

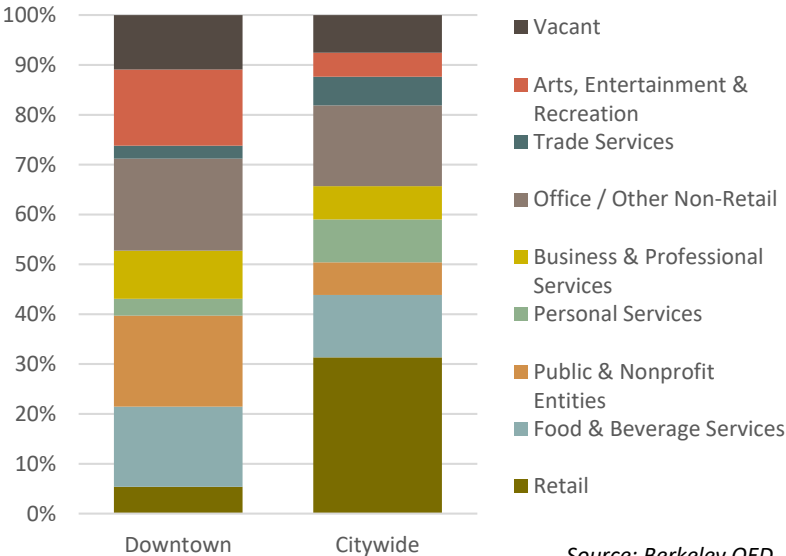
Downtown: 2024 Snapshot



Downtown Berkeley serves as the City’s core commercial district, meeting the daily needs of residents, students, workers, and visitors. The district benefits from a significant concentration of arts and entertainment uses, which occupy 15.3% of total ground floor commercial space in the district, compared to 4.8% citywide. As of Q4 2024, the vacancy rate in Downtown is 10.91%, an increase from 10.78% in 2023, and above the 9.9% seen during the first year of COVID (2020). Sales tax revenue generated by Food & Beverage services reached its nadir in 2021 (\$565,561), but has recently matched pre-COVID levels with \$1.17M generated in 2024 (a slight drop from \$1.2M in 2023).

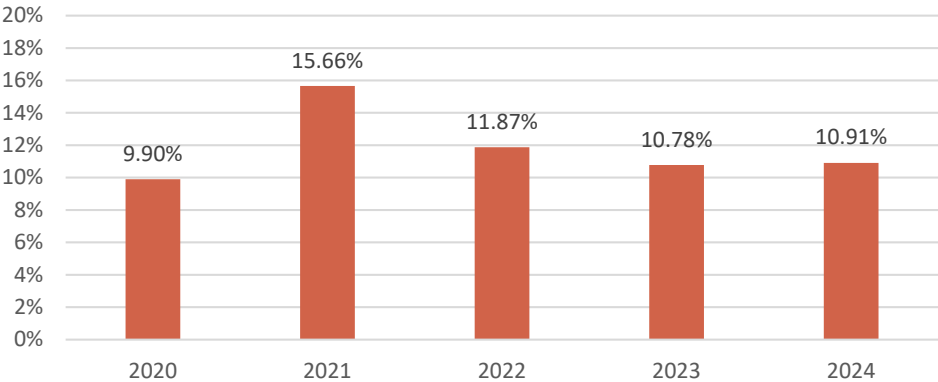


Ground Floor Commercial Business Mix
(by Square Footage), 2024 Q4



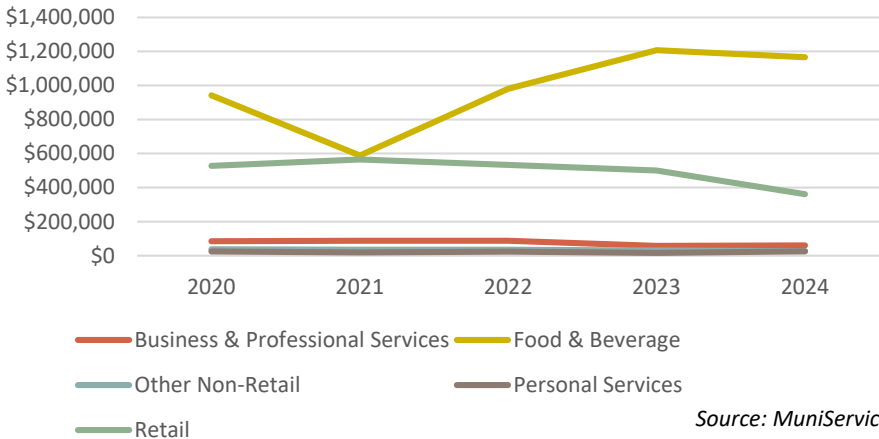
Source: Berkeley OED

Ground Floor Commercial Vacancy Rate
(by Square Footage), 2020-2024



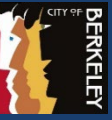
Source: Berkeley OED

Sales Tax Revenue by Sector, 2020-2024



Source: MuniServices

Elmwood: 2024 Snapshot

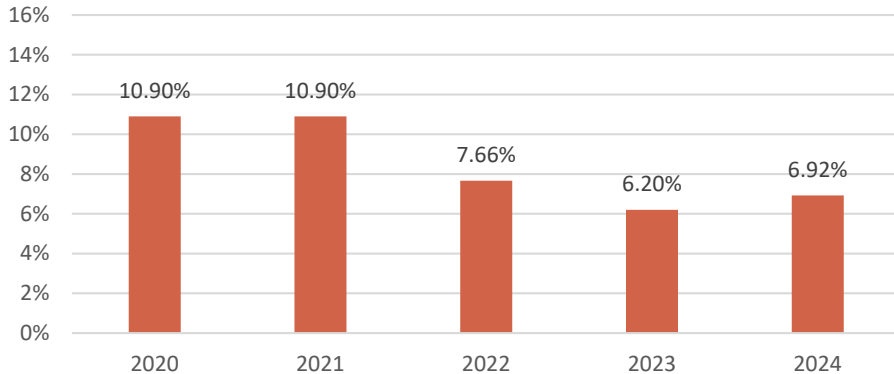


The Elmwood is a compact three block commercial district along College Avenue near the Berkeley-Oakland border and the neighboring Rockridge shopping district. The Elmwood district is characterized by a high concentration (29%) of Food & Beverage services and Personal Services (17.6%), and is a walkable, neighborhood-serving commercial district. As of Q4 2024, the district's vacancy rate by square footage is 6.9%.

Sales tax collected from the Food and Beverage sector in the Elmwood increased in 2024 to \$229,309, from a low of \$140,812 in 2021. Sales tax collected from the Retail sector decreased slightly in 2024 to \$103,201, but remained above retail sales tax collected in 2021 (\$88,709) when the pandemic was in an acute phase.

