

OAKLAND | CALIFORNIA RESEARCH & FORECAST REPORT



Office Market Review

OAKLAND METROPOLITAN OVERVIEW

The one constant in every market is change. The Oakland Metropolitan office market experienced a great deal of change during the first half of the year, and we expect much of it will be good for the region. The Watergate Office complex in Emeryville, which had been in receivership since early 2009, was taken back by US Bank who hired TMG Partners to manage the three building, class A office complex that totals over 800,000 square feet. This was good news for the leasing market as it provided some clarity to the marketplace. It is rumored that US Bank has signed or is about to sign over 140,000 square feet of leases in the complex.

CBREI acquired over 1.5 million square feet of office and retail space at Oakland City Center from the Shorenstein Company on the last day of the quarter. This might be the largest real estate transaction for the year in the East Bay, and it was certainly a surprise to the market. Shorenstein purchased City Center in 1987 and subsequently built 555 12th Street, one of the premier office buildings in the region. Shorenstein had started construction on another office tower in 2008 but stopped due to the meltdown in the financial services market. Shorenstein retained possession of that development, but there were few in the area that thought they would ever sell their primary interest in City Center.

Leasing activity picked up to end the second quarter at 667,620 square feet compared to 239,812 square feet at the midpoint of 2009. Despite slightly negative net absorption numbers for the quarter, vacancy rates have leveled out, and rents seem to have stabilized as well, despite a slight drop to \$2.02 from year end 2009's \$2.04 Full Service (FS) per square foot per month (psf/mo). These figures are consistent with our first quarter projection of a market that appears to have bottomed out.

We are cautiously optimistic for the second half of 2010 as job creation seems to be on the horizon and we expect to see job growth in health care and alternative energy sectors.

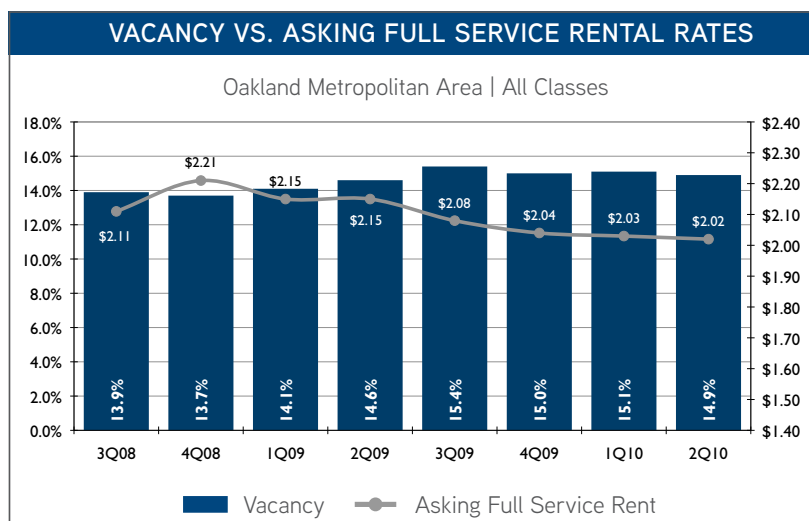
MARKET INDICATORS

	Q2-10	Projected Q3-10
VACANCY	—	—
NET ABSORPTION	↓	—
CONSTRUCTION	—	—
RENTAL RATE	—	—

SELECTED MARKET STATISTICS

- > Year to date leasing activity is 667,620 square feet compared to 374,259 square feet at the end of the second quarter of 2009.
- > Vacancy this quarter was 14.8 percent, down from 15.1 percent last quarter.
- > Sublease vacancy was 1.3 percent, down from 1.7 percent last quarter.
- > Alameda County's unemployment rate is 11.5 percent as of June 2010.*

* SOURCE: CALIFORNIA EMPLOYMENT DEVELOPMENT DEPARTMENT





"We began to see a renewal of investment activity again in the Downtown Oakland market in the second quarter."

