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 developed corridor,” 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 gain. 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.”

**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.”

**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 was 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 employ- ee parking and is in escrow on an additional 60 acres of land in Otay Mesa, said Mark Lewkowtiz, a senior vice president at 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 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 Development.

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 Technol- ogy Park, due to be finished in the third quarter of 2021.

Colin 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 the east, from Central San Die- go County,” Parker said. “We don’t see nearly as much geographic specific requirements from tenants.”

**Ryan Spradling**

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 major- ity of future develop- ment 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 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.’”

**New and Affordable**

On the housing side, Meridian Development is finishing up its Milennia 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 a milestone for the Bayfront project was underway 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 proj- ect,” 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 develop- ment process,” Nevin said.

**Sudberry Properties**

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Cush & Wakefield, a division of Colliers International, 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

By RAY HUARD

| Ann Moore Commissioner Port of San Diego |
| Alan Nevin Director of Economic and Market Research Xpera Group |
| Mark Lewkowitz Senior Vice President Colliers International |

**The Time is Now for South County Region Seen as the Most Exciting and Promising Area for Growth**

www.sdbj.com MAY 24, 2021

The Time is Now for South County
Region Seen as the Most Exciting and Promising Area for Growth

By RAY HUARD

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“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 benefited tremendously from completed freeway and road infrastructure, which has sig- nificantly changed the landscape and draw to the market.”

Otay Mesa also has “a highly diverse and robust labor pool” that makes the area attrac- tive to industrial developers and tenants, Aberg said.

**New and Affordable**

On the housing side, Meridian Development is finishing up its Milennia 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
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.”

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 in the 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 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 centers.” 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.”

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Joe Yetter First Vice President CBRE

“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, director 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.

Kevin Multehrn Senior Vice President CBRE

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

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1. 8TH & B STREET
Location: 8th & B St., National City
Development: Malick Infill Development & Project
Developer/Owner: Chula Vista Elementary School District
Estimated Completion: Q3 2021

2. HOTEL DEL CORONADO: THE VICTORIAN
Cost: $120 Million
Location: 1500 Orange Ave., Coronado
Description: Eight story, 130k SF; 127 residential units (94 studios, 12 two-bedroom units, 12 two-bedroom units and 3 four-bedroom units), and 34,000 SF of parking & mechanical storage.
Developer: BRE Hotels & Resorts
Architect: Tucker Sadler Architects
Contractor: Cannon Constructors South Inc.
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
Architect: Leo A Daly
Contractor: Swinerton
Estimated Completion: 2022

4. CASA ESTILO
Location: 793 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

7. LANDMARK
Cost: $32.9 Million
Location: 1145 Camino Prado
Description: New 64.4k SF elementary school serving the growing community of Chula Vista. Can accommodate five grades, classrooms, administrative offices, multipurpose rooms and outdoor play areas.
Developer: Majestic Elementary School District
Architect: Ruhnau Clarke Architects
Estimated Completion: Q2 2022

8. OTAY MESA INDUSTRIAL PARK
Location: northwest corner of the SR-125 and SR 905
Description: The industrial park will include buildings ranging in size from 35k-135k SF and will be available for lease and sale. Construction is slated to begin during the first quarter of 2021.
Developer: Majestic Realty and Sunroad Enterprises

South County’s Largest Construction Projects Are Valued at More Than $600 Million
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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

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

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

8. OTAY MESA INDUSTRIAL PARK
Location: northwest corner of the SR-125 and SR 905 interchange on Otay Mesa Road
Description: A development across four buildings ranging from sizes 35k-135k SF and will be available for lease and sale. Construction is slated to begin during the second quarter of 2021.
Developer: Phelan Development

7. LANDMARK AT OTAY
Cost: $100 million
Location: The intersection of SR-905 and SR-125 in Otay Mesa
Description: A 50-acre industrial center will feature 845,830k SF of Class-A development across four buildings ranging in size from 154k SF to 241k SF with ample dock high and ground level doors, trailer and car parking.
Developer: Majestic Realty and Sunroad Enterprises
Estimated Completion: Q4 2021

6. NEW ELEMENTARY VILLAGE NO. 3
Cost: $32.9 Million
Location: 1145 Camino Prado, Chula Vista
Description: New 64.4k SF elementary school serving the growing community of Chula Vista. Campus will include classrooms, administration offices, multipurpose rooms and outdoor play area.
Developer/Owner: Chula Vista Elementary School District
Contractor: Balfour Beatty
Architect: Ruhnau Clarke Architects
Estimated Completion: Q2 2022

5. THE AVALYN- MILLENIA MULTIFAMILY
Cost: $112.9 Million
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Contractor: Ryan Companies
Architect: ARK Architects
 Estimated Completion: Q1 2023

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Developer: Sudberry Properties
Estimated Completion: Q1 2022

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Estimated Completion: Q1 2022

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MAY 24, 2021
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19

2,700
MEMBERS

1,080
CONTRACTORS

1,600
AGREEMENTS
### Analysis

Net absorption for industrial was the highest since Q3 2018, reaching more than 1 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 stands at 3.6% countywide, 160 basis points lower than a year ago.

Eight buildings totaling 445,260 square feet were delivered in Q1 and were 86% 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 $578 million or $173 per square foot. The facility has 333,400 square feet of rentable building area.

Sources: CBRE, Cushman & Wakefield, Voit.

### Market Conditions

#### OFFICE

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<tr>
<th>Submarket</th>
<th>Existing Buildings SF</th>
<th>Inventory SF</th>
<th>Vacancy Rate</th>
<th>12 Mo Net Absorp SF</th>
<th>12 Mo Net Delivered SF</th>
<th>Under Constr SF</th>
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<td>437</td>
<td>10,348,965</td>
<td>3.0%</td>
<td>33,913</td>
<td>0</td>
<td>$1,09</td>
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</tr>
<tr>
<td>Chula Vista</td>
<td>403</td>
<td>10,194,943</td>
<td>4.2%</td>
<td>61,006</td>
<td>103,500</td>
<td>66,860</td>
<td>$1,22</td>
</tr>
<tr>
<td>El Cajon</td>
<td>530</td>
<td>10,035,578</td>
<td>3.8%</td>
<td>-135,428</td>
<td>0</td>
<td>$1,19</td>
<td></td>
</tr>
<tr>
<td>Poway</td>
<td>248</td>
<td>9,733,128</td>
<td>1.0%</td>
<td>526,789</td>
<td>533,950</td>
<td>$1,33</td>
<td></td>
</tr>
<tr>
<td>Totals</td>
<td>8,775</td>
<td>198,999,290</td>
<td>5.1%</td>
<td>1,956,360</td>
<td>1,044,098</td>
<td>5,617,658</td>
<td>$1,43</td>
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</table>