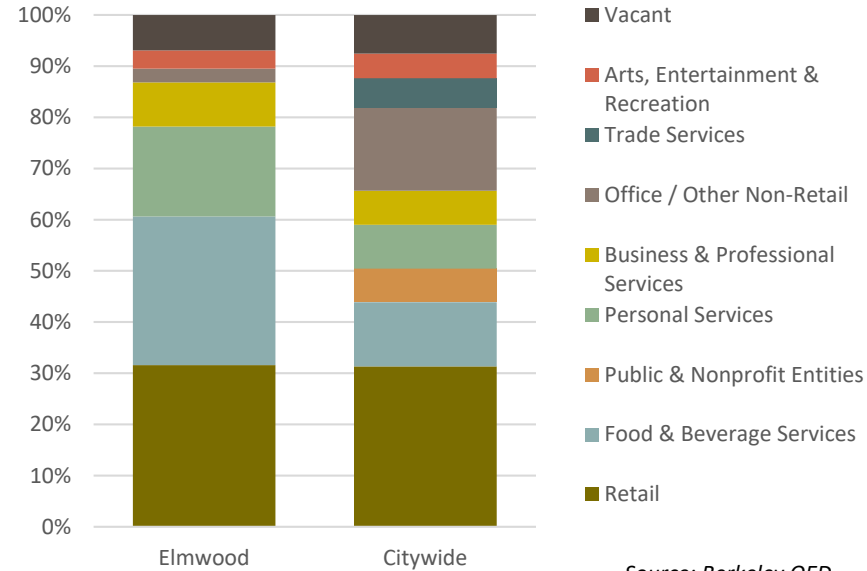


Ground Floor Commercial Vacancy Rate (by Square Footage), 2020-2024



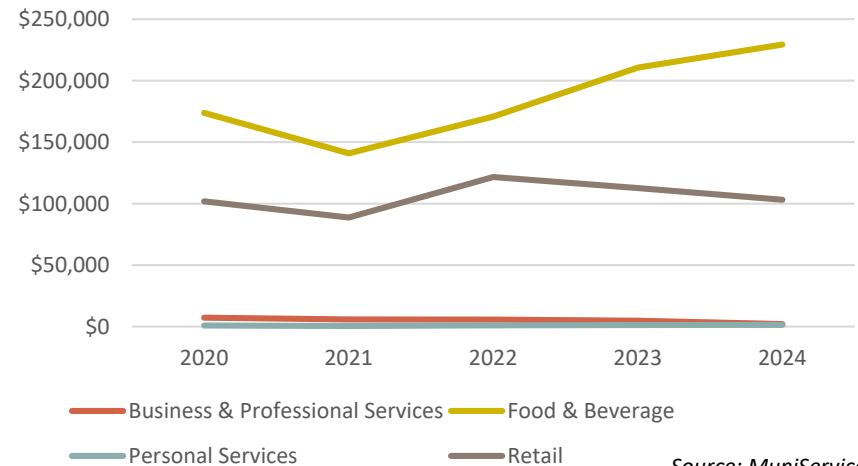
Source: Berkeley OED

Business Mix (by Square Footage), 2024 Q4



Source: Berkeley OED

Sales Tax Revenue by Sector, 2020-2024



Source: MuniServices

North Shattuck: 2024 Snapshot

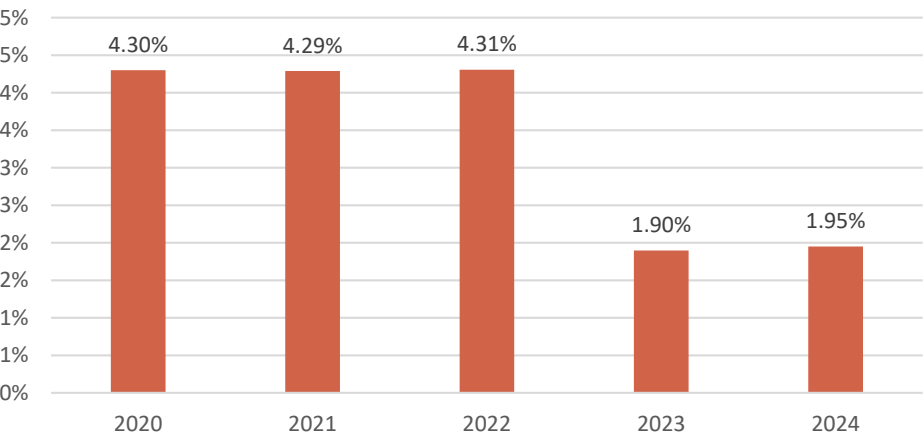


North Shattuck is one of Berkeley's oldest commercial districts, just north of Downtown. The district is characterized by a high concentration of well-known, long-standing, and celebrated restaurants, including Chez Panisse and the Cheeseboard. North Shattuck is both a walkable, neighborhood-serving commercial district as well as a global destination for food and dining. As of Q4 2024, the district's vacancy rate by square footage is 1.95%, on par with the 1.9% calculated in 2023 Q4.

Sales tax collected from the Food and Beverage sector in North Shattuck increased in 2024 to \$588,817 from its 2021 low (\$298,196), and sales tax collected from the retail sector increased slightly in 2024 to \$136,153 from \$134,219 collected in 2023.