DOWNTOWN OAKLAND

The Downtown Oakland submarket experienced flat overall vacancy during the second quarter of 2010, remaining at 12.3 percent. Class A vacancy rose from 9.5 percent to 9.7 percent quarter over quarter with the largest amounts of space coming onto the market at 1111 Broadway and 155 Grand Avenue. Class B/C/Flex vacancy decreased from 17.4 to 17.0 percent in the same time period. No large blocks of space have come onto class B/C/Flex market; however, no large deals have been done either. Vacancy trends are consistent with the past few quarters. There has been some leasing activity, but most of it has been within the submarket. We expect vacancy to remain flat through the end of 2010. Net absorption in the class A market was negative 68,706 square feet, while class B/C/Flex net absorption was positive 20,324 square feet.

Downtown Oakland rents remain the highest in the Oakland metropolitan office market. However, class A rents have decreased from \$2.68 to \$2.54 FS psf/mo over the course of the quarter, and class B/C/Flex rates have increased from

\$1.93 to \$1.97 FS psf/mo.

In Jack London Square's class A market, the first of four 25,000 square foot available spaces leased in Jack London Market to Kazan Law Firm. There were also several larger transactions in the Downtown Oakland submarket. Solar Millennium subleased 22,310 square feet at 1111 Broadway in June, and Foley & Mansfield leased 20,839 square feet at 300 Lakeside Drive.

We began to see a renewal of investment activity again in the Downtown Oakland market in the second quarter. 1440 Broadway, an 89,582 square foot building, sold to 1440 Broadway, LLC; 2134 Broadway, a 25,416 square foot building, sold to Dudley Franklin Investors; and, in clearly the largest transaction in the Oakland metropolitan office market this year, over 1.5 million square feet of office and retail space sold to CBREI on the last day of the quarter.

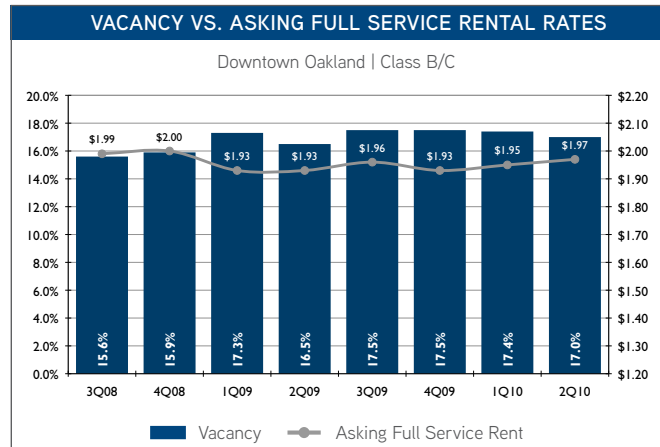
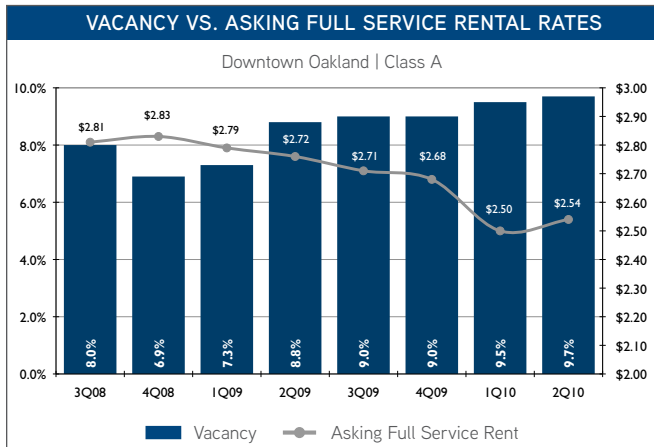
LEASE AND SALES ACTIVITY

LEASE ACTIVITY

PROPERTY ADDRESS	LEASE DATE	SIZE	TENANT	TYPE
Jack London Market	June 2010	25,000 SF	Kazan Law Firm	Office
555 12th Street	June 2010	24,161 SF	Boornazian, Jensen & Garthe	Office
1111 Broadway	June 2010	22,310 SF	Solar Millenium	Office

