This chapter of the General Plan sets the context for the chapters that follow. It presents background information on San Leandro, with an emphasis on the factors that will shape the city’s future. The chapter provides an overall perspective on San Leandro’s role within the greater Bay Area. The city’s history, population, economy, land use, transportation system, and environment are profiled. An estimate of the city’s development potential is provided, drawing on a land capacity analysis and regional projections prepared by the Association of Bay Area Governments.

A. OUR ROLE IN THE REGION

San Leandro is located in the heart of the San Francisco Bay Area, the fourth largest metropolitan area in the country and home to 7.5 million residents. The city is located in the “East Bay” sub-area, consisting of 33 cities in Alameda and Contra Costa Counties. More than one-third of the Bay Area’s population resides in the East Bay. While the area is sometimes perceived as suburban San Francisco, it is a diverse metropolitan area in its own right. In 2016, the East Bay was home to 1.1 million jobs and 2.7 million residents. San Leandro is the fifth largest city in Alameda County in population, following Oakland, Fremont, Hayward, and Berkeley.

Figure 2-1 illustrates San Leandro’s position within the Bay Area. The city is located 8 miles south of Downtown Oakland, 15 miles southeast of San Francisco, and 30 miles north of San Jose. It is bounded on the north by Oakland and on the south by the unincorporated communities of San Lorenzo and Ashland. The western edge of the city is defined by San Francisco Bay, while the East Bay hills define the eastern edge.
Source: Alameda County, 2013; PlaceWorks, 2015.

Figure 2-1

Regional Location
San Leandro is well connected to the region’s transportation system, with three freeways (I-880, I-580, and I-238) passing through the city and Metropolitan Oakland International Airport just a few miles away. The city is served by two BART stations, two active railroad lines, and an extensive network of bus and shuttle routes. These transportation advantages have helped define San Leandro’s economic base and were a key factor in its development during the second half of the 20th Century.

Over the past 50 years, San Leandro has developed a reputation as a diverse, innovative, business-friendly city. Much of the city’s identity dates from the mid-20th Century, when the community was at the leading edge of the Bay Area’s development. Many of the city’s residents arrived during this era. While some of these residents continue to make San Leandro their home today, tens of thousands of new residents have arrived in the last few decades. This influx of new residents has brought new energy to the city, and shifting perspectives on issues such as growth, transportation, and the environment. The city has found strength in its growing diversity, and is emerging as a center for innovation, creative problem-solving, and new ideas.

B. HISTORY

Following some 3,000 years of Native American settlement, the area now known as San Leandro was divided through Spanish land grants between 1820 and 1842. Most of modern-day San Leandro was contained within the vast cattle ranches of Ignacio Peralta (north of San Leandro Creek) and Don Jose Joaquin Estudillo (south of San Leandro Creek). The ranches gave way to farms as settlers, squatters, and “49ers” arrived in the early 1850s. The town of San Leandro was laid out in 1855 and became the seat of Alameda County in 1856. The original town plan established a grid of streets, with sites set aside for prominent buildings such as the County Courthouse and City Hall.

After a catastrophic earthquake destroyed the Courthouse in 1868 and the transcontinental railroad reached Oakland in 1869, the county seat was relocated from San Leandro to Oakland. However, San Leandro continued to prosper as a small agricultural town. The city incorporated in 1872 and had grown to about 2,300 residents by 1900. Farms and orchards surrounding San Leandro produced a variety of fruits and vegetables, including cherries, tomatoes, onions, potatoes, asparagus, sugar beets, rhubarb, and apricots.
San Leandro continued to grow at a moderate pace during the first 40 years of the 20th Century. Many of the neighborhoods in the northeast part of the city, such as Broadmoor and Estudillo Estates, were developed during this time period. The railroad corridors running through the city were developed with industry, while Downtown was the center for commerce and civic life. By 1940, San Leandro had 14,000 residents. Still, the town covered just a few square miles and was surrounded by farms and orchards.

The 1940s and 50s were a time of transformation for the city. A development boom, initially created by the need for wartime housing and then sustained by returning veterans and their families, brought about a 350 percent increase in the city’s population in just 20 years. Much of San Leandro’s current form and character was defined during this era and nearly half of the city’s current housing stock was added. Most of the neighborhood shopping centers and the commercial strips along East 14th Street and other arterials date from this period.