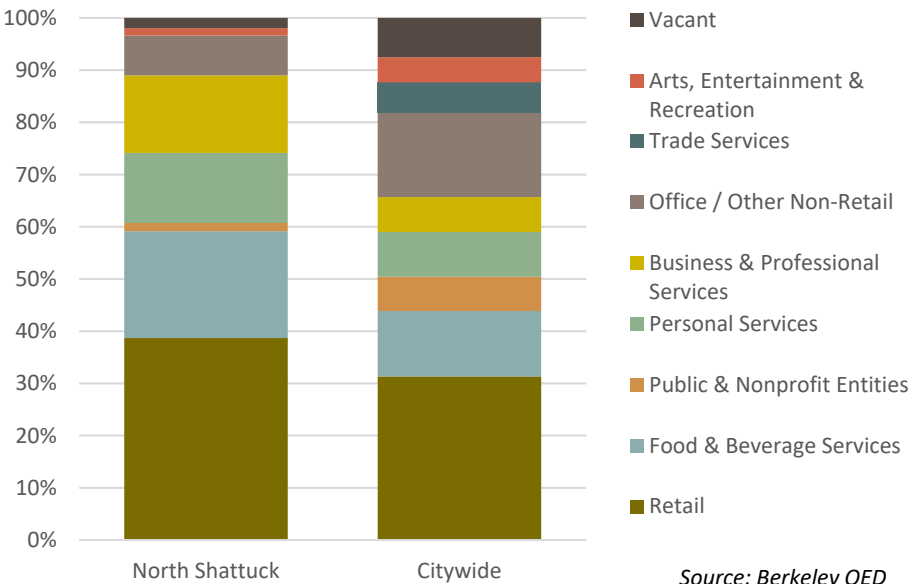


Ground Floor Commercial Vacancy Rate (by Square Footage), 2020-2024



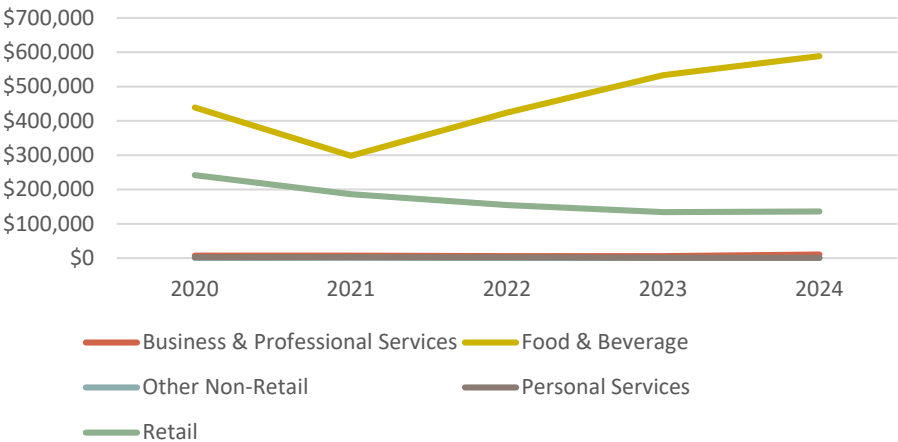
Source: Berkeley OED

Business Mix (by Square Footage), 2024 Q4



Source: Berkeley OED

Sales Tax Revenue by Sector, 2020-2024



Source: MuniServices

San Pablo: 2024 Snapshot

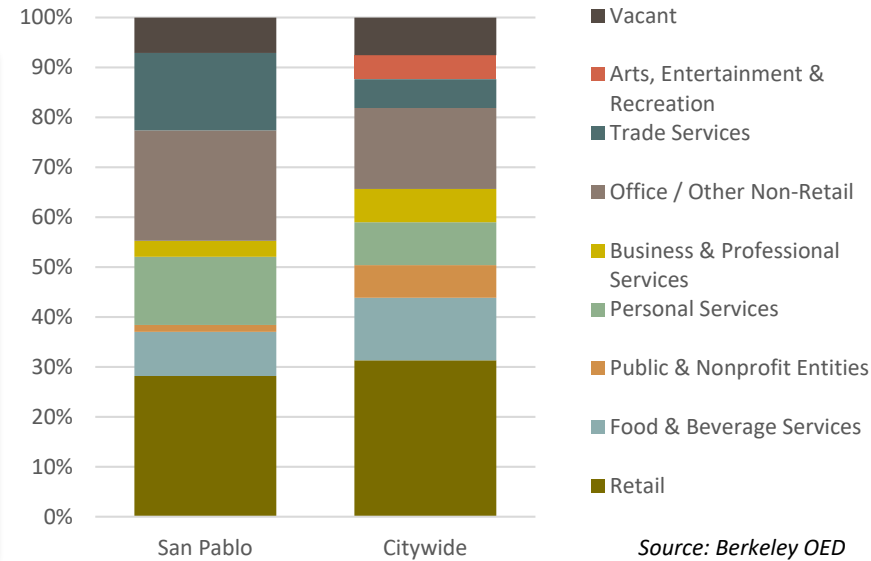


San Pablo Avenue is Berkeley's largest commercial corridor, running the entire north-south length of the City. San Pablo is characterized by a high concentration of Trade Services (15.5%), including automobile services.

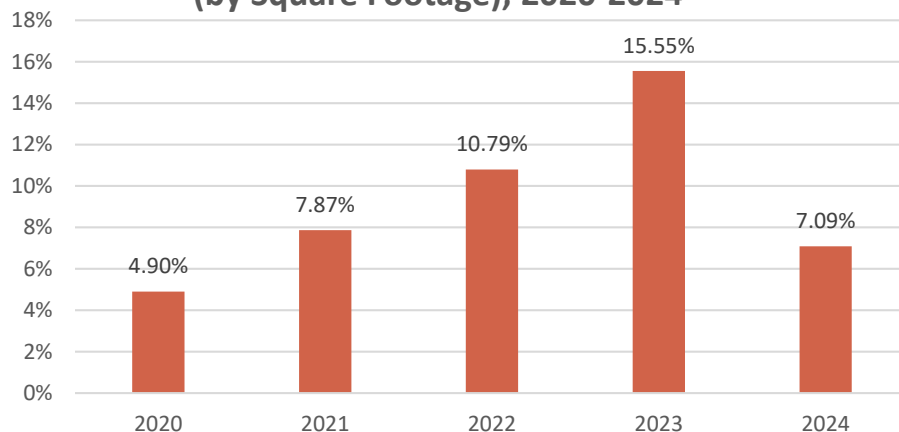
San Pablo functions more as a regional destination for specific uses rather than a walkable, neighborhood-serving commercial district; as such, it features smaller percentages of Food & Beverage Services (8.9%) and a larger portion of Personal Services (13.7%) than the city as a whole. In 2024, the district's vacancy rate by square footage is 7.1%, down from 15.6% in 2023. Retail Sales tax revenue collected in 2024 has increased to \$772,703 since 2023 (\$679,253) and continues to be the largest source of tax revenue for the area.