SALES ACTIVITY

PROPERTY ADDRESS	SALE DATE	SIZE	BUYER	TYPE
City Center	June 2010	1.5 Million SF	CBREI	Office
1440 Broadway	May 2010	89,582 SF	1440 Broadway, LLC	Office
2134 Broadway	May 2010	25,416 SF	Dudley Franklin Investors, LLC	Office



OAKLAND AIRPORT

Although leasing activity in the Oakland Airport market continued to suffer from negative absorption in the second quarter of 2010, two significant sale transactions suggest that continued changes in airport market ownership groups, lease rates, and property values are on the way. The former owner of 7700 Edgewater Boulevard (Edgewater Park Plaza), a four building, 204,000 square foot property, was in default on a \$13.3 million loan with JP Morgan Chase due to their below market vacancy rate of 50 percent when its owners decided to sell the asset. JP Morgan Chase negotiated the transaction directly with the Turkish real estate fund named, Polidev International. The property sold for \$12 million, or \$59 per square foot, while comparable buildings in the area were selling for between \$110 and \$125 per square foot in 2007 and the beginning of 2008. 80 Swan Way, another prominent office building consisting of 52,466 square feet just off Hegenberger Road, sold during a trustee's sale at the courthouse steps for \$1.5 million or approximately \$29 per

square foot. The property was reportedly 29 percent leased when the transaction closed.

Due to steadily increasing vacancy and dwindling demand for office space, in addition to the heavily discounted prices at which certain properties have traded recently, leasing activity is expected to increase towards the end of this year. As evidenced by the aforementioned sales, new property owners will almost certainly take advantage of having such a low basis in their assets and should be able to spur absorption in their buildings by lowering lease rates. In order to retain their existing tenants, established ownership groups will likely be forced to follow suit, and in doing so will accelerate the resetting of values in the airport market. This transition will likely bring about a supplemental wave of foreclosures in the area, as modified lease rates will not bring in enough income to keep properties that were overpaid for afloat.



“Continued changes in airport market ownership groups, lease rates, and property values are on the way.”

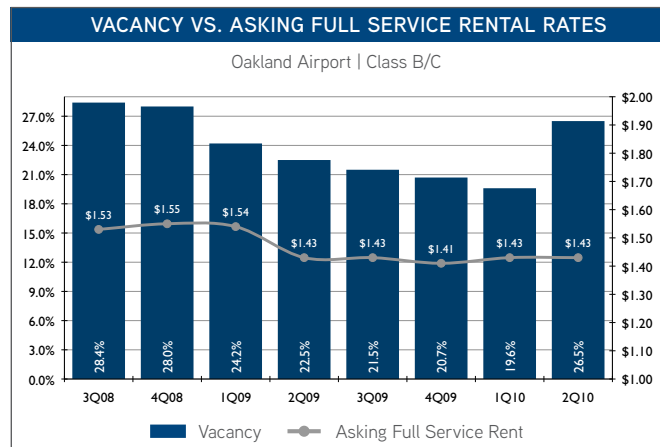
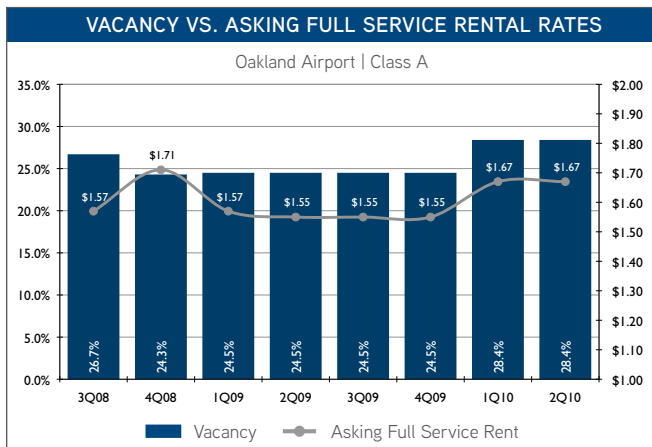
LEASE AND SALES ACTIVITY

LEASE ACTIVITY

PROPERTY ADDRESS	LEASE DATE	SIZE	TENANT	TYPE
7677 Oakport Street	April 2010	23,743 SF	Livescribe	Office

SALES ACTIVITY

PROPERTY ADDRESS	SALE DATE	SIZE	BUYER	TYPE
7700 Edgewater Drive	June 2010	204,858 SF	Polidev International	Office
80 Swan Way	May 2010	52,466 SF	-	Office





“Vacancy in Downtown Berkeley dropped by 2.4 percent this quarter to 12.3 percent, the largest change we have seen since the second quarter of 2009.”