Despite the suburban character of the development, San Leandro emerged from the boom period as much more than a “bedroom community.” The city was among the fastest growing industrial centers in the Bay Area during the post-war years, adding 6,000 manufacturing jobs between 1947 and 1954 alone. Much of West San Leandro was developed with industry and numerous warehousing and distribution facilities were built south of Marina Boulevard. At the same time, early shopping centers such as Pelton Center and Bayfair Mall made the city a thriving retail destination. The favorable balance between jobs and housing enabled San Leandro to offer a competitive tax rate and a high level of City services.
The pace of growth slowed as the city reached its natural limits during the 1960s. On the east, steep hills created a barrier to large-scale development. On the west, most of the shoreline had been acquired for park uses. Established communities lay to the north and south. The focus of new development shifted to smaller infill sites, including greenhouses and nurseries, and other properties that had been bypassed during the boom years.

By the 1980s, other factors had begun to shape the form of San Leandro. The Bay Area’s economic base shifted from manufacturing to services and technology, and many traditional industries left the city. As the thousands of families who moved to San Leandro during the 1940s and 50s matured, school enrollment dropped and several schools were closed and redeveloped with housing. The percentage of senior citizens in the city increased from six percent in 1960 to 20 percent by 1990, giving San Leandro the highest median age in Alameda County. Local retailers were impacted by these changes and further by competition from new suburban malls.

San Leandro’s evolution continued through the 1990s and early 2000s. Significant reinvestment in the city’s housing stock took place, and the city gained almost 20,000 residents in two decades. Much of the city’s growth was fueled by an increase in foreign-born residents and young families, transforming many of the city’s shopping areas and cultural institutions, and increasing school enrollment. The city’s industrial areas also evolved. In 2011, San Leandro launched a public-private
partnership to develop an 11-mile fiber optics loop (Lit San Leandro). This investment has put the city on the leading edge of the Bay Area economy and has repositioned the city’s businesses to be more technology and innovation focused. At the same time, San Leandro has promoted higher density development around its two BART stations, creating a development pattern that is oriented toward walking, bicycling, and transit use rather than driving.

Figure 2-2 illustrates the stages of San Leandro’s development from 1872 to 2015. Chart 2-1 tracks the city’s population during the last century. Both the map and the graph clearly illustrate the burst of growth that took place in the city between 1940 and 1960. However, as the following pages point out, the city has continued to grow and change over the past 40 years.

Chart 2-1: San Leandro Population, 1900-2015

Source: US Census
Figure 2-2

Evolution of the City, 1872-2015

Source: San Leandro General Plan Update, 2002; PlaceWorks, 2016.

Urbanized Area
C. POPULATION

The California Department of Finance placed the population of San Leandro at 88,441 residents in 2015. The city’s population has increased by 11 percent since 2000. This is a slightly faster rate than Alameda County as a whole which grew by 9 percent during the same period.

Most of San Leandro’s growth during the last 15 years has been the result of increasing household size rather than new construction. The average number of persons in a San Leandro household was 2.57 in 2000 and 2.85 in 2015. This continues a trend underway since 1990, when average household size was just 2.33. During the 2010-2015 period alone, San Leandro added just 120 households while its population increased by 3,500 people.

San Leandro has become much more ethnically diverse over the past two decades. The percentage of Non-Hispanic White residents in the city declined from 79 percent of the city’s population in 1980 to 27 percent in 2010. Based on the 2014 American Community Survey, San Leandro’s population is 32 percent Asian, 28 percent Hispanic, 24 percent Non-Hispanic White, 11 percent African American, and 5 percent other races or multi-racial. Approximately 24 percent of the city’s residents are multi-lingual and 26 percent primarily speak another language at home.
The median age in the city is 40.4, up from 39.3 in 2010 and 37.7 in 2000. The city experienced remarkable growth in its youth population during the 1990s, with a 36 percent increase during the decade. The rate slowed to about 9 percent in 2000-2010. In 1990, nearly one in five San Leandro residents was over 65. That percentage declined in the 1990s and 2000s, and the percentage of seniors now stands at 13.7 percent of the population.

In recent years, the fastest growing segment of the population has been the 45-64 age cohort. There were 25,600 people in this cohort in 2014 compared to 14,000 in 1990. A substantial increase in the senior population is anticipated as the “baby boomer” generation advances. The so-called “millennial” generation is somewhat under-represented in San Leandro, with persons aged 20-34 comprising 19.7 percent of the population, compared to 22.4 percent in Alameda County.