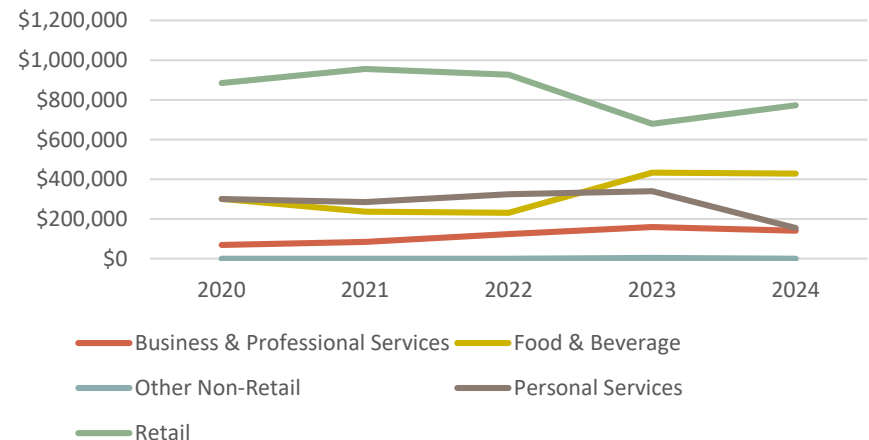
Business Mix (by Square Footage), 2024 Q4



Ground Floor Commercial Vacancy Rate (by Square Footage), 2020-2024



Sales Tax Revenue by Sector, 2020-2024



Solano: 2024 Snapshot



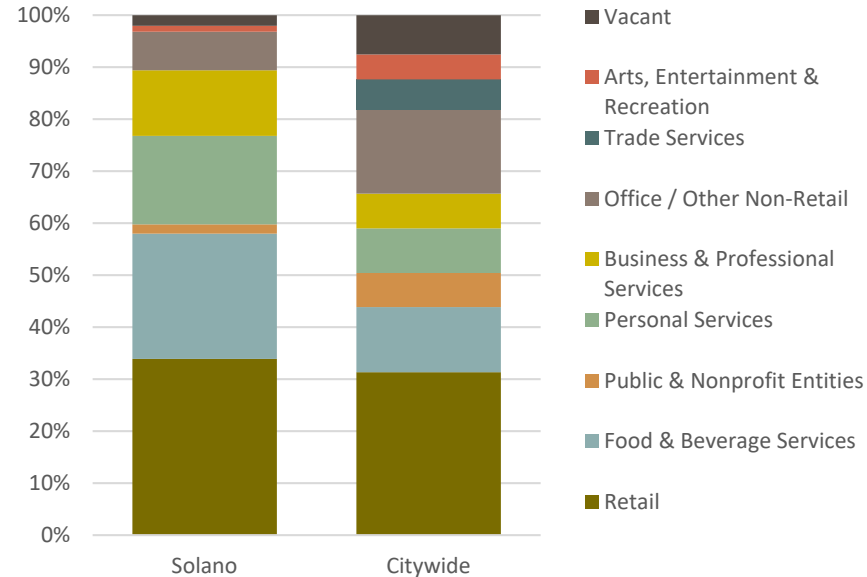
Solano is a small district in North Berkeley, with a total of 148 commercial spaces and approximately 189 thousand square feet of commercial space. It shares a border with Albany and is situated next to a large

elementary school and an active neighborhood of single-family homes. The former Oaks Theatre is now occupied by *The Oaks* climbing gym that opened in 2024. The district's vacancy rate by square footage is 2.1%, a slight decrease from 2023 (2.6%).

Sales tax collected from the Food and Beverage sector along Solano Avenue increased by \$3,084, from 2023 to 2024, and sales tax collected from the retail sector also increased from 2023, to \$114,635.