BERKELEY

Vacancy in Downtown Berkeley dropped by 2.4 percentage points this quarter to 14.8 percent overall, the largest change we have seen since the second quarter of 2009. The sale of 2201 Dwight Way played a substantial role in the drop, removing approximately 20,000 square feet from our leasable inventory. The building was purchased by a local user, 510 Systems. Other activity in Downtown included Trilogy Interactive’s 2,800 square foot lease at 2030 Addison Street and Management Recruiters 2,100 square foot lease at 2150 Shattuck Avenue. Rents in Downtown stayed very stable with an average rate of \$2.30 FS psf/mo. The owners of 2020 Milvia Street entered into a purchase and sale agreement with a local investor who plans on rehabilitating the building and putting it back out to the market as a multi-tenant office building.

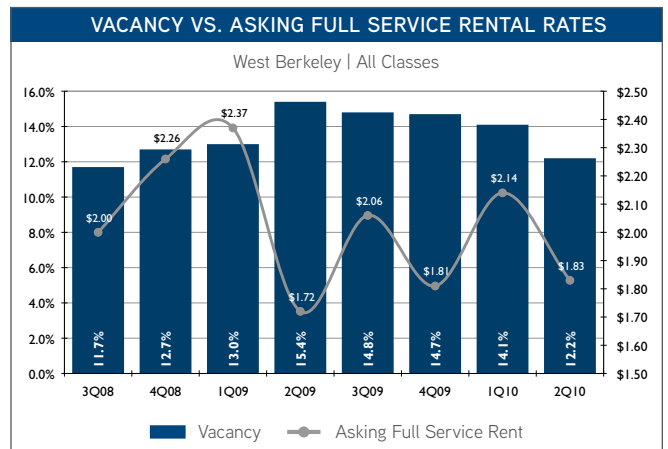
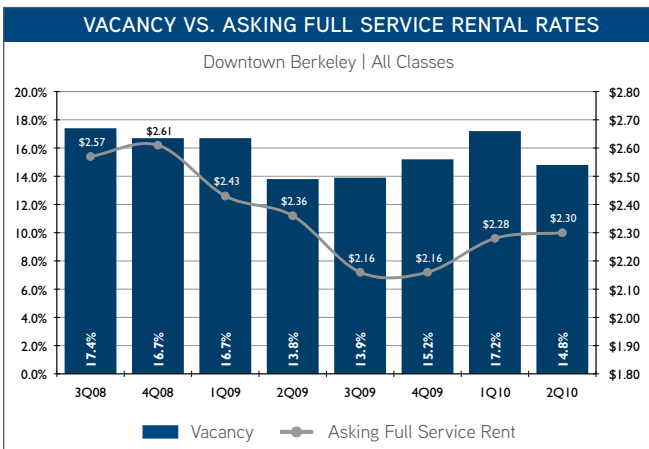
came on the market for sale—a property that has continued to host the largest blocks of office space in West Berkeley. There was considerable interest from investors and users, but the ownership has not entered into contract with a buyer at this point. In the meantime, the asking lease rate for the project was revised, so while no absorption occurred, it affected the average asking rents in the market. The Dynavax sublease of almost 10,000 square feet was taken off the market for the time being, and the remaining office space consisting of about 5,200 square feet at the Zaentz Media Center was leased to current tenants in the project. Ecole Bilingue, the French American School, purchase 901 Grayson Street in the early part of the second quarter in an off market transaction.

