

SPECIAL REPORT: COMMERCIAL REAL ESTATE

The Time is Now for South County

Region Seen as the Most Exciting and Promising Area for Growth

■ By RAY HUARD

South County's time has come, according to economists and real estate professionals. "It's an exciting time for South County relative to the rest of the county. This is the last developable horizon," said **Kevin Mulhern**, a senior vice president at the commercial real estate brokerage **CBRE**.

Lynn Reaser, chief economist at the **Fermanian Business & Economic Institute at Point Loma Nazarene University** said "South County represents one of the region's most exciting and promising areas for growth."

"It's more affordable housing, developments to accommodate tourism and conventions, and its proximity to Mexico position it well for economic gains. Its housing will help give employers the workers they need, while the region develops as a major hub for tourism, trade, warehousing, and manufacturing," Reaser said. "A decade ago, South County attracted little attention, except from local boosters. Today, it has moved into the spotlight for developers, businesses, and people seeking more affordable homes."



Lynn Reaser
Chief Economist
Fermanian Business
& Economic Institute

A Place with Everything

Just wait, because there's more to come, said **James O'Callaghan**, executive director of the **South County Economic Development Council**.

"There's a lot of opportunity here today, but there's going to be more in the coming years," O'Callaghan said. "Long term, if you're looking for a place to locate, South County has everything."

Kelly Broughton, Chula Vista deputy city manager, said his city is seeing considerable activity in the core downtown, spurred in part by a \$9 million to \$10 million overhaul of the streets and sidewalks, and streetscape along 3rd Avenue.

"It's really made the whole 3rd Avenue district a lot more cohesive in the way it feels," Broughton said. "We've had a lot of infill commercial that's going on."

Among the biggest South County projects is the \$1.1 billion Chula Vista Bayfront Resort.

The project would include a 1,600-room hotel and a 275,000 square foot convention center to be operated by **Gaylord Hotels** and built by the **Port of San Diego**, the city of **Chula Vista** and **RIDA Chula Vista**.

Final financing documents should be ready for court validation "in the next month or so" financing bonds going to

market at the end of this year or in early 2022, said **Ann Moore**, Chula Vista's representative on the **San Diego Board of Port Commissioners**.

"It's our time. I think after a number of years, it's really our time. These projects are starting to come to fruition and there will be a renaissance of the South Bay," Moore said. "This is really the beginning."

A milestone for the Bayfront project was reached earlier this year with the opening **Sun Outdoors San Diego Bay RV resort**.

"That was really a building block for us, a very important project, a very beautiful project," Moore said.

Two big pieces of the development activity in South County are industrial and housing development.

"It's the only place that has a lot of industrial land left and the price of industrial land there is far more reasonable than elsewhere in the county," said economist **Alan Nevin**, director of economic and market research for **Xpera Group**.

"There have been several major (property) owners who are now starting in the development process," Nevin said.

Bullish Investors

Colliers International commercial real estate brokerage in its first quarter report on industrial development noted that 5.7 million square feet of industrial buildings were under construction countywide, the biggest of which is a 3.3 million square-foot distribution center for **Amazon** in Otay Mesa, due to be finished in the second quarter.

Amazon also has a lease out for 850,000 square feet of land near the distribution center for employee parking and is in escrow on an additional 60 acres of land in Otay Mesa, said **Mark Lewkowitz**, a senior vice president of **Colliers International**.

"With Amazon locating in Otay Mesa, it seems for the 15 years I've been working there, there's more legitimacy to the market. It seems like the capital and institutional investors are much more



Ann Moore
Commissioner
Port of San Diego



Alan Nevin
Director of Economic
and Market Research
Xpera Group



Mark Lewkowitz
Senior Vice President
Colliers International

comfortable and bullish on Otay Mesa being a desirable location," Lewkowitz said.

Although hardly due entirely to Amazon, "South County is becoming much more sought after," Lewkowitz said. "I'd say no one wanted to meet with me 15 years ago and now all of a sudden I'm popular."

A move by some manufacturers to bring their businesses closer to home by opening plants in Mexico instead of more remote locations – so-called near-shoring, also is driving up demand for warehouse space in Otay Mesa.

"Our Tijuana market brokers have been busier than ever finding new locations for manufacturing," Lewkowitz said. "That type of move is obviously a huge move, bringing a manufacturing plant from China to Tijuana, but we believe it will benefit the Otay market."

New Tenants

The largest industrial project completed in the first quarter of 2021 in the county was in Otay Mesa, according to **Colliers**, the 227,268 square-foot **Majestic Sunroad Center** built by **Majestic Realty Co.** and **Sunroad Enterprise**.

Majestic and **Sunroad** also are building the 845,830 square-foot **Landmark** at Otay industrial park in Otay Mesa, due to be finished in the third quarter of 2021.

"That's the largest industrial development that we've seen in San Diego County in years and that's going to be just a state-of-the-art warehouse distribution facility project and if we're lucky, we'll lease it out before the certificate of occupancy is completed just as we did with the previous project **Majestic Sunroad** built," Lewkowitz said.

Also of note, **Sudberry Properties** is building the 453,350 square-foot **California Crossings** industrial park in Otay Mesa and just finished the 95,500 square-foot **Otay River Business Park** in Chula Vista and **Murphy Development** is building the 229,063 square-foot **Brown Technology Park**, due to be finished in the third quarter of 2021.

Colton Sudberry, president of **Sudberry Properties**, said Otay Mesa is drawing companies like his because it's one of the last areas in the county with large blocks of industrial land available.

"There's not that many available sites in the county that are bigger than 20 or 30 acres that are entitled today," Sudberry said.

The scarcity of land elsewhere also is driving up demand in South County, drawing "more tenants than wouldn't have ordinarily come to South County," Sudberry said.

Eric Parker, a vice president of **CBRE**, said that in the 20 years that he's been working the South County region, he's never seen demand for industrial space as strong as it is this year.

"It's hard to drive down there without getting run over by a truck or a bus," Parker said.

Like **Sudberry**, **Parker** said he's seeing tenants from other submarkets taking a hard look at South County.

"We're seeing a lot of new migration to that market, tenants from Central San Diego County," **Parker** said. "We don't see nearly as much geographic specific requirements from tenants."

Ryan Spradling, an executive vice president of the commercial real estate brokerage **JLL**, said the push to South County for industrial development is likely to continue.

"If you were to look at the next three years, the majority of future development is going to be in the Otay market," **Spradling** said. "It's definitely skewed toward the South County market."

Through 2024, **Spradling** said about 10 million square feet of industrial space is expected to be built in South County compared to 1.2 million square feet in North County, 563,000 square feet in Central County and 156,000 square feet in East County.

"For projects that are already entitled and essentially under construction, investors are coming in and paying pretty big numbers to get control of those projects. That's new for San Diego. They're saying, 'hey, when you complete your building, we'll buy it.'"

Brant Aberg, executive managing director of the commercial real estate brokerage **Cushman & Wakefield**, said South County's industrial market "has benefitted tremendously from completed freeway and road infrastructure, which has significantly changed the landscape and draw to the market."

Otay Mesa also has "a highly diverse and robust labor pool" that makes the area attractive to industrial developers and tenants, **Aberg** said.

New and Affordable

On the housing side, **Meridian Development** is finishing up its **Millenia** project in Chula Vista that will have nearly 2,700 units in a mix of apartments and for-sale product.

"The project is probably 80%-plus complete," said **Guy Asaro**, president and CEO of **Meridian Development**. "It's



Ryan Spradling
Executive Vice
President
JLL



Brant Aberg
Executive Director
Cushman & Wakefield



Guy Asaro
President and CEO
Meridian Development

been tremendously successful both on the rental side and the for-sale side.”

Millenia includes a 200-unit affordable apartment complex by **Chelsea Development Corp.**

“The project is designed around civic infrastructure, designed around urban scaled projects,”

Asaro said. “No residential unit is outside of a three-block walk to a park.”

Millenia also includes, a 130,000 square-foot shopping center. A 138-room **Ayers Hotel**, 8,000 square-feet of commercial space on the ground floor of an apartment complex and an additional 29,000 square feet of retail space around a park, Asaro said.

There’s also a new fire station for Chula Vista and a bridge across Eastlake Parkway to a school site.