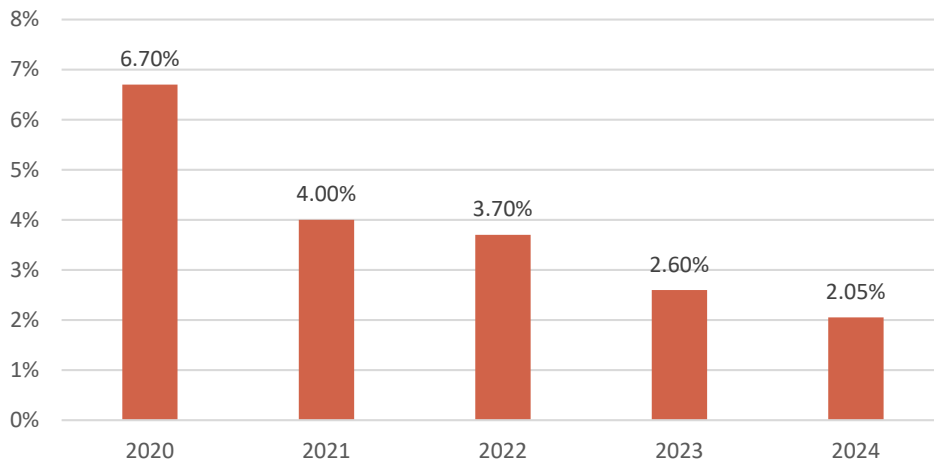


Business Mix (by Square Footage), 2024 Q4



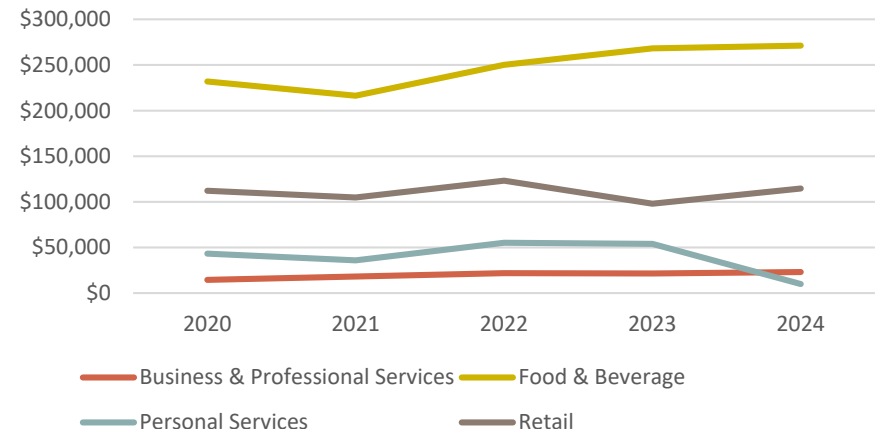
Source: Berkeley OED

Ground Floor Commercial Vacancy Rate (by Square Footage), 2020-2024



Source: Berkeley OED

Sales Tax Revenue by Sector, 2020-2024



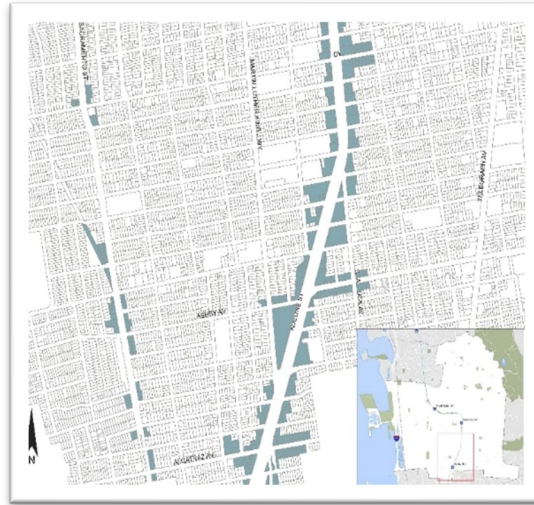
Source: MuniServices

South Berkeley: 2024 Snapshot

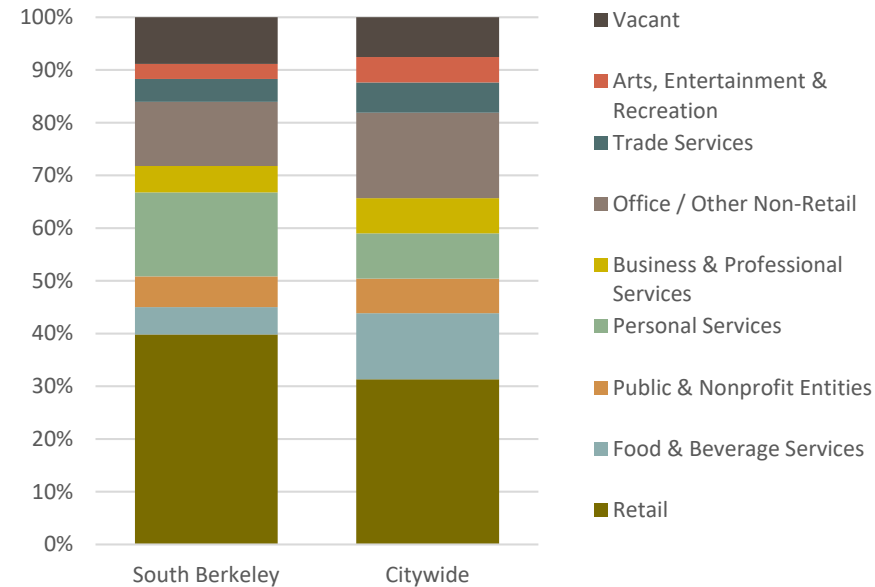


South Berkeley is a large district stretching over an area known for its cultural diversity and includes the Lorin District, the Sacramento Ave. corridor, and the South Shattuck area. South Berkeley includes car dealerships, which accrue retail sales tax revenue for the City.

The area features a high concentration of Personal Services businesses (15.9% vs. 8.6% citywide) but is under-served by Food & Beverage services, which account for only 5.2% of ground floor commercial space, as compared to 12.5% citywide. As of Q4 2024, the district's vacancy rate by square footage was 8.9%, a marked decrease from 2023 (19.3%).

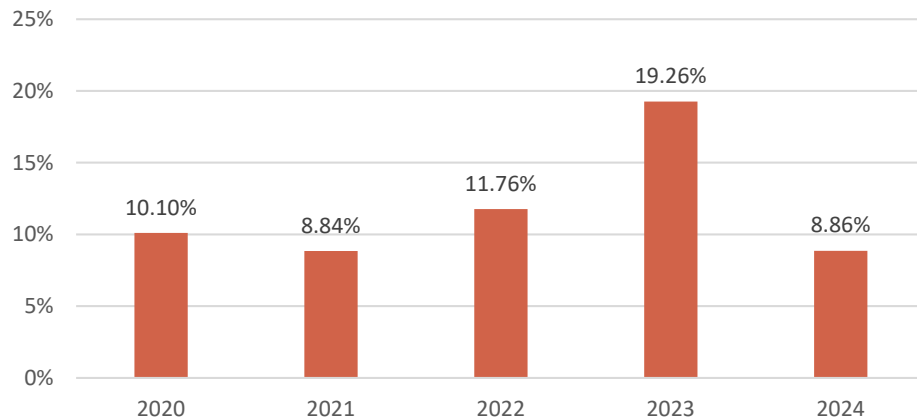


Business Mix (by Square Footage), 2024 Q4



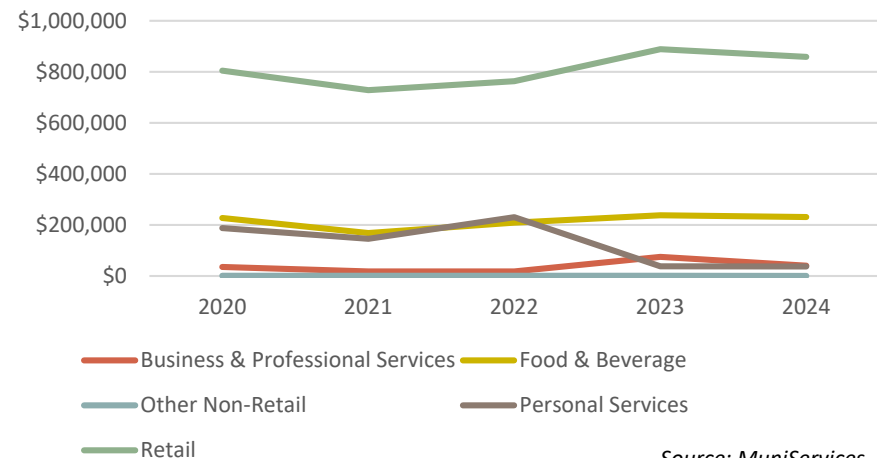
Source: Berkeley OED

Ground Floor Commercial Vacancy Rate (by Square Footage), 2020-2024



Source: Berkeley OED

Sales Tax Revenue by Sector, 2020-2024



Source: MuniServices

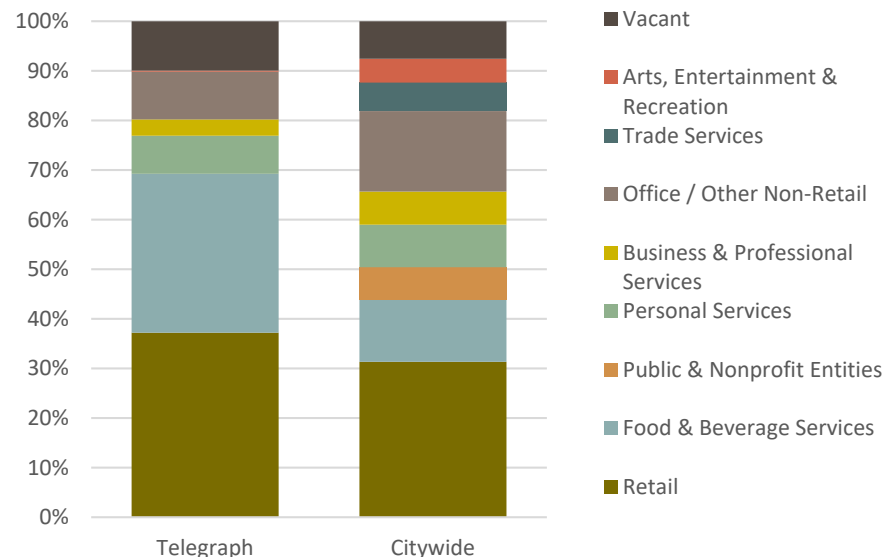
Telegraph: 2024 Snapshot



The Telegraph district has undergone significant change with respect to its ground floor inventory over the past several years. Food & Beverage services have shown a dramatic increase in the last decade, with 32% of Food & Beverage services accounting for ground floor commercial space in the district, as compared to 12.5% citywide. Telegraph's ground floor inventory of retail accounts for 37.2% of the business mix, slightly more than the 31.3% observed citywide. As of Q4 2024, the district's ground floor commercial vacancy rate of 9.9%, was higher than 2023 (9.3%). Food & Beverage services outperform Retail with respect to sales tax collected; Food & Beverage collections increased to \$618,773 in 2024.

