

Greater Downtown Miami Development Pipeline

Under Construction 2,317 Condos 4,880 Apartments 2,083 Hotel Units 90,000 SF Office 405,666 SF Retail 550,000 SF Meeting 1,780 Theater Seats

1. AC Hotel by Marriott Midtown Miami 3400 Biscayne Blvd Developer: Midtown Lodging 2 Architect: Kobi Karp Est. Completion: 2019 Hotel Units: 153

2. Midtown 6 3101 NE 1 Ave Developer: Midtown Group/Magellan Development Architect: BKL Architects Est. Completion: 2019 Apartments: 447 Retail SF: 40,000 magellanddevelopment.com

3. Gran Paraiso (Paraiso Bay - Tower 2) 601 NE 31 St Developer: The Related Group Architect: Arquitectonica Est. Completion: 2019 Condos: 317 granparaisoresidences.com

4. Midtown 8 2901 NE 1 Ave Developer: Magellan Development Architect: Loewnborg Architects Est. Completion: 2019 Apartments: 3877 Retail SF: 30,000 midtownmiami.com
5. AMLI @ Midtown Miami 2900 NE 2 Ave Developer: AMLI Residential Architect: Zyscovich Est. Completion: 2019 Apartments: 720

6. The Edgewater 481 NE 29 St Developer: Edgewater Condo Est. Completion: 2019 Condos: 30 edgewatermiamicondo.net

7. Biscayne 27 2701 Biscayne Blvd Developer: Richman Group Architect: Corwill Architects Est. Completion: 2019 Apartments: 330 Retail SF: 9,600 therichmangroup.com

8. 26 Edgewater 321 NE 26 St Developer: Strikey Development Architect: Laith Sayigh Group Est. Completion: 2019 Condos: 86 26edgewatercondos.com
9. Missoni Baia 777 NE 26 Ter Developer: OKO Group | DB Group | Cain Hoy Architect: Revuelta Architecture | Asymptot Architecture Est. Completion: 2020 Condos: 249 missonibaia.com

10. The Bradley 51 NW 26 St Developer: The Related Group Architect: Arquitectonica Est. Completion: 2019 Apartments: 175 Retail SF: 32,000 bradleywynwood.com

11. Modera Edgewater 411 NE 24 St Developer: Mill Creek Residential Architect: Corwill Architects Est. Completion: 2019 Apartments: 297 millcreekplaces.com

12. Wynwood 25 252 NW 25 St Developer: East End Capital | The Related Group Architect: Kobi Karp Est. Completion: 2019 Apartments: 289 Retail SF: 31,000 wynwood25.com
13. Cube Wynwd 230 NW 24 St Developer: RedSky Capital Architect: Arquitectonica Est. Completion: 2019 Retail SF: 10,000 Office SF: 90,000 cubewynwd.com

14. Elysee Miami 788 NE 23 St Developer: Two Roads Development Architect: Arquitectonica Est. Completion: 2020 Condos: 100 elyseemiami.com

15. Art Plaza Towers 58 NE 14 St Developer: Melo Group Architect: itcdesign Est. Completion: 2020 Apartments: 667 Retail SF: 15,000

16. 1000 Museum 1000 Biscayne Blvd Developer: Covin Development Architect: Zaha Hadid Est. Completion: 2019 Condos: 83 1000museum.com
17. Paramount Miami Worldcenter 700 N Miami Ave Developer: Daniel Kotsi | Art Falcone | Nitin Motwani Architect: Elkus Manfredi Est. Completion: 2019 Condos: 513 miamiworldcenter.com

18. Retail @ Miami Worldcenter 700 N Miami Ave Developer: Miami Worldcenter Associates Architect: N/A Est. Completion: 2019 Retail: 140,000 miamiworldcenter.com

19. Caoba @ Miami Worldcenter 698 NE 1 Ave Developer: Miami Worldcenter Associates Architect: Cohen, Freedman, Encinosa & Associates Est. Completion: 2018 Apartments: 444 caobamwc.com