In 2014, the median household income in San Leandro was estimated to be about $63,400. Although this represents a substantial increase over 2000, it is still about 16 percent below the Alameda County median of $73,775. Based on data provided to the city by ABAG in 2013, about 44 percent of the city’s households meet the US Department of Housing and Urban Development (HUD) definition of “low” or “very low” income. The cost of housing is particularly vexing for lower income households, with some San Leandro families spending more than 50 percent of their monthly incomes on their housing costs. The Housing Element of the General Plan addresses this issue in detail.
Charts 2-2 and 2-3 illustrate the characteristics of San Leandro’s housing stock. Nearly half of the housing in San Leandro was built during the 1940s and 50s. However, the city also contains more than 3,500 dwelling units which pre-date 1940. About two-thirds of San Leandro’s dwelling units are single family homes and about a quarter are in multi-family buildings with five or more units.

San Leandro is more affordable than other East Bay communities, but has experienced dramatic swings in housing costs in the last 15 years. Between 2001 and 2006, the estimated market value of a single family home in the city nearly doubled, rising from $330,000 to $582,000. San Leandro was severely impacted by the real estate depression in the 2008-2011 period and saw its median home value plummet to $310,000 in February 2012. Prices have risen steadily since that time. As of 2016, the median value was $539,000.

Rents did not decline as steeply as home prices during the downturn and have increased at an accelerating rate during the economic recovery since 2012. The median rent for a one-bedroom apartment rose from $1,000/month in October 2011 to $2,100 in October 2015. Roughly 55 percent of the dwellings in San Leandro are occupied by owners and about 45 percent are occupied by renters.
**Chart 2-2: Year of Construction of San Leandro's Housing Stock**

Source: US Census, 2015

**Chart 2-3: Composition of San Leandro's Housing Stock**

Source: California Dept of Finance, 2015
The Association of Bay Area Governments (ABAG) projects that the Bay Area’s population will increase by 2.1 million residents between 2010 and 2040. ABAG and the Metropolitan Transportation Commission (MTC) envision fundamental changes in where this growth occurs, with most of it taking place in cities at the center of the region rather than communities on the suburban fringe. ABAG’s Plan Bay Area forecasts for San Leandro indicate the city will add 7,600 new households between 2010 and 2040. This General Plan accommodates this growth, primarily through infill and redevelopment of underutilized parcels.

D. ECONOMY

San Leandro has a diverse economy, with a substantial number of jobs in manufacturing, wholesaling, retail, office, hospitality, health care, construction, and personal and professional services sectors. During the post-war era, the City invested in infrastructure to support significant industrial growth, including a municipal sewer plant and wastewater collection system. Among San Leandro’s major employers during the 1950s and 60s were Caterpillar, Dodge/Plymouth, Friden Calculator, California Packing Corp, General Foods, Kellogg, Western Electric and Hudson Lumber. Tax revenues from this strong industrial base enabled the City to maintain a relatively low tax rate and provide a high level of municipal services.

While many of the traditional manufacturers are gone today, the City continues to invest in infrastructure to support economic growth. Today the emphasis is on high-speed data and communication. Investment in fiber optics systems continues to fuel the growth of traditional industries such as food processing and manufacturing, but with the added benefits and productivity of new technologies.

Several factors have contributed to San Leandro’s economic repositioning. The city is centrally located in the Bay Area, has one of the fastest rates of internet connectivity in the country, and has numerous transportation and freight options, including interstate highways, ports, and airports. It has a business friendly reputation, a skilled and diverse work force, and a substantial inventory of industrially zoned and underutilized land. Prices in San Leandro are also competitive, making the city an attractive investment and an excellent location for start-ups and emerging industries.
The number of jobs in the city was estimated by ABAG to be 43,000 in 2015. While employment rose slightly between 2000 and 2005, San Leandro was hard hit by the economic recession and experienced a net loss of approximately 7,000 jobs between 2005 and 2011. The city has rebounded since 2011, adding an estimated 3,400 jobs in the last four years.

In 2010, about 22 percent of the city’s jobs were manufacturing and wholesale jobs, compared to 15 percent countywide. The percentage of total jobs in manufacturing has been declining in the city, while the percentage of jobs in the service sector has increased. Retail jobs have remained relatively constant, representing about 16 percent of the city’s jobs. The Economic Development Element of the General Plan includes a complete profile of the local employment base, as well as a discussion of labor force and labor characteristics.