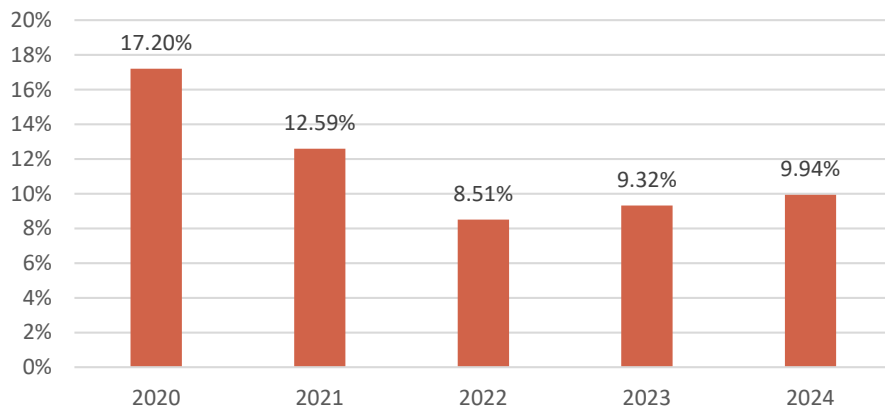


Business Mix (by Square Footage), 2024 Q4



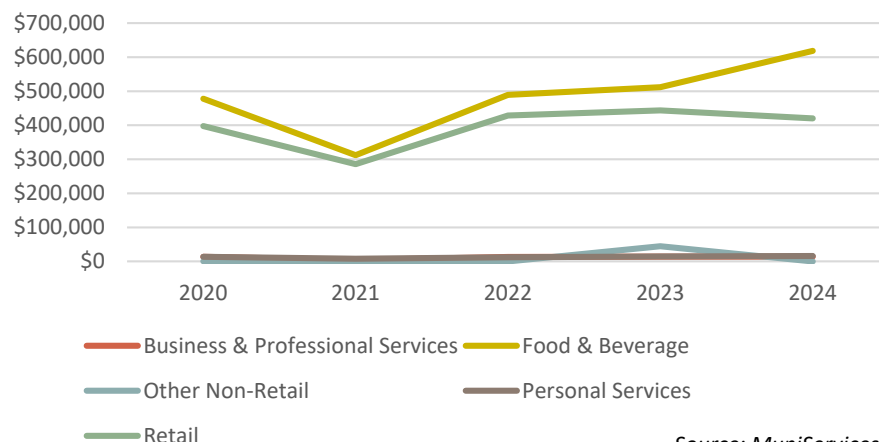
Source: Berkeley OED

Ground Floor Commercial Vacancy Rate (by Square Footage), 2020-2024



Source: Berkeley OED

Sales Tax Revenue by Sector, 2020-2024



Source: MuniServices

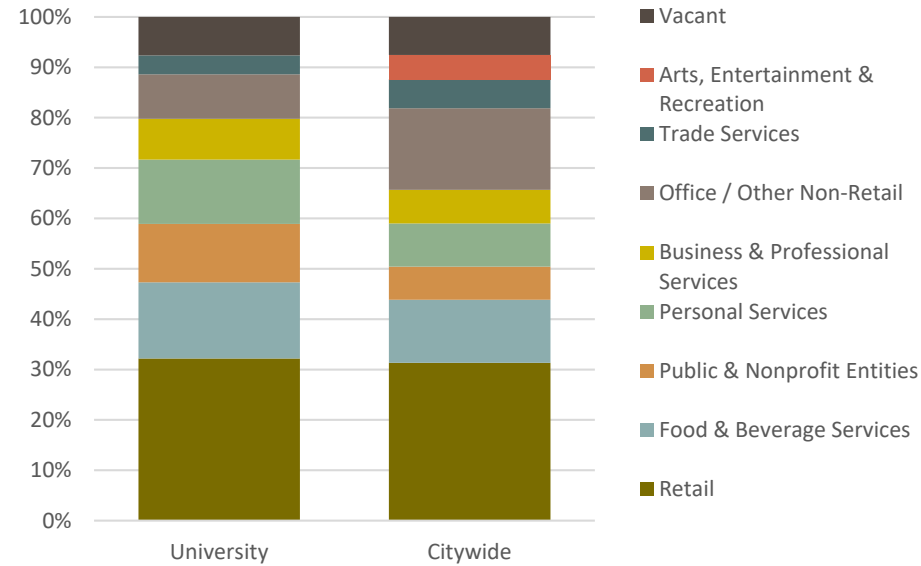
University: 2024 Snapshot



University Avenue, from Martin Luther King Jr Way to the waterfront, spans many of the City's neighborhoods and serves as the gateway to the UC Berkeley Campus. Since 2019, Retail and Food & Beverage Services have generated the most sales tax revenue for the district. Retail sales tax collected in 2024 decreased slightly by \$14,117 from 2023, and sales tax from Food & Beverage stayed steady. The 2024 vacancy rate decreased year over year from 17.7% in 2023 to 7.7% in 2024; the lowest rate in five years.