“It’s largely suburban in context. This project was always designed to be the core of the eastern territory (of Chula Vista), kind of the core of a mini downtown,” Asaro said. “South County is the value property, more affordable than the rest of the county but also the infrastructure in new. The schools are new. The infrastructure is new. The shops are new. Everything down there is well maintained to I think that’s part of the acceleration of the market of South County.”

Kevin Nolen, a broker with Cushman & Wakefield, said that Otay Mesa “is probably the most dynamic community in all of San Diego right now.”

Jimmy Ayala, San Diego division president of **Tri Pointe Homes**, said that Otay Mesa “is probably the most dynamic community in all of San Diego right now.”

“Otay Mesa is really growing with a balanced community. In Otay Mesa, you really have an opportunity with the housing that’s being built that’s really middle income. That’s a differentiator right now.”

Tri Pointe is building the 1,100-acre Ocean View Hills community in Otay Mesa with 4,048 housing units. The company has plans for another project with up to 5,000 home sites, Ayala said.

“I’m a great proponent of South County. It’s a great place to live and grow up in,” said Ayala, who was born in National City and raised in Chula Vista.

As with the industrial market, South County is attractive to housing developers such as Meridian because there’s land to build on.

“The South County brand is really strong regionally when you look at the availability of land,” Asaro said.

Kent Aden, president of **HomeFed Communities**, said residential development in South County took time to mature.

“Because of the extensive planning process that was done 30 years ago, they’ve been able to implement a wide variety of housing types in all price ranges,” Aden said. “We’re still able to hit a price point where a lot of our buyers are military, teachers, and first responders. That’s just not happening in other places in the county.”

Downtown Chula Vista and downtown



Kent Aden
President
HomeFed
Communities



Kevin Nolen
Broker
Cushman & Wakefield



Kevin Mulhern
Senior Vice President
CBRE



Rendering courtesy of the Port of San Diego

The \$1 billion Chula Vista Bayfront project is expected to be a catalyst for further development in South County.

National City also have seen several housing and mixed-use projects built of late or on the horizon.

“One draw to South County is stable renters,” said **Kevin Nolen**, a broker with Cushman & Wakefield.

“We were talking with a group about how their portfolio of properties fared during the COVID crisis, which properties saw the least amount of non-paying tenants and which properties saw the highest,” Nolen said. “The response was that the properties in South County actually fared the best, the tenants continued to pay and there was little disruption.”

An ‘Aha’ Moment

On the office side, the biggest South County project in the works is **Lee Chesnut**’s plan for what he’s rebranded Smart Park, a project that could have 1.5 million square feet of office space geared toward companies working with automated vehicle research, drones and other automated projects.

Chesnut originally proposed the project in 2018 as a general office park but switched to target a more specialized market coming out of the COVID-19 pandemic that created

uncertainty in the office market.

His plan is to build the project in three stages, starting with the groundbreaking later this year on a 168,000 square-foot building on what he’s calling the two-building THINK campus.

Asaro of Meridian Development is optimistic about expanding South County’s office offerings said,

“We’re working hard on the office side on our own and with Lee to attract the office market. I’m confident that it will be successful.”

The new housing developments that Meridian and others are building provides a rich talent pool that should draw office tenants, he said.

“It’s going to take one decent-sized tenant and then that will be the ‘aha’ moment,” Asaro said. “You’re sandwiched between downtown and the border, the pacific rim and the maquiladoras. The synergy is there. It’s not a matter of if. It’s a matter of when.”

For now, with a few exceptions, most of the latest activity in the South County retail sector has been renovations and redevelopment, said **Joe Yetter**, a CBRE first vice



Joe Yetter
First Vice President
CBRE



Daniel Fitzgerald
Director
Center for Business,
Southwestern College

president who has been a retail broker in South County for more than 30 years.

“Currently in the way of new development, there really isn’t anything coming on the horizon,” Yetter said. “There will be retail components to the Chula Vista waterfront but that’s still a ways out and I’ve not seen any marketing on that yet.”

On the redevelopment side, Yetter said the catch is that the demand is there but there isn’t much to buy.

“It’s a matter of prying the properties loose,” Yetter said. “I have plenty of people interested in investing in National City and Chula Vista. It’s a matter of someone willing to sell.”

Daniel Fitzgerald, direct of the **Center for Business Advancement at Southwestern Community College** in Chula Vista, said he’s seen an uptick of people starting new businesses in South County now that COVID-19 restrictions are easing.

“Since about mid-February, we’re helping a lot of folks starting their business and consistently, we’re getting 15 to 20 requests a week,” Fitzgerald said.

Logistics – shipping and delivering goods continues to predominate the business sector, but Fitzgerald said that the rapid development of housing projects is feeding the business environment, Fitzgerald said.

“It creates the demand for retail and personal services. You have people who need a place to shop and to get their haircut. That certainly creates the market,” Fitzgerald said. ■



Photo courtesy of Mountain West Realty

Urbana, built in downtown Chula Vista by Mountain West Realty, is among new residential developments in South County.

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**BUILD
UNION**

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SAN DIEGO

South County's Largest Construction Projects

2. HOTEL DEL CORONADO: THE VICTORIAN

Cost: \$120 Million

Location: 1500 Orange Ave., Coronado

Description: 223.2k SF; the project will include a new main entrance to the hotel and 150 condo-hotel guestrooms with significant conference center facilities. The project will also include extensive landscape, water and other site features.

Developer: BRE Hotels & Resorts

Contractor: Swinerton

Architect: Leo A Daly

Estimated Completion: 2022



3. HOTEL DEL CORONADO: THE VIEWS

Cost: \$142 Million

Location: 1500 Orange Ave., Coronado

Description: 169k SF; renovation of the North and South Ocean towers including 100% MEP & FS upgrade as well as exterior facade (including finish, fenestration and railings) and all interior build out.

Developer: BRE Hotels & Resorts

Contractor: Swinerton

Architect: Gonzalez Architects

Estimated Completion: Q3 2021

4. CASA ESTÍLO

Location: 795 Third Ave., Chula Vista

Description: Five-story L-Shaped mixed-use building. The project will include 142 apartment units, café, fitness center, yoga studio, pool, other outdoor amenities, separated commercial space for retail leasing and 139 subterranean parking spaces.

Developer: MountainWest Real Estate

Architect: Tucker Sadler Architects

Estimated Completion: 2022



5. BROWN FIELD TECHNOLOGY PARK (BUILDINGS A AND C)

Cost: \$100 million

Location: Britannia Blvd, San Diego

Description: 52-acre corporate industrial and office park in Otay Mesa. Building A will feature 105k SF industrial space and Building C will feature 124k SF industrial space.

Developer: Murphy Development Company

Estimated Completion: Q3 2021



6. AIRWAY INDUSTRIAL PARK

Location: 8150 Airway Road, Otay Mesa

Description: The 137k SF distribution center is zoned for industrial use and will be designed for single-tenant or multi-tenant occupancy. Features 32-inch ceilings and 137 auto parking spots. Developer purchased the 7.81 acre improved land parcel in 2019.

Developer: Rockefeller Group

Estimated Completion: Q2 2021



1. 8TH & B STREET

Location: 8th & B St., National City

Description: Eight story, 130k SF building with 127 residential units (94 studios, 12 one-bedroom units, 12 two-bedroom units and 3 four-bedroom units), 4k SF of retail space, 4k SF of office space and 4k SF of parking & mechanical storage.

Developer: Malick Infill Development & Production

Contractor: Cannon Constructors South Inc.

Architect: The Miller Hull Partnership, LLP

Estimated Completion: Q3 2021



13. NEW ELEMENTARY

Cost: \$32.9 Million

Location: 1145 Camino Prado, Chula Vista

Description: New 64.4k SF elementary school building for the community of Chula Vista. Car administration offices, multiple classrooms.

Developer/Owner: Chula Vista Elementary School District

Contractor: Balfour Beatty

Architect: Ruhna Clarke Architects

Estimated Completion: Q2 2022



7. LANDMARK

Cost: \$100 million

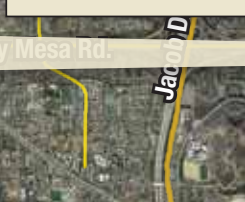
Location: The intersection of

Mesa

Description: A 50-acre project featuring 845,830k SF of Class B office space ranging in size from 1,000 to 10,000 SF high and ground level.

Developer: Majestic Development

Estimated Completion: 2022



8. OTAY MESA INDUSTRIAL PARK

Location: northwest corner of the SR-125 and SR 94

Description: The industrial park will feature buildings ranging from sizes 35k-100k SF. Construction is scheduled to start in the second quarter of 2021.