ABAG projects that San Leandro will gain 13,000 jobs between 2010 and 2040, with a total of 52,900 jobs projected for 2040. Some of this growth represents the continued recovery of jobs lost during the recession, but much of it is net new growth. The city has long recognized that its economic health was linked to a favorable balance between the number of jobs and housing units in the community. In 2015, there were about 0.96 jobs for each employed resident in the city. Although this appears to be a good balance, most San Leandro residents work in other cities and most San Leandro jobs are filled by residents living elsewhere. Looking to the future, the city strives to reduce “external” work trips and create a community where residents can find jobs within the city, and employees can find housing without long commutes.
Chart 2-4 compares the ratio of employed residents to households in San Leandro with those for other cities in Alameda County.

E. LAND USE

The City of San Leandro encompasses 15.4 square miles, including 13.3 square miles (about 8,500 acres) of land and 2.1 square miles of water. There are approximately 25,000 parcels of land in the city, about three-quarters of which contain single family detached homes. Chart 2-5 illustrates the existing composition of land uses in San Leandro.

Excluding streets and freeways, 45.7 percent of San Leandro’s land area is in residential uses. San Leandro’s neighborhoods include about 2,620 acres of single family detached homes, 280 acres of townhomes and duplexes, 300 acres of apartments and condominiums, and 70 acres of mobile homes. These areas contain about 32,500 housing units, for an average residential density of 10 units per acre. This density creates a more urban character than the newer communities of the East Bay (like Dublin and Fremont) but a more suburban character than Berkeley, Oakland, and other cities closer to San Francisco. In fact, many of San
Leandro’s neighborhoods have a comfortable “small town” quality that is created in part by mixed density housing.

The mean single family lot size in the city is 6,200 square feet. Rectangular lots measuring about 60’ x 100’ comprise most of the city’s post-war neighborhoods (such as Washington Manor) but are also typical in older areas such as Estudillo Estates and Farrelly Pond. Slightly larger lots prevail in the Bay-O-Vista, Broadmoor, and Mulford Gardens areas, while smaller lots are more common in the post-1990 subdivisions such as Heron Bay and Cherrywood.

Although many San Leandro neighborhoods are perceived as being homogeneous, the housing stock is actually quite diverse. The city’s neighborhoods include view-oriented hillside homes, craftsman bungalows and Mediterranean cottages, apartment buildings and garden apartment complexes, mid-rise condominiums, ranch-style tract homes, century-old Victorians, mobile home parks, California contemporaries, and even semi-rural ranchettes. Many single family neighborhoods include pockets of higher-density housing, along with other uses such as parks, schools, and churches. Densities as high as 100 units per acre can be found on some blocks around Downtown San Leandro, although most multi-family housing is in the range of 25 to 50 units per acre. The major concentrations of higher density housing are located around Downtown, along East 14th Street and Washington Avenue, in the Springlake area, along Orchard Avenue, at the west end of Marina Boulevard, around San Leandro Hospital, and around the Greenhouse Marketplace Shopping Center.

Commercial (retail, service, and office) uses in San Leandro comprise 564 acres, or about 8 percent of the city. Although Downtown is the city’s historic retail center, the largest retail parcels in the city are the community and regional shopping centers such as Bayfair and Marina Square. Much of the city’s retail acreage is contained in commercial strips along East 14th Street, Washington Avenue, MacArthur Boulevard and Marina Boulevard. The city also contains a number of small neighborhood-oriented shopping centers. About 108 acres of the city’s commercial land consists of offices. The largest concentrations are located around the Downtown BART Station, along East 14th Street, and just east of Downtown.
San Leandro contains about 1,300 acres of industrial uses. This is a reduction of about 60 acres in the last 15 years. Industrial areas are generally located in the west and northwest parts of the city, and in the central area just east of I-880 and south of Marina Boulevard. During the late 19th and early 20th centuries, San Leandro’s major industries were located along the rail line just west of Downtown. This pattern changed with the construction of the Nimitz Freeway and the large-scale subdivision of lands further west. Today, developments like The Gate and the 21st Amendment Brewery are repurposing former heavy manufacturing buildings for modern industrial uses. While the city still contains general industrial uses such as wrecking yards, warehouses, and foundries, the mix of activities has become more innovation-driven.