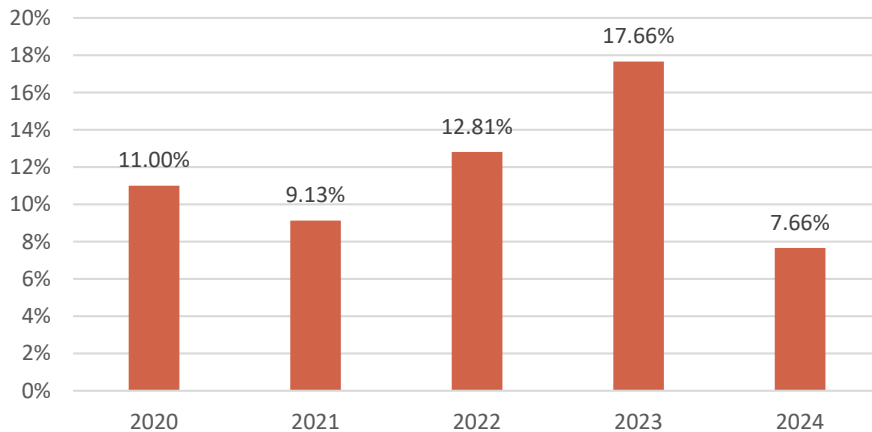


Business Mix (by Square Footage), 2024 Q4



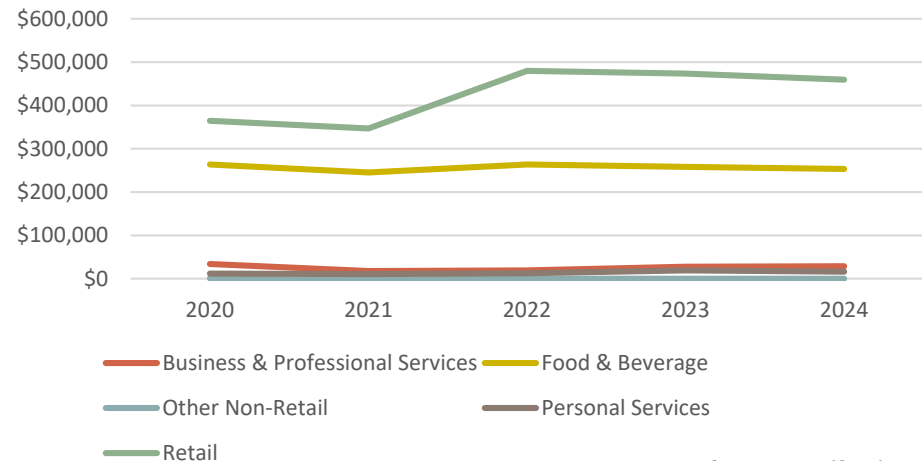
Source: Berkeley OED

Ground Floor Commercial Vacancy Rate (by Square Footage), 2020-2024



Source: Berkeley OED

Sales Tax Revenue by Sector, 2020-2024



Source: MuniServices

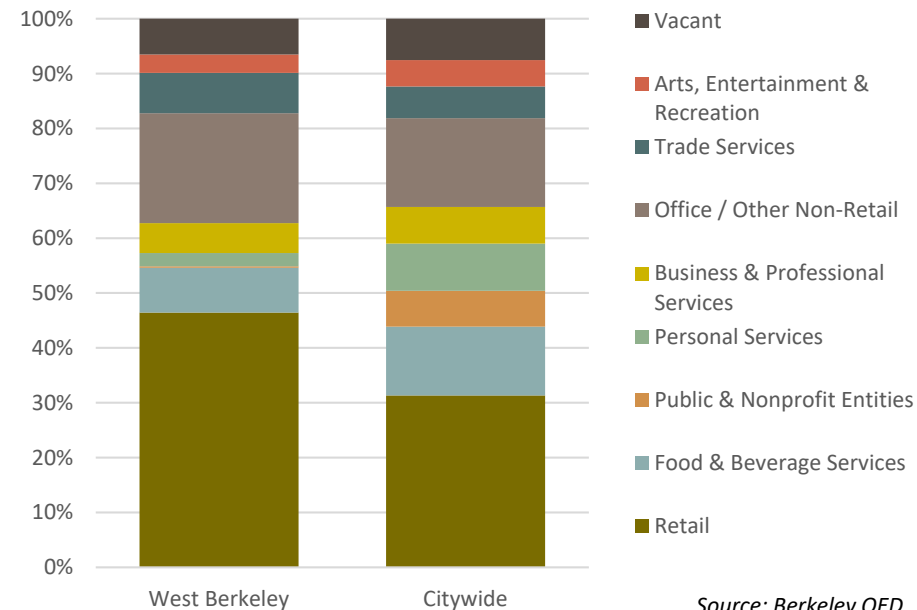
West Berkeley: 2024 Snapshot



West Berkeley represents all commercial spaces west of San Pablo Avenue, including 4th Street and the Gilman District. There are a number of major, large-floor-plate retailers, and a dense cluster of home supplies and construction businesses. There is also a higher percentage of non-retail commercial uses, including manufacturing and warehousing. Retail accounts for 46.4% of ground floor commercial space in the district, as compared to 31.3% citywide. West Berkeley also has a smaller percentage of square footage devoted to Food and Beverage (8.2%) businesses than the citywide rate of 12.5%. The commercial vacancy rate in Q4 of 2024 is 6.5%, up from 2023's 2.1%. Sales tax revenue has decreased or stayed steady in this area in all categories including Retail where a sales tax revenue decrease of \$473,968 (-7.1%) YoY is observed.