#### INDUSTRIAL

<table>
<thead>
<tr>
<th>Submarket</th>
<th>Existing Buildings SF</th>
<th>Inventory SF</th>
<th>Vacancy Rate</th>
<th>12 Mo Net Absorp SF</th>
<th>12 Mo Net Delivered SF</th>
<th>Under Constr SF</th>
<th>Market Rent/SF</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specialized</td>
<td>3,299</td>
<td>66,068,115</td>
<td>3.7%</td>
<td>191,523</td>
<td>-4,938</td>
<td>150,150</td>
<td>$1.24</td>
</tr>
<tr>
<td>Logistics</td>
<td>3,529</td>
<td>81,308,876</td>
<td>4.6%</td>
<td>1,230,138</td>
<td>5,136,571</td>
<td>$1,18</td>
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<tr>
<td>Flex</td>
<td>1,947</td>
<td>51,622,299</td>
<td>7.6%</td>
<td>534,699</td>
<td>-3,884</td>
<td>$2.10</td>
<td></td>
</tr>
<tr>
<td>Totals</td>
<td>8,775</td>
<td>198,999,290</td>
<td>5.1%</td>
<td>1,956,360</td>
<td>1,044,098</td>
<td>5,617,658</td>
<td>$1.43</td>
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</tbody>
</table>

#### Construction

<table>
<thead>
<tr>
<th>Submarket</th>
<th>Existing Buildings SF</th>
<th>Inventory SF</th>
<th>Vacancy Rate</th>
<th>12 Mo Net Absorp SF</th>
<th>12 Mo Net Delivered SF</th>
<th>Under Constr SF</th>
<th>Market Rent/SF</th>
</tr>
</thead>
<tbody>
<tr>
<td>Otay Mesa</td>
<td>351</td>
<td>16,733,896</td>
<td>6.1%</td>
<td>-337,990</td>
<td>0</td>
<td>369,000</td>
<td>$3.86</td>
</tr>
<tr>
<td>Carmel Valley</td>
<td>707</td>
<td>5,725,690</td>
<td>4.4%</td>
<td>22,006</td>
<td>86,000</td>
<td>$2.22</td>
<td></td>
</tr>
<tr>
<td>Chula Vista</td>
<td>403</td>
<td>10,194,943</td>
<td>4.2%</td>
<td>61,006</td>
<td>103,500</td>
<td>66,860</td>
<td>$1,22</td>
</tr>
<tr>
<td>Downtown</td>
<td>238</td>
<td>13,995,090</td>
<td>20.0%</td>
<td>-80,451</td>
<td>347,729</td>
<td>1,069,690</td>
<td>$2.89</td>
</tr>
<tr>
<td>Kearny Mesa</td>
<td>288</td>
<td>11,684,677</td>
<td>12.4%</td>
<td>-110,699</td>
<td>340,000</td>
<td>$2.60</td>
<td></td>
</tr>
<tr>
<td>Sorrento Mesa</td>
<td>134</td>
<td>9,388,684</td>
<td>10.1%</td>
<td>-44,429</td>
<td>-21,932</td>
<td>194,910</td>
<td>$3.16</td>
</tr>
<tr>
<td>UTC</td>
<td>93</td>
<td>8,761,310</td>
<td>9.4%</td>
<td>-337,990</td>
<td>0</td>
<td>369,000</td>
<td>$3.86</td>
</tr>
<tr>
<td>Carlsbad</td>
<td>339</td>
<td>7,072,839</td>
<td>14.7%</td>
<td>54,035</td>
<td>13,368</td>
<td>$2.90</td>
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<tr>
<td>Mission Valley</td>
<td>138</td>
<td>7,342,607</td>
<td>15.1%</td>
<td>-533,503</td>
<td>0</td>
<td>3,681</td>
<td>$2.70</td>
</tr>
<tr>
<td>Rancho Bernardo</td>
<td>133</td>
<td>7,072,839</td>
<td>14.3%</td>
<td>-189,307</td>
<td>0</td>
<td>$3.01</td>
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<tr>
<td>East County</td>
<td>272</td>
<td>3,444,299</td>
<td>6.2%</td>
<td>-6,332</td>
<td>-4,000</td>
<td>$2.58</td>
<td></td>
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<tr>
<td>Del Mar Hts/</td>
<td>83</td>
<td>5,139,199</td>
<td>16.2%</td>
<td>98,914</td>
<td>288,484</td>
<td>228,662</td>
<td>$4.30</td>
</tr>
<tr>
<td>Carmel Valley</td>
<td>722</td>
<td>3,444,299</td>
<td>6.2%</td>
<td>-6,332</td>
<td>-4,000</td>
<td>$2.58</td>
<td></td>
</tr>
<tr>
<td>Totals</td>
<td>5,525</td>
<td>118,722,502</td>
<td>11.9%</td>
<td>-1,770,480</td>
<td>1,191,839</td>
<td>2,027,770</td>
<td>$2.91</td>
</tr>
<tr>
<td>All</td>
<td>5,525</td>
<td>118,722,502</td>
<td>11.9%</td>
<td>-1,770,480</td>
<td>1,191,839</td>
<td>2,027,770</td>
<td>$2.91</td>
</tr>
<tr>
<td>Class A</td>
<td>308</td>
<td>39,554,033</td>
<td>16.1%</td>
<td>-351,975</td>
<td>990,548</td>
<td>1,732,262</td>
<td>$3.51</td>
</tr>
<tr>
<td>Class B</td>
<td>2,050</td>
<td>55,883,582</td>
<td>11.4%</td>
<td>-1,152,050</td>
<td>241,352</td>
<td>295,528</td>
<td>$2.72</td>
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<tr>
<td>Class C</td>
<td>3,160</td>
<td>23,259,371</td>
<td>5.8%</td>
<td>-257,963</td>
<td>0</td>
<td>$2.28</td>
<td></td>
</tr>
</tbody>
</table>

#### Sources

- CBRE, Cushman & Wakefield, Voit.
Market Conditions

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 Q1 2021 there were 804,000 square feet of negative net absorption.