West Berkeley experienced a dip in both vacancy and rental rates, but this was largely due to internal tenants leasing available space and/or removing space off the market. 1608 4th Street

LEASE AND SALES ACTIVITY

SALES ACTIVITY

PROPERTY ADDRESS	SALE DATE	SIZE	BUYER	TYPE
2201 Dwight Way	April 2010	20,500 SF	510 Systems	Office



EMERYVILLE

Vacancy in the Emeryville office market ends the second quarter of 2010 at 16.7 percent overall, up slightly from last quarter's 16.0 percent. We predict a continuing increase in vacancy over the course of the next six months as tenants give back space due to businesses closing or contracting. Class A vacancy increased 1.8 percentage points during the quarter to 19.5 percent, while Class B/C/Flex vacancy decreased 0.8 percent to 12.6 percent. Year to date net absorption is still negative at 86,503 square feet. However, net absorption was negative 138,793 square feet at the close of the second quarter of 2009.

Leasing activity has been slow this quarter at 12,928 square feet. Year to date leasing activity is 121,195 square feet, approximately double that of the same time period of last year, in large part due to Gracenote's 47,957 square foot sublease at 2000 Powell Street during the first quarter of 2010. The largest deal signed during the second quarter was Zoom Eyeworks' 7,727 square foot lease at 5858 Horton Street.

The Class A market saw a minor decrease in asking rental rates quarter over quarter, from \$2.19 to \$2.17 FS psf/mo. The Class B/C/Flex market's rates dropped from \$1.76 to \$1.68 FS psf/mo in the same time period. Continually dropping rental rates, in addition to economic conditions, can be much attributed to the 2009 foreclosure on the Watergate Towers. The three properties are currently being held by FDIC/Union Bank and managed by TMG Partners. Renewals and new deals are being signed at very low rates that are driving the rest of the rates in the market down. Despite continuing signs of weakness, we feel that the Emeryville office market will regain strength in the future, in light of its availability of high quality space at relatively low rental rates and Madison Marquette's planned construction of the second phase of Bay Street.

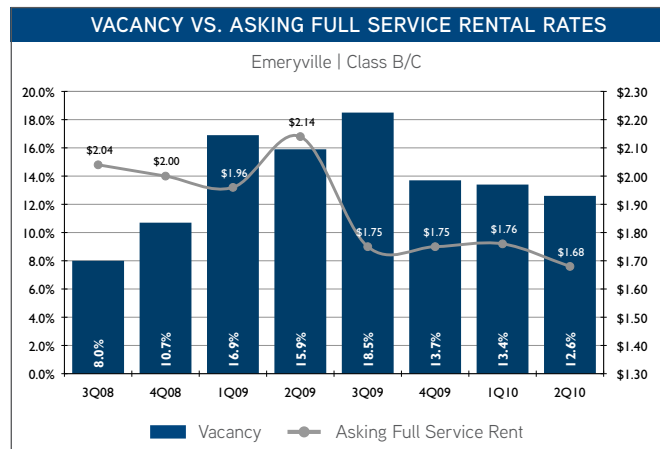
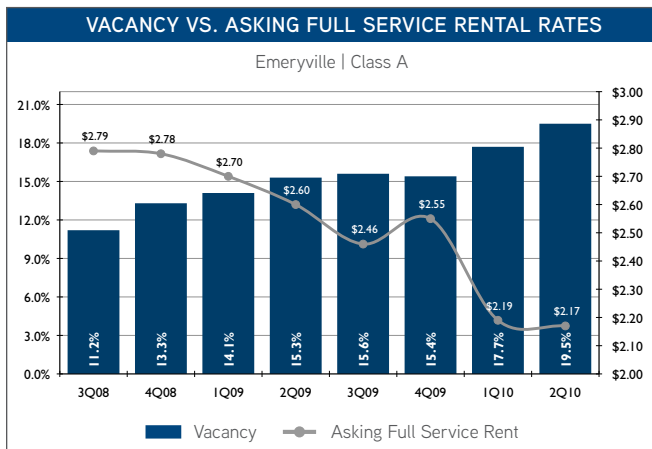


"Continually dropping rental rates, in addition to economic conditions, can be much attributed to the 2009 foreclosure on the Watergate Towers."