The city also contains 466 acres of public and institutional uses and 303 acres of transportation, communication, and utilities land. Public and institutional uses include schools, hospitals, libraries, community centers, municipal buildings, and other civic uses. These uses tend to be scattered around the city within neighborhoods and business districts. The transportation, communication, and utilities land consists mostly of railroad rights-of-way. This land also includes the BART stations, PG&E
rights-of-way, the Davis Street Transfer Station, and wastewater treatment facilities.

Open space and parks comprise 1,000 acres in San Leandro. City parks such as Marina Park and Washington Manor Park represent about 77 acres of this total. Public golf courses and Oyster Bay Regional Shoreline make up another 450 acres. The remainder of the land—about 474 acres—consists mostly of wetlands in the southwestern part of the city.

Additional information on land use in San Leandro may be found in Chapter 3.

F. TRANSPORTATION SYSTEM

Interstates 880 and 580—the Nimitz and Macarthur Freeways—bisect San Leandro in a north-south direction. Interstate 238—the Castro Valley Freeway—provides an east-west link between 880 and 580 in the southern part of the Planning Area. I-880 is one of the busiest freeways in California, carrying 215,000 vehicles through San Leandro on an average day and serving as the major north-south truck corridor through the East Bay. Traffic volumes on I-580 are about 160,000 vehicles per average day. Both of the freeways are four lanes in each direction and both provide several interchanges connecting to local streets in San Leandro. San Leandro is located midway between the Bay Bridge and the San Mateo Bridge, the two major transbay crossings between the San Francisco Peninsula and the East Bay.
The 107-mile Bay Area Rapid Transit (BAR T) system includes four miles of track within San Leandro. Two of the system’s 45 stations are located within the city, at Downtown San Leandro and Bay Fair. About 400,000 commuters ride BART to work on a typical weekday. About 6,000 passengers a day exit the two stations in San Leandro on a typical weekday, a ridership increase of 40 percent in the last 16 years. San Leandro does not currently have an AMTRAK station, although AMTRAK’s trains pass through the city between Oakland and San Jose. Most San Leandro residences are within one-half mile of an AC Transit bus route, providing links to the BART station and major destinations within the city and East Bay. The city is also served by two active freight-rail lines and is approximately one mile from Metropolitan Oakland International Airport.

Additional information on local transportation conditions may be found in the Transportation Element of the General Plan (Chapter 4).

G. ENVIRONMENT

San Leandro is located on the East Bay Plain, a flat area that extends 50 miles from Richmond in the north to San Jose in the south. The Plain is about three miles wide in the San Leandro area. At its eastern edge, the plain transitions into low hills, rising to 526 feet at the highest point in the city’s Bay-O-Vista neighborhood. On its western edge, the Plain slopes down to San Francisco Bay, the largest estuary on the California coast.

San Leandro’s rich alluvial soils and temperate climate support a wide variety of plants and animals. Wetlands in the southwest part of the city provide habitat for the salt marsh harvest mouse and other special status species. San Leandro Creek remains one of the few waterways in the urbanized East Bay that retains its natural character along most of its course. Elsewhere in the city, street trees, parks, large yards, and other open spaces provide both aesthetic and environmental benefits. Just beyond the eastern city limits, thousands of acres of grasslands, woodlands, and coastal scrub are protected in regional park and watershed lands. These open spaces have great environmental importance and scenic value and are a significant amenity for San Leandro residents.
The city’s environment is vulnerable to the impacts of urban development, particularly air and water pollution. Air quality in the region has improved significantly in the last 30 years, but transportation emissions still result in ozone and particulate levels that exceed state and federal standards. Burning of fossil fuels—whether through motor vehicles, industry, or energy generation—also generates greenhouse gases, which contribute to global climate change. The General Plan include policies and actions to improve air quality and reduce greenhouse gas emissions, primarily by reducing dependence on motor vehicles, shifting to renewable energy, and using energy more efficiently.

Like air quality, water quality has improved as a result of stronger controls over point sources such as wastewater treatment plants and heavy industry. Significant advances have also been made in the control of urban runoff from streets, parking lots, and yards. However, storm events, litter, improper disposal of household products, and other human activities still pose a threat to the health of the Bay and its tributaries. The General Plan provides a framework for the City’s stormwater management and water quality programs, including trash reduction, containment and pre-treatment of runoff, reduced pesticide use, and greater public education on environmental quality.