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

Analysis

Neighborhood retail 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 were 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.

Building & Growing To Meet the Needs of Our Clients

Helping our clients achieve their goals.
Committing to the growth and success of our trade partners.
Building long-term relationships out of reliability, honesty and trust.

That's what it means to be the Best Builder in America.
<table>
<thead>
<tr>
<th>Rank</th>
<th>Company</th>
<th>Address</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Balfour Beatty</td>
<td>10620 Tennis St, Suite 300, San Diego 92131</td>
<td>858-635-7400</td>
</tr>
<tr>
<td>2</td>
<td>DPR Construction</td>
<td>5010 Sherman Place, San Diego 92122</td>
<td>858-597-7070</td>
</tr>
<tr>
<td>3</td>
<td>Clark Group</td>
<td>125 B St, Suite 250, San Diego 92101</td>
<td>819-738-2500</td>
</tr>
<tr>
<td>4</td>
<td>McCarthy Building Co., Inc.</td>
<td>9727 Sky Park Court, Suite 208, San Diego 92123</td>
<td>858-784-0447</td>
</tr>
<tr>
<td>5</td>
<td>Swinerton</td>
<td>6788 W. Bernardo Drive, San Diego 92127</td>
<td>858-622-4040</td>
</tr>
<tr>
<td>6</td>
<td>Hensel Phelps</td>
<td>9404 Generous Ave., Suite 140, La Jolla 92037</td>
<td>819-717-9350</td>
</tr>
<tr>
<td>7</td>
<td>Harper Construction Co. Inc.</td>
<td>2241 Ketterer Blvd., San Diego 92101</td>
<td>619-233-7900</td>
</tr>
<tr>
<td>8</td>
<td>Erickson Hall Construction Co.</td>
<td>500 Corporate Drive, Escondido 92029</td>
<td>858-510-7700</td>
</tr>
<tr>
<td>9</td>
<td>Rudolph and Sletten Inc.</td>
<td>7548 Metropolitan Drive, Suite 100, San Diego 92120</td>
<td>819-632-0172</td>
</tr>
<tr>
<td>10</td>
<td>Lusardi Construction Co.</td>
<td>1570 Linda Vista Drive, San Marcos 92075</td>
<td>619-796-1700</td>
</tr>
<tr>
<td>11</td>
<td>BNBbuilders, Inc.</td>
<td>1875 Sheridan Drive, Suite 1, San Diego 92121</td>
<td>858-508-9433</td>
</tr>
<tr>
<td>12</td>
<td>Turner Construction Company</td>
<td>15400 Science Center, Suite 100, San Diego 92128</td>
<td>858-217-2000</td>
</tr>
<tr>
<td>13</td>
<td>Level 10 Construction</td>
<td>12626 High Staff Drive, Suite 250, San Diego 92136</td>
<td>858-639-5700</td>
</tr>
</tbody>
</table>

### Rank by 2020 gross revenues from San Diego County offices

<table>
<thead>
<tr>
<th>Rank</th>
<th>Company</th>
<th>Address</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Balfour Beatty</td>
<td>10620 Tennis St, Suite 300, San Diego 92131</td>
<td>858-635-7400</td>
</tr>
<tr>
<td>2</td>
<td>DPR Construction</td>
<td>5010 Sherman Place, San Diego 92122</td>
<td>858-597-7070</td>
</tr>
<tr>
<td>3</td>
<td>Clark Group</td>
<td>125 B St, Suite 250, San Diego 92101</td>
<td>819-738-2500</td>
</tr>
<tr>
<td>4</td>
<td>McCarthy Building Co., Inc.</td>
<td>9727 Sky Park Court, Suite 208, San Diego 92123</td>
<td>858-784-0447</td>
</tr>
<tr>
<td>5</td>
<td>Swinerton</td>
<td>6788 W. Bernardo Drive, San Diego 92127</td>
<td>858-622-4040</td>
</tr>
<tr>
<td>6</td>
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<td>9404 Generous Ave., Suite 140, La Jolla 92037</td>
<td>819-717-9350</td>
</tr>
<tr>
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<td>Harper Construction Co. Inc.</td>
<td>2241 Ketterer Blvd., San Diego 92101</td>
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</tr>
<tr>
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<td>Erickson Hall Construction Co.</td>
<td>500 Corporate Drive, Escondido 92029</td>
<td>858-510-7700</td>
</tr>
<tr>
<td>9</td>
<td>Rudolph and Sletten Inc.</td>
<td>7548 Metropolitan Drive, Suite 100, San Diego 92120</td>
<td>819-632-0172</td>
</tr>
<tr>
<td>10</td>
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<td>1570 Linda Vista Drive, San Marcos 92075</td>
<td>619-796-1700</td>
</tr>
<tr>
<td>11</td>
<td>BNBbuilders, Inc.</td>
<td>1875 Sheridan Drive, Suite 1, San Diego 92121</td>
<td>858-508-9433</td>
</tr>
<tr>
<td>12</td>
<td>Turner Construction Company</td>
<td>15400 Science Center, Suite 100, San Diego 92128</td>
<td>858-217-2000</td>
</tr>
<tr>
<td>13</td>
<td>Level 10 Construction</td>
<td>12626 High Staff Drive, Suite 250, San Diego 92136</td>
<td>858-639-5700</td>
</tr>
</tbody>
</table>

### Companies Listed

- Balfour Beatty
- DPR Construction
- Clark Group
- McCarthy Building Co., Inc.
- Swinerton
- Hensel Phelps
- Harper Construction Co. Inc.
- Erickson Hall Construction Co.
- Rudolph and Sletten Inc.
- Lusardi Construction Co.
- BNBbuilders, Inc.
- Turner Construction Company
- Level 10 Construction

### Notes

- *Not ranked*
- *Not applicable*
- *Source:* The companies and CPA/CFO attested statements.
- *Due to rounding off, some percentages appear to be incorrect.*
- *To the best of our knowledge, this information is accurate as of press time.*
- *While every effort is made to ensure the accuracy and thoroughness of the list, estimations and typographical errors sometimes occur.*
- *Please send corrections or additions to the Research Department at the San Diego Business Journal.*
- *This list may not be resold in whole or in part without prior written permission from the editor.*
- *Some companies have declined to participate or did not return a survey by press time.*
- *It is not the intent of this list to compare the participants or to imply a company’s size or numerical rank indicates its quality.*
BUILDING
AT THE HIGHEST LEVEL