Developer: Phelan Development



GO RISING

Projects Are Valued at More Than \$600 Million

12. THE AVALYN- MILLENIA MULTIFAMILY

Cost: \$112.9 Million

Location: 1774 Metro Ave., Chula Vista

Description: Eight building, 528k SF multi-family and mixed-use development, 480 apartments, 16k SF commercial and amenity space.

Developer: Ryan Companies

Contractor: Ryan Companies

Architect: ARK Architects

Estimated Completion: Q1 2023



11. MILLENIA

Location: 1610 Millenia Ave., Chula Vista

Description: Mixed-use development; includes homes, apartments and business spaces. The community will also include a shopping center with a plethora of restaurants, retailers and a hotel.

Developer: Meridian Development

Architect: Various architects



RY VILLAGE NO. 3

, Chula Vista
elementary school serving the growing
ampus will include classrooms,
urpose rooms and outdoor play area.



AT OTAY

ction of SR-905 and SR-125 in Otay

re industrial center will feature
-A development across four buildings
54k SF to 241k SF with ample dock
doors, trailer and car parking.
Realty and Sunroad Enterprises
on: Q4 2021



ARK

er
05 interchange on Otay Mesa Road
rial park will include buildings
135k SF and will be available for
tion is slated to begin during the
lopment

9. CALIFORNIA CROSSINGS

Location: Northwest Corner of Otay Mesa Road and Harvest Road

Description: A two-building, 450k SF industrial development near the U.S.-Mexico border. Across 29 acres, the industrial space will feature minimum clear heights 30-32 feet, concrete truck yards, a small mezzanine build out, 126 dock-high doors and nine grade-level doors.

Developer: Sudberry Properties

Estimated Completion: Q1 2022



10. AMAZON DISTRIBUTION CENTER

Location: Otay Mesa rd. & Enrico Fermi Dr., San Diego

Description: 3.4M SF; a four-story distribution center that would be among the largest industrial buildings in San Diego County is being built for Amazon on a 65-acre site with 1,854 parking spaces. Roughly 1,500 jobs will be created at the facility.

Developer: Seefried Properties

Estimated Completion: Q2 2021



2,700
MEMBERS

1,080
CONTRACTORS

1,600
AGREEMENTS

LiUNA!

Local 89

Valentine Macedo

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INDUSTRIAL

Market Statistics

Source: CoStar
Data as of Dec. 31, 2020

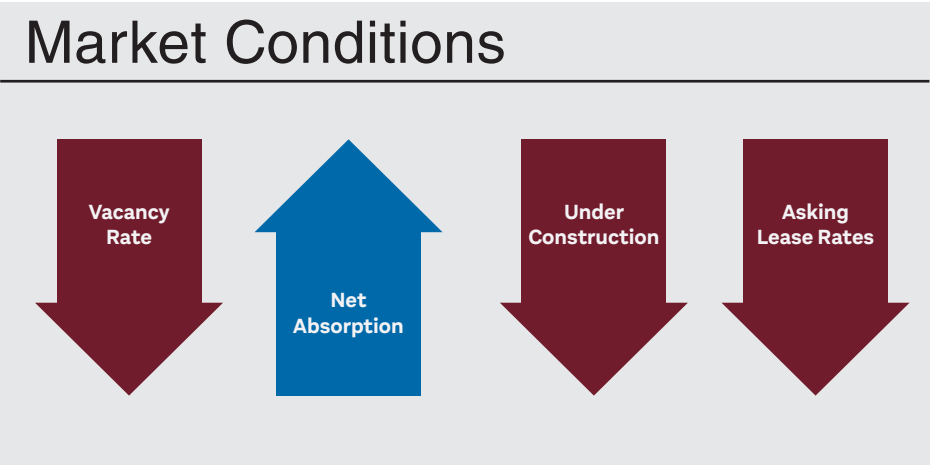
Submarket	Existing Buildings	Inventory SF	Vacancy Rate	12 Mo Net Absorp SF	12 Mo Net Delivered SF	Under Constr SF	Market Rent/SF
Mira Mesa/Miramar	806	18,226,852	3.9%	39,546	0		\$1.47
Otay Mesa	351	16,733,896	6.1%	469,162	327,899	5,245,773	\$0.90
Carlsbad	494	15,879,961	9.3%	327,325	119,150		\$1.46
Kearny Mesa	633	15,493,518	5.1%	-126,063	10,200		\$1.66
Vista	593	14,491,372	8.3%	-124,738	0		\$1.10
Sorrento Mesa	238	10,637,440	8.1%	549,746	-83,084		\$1.99
Oceanside	437	10,348,965	3.0%	33,913	0		\$1.09
Chula Vista	403	10,194,943	4.2%	61,006	103,500	66,860	\$1.22
El Cajon	530	10,035,578	3.8%	-135,428	0		\$1.19
Poway	248	9,733,128	1.0%	526,789	533,950		\$1.33
Totals	8,775	198,999,290	5.1%	1,956,360	1,044,098	5,617,658	\$1.43
All	8,775	198,999,290	5.1%	1,956,360	1,044,098	5,617,658	\$1.43
Flex	1,947	51,622,299	7.6%	534,699	-3,884	330,937	\$2.10
Logistics	3,529	81,308,876	4.6%	1,230,138	1,052,920	5,136,571	\$1.18
Specialized	3,299	66,068,115	3.7%	191,523	-4,938	150,150	\$1.24

Analysis

- Net absorption for industrial was the highest since Q3 2018, reaching more than 1.4 million square feet.
- The vast majority of occupancy gains were recorded in North County, with an e-commerce company moving into 222,000 square feet in Vista.
- Leasing activity and sales volume, however, has turned sluggish, starting the year below normal levels.
- Across the region, the market is the tightest for manufacturing space with direct vacancy of 3.5%, 70 basis points lower than a year ago. Distribution space has the highest vacancy rate at 5.5%, an increase of 80 basis points since last year. Vacancy for R&D

- space stands at 3.6% countywide, 160 basis points lower than a year ago.
- The hot spot for new building continues to be Otay Mesa, with 5.35 million square feet of industrial space under construction.
- Eight buildings totaling 445,260 square feet were delivered in Q1 and were 89% pre-leased. More than two-thirds of the remaining under construction inventory was pre-leased at the end of the quarter.
- Large transactions included Amazon leasing 191,000 square feet in Chula Vista.
- In sales, KKR & Co. bought Three Piper Ranch for \$57.8 million or \$173 per square foot. The facility has 333,400 square feet of rentable building area.

Sources: CBRE, Cushman & Wakefield, Voit



OFFICE

Market Statistics

Source: CoStar
Data as of Dec. 31, 2020

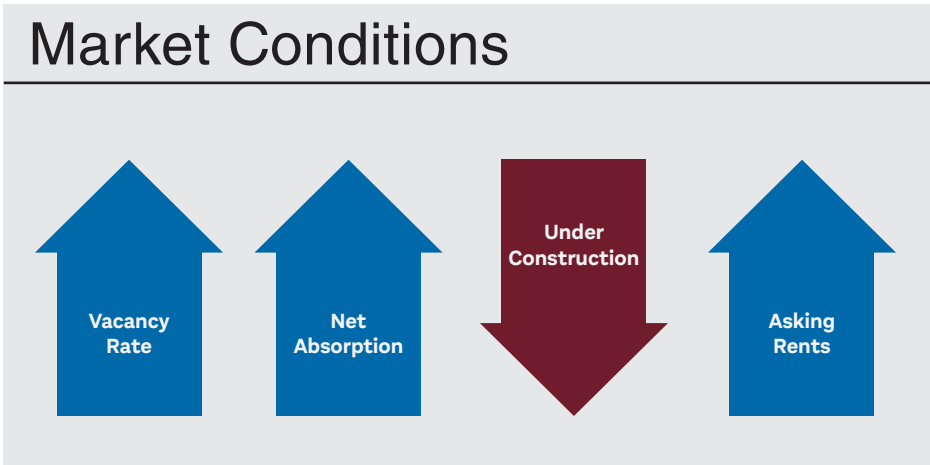
Submarket	Existing Buildings	Inventory SF	Vacancy Rate	12 Mo Net Absorp SF	12 Mo Net Delivered SF	Under Constr SF	Market Rent/SF
Downtown	238	13,995,090	20.0%	-80,451	347,729	1,069,690	\$2.89
Kearny Mesa	288	11,684,677	12.4%	-110,699	340,000		\$2.60
Sorrento Mesa	134	9,388,684	10.1%	-44,429	-21,932	194,910	\$3.16
UTC	93	8,761,310	9.4%	-337,990	0	369,000	\$3.86
Carlsbad	339	7,659,854	14.7%	54,035	13,268		\$2.90
Mission Valley	138	7,342,607	15.1%	-533,503	0	3,681	\$2.70
Rancho Bernardo	133	7,072,839	14.3%	-189,307	0		\$3.01
East County	707	5,725,690	4.4%	22,006	86,000		\$2.22
Del Mar Hts/ Carmel Valley	83	5,139,199	16.2%	98,914	288,484	228,662	\$4.30
Chula Vista	272	3,444,299	6.2%	-6,332	-4,000		\$2.58
Totals	5,525	118,722,502	11.9%	-1,770,480	1,191,839	2,027,770	\$2.91
All	5,525	118,722,502	11.9%	-1,770,480	1,191,839	2,027,770	\$2.91
Class A	308	39,554,033	16.1%	-351,975	990,548	1,732,262	\$3.51
Class B	2,050	55,883,582	11.4%	-1,152,050	241,352	295,508	\$2.72
Class C	3,160	23,259,371	5.8%	-257,963	-40,061		\$2.28