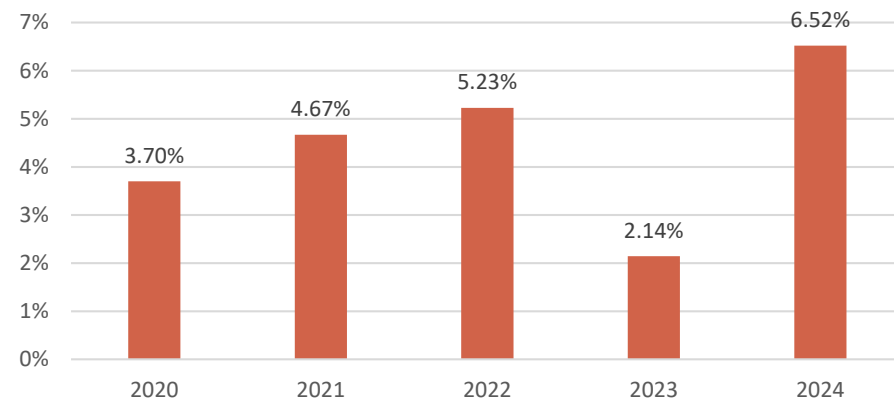


Business Mix (by Square Footage), 2024 Q4



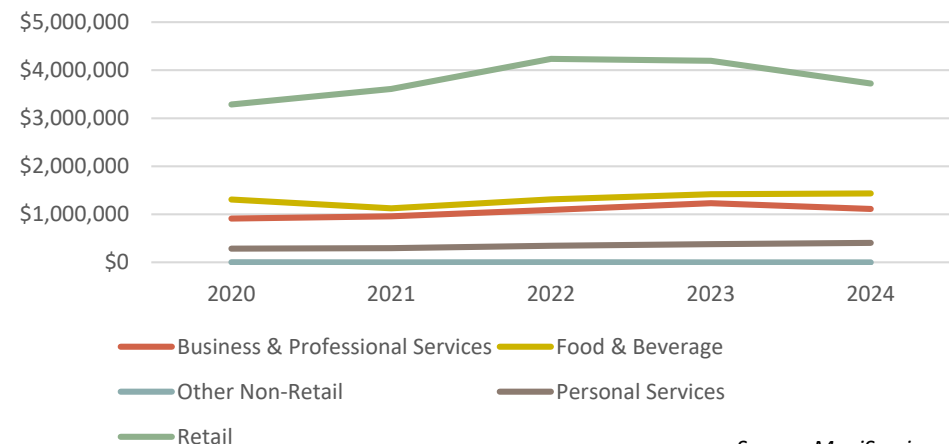
Source: Berkeley OED

Ground Floor Commercial Vacancy Rate (by Square Footage), 2020-2024



Source: Berkeley OED

Sales Tax Revenue by Sector, 2020-2024



Source: MuniServices

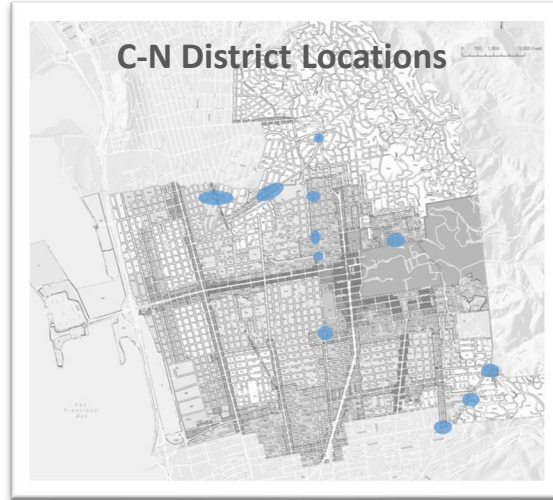
Neighborhood (C-N): 2024 Snapshot



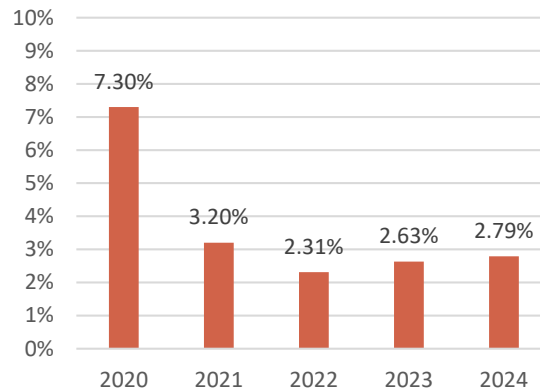
Across Berkeley there are **11** smaller commercial pockets, zoned as “C-N” or “Neighborhood Commercial.” These areas are one or two block collections of commercial enterprises distributed throughout Berkeley.

The “C-N” areas represent nearly 190 commercial spaces, and approximately 390K square feet of commercial space. The C-N areas collectively generate 2.4% of the city’s total sales tax. They also include a large number of Personal Services companies (32.8% by square footage, compared to 8.6% citywide) and Public and Non-Profit entities (24.6% compared to 6.6% citywide). The C-N vacancy rate is 2.8%. These areas include commercial nodes at the following intersections:

- Claremont and Prince
- Claremont and Tunnel
- College and Alcatraz
- Gilman and Curtis
- Hearst and Euclid
- Hopkins and El Dorado
- Hopkins and Monterey
- Martin Luther King Jr Way (MLK) and Dwight
- MLK and Hearst
- MLK and Rose
- MLK and Virginia

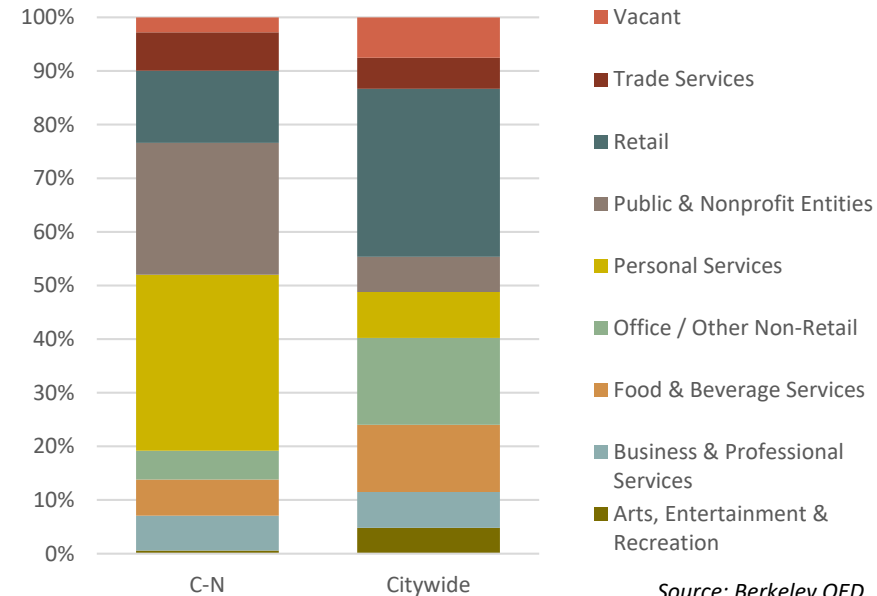


Ground Floor Commercial Vacancy Rate (by Square Footage), 2020-2024



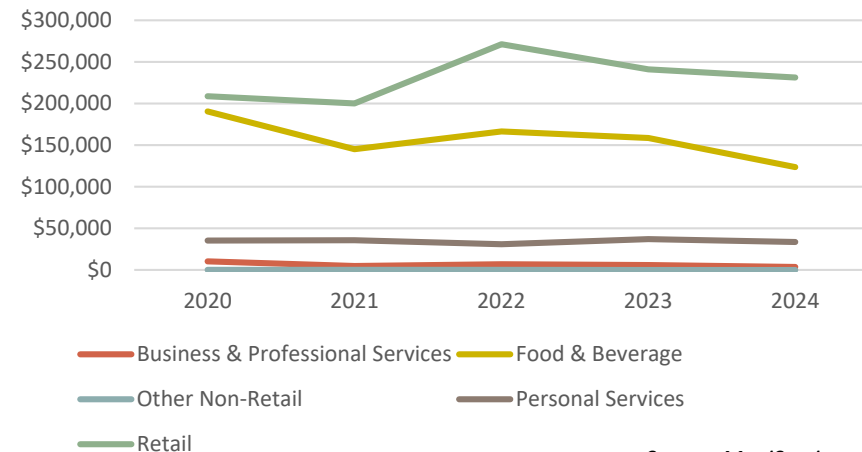
Source: Berkeley OED

Business Mix (by Square Footage), 2024 Q4



Source: Berkeley OED

Sales Tax Revenue by Sector, 2020-2024



Source: MuniServices