TriLink Biotechnologies

University of San Diego
Knauss Center for Business Education

ERTC MOB2

Museum of Contemporary Art
La Jolla Expansion

Father Joe’s Villages
Saint Teresa of Calcutta Villa

OMNIOME
### General Contractors

#### Ranked by 2020 gross revenues from San Diego County offices

<table>
<thead>
<tr>
<th>Rank</th>
<th>Company</th>
<th>Gross revenues: (millions) 2020</th>
<th>2019</th>
<th>% (+ -)</th>
<th>Contracts awarded: (millions) 2020</th>
<th>2019</th>
<th>% (+ -)</th>
<th># of employees</th>
<th>Largest project under construction: Square footage</th>
<th>Cost (millions)</th>
<th># of offices</th>
<th>Local Statewide</th>
<th>Specialization</th>
</tr>
</thead>
<tbody>
<tr>
<td>14</td>
<td>Ryan Companies US Inc.</td>
<td>$149.13</td>
<td>$95.32</td>
<td>56</td>
<td>$232.92</td>
<td>$108.86</td>
<td>112</td>
<td>60</td>
<td>1,700</td>
<td>Milennia Multifamily - The Avalon</td>
<td>$28,000</td>
<td>$12,89</td>
<td>1</td>
</tr>
<tr>
<td>15</td>
<td>C.W. Driver Cos.</td>
<td>$146.06</td>
<td>$94.02</td>
<td>1 (1)</td>
<td>$402.45</td>
<td>$308.31</td>
<td>30</td>
<td>58</td>
<td>300</td>
<td>San Diego USD Ovita Elementary School</td>
<td>71,230</td>
<td>$567</td>
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<tr>
<td>16</td>
<td>Bycor General Contractors</td>
<td>$141.13</td>
<td>$82.38</td>
<td>23 (2)</td>
<td>$141.13</td>
<td>$109.36</td>
<td>103</td>
<td>103</td>
<td>$6,000</td>
<td>The U</td>
<td>$6,000</td>
<td>$5.96</td>
<td>1</td>
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<tr>
<td>17</td>
<td>Pacific Building Group</td>
<td>$128.00</td>
<td>$115.00</td>
<td>11</td>
<td>$76.00</td>
<td>$20.00</td>
<td>121</td>
<td>121</td>
<td>na</td>
<td>Confidential Life Science Tenant Improvement in Sorrento Valley</td>
<td>$5,000</td>
<td>$10</td>
<td>na</td>
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<td>18</td>
<td>Sundt Construction Inc.</td>
<td>$124.63</td>
<td>$81.46</td>
<td>25</td>
<td>$58.55</td>
<td>$40.32</td>
<td>63</td>
<td>1463</td>
<td>na</td>
<td>San Diego County Regional Airport Authority's Airport Support Facilities</td>
<td>(467)</td>
<td>na</td>
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<td>19</td>
<td>Burger Construction</td>
<td>$87.92</td>
<td>$75.18</td>
<td>17</td>
<td>$114.11</td>
<td>$78.37</td>
<td>55</td>
<td>55</td>
<td>na</td>
<td>USCD Future College Living Learning Neighborhood</td>
<td>1,420,000</td>
<td>$496</td>
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<td>20</td>
<td>Barnhart-Reese Construction Inc.</td>
<td>$64.15</td>
<td>$48.07</td>
<td>33</td>
<td>$61.74</td>
<td>$46.99</td>
<td>55</td>
<td>55</td>
<td>na</td>
<td>UC Medical Center B3 3rd Floor - Convert to Med Surg</td>
<td>25,000</td>
<td>$128</td>
<td>1</td>
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<tr>
<td>21</td>
<td>Kitchell</td>
<td>$54.82</td>
<td>$36.65</td>
<td>63</td>
<td>$110.00</td>
<td>$73.74</td>
<td>30</td>
<td>30</td>
<td>190</td>
<td>Travis AFB 3-Bay Maintenance Hangar</td>
<td>Mechanical, Plumbing, Control Systems, &amp; associated work.</td>
<td>20,000</td>
<td>$7.54</td>
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<tr>
<td>22</td>
<td>Align Builders Inc.</td>
<td>$43.45</td>
<td>$24.04</td>
<td>81</td>
<td>$37.61</td>
<td>$28.23</td>
<td>43</td>
<td>43</td>
<td>na</td>
<td>AGID Healthcare Foundation</td>
<td>12,000</td>
<td>$2.4</td>
<td>1</td>
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<tr>
<td>23</td>
<td>TSA Construction, Inc.</td>
<td>$39.93</td>
<td>$32.67</td>
<td>25</td>
<td>$7.84</td>
<td>$6.80</td>
<td>14</td>
<td>14</td>
<td>na</td>
<td>2051 Palomar Airport Road Repositioning project of existing tilt up building featuring added site work, fitness &amp; test lab areas, lobby expansion and added exterior storefront windows and entries</td>
<td>208,904</td>
<td>$8.8</td>
<td>1</td>
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<tr>
<td>24</td>
<td>White Construction</td>
<td>$31.68</td>
<td>$36.12</td>
<td>74</td>
<td>$31.68</td>
<td>$36.12</td>
<td>33</td>
<td>33</td>
<td>na</td>
<td>3Roots Wellness Center</td>
<td>6,400</td>
<td>$5.9</td>
<td>1</td>
</tr>
<tr>
<td>25</td>
<td>C2 Building Group</td>
<td>$29.57</td>
<td>$21.61</td>
<td>68</td>
<td>$39.75</td>
<td>$22.58</td>
<td>33</td>
<td>33</td>
<td>na</td>
<td>Solar Turbines Modernization Project - This exceptional project included extensive remodel of office &amp; test lab areas throughout the facility during stringent work hours. Facility is a 24/7 facility.</td>
<td>3Roots Wellness Center</td>
<td>6,400</td>
<td>$5.9</td>
</tr>
<tr>
<td>26</td>
<td>I.E.-Pacific Inc.</td>
<td>$25.59</td>
<td>$33.00</td>
<td>83</td>
<td>$37.02</td>
<td>$17.37</td>
<td>28</td>
<td>28</td>
<td>$200 - D/B Flight Line Station at Edwards Air Force Base, CA</td>
<td>38,920</td>
<td>$226.40</td>
<td>2</td>
<td>Diane Komstert-Bryon San Diego 1993</td>
</tr>
<tr>
<td>27</td>
<td>C&amp;S Companies</td>
<td>$20.25</td>
<td>$12.12</td>
<td>29</td>
<td>$9.8</td>
<td>$19.9</td>
<td>33</td>
<td>33</td>
<td>461</td>
<td>Solar Turbines Modernization Project - This exceptional project included extensive remodel of office &amp; test lab areas throughout the facility during stringent work hours. Facility is a 24/7 facility.</td>
<td>3Roots Wellness Center</td>
<td>6,400</td>
<td>$5.9</td>
</tr>
<tr>
<td>28</td>
<td>Conlan Construction</td>
<td>$17.36</td>
<td>$15.00</td>
<td>15</td>
<td>$15.00</td>
<td>$12.3</td>
<td>18</td>
<td>18</td>
<td>18</td>
<td>Solar Turbines Modernization Project - This exceptional project included extensive remodel of office &amp; test lab areas throughout the facility during stringent work hours. Facility is a 24/7 facility.</td>
<td>3Roots Wellness Center</td>
<td>6,400</td>
<td>$5.9</td>
</tr>
<tr>
<td>29</td>
<td>Graebon Construction Company Inc.</td>
<td>$10.49</td>
<td>$6.13</td>
<td>71</td>
<td>$16.49</td>
<td>$6.13</td>
<td>21</td>
<td>21</td>
<td>21</td>
<td>Pomarodo Cemetery District - Entrance Project at the Deadborn Cemetery, CA</td>
<td>Prado, CA</td>
<td>4,500</td>
<td>0</td>
</tr>
</tbody>
</table>