Analysis

- Some 3.7 million square feet of office space — spread among 25 properties — was under construction in the region. Approximately 85% of that inventory was speculative. Downtown had the lion's share of space under construction, with approximately 2 million square feet. The Torrey Pines submarket followed at a distant second with approximately 500,000 square feet.
- Prior to 2020, the San Diego office market had not had more than 2 million square feet under construction since 2008.
- Tech and life science oriented development is timely as these companies continue to attract record breaking venture capital investments.

- Direct office vacancy was 14% at the end of Q1 2021, up 2% from a year ago.
- Class A asking rents increased by 1.6% to \$3.87 per square foot, while Class B rent decreased by 2.1% to \$3.30 per square foot.
- The top lease went to Apple, which leased an entire 135,000 square foot building in the Rancho Vista Corporate Center in Rancho Bernardo. The tech company also leased a 63,400 square foot building in the University Towne Center neighborhood.
- Key office sales included the Promontory in Rancho Bernardo. Peregrine Realty Partners bought the property, with 98,000 rentable square feet, for \$33 million or \$336 per square foot.

Sources: CBRE, Cushman & Wakefield, Voit



RETAIL

Market Statistics

Submarket	Market	Existing Buildings	Inventory SF	Vacancy Rate	12 Mo Net Absorp SF	12 Mo Net Delivered SF	Under Constr SF	Market Rent/SF
Escondido	San Diego - CA	856	9,829,072	5.2%	-142,965	0	6,574	\$2.13
Chula Vista	San Diego - CA	748	9,037,468	5.9%	-235,371	23,420	5,459	\$2.43
El Cajon	San Diego - CA	846	8,607,778	5.1%	-80,687	-16,878	17,000	\$1.80
Clarmnt/KM/Tierrasnta	San Diego - CA	502	7,623,926	4.7%	-193,637	22,240		\$2.35
Mid City/SE San Diego	San Diego - CA	1,239	7,416,287	2.8%	-34,563	-1,550	15,000	\$2.03
Oceanside	San Diego - CA	715	7,414,237	6.3%	-23,825	3,143	59,612	\$2.28
Carlsbad	San Diego - CA	380	5,747,448	8.3%	-184,481	0	22,000	\$3.39
Cardiff/Encinitas	San Diego - CA	424	5,402,690	3.9%	-54,999	-1,800	3,100	\$3.26
Mission Valley	San Diego - CA	117	5,266,636	3.1%	-46,001	18,000	38,000	\$3.82
Vista	San Diego - CA	551	5,217,860	6.3%	-70,048	0	35,440	\$1.97
Totals	San Diego - CA	13,830	139,051,388	5.4%	-1,621,713	-519,152	773,373	\$2.54
All	San Diego - CA	13,830	139,051,388	5.4%	-1,621,713	-519,152	773,373	\$2.54
General Retail	San Diego - CA	9,601	56,752,662	3.9%	-509,271	-866,916	325,773	\$2.38
Mall	San Diego - CA	183	12,911,350	6.4%	-139,693	233,000	300,000	\$3.31
Neighborhood Center	San Diego - CA	2,308	44,722,126	6.9%	-587,885	6,648	23,200	\$2.54
Other	San Diego - CA	38	1,875,794	6.5%	-21,631	0		\$2.71
Power Center	San Diego - CA	374	11,704,587	5.3%	-287,312	74,659	81,812	\$2.85
Strip Center	San Diego - CA	1,308	10,901,015	6.3%	-45,782	33,457	42,588	\$2.11

Source: CoStar

Data as of Dec. 31, 2020

Market Conditions

Vacancy Rate

Net Absorption

Under Construction

Asking Rents

Analysis

COVID-19 continued to hamper the retail market at the beginning of the year, but the situation improved significantly late in Q1, spurring optimism for the remainder of the year.

The regional retail market saw 1.28 million square feet of negative net absorption in 2020. This is more than double the largest annual negative net absorption total reported in the past decade. In 1Q 2021 there were 804,000 square feet of negative net absorption.

New leasing was active, reaching 528,000 square feet in Q1.

Neighborhood retails centers were where the most vacancy was, with 8.7% of space available. Strip centers and lifestyle centers had 8.3% and 8.1% availability, respectively. Regional centers had 5% availability and power centers 4.1%.

Leasing activity appeared to be stabilizing, most recently driven by fitness centers and health and social service providers.

Key sales included the Zion Market property in Kearny Mesa. McGrath Development sold the 128,000 square foot space to Hammer Ventures for \$66.5 million, or \$519 per square foot.

Key leases included a new, 24,100-square-foot property in the 600 block of Rancho Santa Fe Road in San Marcos, leased to Planet Fitness.