LEASE AND SALES ACTIVITY

LEASE ACTIVITY

PROPERTY ADDRESS	LEASE DATE	SIZE	TENANT	TYPE
5858 Horton Street	April 2010	7,727 SF	Zoom Eyeworks	Office
1900 Powell Street	June 2010	5,199 SF	Agilysis	Office





“Both Marina Village’s and Harbor Bay’s vacancy decreased over the course of the quarter.”

ALAMEDA

The Alameda office market began to show signs of health during the first half of 2010. Vacancy decreased nine percentage points from the close of 2009 to end the second quarter at 23.9 percent. Both Marina Village and Harbor Bay’s vacancy decreased over the course of the quarter with Marina Village’s declining more than 13 percent. Available sublease space in Marina Village went down approximately 50 percent since a large owner-user took space off the market. The number of available spaces 18,000 square feet or larger declined to sixteen from twenty at the end of last quarter. Eleven of those sixteen spaces are in Marina Village. As well as a decrease in vacancy, Marina Village experienced an increase in asking rental rates to \$1.95 from \$1.92 FS psf/mo at the end of 2009.

However, the Marina Village submarket has the highest vacancy in the Oakland metropolitan office market at 28.9 percent, down from 33.5 percent at the end of last year. The high vacancy is caused by a 70.0 percent vacancy in its office/flex product. Alameda still has over 800,000

square feet of available space, and more than 28 percent of the total vacancy is lab space. Alameda has several properties on the market for sale ranging from 15,296 to 85,631 square feet with asking rates ranging from \$89.00 to \$297.05 psf.

Net absorption was positive 80,677 square feet in Alameda, most of which was due to the Marina Village submarket, as compared to negative 81,817 square feet at the middle of 2009.

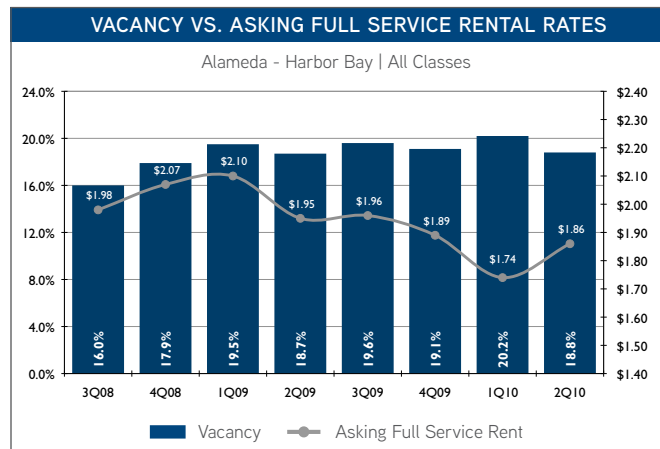
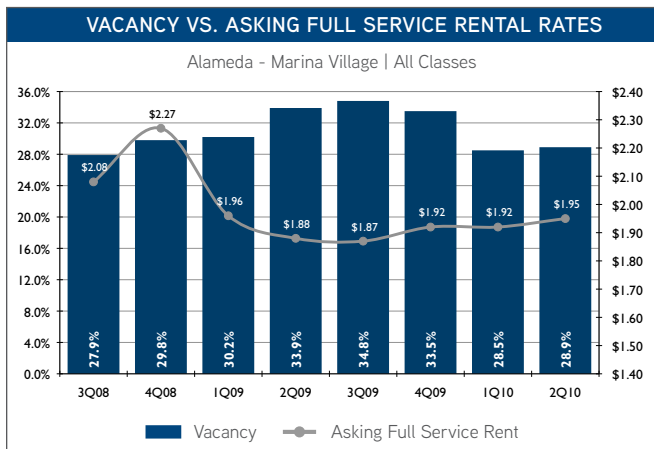
Harbor Bay remains the steadiest of the two businesses parks with a vacancy of 18.8 percent, down 2 percent from year end 2009. However, asking rental rates in this submarket have decreased to \$1.86 from \$1.89 FS psf/mo in the same time period.