San Leandro’s environment also creates a number of natural hazards. The Hayward Fault, considered by some seismologists to be the most dangerous hazard in the Bay Area, traverses the eastern edge of the city. Groundshaking and liquefaction in a major earthquake could cause serious damage and injury. Even in the absence of an earthquake, some
of the city’s steep hillsides are prone to landslides and erosion. Other parts of the city are subject to shallow flooding. Man-made hazards, such as noise from airplanes, trains, and trucks, also exist in the city.

Climate change also poses a long-term hazard. During the next century, the western shore of San Leandro will be affected by rising sea level, with increased frequency of flooding and higher water levels in wetlands and tidal areas. The City will need to adapt to this reality, making its shoreline more resilient while also regulating the character of construction in vulnerable areas. Climate change may also result in more severe storms, changes in habitat, reduced potable water supply, and greater temperature extremes.

A substantial part of the General Plan is dedicated to environmental and natural hazard issues. Policies and actions in the Open Space, Parks, and Conservation Element (Chapter 6), and in the Environmental Hazards Element (Chapter 7), address the management of natural resources and protection of the public from these hazards.

H. DEVELOPMENT POTENTIAL

San Leandro is a mostly built out city, with a limited supply of vacant land. Based on 2015 Alameda County tax assessor records, only 159 parcels in the city (out of 24,949) are classified as “vacant.” A June 2015 survey conducted as part of the General Plan Update found 97 acres of vacant land in the city. This total excludes underutilized sites, or large sites on which only a portion of the property is developed.

Most of the vacant sites in the city are located in industrial areas and along major arterials. There are also a small number of vacant sites in the San Leandro Hills, most of which are constrained by steep slopes and limited access. The largest vacant areas include a 25-acre commercial property at the southwest corner of Interstate 880 and Marina Boulevard (adjacent to the new Kaiser Permanente Hospital), a cluster of parcels at the north end of Alvarado Street, the area south of the BART station along Martinez Street, several parcels at the San Leandro shoreline, and several properties along Washington Avenue north of Floresta.

A far greater number of sites are “underutilized,” meaning they have the capacity to support many more housing units or more square footage of non-residential space than they do today, based on zoning, existing floor area, and land value. Numerous parcels in the industrial area are used
for staging and storage, warehousing, salvage yards, truck parking, and other activities that represent very low improvement values relative to the value of the land. There are also a number of dormant or underutilized industrial buildings that could potentially support more active uses.

Similarly, East 14th Street, Washington Avenue, MacArthur Boulevard, and other commercial thoroughfares include many properties with minimal structural improvements, such as used car dealerships, gas stations, and “drive-through” businesses dating back to the 1940s and 50s. As land values have increased and shopping patterns have changed, the reuse of these properties for higher value commercial development, multi-family housing, and mixed uses has become more viable.

Similar conditions exist in Downtown San Leandro and around the San Leandro BART station. Large surface parking lots, marginal commercial uses, and vacant storefronts all hold the potential for reuse or redevelopment. Because most of the Downtown area is within a short walk of the BART station, the opportunity exists to build more densely, with an orientation toward BART (rather than single passenger cars) as the primary mode of travel. Cities across the country have embraced the concept of transit-oriented development (TOD) as a way to reduce congestion and greenhouse gas emissions, leverage the investment that has been made in mass transit, and create vibrant new neighborhoods without urbanizing farmland or open space on the periphery of the region.
The Bayfair Center area represents another significant opportunity for transit-oriented development. In 2016, the area around the BART station was almost completely auto-oriented, with wide streets, vast parking lots, and barriers such as flood control channels and railroad tracks. An emerging Specific Plan will establish a new vision for Bayfair, including better connections between the shopping areas and the BART station, and additional development on the Mall and BART properties and nearby commercial sites.

Quantifying San Leandro’s development potential depends on the assumptions that are made about the underutilized sites. The City’s 2015-2023 Housing Element identified 94 sites with the capacity for 2,347 housing units by 2023. Three of these sites had approved projects, 38 were vacant lots, and 53 were underutilized with high potential for re-use. Beyond 2023, the capacity for several thousand additional housing units exists on underutilized properties that are still in active use but have long-term redevelopment potential.

The 2007 Downtown TOD Strategy, which focuses only on the area within a half-mile of the San Leandro BART station, identified a site-specific capacity estimate of 3,430 new residential units. Similarly, the 2004 East 14th South Area Development Strategy included a site-specific estimate of 1,000 new residential units on 34 specific properties. The 2015 Shoreline Development Plan included pre-approvals for 354 housing units. An estimate of about 800 units (by 2035) was also made for the Bayfair area as part of the General Plan Update. Thus, these areas alone were estimated at having the capacity for 5,580 housing units (this includes the 2,347 units in the Housing Element). This General Plan assumes that most of this development potential will be realized in the next 20 years, consistent with ABAG’s forecasts. Additional housing may be added through second units and infill development and on sites not yet identified.

