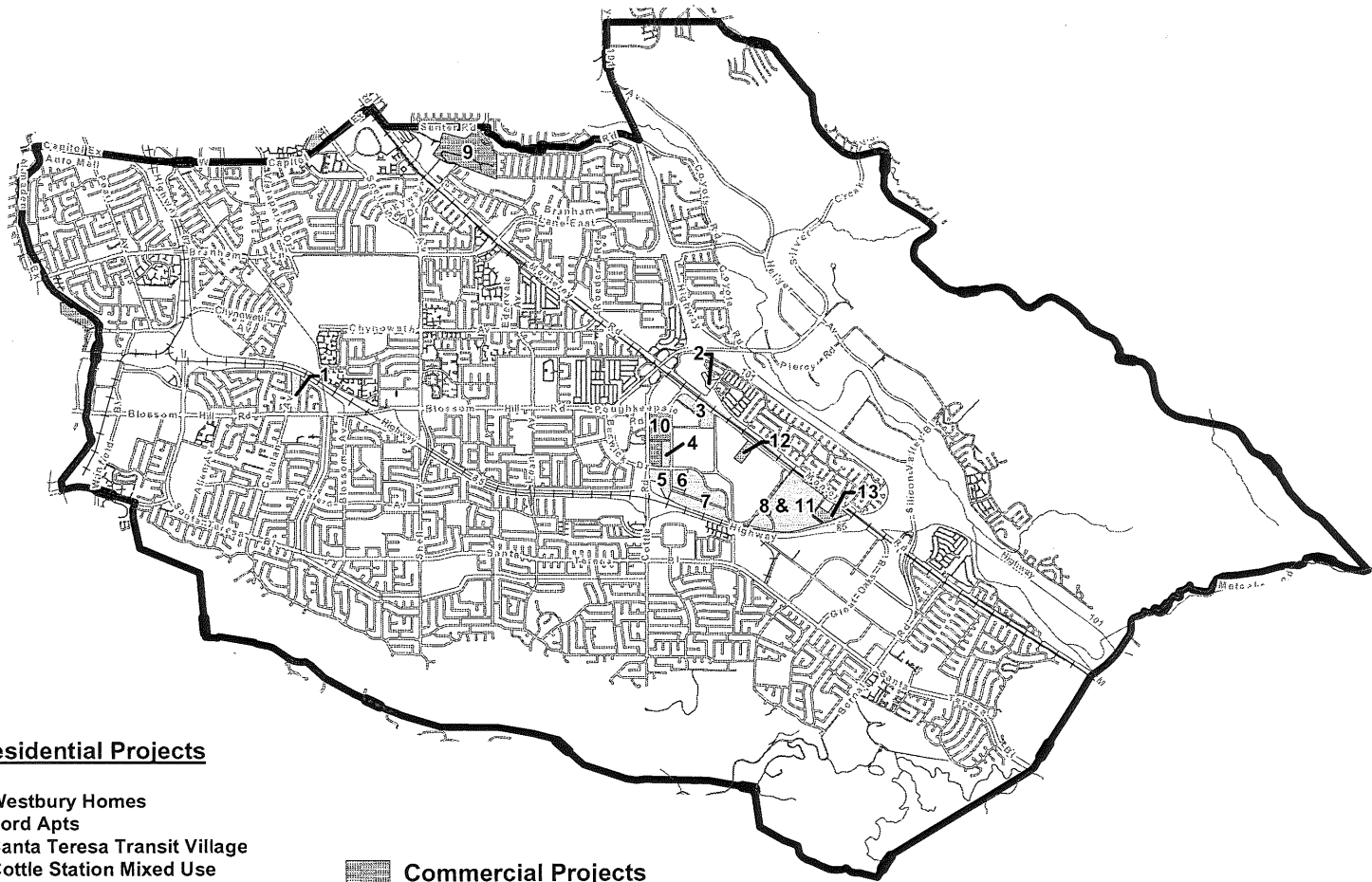


 **Commercial Projects**

- 1 Samaritan Medical Center
- 2 Almaden Ranch

Total Commercial Sq.Ft.= 452,000

# Edenvale Planning Area Major Development Activity



A-25

### Residential Projects

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

Total Dwelling Units= 3,439

### Commercial Projects

- 9 Valley Christian Schools
- 10 Village Oaks (Hitachi)
- 11 Great Oaks Mixed Use