The most significant activity in Alameda during the second quarter was the June 2010 sale of 1600 Harbor Bay Parkway, a 61,463 square foot office/flex building, to Worthington Investments. This is one of the first investment sales in the Oakland metropolitan office market since the end of 2008.

LEASE AND SALES ACTIVITY

SALES ACTIVITY

PROPERTY ADDRESS	SALE DATE	SIZE	BUYER	TYPE
1600 Harbor Bay Parkway	June 2010	61,463 SF	Worthington Investments	Office/Flex



MARKET COMPARISONS

OFFICE MARKET

CLASS	BLDGS	TOTAL INVENTORY SF	DIRECT VACANT SF	DIRECT VACANCY RATE	SUBLEASE VACANT SF	SUBLEASE VACANCY RATE	TOTAL VACANT SF	VACANCY RATE CURRENT QUARTER	VACANCY RATE PRIOR QUARTER	NET ABSORPTION CURRENT QTR SF	NET ABSORPTION YTD SF	COMPLETED CURRENT QTR SF	UNDER CONSTRUCTION SF	AVG ASKING FULL SERVICE
CBD SECTION														
OAKLAND - DOWNTOWN														
A	29	9,842,645	802,054	8.1%	151,159	1.5%	953,213	9.7%	9.5%	(16,785)	(68,706)	-	-	\$2.54
B/C & Flex	114	5,407,729	878,320	16.2%	41,558	0.8%	919,878	17.0%	17.4%	20,324	24,692	-	-	\$1.97
Total	143	15,250,374	1,680,374	11.0%	192,717	1.3%	1,873,091	12.3%	12.3%	3,539	(44,014)	-	-	\$2.26
OAKLAND - JACK LONDON SQUARE														
A	4	355,600	98,283	27.6%	-	0.0%	98,283	27.6%	34.7%	25,000	25,000	-	-	\$2.93
B/C & Flex	41	1,285,539	144,624	11.3%	8,144	0.6%	152,768	11.9%	14.4%	(80,094)	(76,198)	-	62,000	\$1.58
Total	45	1,641,139	242,907	14.8%	8,144	0.5%	251,051	15.3%	18.5%	(55,094)	(51,198)	-	62,000	\$2.11
CBD TOTAL														
A	33	10,198,245	900,337	8.8%	151,159	1.5%	1,051,496	10.3%	10.4%	8,215	(43,706)	-	-	\$2.58
B/C & Flex	155	6,693,268	1,022,944	15.3%	49,702	0.7%	1,072,646	16.0%	16.8%	(59,770)	(51,506)	-	62,000	\$1.91
Total	188	16,891,513	1,923,281	11.4%	200,861	1.2%	2,124,142	12.6%	12.7%	(51,555)	(95,212)	-	62,000	\$2.24
SUBURBAN SECTION														
RICHMOND														
A	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-	-	N/A
B/C & Flex	97	3,436,753	330,870	9.6%	12,257	0.4%	343,127	10.0%	11.7%	58,377	74,228	-	-	\$1.45
Total	97	3,436,753	330,870	9.6%	12,257	0.4%	343,127	10.0%	11.7%	58,377	74,228	-	-	\$1.45
BERKELEY - DOWNTOWN														
A	9	558,882	68,280	12.2%	500	0.1%	68,780	12.3%	13.6%	7,239	7,753	-	-	\$2.33
B/C & Flex	28	974,473	158,205	16.2%	-	0.0%	158,205	16.2%	19.2%	29,327	(1,123)	-	-	\$2.29
Total	37	1,533,355	226,485	14.8%	500	0.0%	226,985	14.8%	17.2%	36,566	6,630	-	-	\$2.30
BERKELEY - WEST														
A	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-	-	N/A
B/C & Flex	40	1,454,998	172,429	11.9%	8,651	0.6%	181,080	12.4%	14.1%	23,679	32,358	-	-	\$1.83
Total	40	1,454,998	172,429	11.9%	8,651	0.6%	181,080	12.4%	14.1%	23,679	32,358	-	-	\$1.83
EMERYVILLE														
A	14	2,569,348	360,657	14.0%	139,374	5.4%	500,031	19.5%	17.7%	(44,441)	(104,900)	-	-	\$2.17
B/C & Flex	44	1,683,088	208,313	12.4%	3,600	0.2%	211,913	12.6%	13.4%	14,031	18,397	-	-	\$1.68
Total	58	4,252,436	568,970	13.4%	142,974	3.4%	711,944	16.7%	16.0%	(30,410)	(86,503)	-	-	\$2.02
ALAMEDA - MARINA VILLAGE														
A	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-	-	N/A
B/C & Flex	55	1,671,320	444,367	26.6%	39,123	2.3%	483,490	28.9%	28.5%	(6,906)	77,029	-	-	\$1.95
Total	55	1,671,320	444,367	26.6%	39,123	2.3%	483,490	28.9%	28.5%	(6,906)	77,029	-	-	\$1.95
ALAMEDA - HARBOR BAY														
A	0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-	-	N/A
B/C & Flex	28	1,684,784	291,776	17.3%	25,592	1.5%	317,368	18.8%	20.2%	22,506	3,648	-	-	\$1.86
Total	28	1,684,784	291,776	17.3%	25,592	1.5%	317,368	18.8%	20.2%	22,506	3,648	-	-	\$1.86
OAKLAND AIRPORT														
A	3	453,697	123,378	27.2%	5,320	1.2%	128,698	28.4%	28.4%	-	(17,501)	-	-	\$1.67
B/C & Flex	32	1,389,507	361,322	26.0%	6,770	0.5%	368,092	26.5%	19.6%	(95,741)	(79,888)	-	-	\$1.43
Total	35	1,843,204	484,700	26.3%	12,090	0.7%	496,790	27.0%	21.8%	(95,741)	(97,389)	-	-	\$1.49
SUBURBAN TOTAL														
A	26	3,581,927	552,315	15.4%	145,194	4.1%	697,509	19.5%	18.4%	(37,202)	(114,648)	-	-	\$2.06
B/C & Flex	324	12,294,923	1,967,282	16.0%	95,993	0.8%	2,063,275	16.8%	17.1%	45,273	124,649	-	-	\$1.78
Total	350	15,876,850	2,519,597	15.9%	241,187	1.5%	2,760,784	17.4%	17.4%	8,071	10,001	-	-	\$1.85