Sources: CBRE, Cushman & Wakefield, Voit

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THE LIST

GENERAL CONTRACTORS

► Ranked by 2020 gross revenues from San Diego County offices

Rank (Last year)	Company Address Website Phone		Gross revenues: (millions) 2020 2019 % + (-)	Contracts awarded: (millions) 2020 2019 % + (-)	# of employees as of 4/1/2021: S.D. County Companywide	Largest project under construction: Square footage Cost (millions)	# of offices: Local Statewide Companywide	Top local executive Headquarters Year est. locally	
1 (8)	Balfour Beatty US 10620 Trenea St., Suite 300, San Diego 92131 www.balfourbeattyus.com 858-635-7400		\$564.85 \$200.66 181	\$535.22 \$280.29 91	275 4,500	Logan Memorial Education Complex 266,000 \$180.25	1 11 32	Brian Cahill Dallas, Texas 1983	
2 (2)	DPR Construction 5010 Shoreham Place, San Diego 92122 dpr.com 858-597-7070		\$395 \$343 15	\$335 \$475 (29)	497 6,500	na na na	1 7 29	Scott Sass Brian Gracz Redwood City, CA 1992	
3 (1)	Clark Group 525 B St., Suite 250, San Diego 92101 www.clarkconstruction.com 619-578-2650		\$368.6 \$584.78 (37)	\$465 na na	188 4,660	UCSD North Torrey Pines Living and Learning Neighborhood 1,500,000 \$510	1 6 15	Jim McLamb Bethesda, Md. 2004	
4 (7)	McCarthy Building Cos. Inc. 9275 Sky Park Court, Suite 200, San Diego 92123 www.mccarthy.com 858-784-0347		\$349.17 \$204.08 71	\$195.83 \$925 (79)	224 2,474	Scripps Memorial Hospital La Jolla, Tower 2, a 10-story with basement level, 415,000 sq. ft structure with connecting bridges at multiple levels. This project also includes a CEP expansion and new helistop and will be utilizing OSHPD CRC process. 415,000 \$420	1 6 17	Robert Betz St. Louis, Mo. 2005	
5 (4)	Swinerton 16798 W. Bernardo Drive, San Diego 92127 www.swinerton.com 858-622-4040		\$315.84 \$315.68 0	\$677.5 \$326.4 108	310 4,700	Simone Little Italy, a multi-family high rise residential project. 612,579 \$143.45	1 9 20	Mark Payne Concord, CA 1993	
6 (3)	Hensel Phelps 9404 Genesee Ave., Suite 140, La Jolla 92037 www.henselphelps.com 619-717-8650		\$272.14 \$327.55 (17)	\$496.2 \$367.2 35	220 5,000	Sharp Healthcare - Chula Vista - Ocean View Tower 197,000 \$192.5	1 4 16	Brad Jeanneret Greeley, Colo. 1985	
7 (5)	Harper Construction Co. Inc. 2241 Kettner Blvd., Suite 300, San Diego 92101 www.harperconstruction.com 619-233-7900		\$268.72 \$257.46 4	\$75.22 \$64.5 17	62 138	V-22 Hangar P-1024 Coronado 132,000 \$65.95	1 1 1	Jeff Harper San Diego 1974	
8 (13)	Erickson-Hall Construction Co. 500 Corporate Drive, Escondido 92029 www.ericksonhall.com 760-796-7700		\$230 \$143.6 60	\$187 \$150 25	87 165	Los Alamitos STEM Building - a 3-story science, technology, engineering & mathematics classroom building 86,000 \$57	1 4 4	David Erickson Escondido 1998	
9 (20)	Rudolph and Sletten Inc. 7584 Metropolitan Drive, Suite 100, San Diego 92108 www.rsconstruction.com 619-432-0122		\$216.26 \$77 181	\$60 \$165 (64)	76 500	Apex 9775 Towne Centre Drive Science & Research Building 165,000 \$78.8	1 5 5	Howard Mills San Carlos 1990	
10 (6)	Lusardi Construction Co. 1570 Linda Vista Drive, San Marcos 92078 www.lusardi.com 760-744-3133		\$214.74 \$235.07 (9)	\$243 \$158.15 54	180 215	Veterans Affairs Outpatient Clinic 129,857 \$67.5	1 2 2	Scott Free San Marcos 1958	
11 (14)	BNBuilders, Inc. 5825 Oberlin Drive, Suite 1, San Diego 92121 www.bnbuilders.com 858-550-9433		\$181.5 \$134.1 35	\$1,500 \$2,000 (25)	217 1,029	UC San Diego Pepper Canyon Amphitheater and Public Realm Improvements 10,000 \$52	1 3 4	James Awford Seattle, Wash. 2010	
12 (10)	Turner Construction Company 15378 Avenue of Science, Suite 100, San Diego 92128 turnerconstruction.com 858-217-0700		\$177.27 \$180.86 (2)	\$2,041.32 \$81.24 2,413	131 10,901	San Diego International Airport Terminal 1 Replacement Project 1,210,000 \$2,200	1 5 46	Martine Zettle New York, NY 1983	
13 (18)	Level 10 Construction 12626 High Bluff Drive, Suite 250, San Diego 92130 www.level10gc.com 858-939-9780		\$157.92 \$93.51 69	\$406.18 \$241.91 68	104 476	Saint Teresa of Calcutta Villa 407-unit affordable apartment development with two structures, a 14-story Type I building and a seven-story Type V building over a two-level concrete podium. 291,133 \$145	1 3 4	Mike Conroy Sunnyvale, CA 2013	

(NR) Not ranked

na Not applicable

Sources: The companies and CPA/CFO attested statements.

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TriLink Biotechnologies

Museum of Contemporary Art
La Jolla Expansion

University of San Diego
Knauss Center for Business Education

Father Joe's Villages
Saint Teresa of Calcutta Villa

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THE LIST

GENERAL CONTRACTORS

► Ranked by 2020 gross revenues from San Diego County offices

Rank (Last year)	Company Address Website Phone		Gross revenues: (millions) 2020 2019 % + (-)	Contracts awarded: (millions) 2020 2019 % + (-)	# of employees as of 4/1/2021: S.D. County Companywide	Largest project under construction: Square footage Cost (millions)	# of offices: Local Statewide Companywide	Top local executive Headquarters Year est. locally	
14 (17)	Ryan Companies US Inc. 4275 Executive Square, Suite 370, La Jolla 92037 ryancompanies.com 858-812-7910		\$149.13 \$95.32 56	\$232.92 \$109.86 112	60 1,700	Millenia Multifamily - The Avalyn 528,000 \$112.89	1 1 15	Mike Mahoney Minneapolis, Minn. 2005	
15 (12)	C.W. Driver Cos. 7588 Metropolitan Drive, San Diego 92108 www.cwdriver.com 619-696-5100		\$146.06 \$148.1 (1)	\$402.45 \$308 31	58 300	San Diego USD Civita Elementary School 77,250 \$56.7	2 6 6	Richard Freeark Pasadena, CA 1997	
16 (9)	Bycor General Contractors 6490 Marindustry Place, San Diego 92121 www.bycor.com 858-587-1901		\$141.13 \$182.91 (23)	\$141.13 \$193.36 (27)	103 103	The U 66,000 \$8.96	1 1 1	Scott Kaats San Diego 1981	
17 (15)	Pacific Building Group 9752 Aspen Creek Court, Suite 150, San Diego 92126 www.pacificbuildinggroup.com 858-552-0600		\$128 \$115 11	\$76 \$120 (37)	121 121	The San Diego Zoo's new Sanford Children's Zoo will consist of five acres of diverse habitats including 16 buildings and countless exhibits with various types of construction 194,277 na	1 1 1	James Roherty San Diego 1984	
18 (19)	Sundt Construction Inc. 1660 Hotel Circle N., Suite 400, San Diego 92108 www.sundt.com 619-321-4800		\$124.63 \$81.08 54	\$58.55 \$152.02 (61)	63 1,463	San Diego County Regional Airport Authority's Airport Support Facilities (ASF) na \$163.93	1 3 10	Ryan Nessen Tempe, Ariz. 1947	
19 (21)	Burger Construction 4920 Carroll Canyon Rd Suite 200, San Diego 92121 www.burgercon.com 858-755-1800		\$87.92 \$75.18 17	\$114.11 \$78.37 46	55 55	Confidential Life Science Tenant Improvement in Sorrento Valley. 50,000 \$10	1 1 1	Jack Burger San Diego 1992	
20 (22)	Barnhart-Reese Construction Inc. 10805 Thornmint Road, Suite 200, San Diego 92127 www.debinc.com 858-592-6500		\$64.15 \$48.07 33	\$61.74 \$46.99 31	55 55	Southwestern College Public Safety Center to provide expanded instruction for the Fire Science, Emergency Medical Technician, and Police Education programs at SWC. 25,000 \$19.41	1 1 1	Douglas Barnhart West Reese San Diego 2009	
21 (25)	Kitchell 9330 Scranton Road, Suite 100, San Diego 92121 www.kitchell.com 858-947-5144		\$54.92 \$33.65 63	\$110 \$733.74 (85)	90 830	UCSD Future College Living Learning Neighborhood 1,429,000 \$496	2 9 11	Michael Wolfe Phoenix, Ariz. 1990	
22 (27)	Align Builders Inc. 5451 Avenida Encinas, Suite A, Carlsbad 92008 www.alignbuilders.com 858-800-2531		\$43.45 \$24.04 81	\$37.61 \$28.23 33	42 47	UCI Medical Center B3 3rd Floor - Convert to Med Surg 25,000 \$12.8	1 1 1	Steve Sherrer Carlsbad 2014	
23 (NR)	TSA Construction, Inc. 11440 W Bernardo Court, Suite 166, San Diego 92127 www.tsaci.com 858-784-3650		\$39.93 \$32.07 25	\$7.84 \$39.8 (80)	14 14	Travis AFB 3-Bay Maintenance Hangar Mechanical, Plumbing, Control Systems, & associated work. 20,000 \$7.84	1 1 1	Terry Arnett San Diego 2003	
24 (23)	White Construction 2524 Gateway Road, Carlsbad 92009 www.whiteconstructioninc.com 760-931-1130		\$31.68 \$36.12 (12)	\$31.68 \$36.12 (12)	33 33	AIDS Healthcare Foundation 12,000 \$2.4	1 2 2	Steve White Carlsbad 1983	
25 (29)	C2 Building Group 107 S. Cedros Ave., Suite 220, Solana Beach 92075 www.c2sd.com 858-232-0213		\$29.57 \$17.61 68	\$39.75 \$22.58 76	33 33	2051 Palomar Airport Road Repositioning project of existing tilt up building featuring added site work, fitness center, core restrooms, lobby expansion and added exterior storefront windows and entries 208,904 \$8.8	1 1 1	Jeff Cole Solana Beach 2014	
26 (26)	I.E.-Pacific Inc. 150 W. Crest St., Escondido 92025 www.iepacific.com 760-294-7097		\$25.59 \$33 (22)	\$37.02 \$17.37 113	28 28	260 - D/B Flight Line Station at Edwards Air Force Base, CA 38,920 \$22.64	1 2 2	Diane Koester-Byron San Diego 1993	
27 (28)	C&S Companies 2355 Northside Drive, Suite 350, San Diego 92108 www.cscos.com 619-296-9373		\$20.25 \$21.7 (7)	\$9.8 \$18.9 (48)	33 561	3Roots Wellness Center 6,400 \$5.9	1 4 23	Cory Hazlewood, DBIA Syracuse, NY 2000	
28 (NR)	Conan Construction 5937 Darwin Court Unit G, Carlsbad 92008 www.conanconstruction.com 760-512-1188		\$17.36 \$18.96 (8)	\$15 \$23 (35)	18 18	Solar Turbines Modernization Project- This exceptional project included extensive remodel of office & test lab areas throughout the facility during stringent work hours. Facility is a 24hr facility. 24,600 \$4.57	1 0 1	Shannon Maurer Carlsbad 1998	
29 (31)	Grahovac Construction Company Inc. 8418 La Mesa Blvd., La Mesa 91942 www.grahovacconstruction.com 619-466-6693		\$10.49 \$6.13 71	\$10.49 \$6.13 71	21 21	Pomerado Cemetery District - Entrance Project at the Dearborn Cemetery, Poway, CA 4,500 \$0.75	1 0 0	Gina Grahovac Franklin La Mesa 1985	