*Not ranked*  
na = Not applicable

**Source:** The companies and CPA/CFO attested statements. Due to rounding off, some percentages appear to be incorrect. To the best of our knowledge, this information is accurate as of press time. While every effort is made to ensure the accuracy and thoroughness of the on-line listings and typographical errors sometimes occur. Please send corrections or additions to the Research Department at the San Diego Business Journal, Eric Alade, editor@sd bj.com. This list may not be reprinted in whole or in part without prior written permission from the editor. Some companies have declined to participate or did not return a survey by press time. It is not the intent of this list to endorse the participants or to imply a company's size or numerical rank indicates its quality.
Across the shorelines of San Diego to the skyline of San Francisco, from the palms of the Inland Empire to the pines of the Sierras, our teams are building the important structures and infrastructure that enhance how people live, work, and play in our communities. **Together, we’re building new futures.**

**Balfour Beatty**

balfourbeattyus.com  p. 858.635.7400
## THE LIST

### LANDSCAPE ARCHITECTS

<table>
<thead>
<tr>
<th>Rank</th>
<th>Company</th>
<th>Address</th>
<th>Phone</th>
<th>Website</th>
<th>Projects</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>KTUA</td>
<td>3916 Normal St., San Diego 92103</td>
<td>619-294-4477</td>
<td><a href="http://www.ktua.com">www.ktua.com</a></td>
<td>Chula Vista Bayfront Parks North Park Mini-Park</td>
</tr>
<tr>
<td>3</td>
<td>OJB Landscape Architecture</td>
<td>500 Lomas Santa Fe Drive, Suite A, Solana Beach 92075</td>
<td>858-793-8970</td>
<td><a href="http://www.ojb.com">www.ojb.com</a></td>
<td>La Jolla Community Center, Sharp Memorial Campus Master Plan</td>
</tr>
<tr>
<td>4</td>
<td>Spurlock Landscape Architects</td>
<td>2212 Hancock St., San Diego 92101</td>
<td>619-294-0090</td>
<td><a href="http://www.spurlockland.com">www.spurlockland.com</a></td>
<td>wwwIntegrationDesign.com, 760-692-1924</td>
</tr>
<tr>
<td>5</td>
<td>VDLA Landscape Architects</td>
<td>402 Stevens Ave., Suite 107, Solana Beach 92075</td>
<td>619-294-9484</td>
<td><a href="http://www.vdla.us">www.vdla.us</a></td>
<td>La Colonia Park ViaStad Cafe and Courtyard</td>
</tr>
<tr>
<td>7</td>
<td>The Lightfoot Planning Group</td>
<td>5900 Ponder Court, Suite 115, Carlsbad 92008</td>
<td>760-662-1924</td>
<td><a href="http://www.lightfootpl.com">www.lightfootpl.com</a></td>
<td>Roberts Ranch, a residential development in Carlsbad, El Corazon in Oceanside, Planning and design.</td>
</tr>
<tr>
<td>9</td>
<td>Kimley-Horn</td>
<td>401 B St., Suite 600, San Diego 92101</td>
<td>619-294-9411</td>
<td><a href="http://www.kimleyhorn.com">www.kimleyhorn.com</a></td>
<td>Millenia Park, UCSD Mesa Housing Pedestrian Bridge</td>
</tr>
<tr>
<td>10</td>
<td>Krizan Associates Inc.</td>
<td>1829 Granite Hills Drive, Granite Hills 92019</td>
<td>619-517-2885</td>
<td><a href="http://www.krizanassociates.com">www.krizanassociates.com</a></td>
<td>Ambiente Resort adjacent to Cocinno National Forest, Private Estates in Poway, Paint Loma, Rancho Santa Fe and La Jolla</td>
</tr>
<tr>
<td>11</td>
<td>Project Design Consultants</td>
<td>741 B St., Suite 800, San Diego 92101</td>
<td>619-225-9411</td>
<td><a href="http://www.projectdesignconsultants.com">www.projectdesignconsultants.com</a></td>
<td>SDSU Aztec Stadium Streetscapes, JRoots Production Housing Landscape for 100 D.O.</td>
</tr>
<tr>
<td>14</td>
<td>Wynn-Smith Landscape Architecture Inc.</td>
<td>3294 Emerson Street Suite 335, San Diego 92106</td>
<td>619-517-2885</td>
<td><a href="http://www.wynn-smith.com">www.wynn-smith.com</a></td>
<td>Scripps Northridge Business Park, Reconstruction, Central Garden Renovation</td>
</tr>
<tr>
<td>16</td>
<td>Greg Hebert Landscape Architect</td>
<td>2037 Shelter Island Drive #105-417, San Diego 92106</td>
<td>619-294-1113</td>
<td>wwwgreghebert.com</td>
<td>La Jolla Oceanfront Residence Del Mar Residences</td>
</tr>
<tr>
<td>17</td>
<td>In-Site Landscape Architecture Inc.</td>
<td>2607 Shelter Island Drive #105-417, San Diego 92106</td>
<td>619-294-1113</td>
<td>wwwinsitearch.com</td>
<td>Palomar Rehabilitation Institute, Escondido Park Center, Valley Center</td>
</tr>
</tbody>
</table>