20. Miami Worldcenter 700 N Miami Ave Developer: Miami Worldcenter Associates Architect: Elkus Manfredi Est. Completion: 2019 Residential: 1,820 Hotel Units: 2,050 Commercial SF: 800,000 miamiworldcenter.com
21. Marriott Marquis Miami Hotel & Expo @ Miami Worldcenter 700 N Miami Ave Developer: MDM Group | Miami Worldcenter Associates Architect: Nichols Brosch | Wurst Wolfe & Associates Est. Completion: 2019 Hotel Units: 1,700 Meeting SF: 550,000 miamiworldcenter.com

22. Bayside Marketplace (Renovations) 401 Biscayne Blvd Developer: Greybrook Realty Architect: Zyscovich Architects Retail SF: 140,850

23. Park-Line Towers @ MiamiCentral Station NW 1 Ave & NW 3 St Developer: Florida East Coast Industries Architect: SOM Est. Completion: 2019 Apartments: 800 Retail SF: 319,000 miamicentral.com

24. MiamiCentral Station 40 NW 3 St Developer: Florida East Coast Industries Architect: SOM Est. Completion: 2018 Apartments: 800 Retail SF: 217,000 Office SF: 319,000 miamicentral.com
25. Muze at Met Square 302 SE 3 St Developer: ZOM Group Architect: Nichols Brosch | Wurst Wolfe & Associates Est. Completion: 2018 Apartments: 392 Retail SF: 37,666 Theater Seats: 1,780 metropolitannmiami.com

26. Aston Martin Residences 300 Biscayne Blvd Way Developer: G & G Business Developments Architect: BMA & Revuelta Architecture Est. Completion: 2019 Condos: 390 Retail SF: 37,666 astonmartinresidences.com

27. Brickell World Plaza 44 SE 6 St Developer: Brickell World Center Architect: HOK Est. Completion: 2019 Retail SF: 15,000 brickellworldplaza.com

28. Brickell Flatiron 1001 S Miami Ave Developer: CMC Group Inc. Architect: Luis Revuelta Est. Completion: 2019 Condos: 549 Retail SF: 40,000 brickellflatiron.com
29. Hotel Indigo 145 SW 11 St Developer: SunView Companies | HES Group Architect: Kobi Karp Est. Completion: 2018 Hotel Units: 230

30. Maizon at Brickell 237 SW 12 St Developer: ZOM Architect: MSA Architects Est. Completion: 2019 Apartments: 262 Retail SF: 15,000 zomliving.com

Planned* 1,099 Condos 2,071 Hotel Units 236 Condo-Hotel Units 828,144 Office SF 452,776 Retail SF 10,123 Meeting SF 72 Theater Seats

1. 545 wyn 545 NW 26 St Developer: Sterling Bay Architect: Gensler Office SF: 209,050 Retail SF: 28,436 545wyn.com

2. Jungle Island 1111 Parrott Jungle Trail Developer: Jungle Island Architect: EoA Hotel Units: 300

3. Island Gardens 950 MacArthur Cswy Developer: Flagstone Group Architect: Eric Kuhne Hotel Units: 600 Retail SF: 220,000 islandgardens.com

4. CitizenM at Miami WorldCenter 155 NE 10 St Developer: Miami World Center & CitizenM Architect: Gensler Hotel Units: 351 miamiworldcenter.com
5. Okan Tower 555 N Miami Ave Developer: Turkish Okan Group Architect: Behar Font & Partners Condos: 153 Condo-Hotel Units: 236 Office SF: 64,000 theokantowermiami.com

6. Skyrise Miami 401 Biscayne Blvd Developer: Berkowitz Development Architect: Arquitectonica Meeting SF: 10,123 Retail SF: 174,340 Event SF: 24,291 Restaurant SF: 39,467 Theater Seats: 72 skyrisemiami.com

7. YotelPad 227 NE 2 St Developer: Aria Development Group Architect: ADD Inc. Condos: 215 Hotel Units: 250 yotelpadmiami.com