(NR) Not ranked

na Not applicable

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
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THE LIST

LANDSCAPE ARCHITECTS

► Ranked by local-full time employees as of April 1, 2021

Rank (Last year)	Company Address Website Phone		# of local full-time employees: 2021 2020 % + (-)	# of licensed architects:	% of revenue				Services							Recent local projects	Local executive(s) Year est. locally	
					% commercial	% residential	% institutional	% other	Urban design	Water management	Wetlands mitigation	Environmental impact study	Historic preservation	Erosion control				
1 (1)	KTU&A 3916 Normal St., San Diego 92103 www.ktua.com 619-294-4477		32 33 (3)	14	20	0	50	30	Y	Y	Y	Y	Y	Y	Chula Vista Bayfront Parks North Park Mini-Park	Mike Singleton 1970		
2 (3)	Schmidt Design Group, Inc. 1310 Rosecrans Street, Suite G, San Diego 92106 www.schmidtsgroup.com 619-236-1462		32 27 19	9	36	1	63	0	Y	Y	N	N	N	N	SDSU Mission Valley, Sharp Memorial Campus Master Plan	Glen Schmidt JT Barr 1983		
3 (2)	OJB Landscape Architecture 550 Lomas Santa Fe Drive, Suite A, Solana Beach 92075 www.ojb.com 858-793-6970		30 31 (3)	9	55	0	35	10	Y	Y	Y	Y	Y	Y	Living Learning Neighborhood, North Torrey Pines, University of California, San Diego, La Jolla, CA East Village Green, San Diego, CA	James Burnett Nathan Elliott Kyle Fiddelke 2003		
4 (4)	Spurlock Landscape Architects 2122 Hancock St., San Diego 92110 www.spurlock-land.com 619-681-0090		19 20 (5)	7	24	3	41	32	Y	Y	Y	Y	Y	Y	SDSU Aztec Stadium UCSD Ridge Walk	Leigh Kyle 1988		
5 (NR)	VDLA Landscape Architects 462 Stevens Ave., Suite 107, Solana Beach 92075 www.vdla.us 619-294-8484		16 15 7	5	80	0	20	0	Y	Y	Y	Y	Y	Y	La Colonia Park ViaSat Cafe and Courtyard	Yale Hooper 1972		
6 (5)	McCullough Landscape Architecture Inc. 703 16th St., Suite 100, San Diego 92101 www.mlasd.com 619-296-3150		11 12 (8)	1	50	20	30	0	Y	Y	Y	N	Y	Y	Midway Sports Entertainment District, SDSU Don Powell Theatre	Catherine McCullough David McCullough 1999		
7 (6)	The Lightfoot Planning Group 5900 Pasteur Court, Suite 110, Carlsbad 92008 www.lightfootpg.com 760-692-1924		10 10 0	3	60	0	10	30	Y	Y	Y	N	N	Y	Robertson Ranch, a residential development in Carlsbad. El Corazon in Oceanside. Planning and design.	James Taylor 1978		
8 (NR)	Rick Engineering Co. 5620 Friars Road, San Diego 92110 www.rickengineering.com 619-291-0707		8 8 0	5	10	35	50	5	Y	Y	Y	Y	N	Y	San Diego International Airport Terminal 1 Redevelopment Fallbrook Park	Kai Ramer 1955		
9 (8)	Kimley-Horn 401 B St., Suite 600, San Diego 92101 www.kimley-horn.com 619-234-9411		7 7 0	4	40	0	30	30	Y	Y	N	Y	N	Y	Millenia Park, UCSD Mesa Housing Pedestrian Bridge	Michael Madsen 1992		
10 (10)	Krizan Associates Inc. 1829 Granite Hills Drive, Granite Hills 92019 www.krizanassociates.com 619-517-2885		7 6 17	1	50	35	5	10	Y	Y	Y	N	Y	Y	Ambiente Resort adjacent to Coconino National Forest, Private Estates in Poway, Point Loma, Rancho Santa Fe and La Jolla	John Krizan 1990		
11 (14)	Project Design Consultants 701 B St., Suite 800, San Diego 92101 www.projectdesign.com 619-235-6471		6 5 20	1	10	45	30	15	Y	N	N	Y	N	N	SDSU Aztec Stadium Streetscapes 3Roots Production Housing Landscape for 100 D.U.	Greg Shields 1976		
12 (11)	Integration Design Studio, Landscape Architects 5845 Avenida Encinas, Suite 134, Carlsbad 92008 www.integration-design.com 760-602-0144		5 5 0	3	50	20	15	15	Y	Y	N	N	Y	Y	The Beacon, Carlsbad Whispering Winds Camp, Julian	Larry Sheehan Glen Brouwer 2003		
13 (13)	Deneen Powell Atelier Inc. 2305 El Cajon Blvd., San Diego 92104 www.dpadesign.com 619-294-9042		5 5 0	1	10	5	85	0	Y	Y	N	N	N	Y	San Diego Zoo Children's Zoo San Diego Botanic Garden Dickenson Family Education Conservatory	Jeri Deneen 1995		
14 (15)	Wynn-Smith Landscape Architecture Inc. 12315 Oak Knoll Road, Suite 300, Poway 92064 www.wynn-smith.com 858-513-0030		4 4 0	1	20	20	20	40	Y	Y	Y	N	Y	Y	TERi, Inc. Flintridge Riding Club	Tim Smith 1993		
15 (NR)	Environs Landscape Architecture Inc. 2924 Emerson Street Suite 309, San Diego 92106 www.environs.us 619-232-7007		3 3 0	1	50	25	15	10	Y	Y	N	N	Y	Y	Scripps Northridge Business Park Renovation Fredericka Manor Central Garden Renovation	Martin Schmidt 1989		
16 (17)	Greg Hebert Landscape Architect 2031 Commercial Street, #202, San Diego 921113 www.greghebert.com 619-283-5083		2 2 0	2	5	90	0	5	Y	Y	Y	N	Y	Y	La Jolla Oceanfront Residence Del Mar Residences	Greg Hebert Gail Zerbe Mark Fuerte 1992		
17 (NR)	In-Site Landscape Architecture Inc. 2907 Shelter Island Drive #105-417, San Diego 92106 www.insitelandarch.com 619-795-7603		1 1 0	1	60	10	10	20	Y	Y	Y	N	Y	Y	Palomar Rehabilitation Institute, Escondido Park Circle, Valley Center	Tim Jachlewski Zach Tanner 2007		

(NR) Not ranked

na Not applicable

Source: The companies.

In the case of a tie, landscape architects are ranked by number of licensed architects, then alphabetically.