**Services**
- Rank
- % of revenue
- % of licensed architects
- % of commercial
- % of institutional
- % of other
- % of mixed-use
- Urban design
- Wetlands mitigation
- Water conservation
- Environmental impact study
- Erosion control

**Recent local projects**
- Chula Vista Bayfront Parks North Park Mini-Park
- Living Learning Neighborhood, North Torrey Pines, University of California, San Diego, La Jolla, CA
- La Jolla Community Center, Sharp Memorial Campus Master Plan
- Roberts Ranch, a residential development in Carlsbad, El Corazon in Oceanside, Planning and design.
- San Diego Zoo Children's Zoo Project, Botanic Garden Dickerson Family Education Conservatory
- Scripps Northridge Business Park, Reconstruction, Central Garden Renovation
- La Jolla Oceanfront Residence Del Mar Residences
- Palomar Rehabilitation Institute, Escondido Park Center, Valley Center

**Local executive(s)**
- Mike Singleton 1970
- Gene Schmidt 1983
- James Barnett 2003
- Leigh Kyle 1988
- Yale Hopper 1972
- Catherine McCullough 1999
- James Taylor 1978
- John Krizan 1990
- Greg Shields 1976
- Larry Sheehan 2003
- Jeri Deneen 1995
- Tim Smith 1993
- Martin Schmidt 1989
- Greg Hebert 1992
- Gail Zerbe 1999
- Zach Tanner 2003

**Firm**
- KTUA
- Schmidt Design Group, Inc.
- OJB Landscape Architecture
- Spurlock Landscape Architects
- VDLA Landscape Architects
- McCullough Landscape Architecture Inc.
- The Lightfoot Planning Group
- Rick Engineering Co.
- Kimley-Horn
- Krizan Associates Inc.
- Project Design Consultants
- Integration Design Studio, Landscape Architects
- Deneen Powell Atelier Inc.
- Wynn-Smith Landscape Architecture Inc.
- Environ Landscape Architecture Inc.
- Greg Hebert Landscape Architect
- In-Site Landscape Architecture Inc.

**Website Phone**
- www.ktua.com 619-294-4477
- www.schmidtdesign.com 619-226-1462
- www.ojb.com 858-793-8970
- wwwIntegrationDesign.com, 760-692-1924
- www.vdla.us 619-294-9484
- www.mtlad.com 619-296-3150
- wwwIntegrationDesign.com, 760-692-1924
- www.rickengineering.com 619-291-0707
- www.kimleyhorn.com 619-294-9411
- www.krizanassociates.com 619-517-2885
- www.projectdesignconsultants.com 619-225-9411
- www.integration-design.com 760-662-1924
- www.dpaAtelier.com 619-294-9442
- www.wynn-smith.com 619-517-2885
- www.environ.us 619-232-7007
- wwwgreghebert.com 619-294-1113
- wwwinsitearch.com 619-294-1113

**Projects**
- Science/Advanced Technology: 40 Civic/Industrial
- Commercial/Office: 50 Life Science/Advanced Technology
- Hospitality/residential: 75 Mixed Use/Other
- Civic: 60 Mixed-use: 25
- Institutional/medical: 60 Private Development: 75 Civic/Industrial
- Mixed-Use: 47.6 Higher Education: 21.4 Health Care: 16.5
- Biotech/high tech: 64 Gov./educational: 25

**Notes**
- (NR) Not ranked
- (24) Source: The companies
- (31) To the best of our knowledge, this information is accurate as of press time. While every effort is made to ensure the accuracy and thoroughness of the list, revisions and typographical errors sometimes occur. Please send corrections or additions to the Reader's Department at the San Diego Business Journal. Eric Aldara, ealdrara@sdbj.com. This list may not be reprinted in whole or in part without prior written permission from the author. Some companies have declined to participate or did not return a survey by press time. It is not the intent of the list to endorse the participants or to imply a company's size or numerical rank indicates its quality.
### Ranked by number of local staff as of April 1, 2021

### ARCHITECTURAL FIRMS

<table>
<thead>
<tr>
<th>Rank</th>
<th>Firm</th>
<th>Address</th>
<th># of local staff</th>
<th>Project specialties</th>
<th>Current local representative projects</th>
<th>Year Established</th>
<th>Year Address</th>
<th>Top local executive(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Delawie</td>
<td>4981 Morena Blvd., San Diego 92110</td>
<td>55/60</td>
<td>Hospitality: 50; Life Science: 40</td>
<td>PS5 Basic Training Center, Ocean Beach Resort</td>
<td>1961</td>
<td>26-36</td>
<td>Frank Templesky (1961)</td>
</tr>
<tr>
<td>9</td>
<td>Hed (Harley Ellis Deveaux)</td>
<td>225 Broadway, Suite 1300, San Diego 92101</td>
<td>39/43</td>
<td>Education: 60; Life Science/Technology: 30</td>
<td>Miraza College: Chemistry/Biotechnology Building, Becton Dickinson Lab Renovation (3)</td>
<td>2001</td>
<td>16-20</td>
<td>Neville Williams (2001)</td>
</tr>
<tr>
<td>13</td>
<td>McFarlane Architects</td>
<td>6256 Granview Drive, Suite 510, San Diego 92122</td>
<td>27/37</td>
<td>Commercial/OFC: 50; Life Science/Advanced Technology: 30</td>
<td>Qualcomm; Braceras; Novartis Gene Therapy; Raman Physics: Phase 3 Real Estate Partners; Rayzelio</td>
<td>2000</td>
<td>10-20</td>
<td>Neal McFarlane (2000)</td>
</tr>
<tr>
<td>19</td>
<td>The Miller Hull Partnership</td>
<td>4980 North Harbor Drive, Suite 100, San Diego 92106</td>
<td>21/23</td>
<td>Public Infrastructure: 40; Private Life Sciences: 30</td>
<td>8th and B St. Mixed-Use in National City, City of San Diego; Times One Prime Fire Station</td>
<td>2001</td>
<td>5-15</td>
<td>Ben Fink (2001)</td>
</tr>
</tbody>
</table>