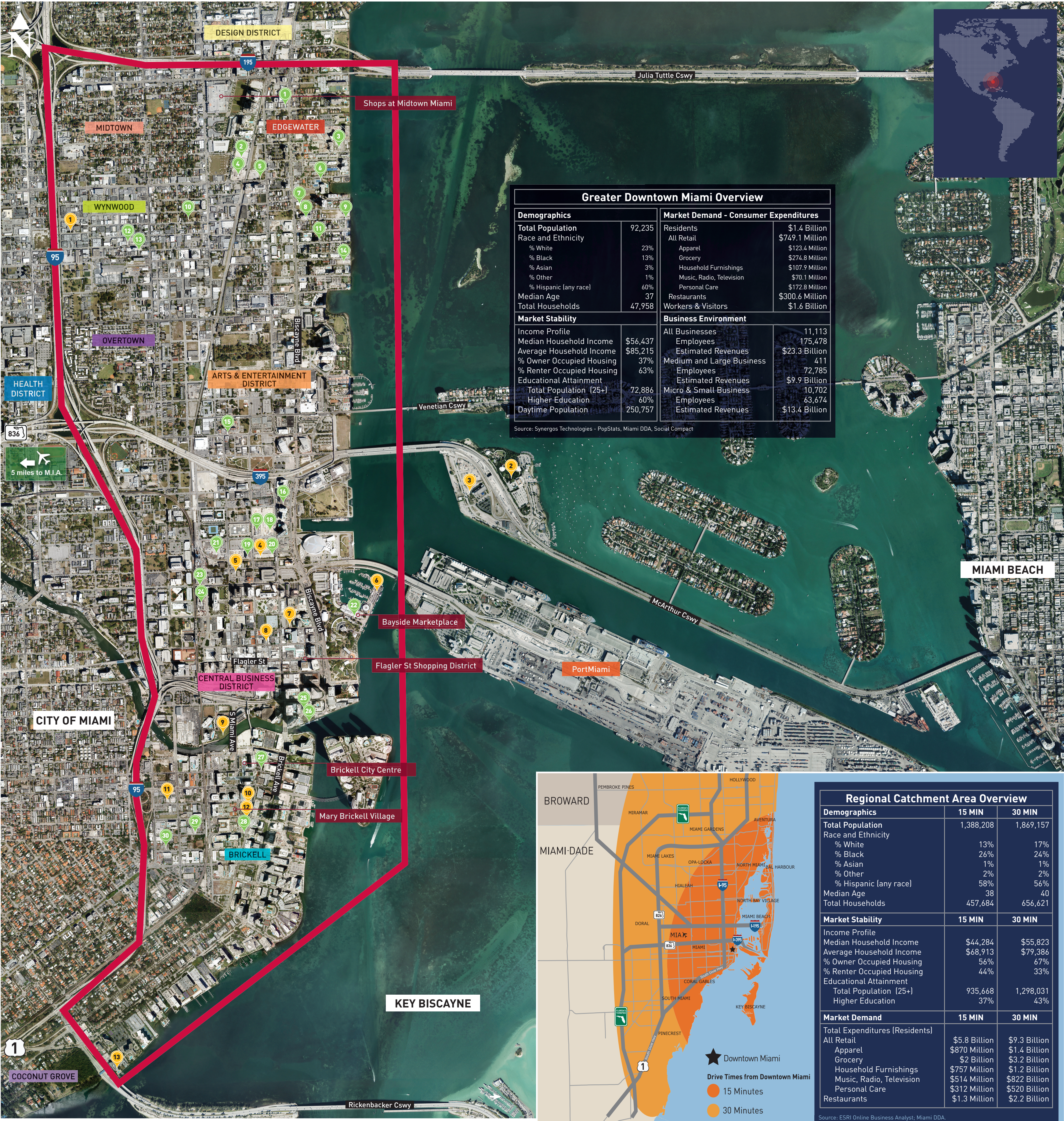
8. OD Miami (Dade Commonwealth Building) 139 NE 1 St Developer: Dream Downtown Miami LLC | OD Hotels Hotel Units: 168 od-hotels.com
9. One River Point (River Village Phase II) 400 S Miami Ave Developer: Kar Properties Architect: Rafael Vinoly Condos: 426 Retail SF: 30,000 oneriverpoint.com

10. 830 Brickell 830 SE 1 Ave Developer: OKO Office SF: 555,094

11. Smart Brickell 229 SW 9 St Developer: Habitat Group Architect: Hernando Carrillo Condos: 170 Hotel Units: 150 smartbrickell.com