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THE LIST

ARCHITECTURAL FIRMS

► Ranked by number of local staff as of April 1, 2021

Rank (Last year)	Firm Address Website Phone		# of local staff: 2021 2020 % + (-)	Licensed architects	% of billings for projects in: S.D. County only U.S. International	Project specialties: Percentage ⁽¹⁾	Current local representative projects	Top local executive(s) Year est. locally	
1 (1)	Gensler 225 Broadway, Suite 100, San Diego 92101 www.gensler.com 619-557-2500		105 100 5	36	70 30 0	Architecture: 60 Interiors: 40	San Diego International Airport Terminal 1 IQHQ Research & Development District	Kevin Heinly 2004	
2 (3)	Delawie 1515 Morena Blvd., San Diego 92110 www.delawie.com 619-299-6690		55 60 (8)	26	65 33 2	Hospitality / Entertainment: 50 Life science / Corporate: 25	P855 Basic Training Command, Oceanside Beach Resort	Frank Ternasky 1961	
3 (4)	Ware Malcomb 3911 Sorrento Valley Blvd., Suite 120, San Diego 92121 www.waremalcomb.com 858-638-7277		51 49 4	5	94 6 0	Interior Design: 53.5 Architecture: 31.5	Westmont of Encinitas Cubic Balboa Campus	Tiffany English 1984	
4 (2)	Carrier Johnson + Culture 185 West F Street, Ste. 500, San Diego 92101 www.carrierjohnson.com 619-239-2353		49 68 (28)	22	86 14 0	Mixed-Use: 47.6 Higher Education: 21.4	Courthouse Commons: Mixed-Use (Holland Partner Group), 1122 Fourth Avenue: Mixed-Use (Caydon)	Gordon R. Carrier Ray Varela 1977	
5 (5)	DGA Planning Architecture Interiors 2550 Fifth Ave., Suite 115, San Diego 92103 www.dgaonline.com 619-685-3990		47 45 4	16	80 20 0	Life Sciences & Technology Architecture: 75 Corporate Interiors: 25	Scripps Research Ionis Conference Center	Nancy Escano 2002	
6 (10)	Ferguson Pape Baldwin Architects 4499 Ruffin Road, Suite 300, San Diego 92123 www.fpbarch.com 619-231-0751		44 35 26	14	76 24 0	Biotech/high tech: 64 University: 20	Healthpeak Properties The Boardwalk RMR The Muse	Jim Ferguson 1976	
7 (7)	LPA Inc. 1600 National Ave., San Diego 92113 www.lpadesignstudios.com 619-929-3939		42 42 0	14	90 10 0	Life science: 50 Civic/ Corporate/developer/health care: 30	Revelle College - UCSD	David Gilmore Eric Jones Matthew Porreca 1985	
8 (6)	AVRP STUDIOS 703 16th St., Suite 200, San Diego 92101 www.avrpstudios.com 619-704-2700		40 44 (9)	12	70 15 15	Residential/mixed-use/ corporate/hospitality: 50 Health care/education: 50	SDUSD Point Loma High School New Library/ Classroom Bldg/Plaza/ Stadium Upgrade MAAC The Ivy Escondido	Doug Austin 1976	
9 (15)	HED (Harley Ellis Devereaux) 225 Broadway, Suite 1300, San Diego 92101 www.hed.design 619-398-3800		39 39 0	16	80 20 0	Education: 60 Life Science/ Tech/Industrial: 30	MiraCosta College, Chemistry/Biotechnology Building; Becton Dickinson Lab Renovation (D3)	Neville Willsmore 2001	
10 (9)	Joseph Wong Design Associates Inc. 2359 Fourth Ave., San Diego 92101 www.jwdainc.com 619-233-6777		38 36 6	15	95 5 0	Hospitality/residential: 75 Gov./educational: 25	BOSA Diega Apartment Towers 800 Broadway Tower	Joseph Wong FAIA Matthew Geaman 1977	
11 (8)	Roesling Nakamura Terada (RNT) Architects 363 Fifth Ave., Suite 202, San Diego 92101 www.rntarchitects.com 619-233-1023		38 37 3	12	80 20 0	K-12: 44 Civic: 26	Morse High School Modernization Botanical Building Renovation, Balboa Park	Ralph Roesling 1980	
12 (12)	Steinberg Hart 320 Laurel St., San Diego 92101 www.steinberghart.com 619-239-9292		30 27 11	14	25 75 0	Civic: 60 Mixed-use: 25	Southeast Live Well Center; Western Operations and Training Center for the U.S. Navy SEALs	Dan Stewart 1991	
13 (16)	McFarlane Architects 6256 Greenwich Drive, Suite 510, San Diego 92122 www.mcfarlanearchitects.com 858-453-1150		27 24 13	10	85 15 0	Commercial/Office: 50 Life Science/Advanced Technology: 50	Quidel; Erasca; Novartis Gene Therapies; Rakuten Medical; Phase 3 Real Estate Partners; RayzeBio	Neal McFarlane 2003	
14 (26)	Dahlin Group Architecture Planning 501 W. Broadway, Suite 1080, San Diego 92101 www.dahlingroup.com 858-350-0544		27 20 35	6	75 25 0	Multifamily: 75 Healthcare: 10	Airway Apartments Paradise Hills Elementary School	Jack Gallagher 1991	
15 (11)	BakerNowicki Design Studio 731 Ninth Ave., Suite A, San Diego 92101 www.bndesignstudio.com 619-795-2450		26 28 (7)	10	100 0 0	Education: 100	Logan Memorial Education Campus (New) Richland Elementary School (Rebuild)	Jon Baker Richard Nowicki Buddy Gessel Brian Leonard 2011	
16 (22)	Tucker Sadler Architects Inc. 1620 Fifth Ave., Suite 200, San Diego 92101 www.tuckersadler.com 619-236-1662		25 22 14	6	65 25 10	Private Development: 75 Civic/ Education: 25	"The Shell" SD Symphony Performance Venue Southwestern Community College, Performing Arts Theatre	Gregory Mueller 1957	
17 (14)	SGPA Architecture and Planning 3111 Camino del Rio North, Suite 500, San Diego 92108 www.sgpa.com 619-297-0131		25 26 (4)	5	45 55 0	Education: 45 Sr. Living/ Wellness: 27	Kearny High School Whole Site Modernization University of San Diego, Camino & Founders Hall	Keith Pittsford 1969	
18 (NR)	Mascari Warner Dinh Architects 1717 Kettner Blvd., Suite 100, San Diego 92101 www.mascariwarnerdinh.com 619-814-0080		23 23 0	3	50 50 0	Healthcare: 100	UCSD CUP Scripps Mercy Cancer Center	Joseph Mascari Thai Dinh 1989	
19 (24)	The Miller Hull Partnership 4980 North Harbor Drive, Suite 100, San Diego 92106 www.millerhull.com 619-220-0984		21 20 5	15	67 33 0	Public Infrastructure: 40 Private Life Sciences: 30	8th and B St. Mixed-Use in National City; City of San Diego, Torrey Pines Fire Station	Ben Dalton, AIA 2011	
20 (18)	Architects Hanna Gabriel Wells 1955 Bacon St., San Diego 92107 www.architects-hgw.com 619-523-8485		21 23 (9)	10	80 20 0	Institutional/medical: 60 Commercial: 20	San Diego Children's Zoo Sharp Healthcare Innovation & Education Center	Randy Hanna 1997	