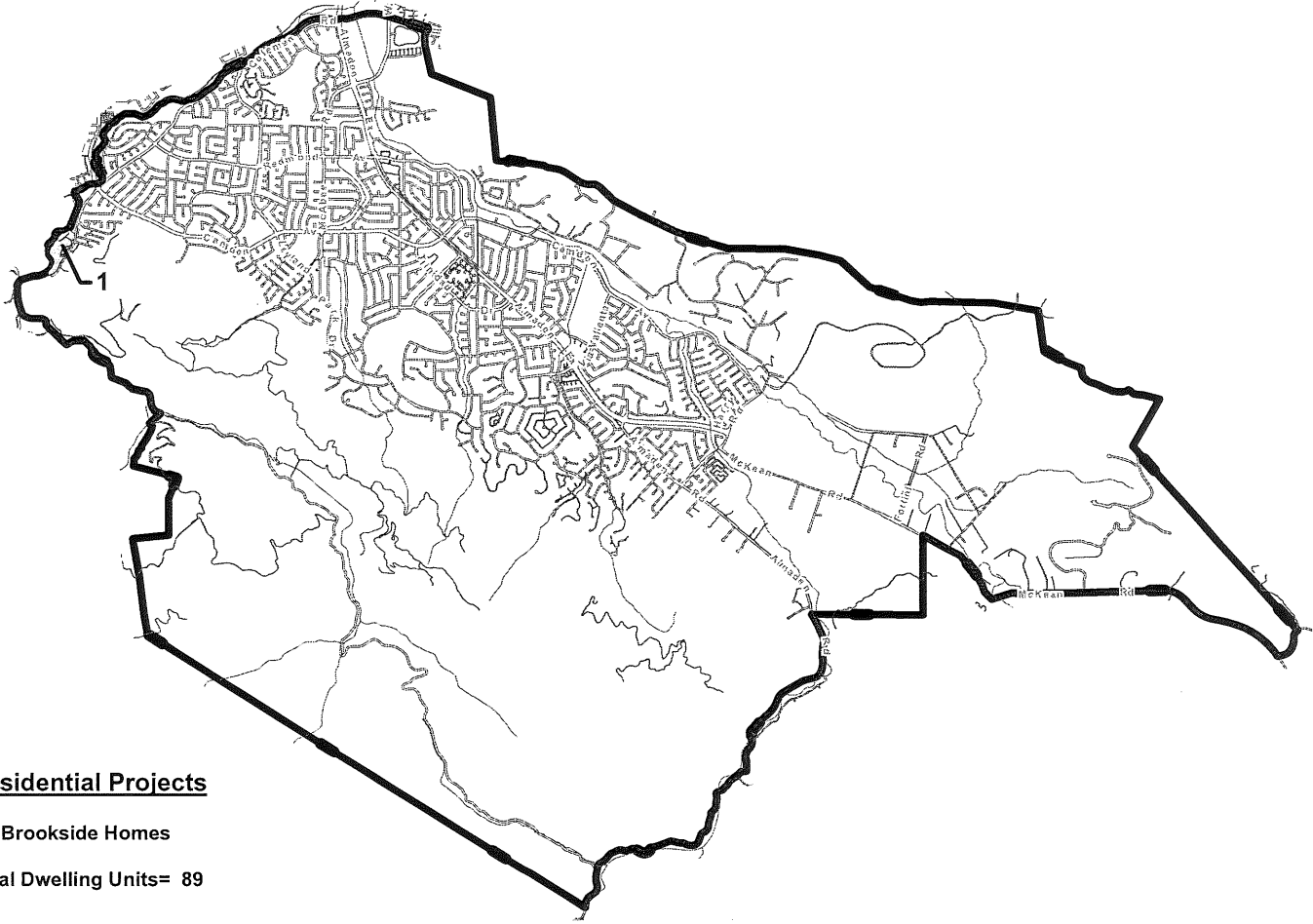
Total Commercial Sq.Ft.= 772,000

### Industrial Projects

- 12 Hitachi Campus (Phase 1)
- 13 Equinix

Total Industrial Sq.Ft.= 460,000

# Almaden Planning Area Major Development Activity



**Residential Projects**

1 Brookside Homes

Total Dwelling Units= 89

## 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 *2014 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 Cassidy Turley's *2014 Bay Area Forecast*.



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