The housing unit forecast used in the General Plan reflects these capacity estimates and is consistent with the forecasts developed by ABAG for the Plan Bay Area regional planning process. ABAG’s forecasts indicate the city will gain 5,110 households between 2015 and 2035. Assuming a 4 to 5 percent vacancy rate, this would be equivalent to 5,300 to 5,400 new housing units. At 2.76 persons per household, this would bring the city’s household population to 101,620 and its total population (including persons in group quarters) to 102,270 by the Year 2035.
The capacity for non-residential development is more difficult to estimate. There are approximately 800 developed commercial parcels and 650 developed industrial parcels in the city. Many of these sites are developed at much lower intensities than is permitted by zoning. For example, the allowable floor area ratio (FARs) in industrial areas is 1.0 (i.e., a 40,000 square foot parcel may contain a building with up to 40,000 square feet, etc.). On an aggregate basis, the city has 22.1 million square feet of industrial floor space on 56.6 million square feet of land area, suggesting the potential for more than 30 million square feet of additional space—at least, based on zoning alone.

Many industrial and commercial sites are developed with single story buildings surrounded by parking, landscaping, outdoor storage, and outdoor operation areas. Moreover, many of the buildings themselves are underutilized structures, with large areas used for storage rather than production. The Next Generation Workplace District Study, which covered all industrially zoned lands in the city, identified approximately 2 million square feet of vacant industrial space in the city. It also identified parcels that were vulnerable to change in the future, based on factors such as land utilization and employment density.

Prior plans for the Downtown TOD area and East 14th Street have included estimates of development capacity. The Downtown TOD Strategy identified potential sites for 120,800 square feet of retail space and 718,200 square feet of office space, while the East 14th South Area Strategy identified the potential for 134,500 square feet of commercial space.
More recently, the Shoreline Development Plan identified sites for 150,000 square feet of office space, a 200-room hotel, a 15,000 square foot conference center, 21,000 square feet of restaurant space, and a parking structure. The Kaiser Permanente Development EIR identified the potential for 387,000 square feet of retail space and a hotel on the 25-acre “North” parcel, with 375,000 square feet of additional floor space in future phases of the medical center.

All of this data has been taken into consideration to prepare Year 2035 employment forecasts for this General Plan. Because of market conditions, it is expected that only a portion of San Leandro’s non-residential development capacity will be realized by that time. ABAG’s 2035 forecasts have been used as a benchmark for the General Plan forecasts, and information on land capacity has been used to disaggregate those forecasts to sub-areas of the city.

The ABAG Plan Bay Area /Projections 2013 forecasts show San Leandro adding 7,700 jobs between 2015 and 2035. The General Plan assumes the addition of about 12,000 jobs in the next 20 years. The City’s more aggressive forecast reflects:

- The City’s objective of recovering the more than 7,000 jobs that were lost in the 2007-2011 recession
- Trends of the last five years, in which job growth has been accelerating and occurring at a more robust rate than indicated by ABAG
- Projects under construction or in the pipeline, such as the San Leandro Tech Campus, the Shoreline Development, and future phases of the Kaiser Permanente hospital and commercial development
- The anticipated benefits of recent economic development initiatives, such as Lit San Leandro and the Downtown and Bay Fair TOD strategies
- The goal of reaching equilibrium between total jobs in the city and total employed residents.

Table 2-1 presents a summary of the forecasts used in this General Plan.
### TABLE 2-1: DEVELOPMENT FORECASTS FOR SAN LEANDRO, 2015-2035

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Source: Barry Miller Consulting, Placeworks, 2015

Notes:
1. 2015 figures based on Department Of Finance estimates for Jan 1, 2015 population and households, and ABAG Projections 2013 estimates for 2015 employment.
2. These forecasts use ABAG Projections 2013 as a benchmark. Expected household and population growth matches the ABAG forecasts, while expected employment growth is somewhat higher, based on recent trends and General Plan land use designations and policies.
3. Assumes household size of 2.76 in 2035, per Projections 2013. Assumes group quarters population remains constant at 650 people.