(NR) Not ranked

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ARCHITECTURAL FIRMS

► Ranked by number of local staff as of April 1, 2021

Rank (Last year)	Firm Address Website Phone		# of local staff: 2021 2020 % + (-)	Licensed architects	% of billings for projects in: S.D. County only U.S. International	Project specialties: Percentage ⁽¹⁾	Current local representative projects	Top local executive(s) Year est. locally	
21 (17)	Architects Mosher Drew 1775 Hancock St., San Diego 92110 www.mosherdrew.com 619-223-2400		20 23 (13)	11	100 0 0	K-12: 35 Higher Education: 25	Mira Mesa High School Whole Site Modernization, MiraCosta CCD-Oceanside Library Renovation	William Magnuson 1948	
22 (25)	Studio E Architects 2258 First Ave., San Diego 92101 www.studioearchitects.com 619-235-9262		20 20 0	10	70 30 0	Multifamily housing: 80 Charter schools: 20	Grantville Trolley Housing UC San Diego Mandeville Art Gallery	Eric Naslund 1987	
23 (21)	Davy Architecture Inc. 1053 10th Ave., San Diego 92101 www.davyarchitecture.com 619-238-3811		20 22 (9)	5	95 5 0	Healthcare: 50 Education: 30	VA La Jolla Patient Room Conversion Loma Linda Cath Lab II	Ric Davy 1984	
24 (20)	Domusstudio Architecture 2800 Third Ave., San Diego 92103 www.domusstudio.com 619-692-9393		18 22 (18)	15	66 34 0	Religious: 40 Educational: 40	Civita Elementary School La Jolla Elementary School	Wayne Holtan David Pfeifer David Keitel John Pyjar Jon Dominy 1986	
25 (23)	SCA Architecture 13280 Evening Creek Drive S., Suite 125, San Diego 92128 www.sca-sd.com 858-793-4777		18 20 (10)	9	100 0 0	Industrial/Logistics: 40 Office/ Interiors: 28	Village 2 Heritage Road Commercial Center California Crossings Commerce Park	Dennie Smith 1988	
26 (28)	Cunningham 1030 G St., San Diego 92101 www.cunningham.com 619-849-1080		18 18 0	8	58 42 0	Health care: 40 Education: 20	Santa Clara Valley MC Behavioral Health, Sharp Coronado Hospital Sub Acute II and SPC-4D Upgrade	G. Wayne Hunter 2013	
27 (27)	ID Studios Inc. 236 S. Sierra Ave., Suite 110, Solana Beach 92075 www.idstudiosinc.com 858-523-9836		18 19 (5)	1	91 9 0	Corporate: 40 Life Science/ Tech: 40	Neurelis, Fish & Richardson	Deborah Elliott 2005	
28 (19)	Awbrey Cook Rogers McGill Architects 1045 14th St., Suite 100, San Diego 92101 www.acrma.com 619-398-3480		17 22 (23)	11	80 20 0	Multi-family Residential: 40 Hospitality: 37	San Diego Marriott Marquis Renovations Pinnacle Columbia Tower Apartments/Hotel	Scot McGill 2002	
29 (29)	JCJ Architecture 750 B St., Suite 2800, San Diego 92101 www.jcj.com 619-282-9922		17 17 0	8	17 83 0	Hotels/resorts: 75 Education/ civic: 25	San Diego Unified School District: Keiler Leadership Academy and Linda Vista Elementary School	Robert Gdowski 1947	

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30 (32)	cass sowatsky consulting architects 3569 Fifth Ave., San Diego 92103 www.csc-a.com 619-298-3480		16 15 7	6	22 78 0	Design-build: 100	P-1901 AAV/ACV at Camp Pendleton P-1024 V-22 Hangar at NB Coronado	Edward Cass 1983	
31 (30)	Platt/Whitelaw Architects Inc. 4034 30th St., San Diego 92104 www.plattwhitelaw.com 619-546-4326		15 16 (6)	6	95 5 0	Civic/government: 50 Schools: 50	Lindbergh Schweitzer Elementary School Modernization MFRO IBPS Agriculture Facility	Sandra Gramley Naveen Waney 1979	
32 (31)	PGAL 2731 B St., San Diego 92102 www.pgal.com 619-269-5288		15 16 (6)	2	6 94 0	Hospitality: 70 Corporate/Commercial: 10	SeaWorld Discovery Restaurant + Aquarium Seacoast Marketplace, Imperial Beach	Matthew Ellis 2002	
33 (34)	AO 731 S. Highway 101, Suite 14, Solana Beach 92075 www.aoarchitects.com 714-639-9860		14 12 17	7	90 10 0	Commercial: 60 Multifamily: 40	The Watermark, San Diego Alta Oceanside, Oceanside	Robert Budetti 2016	
34 (NR)	HBG Design 707 Broadway, Suite 900, San Diego 92101 www.hbg.design 619-858-7888		14 12 17	5	0 100 0	Hospitality: 100	na	Joe Baruffaldi, AIA 2016	
35 (35)	Stephen Dalton Architects (SDA) 444 S. Cedros Ave., Studio 190, Solana Beach 92075 www.sdarchitects.net 858-792-5906		14 12 17	4	100 0 0	Mixed-Use / Multi-family: 75 Custom Homes: 25	Secoya on Fifth, Arbor Crest on Fourth	Stephen Dalton 2004	
36 (NR)	HKS Architects 12636 High Bluff Drive, Suite 400, San Diego 92130 www.hksinc.com 858-429-5558		13 13 0	7	30 60 10	Higher Education: 40 Life Science: 60	UC San Diego Theatre District Living and Learning Neighborhood NMCSD Balboa Clinical Labs	Jeff Larsen Christopher Knell 2012	
37 (36)	HMC Architects 8910 University Center Lan, Suite 650, San Diego 92122 www.hmcarchitects.com 619-744-4077		12 12 0	4	3 97 0	Healthcare: 25 PreK-12 Education: 75	Escondido Union School District Del Dios Academy of Arts and Sciences STEM building	Kyle Peterson 1989	
38 (39)	Vasquez Marshall Architects 13220 Evening Creek Drive, Suite 117, San Diego 92128 www.vmarch.net 858-513-2290		11 9 22	4	100 0 0	Department of Defense: 95 Private sector: 5	F-35 Communications Bldg and Infrastructure, MCAS Miramar; and San Diego Naval Medical Center	David Vasquez 1995	

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39 (38)	Taylor Design 2825 Dewey Road, Suite 200, San Diego 92106 www.WeAreTaylor.com 619-398-0440		8 9 (11)	3	90 10 0	Healthcare: 72 Science/ Education: 28	Palomar Health Rehabilitation Institute Scripps Memorial Hospital Encinitas Acute Care Building	Joe Lowe 2013	
40 (40)	Hollander Design Group 3603 Fifth Ave., San Diego 92103 www.hollanderdgd.com 858-309-4900		8 8 0	2	95 5 0	Commercial: 90 Hospitality: 10	Aya Healthcare Solar Turbines	Jeffrey Hollander 2009	
41 (37)	Lyons Warren, Engineers and Architects 9560 Candida St., San Diego 92126 www.lyonswarren.com 858-573-8999		8 10 (20)	2	35 65 0	Retail: 98 Food service: 2	CVS #11331 - San Diego, CA (Imperial & 12th), Mr. Moto Pizza - San Diego, CA (Seaport Village)	Tracy Lindquist 1979	
42 (NR)	H2 Hawkins + Hawkins Architects Inc. 726 Ninth Ave., Suite 1, San Diego 92101 www.H2asandiego.com 619-232-7700		7 8 (13)	3	34 66 0	Commercial: 90 Residential/ single/multifamily: 10	Louisiana Miro Apartments 14 Units Cedar Shores Clubhouse 8,000 s.f. with Level 2 Pool Deck	Steven Hawkins 1987	
43 (41)	KMA Architecture 2710 Historic Decatur Road, Suite 201, San Diego 92106 www.kma-ae.com 619-276-7710		6 7 (14)	4	20 80 0	Federal: 85 Commercial/office: 15	Tecate Land Port of Entry San Ysidro Land Port of Entry	Don Blair 1973	
44 (42)	Architects BP Associates Inc. 11858 Bernardo Plaza Court, Suite 120, San Diego 92128 www.abpa-inc.com 858-592-4710		6 6 0	2	100 0 0	Residential/multifamily: 50 Mixed-use: 40	The Farm in Poway Hawthorn Street Apartments Ivy Street Office Building	Roger Basinger 2002	
45 (43)	Krenek Design Group Architecture Corp. 6520 Nancy Ridge, San Diego 92121 www.krenekdesign.com 858-558-5935		6 6 0	2	95 5 0	Defense Industry R&D/ Manufacturing: 50 Life science R&D/Manufacturing: 50	Ajinomoto Bio Pharma Services Argonaut Manufacturing Services	Kimberly Krenek 1999	
46 (44)	Hubbell & Hubbell Architects Inc. 1970 Sixth Ave., San Diego 92101 www.hubbellandhubbell.com 619-231-0446		5 6 (17)	1	100 0 0	Residential: 69 Commercial: 29	Shadow Mountain Baseball Field Villa Formosa Apartments	Drew Hubbell 1995	
47 (NR)	CPCArchitects 3132 Tiger Run Court, Suite 113, Carlsbad 92010 www.cpcarchitects.com 858-449-3066		3 3 0	2	99 1 0	Science: 70 Higher Education: 30	Millipore Sigma - Carlsbad SDSU - Calpulli Center	Jean- Claude Constandse Frederick Powell 2013	

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