**Notes:**
- **RANK**
  - No rank
  - **NR** Not ranked
- **S.D. County only**
- **International projects in:**
  - U.S.
  - **Projects specialties:**
  - Architecture: 60
  - Interiors: 40
  - Hospitality: 50
  - Life Science: 30
  - Corporate: 20
  - Development: 15
  - Healthcare: 15
  - Education: 15
  - Civic: 15
  - Mixed Use: 15
  - Residential: 10
  - Hospitality/Residential: 10
  - Commercial: 10
  - Gov/University: 10
  - Education: 10
  - Healthcare: 10
  - Life Sciences & Technologies: 10
  - Corporate: 10
  - Government: 5
  - Education: 5
  - Healthcare: 5
  - Life Sciences: 5
  - Government: 4
  - Education: 4
  - Healthcare: 4
  - Life Sciences: 4
  - Government: 3
  - Education: 3
  - Healthcare: 3
  - Life Sciences: 3
  - Government: 2
  - Education: 2
  - Healthcare: 2
  - Life Sciences: 2
  - Government: 1
  - Education: 1
  - Healthcare: 1
  - Life Sciences: 1
  - Government: 0
  - Education: 0
  - Healthcare: 0
  - Life Sciences: 0

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## ARCHITECTURAL FIRMS

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

<table>
<thead>
<tr>
<th>Rank</th>
<th>Firm</th>
<th>Address</th>
<th>Website Phone</th>
<th># of local staff: 2020 2021 % (+)</th>
<th># of local staff as of April 1, 2021</th>
<th>Top local executive(s)</th>
<th>Year est.</th>
<th>Logo</th>
</tr>
</thead>
<tbody>
<tr>
<td>21</td>
<td>Mosher Drew</td>
<td>1775 Hancock St., San Diego 92110</td>
<td><a href="http://www.mosherdem.com">www.mosherdem.com</a> 619-223-2400</td>
<td>20 23 (13) 11 10 100</td>
<td>0 0 K-12: 35 Higher Education: 25</td>
<td>Mira Mesa High School Whole Site Modernization, Miramar CDC-Dossenske Library Renovation</td>
<td>William Magnuson 1949</td>
<td><img src="mosher-drew-headshot-1.jpg" alt="Mesher Drew Logo" /></td>
</tr>
<tr>
<td>23</td>
<td>Davy Architecture Inc.</td>
<td>1015 10th Ave, San Diego 92101</td>
<td><a href="http://www.davyarchitecture.com">www.davyarchitecture.com</a> 619-238-3811</td>
<td>20 22 (10) 5 95</td>
<td>0 Healthcare: 50 Education: 30</td>
<td>VA La Jolla Patient Room Conversion La Jolla Union Cath Lab II</td>
<td>Ric Davy 1984</td>
<td><img src="davy-architecture-headshot-1.jpg" alt="Davy Architecture Logo" /></td>
</tr>
<tr>
<td>26</td>
<td>Cunningham</td>
<td>1035 1st St, San Diego 92101</td>
<td><a href="http://www.cunningham.com">www.cunningham.com</a> 619-495-1080</td>
<td>18 18 8 58</td>
<td>42 0 Health care: 40 Education: 20</td>
<td>Santa Clara Valley MIC Behavioral Health, Sharp Coronado Hospital Sub Acute II and SFC-4D Upgrade</td>
<td>G. Wayne Hunter 2013</td>
<td><img src="cunningham-headshot-1.jpg" alt="Cunningham Logo" /></td>
</tr>
<tr>
<td>27</td>
<td>ID Studios Inc.</td>
<td>336 S. Sierra Ave, Suite 110, Solana Beach 92075</td>
<td><a href="http://www.idstudiosinc.com">www.idstudiosinc.com</a> 858-323-9836</td>
<td>18 19 (9) 1 91</td>
<td>0 Corporate: 40 Life Science/ Tech: 40</td>
<td>Neutreis, Fish &amp; Richardson</td>
<td>Deborah Elliott 2005</td>
<td><img src="id-studios-headshot-1.jpg" alt="ID Studios Logo" /></td>
</tr>
</tbody>
</table>

### Notes
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- Top two areas of specialty and the percentage that each represents of 2020 gross billings. Percentages will not equal 100 in some cases.

---

**AIA CALIFORNIA 2021 FIRM AWARD**

**THE JURY HAS SPOKEN**

“They were tackling environmental issues before climate action was even a term. To call them strong in the sustainability category would be an understatement.”

“They published values and mission say it all: This firm really walks the walk. They have five tenets and have the proof to back each one.”

---

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**SAN DIEGO** **IRVINE** **SACRAMENTO** **SAN JOSE** **DALLAS** **SAN ANTONIO**

**LPADesignStudios.com**
### The List

#### Architectural Firms

<table>
<thead>
<tr>
<th>Rank</th>
<th>Firm</th>
<th>Address</th>
<th>Phone</th>
<th>Website</th>
<th># of local staff</th>
<th># of licensed architects</th>
<th>% of billings for projects in S.D. County only</th>
<th>% of billings for projects in U.S. International</th>
<th>Project specialties</th>
<th>Current local executive(s)</th>
<th>Top local executive(s)</th>
<th>Year est.</th>
<th>Project specialties</th>
<th>Year est.</th>
<th>Source</th>
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</thead>
<tbody>
<tr>
<td>34</td>
<td>HBG Design</td>
<td>707 Broadway, Suite 900, San Diego 92101 <a href="http://www.hbg-design.com">www.hbg-design.com</a> 619-858-7888</td>
<td></td>
<td></td>
<td>14</td>
<td>12</td>
<td>5</td>
<td>0</td>
<td>100</td>
<td>Hospitality: 100</td>
<td>0</td>
<td>Joe Barfield, AIA</td>
<td>2016</td>
<td></td>
<td></td>
</tr>
<tr>
<td>36</td>
<td>HKS Architects</td>
<td>12636 High Bluff Drive, Suite 400, San Diego 92130 <a href="http://www.hksinc.com">www.hksinc.com</a> 858-429-5058</td>
<td></td>
<td></td>
<td>13</td>
<td>13</td>
<td>7</td>
<td>30</td>
<td>60</td>
<td>Higher Education: 40 Life Science: 60</td>
<td>UC San Diego Theatre District Living and Learning Neighborhood NMCSD Balboa Clinical Labs</td>
<td>Jeff Larson</td>
<td>2017</td>
<td></td>
<td></td>
</tr>
<tr>
<td>38</td>
<td>Vasquez Marshall Architects</td>
<td>13220 Evening Creek Drive, Suite 117, San Diego 92129 <a href="http://www.vmarch.net">www.vmarch.net</a> 858-513-2290</td>
<td></td>
<td></td>
<td>11</td>
<td>9</td>
<td>4</td>
<td>100</td>
<td>0</td>
<td>Department of Defense: 95 Private sector: 5</td>
<td>F-35 Communications Bldg and Infrastructure, MCAS Miramar; and San Diego Naval Medical Center</td>
<td>David Vasquez</td>
<td>1995</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Notes:**
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---