MARKET TOTAL

A	59	13,780,172	1,452,652	10.5%	296,353	2.2%	1,749,005	12.7%	12.5%	(28,987)	(158,354)	-	-	\$2.37
B/C & Flex	479	18,988,191	2,990,226	15.7%	145,695	0.8%	3,135,921	16.5%	17.0%	(14,497)	73,143	-	62,000	\$1.83
Total	538	32,768,363	4,442,878	13.6%	442,048	1.3%	4,884,926	14.9%	15.1%	(43,484)	(85,211)	-	62,000	\$2.02

QUARTERLY COMPARISON AND TOTALS

Q2-10	538	32,768,363	4,442,878	13.6%	442,048	1.3%	4,884,926	14.9%	15.1%	(43,484)	(85,211)	-	62,000	\$2.02
Q1-10	538	32,899,473	4,424,596	13.4%	547,956	1.7%	4,972,552	15.1%	15.0%	(41,727)	(41,727)	-	62,000	\$2.03
Q4-09	538	32,899,473	4,373,223	13.3%	557,602	1.7%	4,930,825	15.0%	15.4%	143,478	(599,944)	-	62,000	\$2.04
Q3-09	538	32,899,473	4,474,620	13.6%	599,83	1.8%	5,074,303	15.4%	14.6%	(263,063)	(743,422)	-	62,000	\$2.08
Q2-09	538	32,899,473	4,312,860	13.1%	498,380	1.5%	4,811,240	14.6%	13.9%	(102,483)	(370,359)	110,000	62,000	\$2.15
Q1-09	537	32,789,473	4,153,059	12.7%	407,338	1.3%	4,535,474	13.9%	13.5%	(107,421)	(107,421)	-	172,000	\$2.15

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