### 60 years

That’s how long we’ve been practicing our core principles of client satisfaction, relationship building, and quality design.

When Homer Delawie founded his studio in Old Town, 1961, he had no way of knowing it would grow to become one of the largest and longest running Architecture and Interior Design firms in San Diego. We’re honored to continue his practice and serve our hometown under his belief of, “Simplicity with attention to detail.”

---

**Contact:**
- [delawie.com](http://delawie.com) 619.299.6680
- [cass & Sovetyk I Consulting Architects](http://www.csa-a.com) 619-298-3480
- [HKS Architects](http://www.hksinc.com) 858-429-5058
- [HMC Architects](http://www.hmcarchitects.com) 619-744-4077
- [Vasquez Marshall Architects](http://www.vmarch.net) 858-513-2290
- [AO](http://www.aarchitects.com) 714-639-9880
- [HBG Design](http://www.hbg-design.com) 619-858-7888
- [Stephen Dalton Architects (SDA)](http://www.sdaarchitects.net) 858-792-5906
- [PGAL](http://www.pgal.com) 619-389-5288

---

**Sources:**
- The firms
- In the case of ties, firms are ranked by number of licensed architects, then alphabetically.
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<th>% (+)</th>
<th>% of billings for projects in: S.D. County only U.S. International</th>
<th>Project specialties: Percentage (%)</th>
<th>Current local representative projects</th>
<th>Top local executive(s)</th>
<th>Year est. locally</th>
</tr>
</thead>
<tbody>
<tr>
<td>39</td>
<td>3215 Seymore Road, Suite 200, San Diego 92104</td>
<td>8 (11)</td>
<td>3</td>
<td>90</td>
<td>Healthcare: 72 Science/ Education: 28</td>
<td>Rehabilitation Institute Saguaro Memorial Hospital Encinitas Acute Care Building</td>
<td>Joe Lowine 2013</td>
<td></td>
</tr>
<tr>
<td>41</td>
<td>Lyons Warren, Engineers and Architects 9589 Candida St., San Diego 92126</td>
<td>8 (20)</td>
<td>2</td>
<td>35</td>
<td>Retail: 98 Food service: 2</td>
<td>CVS 41331 - San Diego, CA (Imperial A &amp; 129th), Mr. Moto Plaza - San Diego, CA (Seaport Village)</td>
<td>Tracy Lindquist 1979</td>
<td></td>
</tr>
<tr>
<td>42</td>
<td>H2 Hawkins + Hawkins Architects Inc. 106 Ninth Ave., San Diego 92101</td>
<td>7 (13)</td>
<td>3</td>
<td>34</td>
<td>Commercial: 90 Residential/ single/multifamily: 10</td>
<td>Louisiana Miro Apartments 14 Units Cedar Shores Clubhouse 9,000 s.f. with Level 2 Pool Deck</td>
<td>Steven Hawkins 1987</td>
<td></td>
</tr>
<tr>
<td>43</td>
<td>KMA Architecture 2716 Historic Decatur Road, Suite 201, San Diego 92106</td>
<td>6 (14)</td>
<td>4</td>
<td>20</td>
<td>Federal: 85 Commercial/office: 15</td>
<td>Traction Land Port of Entry San Ysidro Land Port of Entry</td>
<td>Don Blair 1973</td>
<td></td>
</tr>
<tr>
<td>44</td>
<td>Architects BP Associates Inc. 13858 Bernardi Plaza Courtyard, Suite 120, San Diego 92128</td>
<td>6</td>
<td>2</td>
<td>100</td>
<td>Residential/multifamily: 50 Mixed-use: 40</td>
<td>The Farm in Poway Hawthorn Street Apartments Ivy Street Office Building</td>
<td>Roger Beringer 2002</td>
<td></td>
</tr>
<tr>
<td>46</td>
<td>Hubbell &amp; Hubbell Architects Inc. 1670 Sixth Ave., San Diego 92101</td>
<td>5 (17)</td>
<td>1</td>
<td>100</td>
<td>Residential: 69 Commercial: 29</td>
<td>Shadow Mountain Baseball Field Villa Formosa Apartments</td>
<td>Drew Hubbell 1959</td>
<td></td>
</tr>
<tr>
<td>47</td>
<td>CPCArchitects 3112 Tiger Run Court, Suite 113, Carlsbad 92010</td>
<td>3</td>
<td>2</td>
<td>99</td>
<td>Science: 70 Higher Education: 30</td>
<td>Millipore Sigma - Carlsbad SDU - Calpulli Center</td>
<td>Jean Claude Constandez Frederick Powell 2013</td>
<td></td>
</tr>
</tbody>
</table>

**Notes:**
- **NR** Not ranked
- **S.D. County only**
- **U.S.**
- **International**
- **Mixed-use**
- **Residential/multifamily**
- **Commercial**
- **Retail**
- **Science**
- **Healthcare**
- **Education**
- **Rehabilitation Institute**
- **Saguaro Memorial Hospital**
- **Encinitas Acute Care Building**
- **CVS 41331**
- **Imperial A & 129th**
- **Mr. Moto Plaza**
- **Seaport Village**

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**Architectural Firms**

The list, omissions and typographical errors sometimes occur. Please send corrections or additions to the Research Department at the San Diego Business Journal. Eric Alimonte, alimonte@sdbj.com. This list may not be reprinted in whole or in part without prior written permission from the publisher. Some companies have declined to participate or did not return a survey by press time. It is not the intent of this list to endorse the participants or to imply a firm’s size or numerical rank indicates its quality.

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