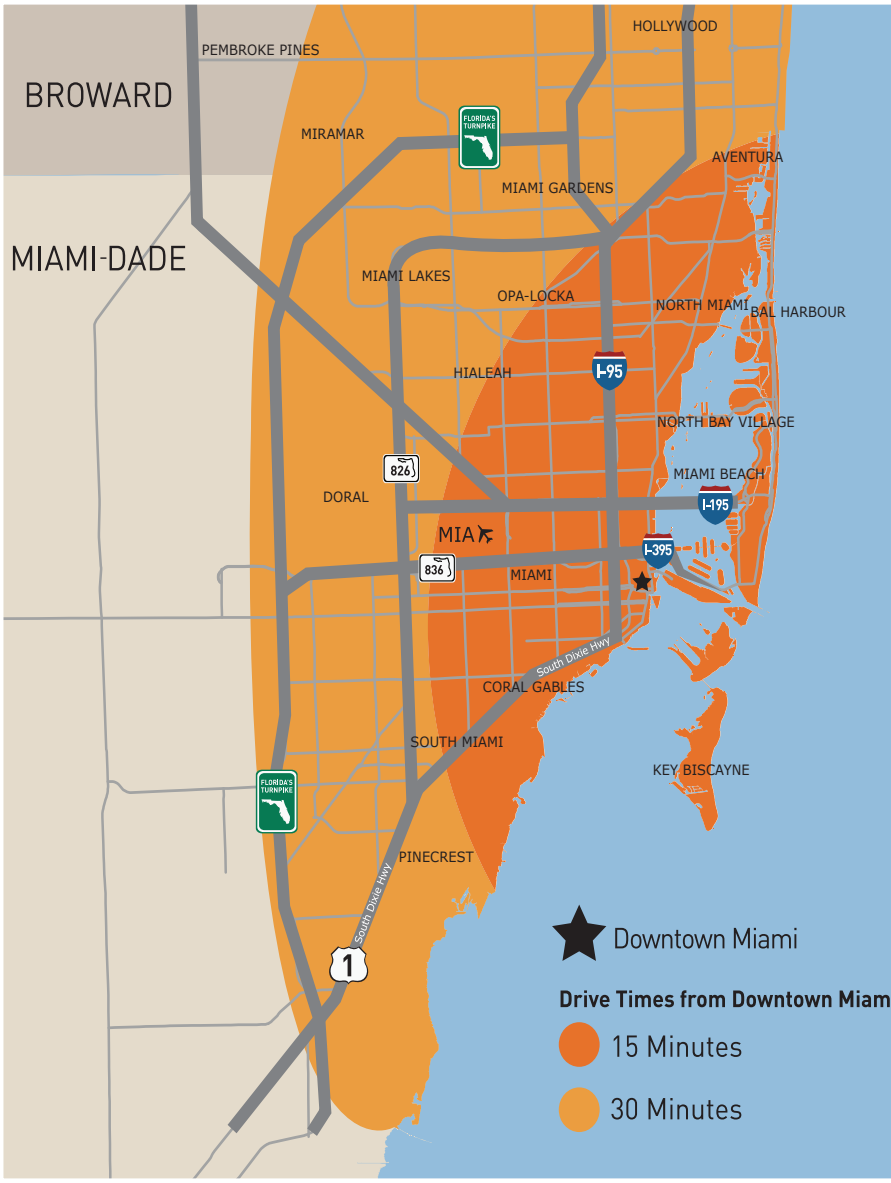
12. CitizenM 15 SE 10 St Developer: CitizenM Hotel Rooms: 252 citizenm.com
13. Una Residences 175 SE 25 Rd Developer: OKO Architect: Adrian Smith & Gordon Gill Architecture Condos: 135 unaresidences.com

* Residential projects listed under "Planned" are either pre-leasing, taking reservations or contracts. Non-residential projects under "Planned" have filed permits with the City of Miami Building Department.



Greater Downtown Miami Overview			
Demographics		Market Demand - Consumer Expenditures	
Total Population	92,235	Residents	\$1.4 Billion
Race and Ethnicity		All Retail	\$749.1 Million
% White	23%	Apparel	\$123.4 Million
% Black	13%	Grocery	\$274.8 Million
% Asian	3%	Household Furnishings	\$107.9 Million
% Other	1%	Music, Radio, Television	\$70.1 Million
% Hispanic (any race)	60%	Personal Care	\$172.8 Million
Median Age	37	Restaurants	\$300.6 Million
Total Households	47,958	Workers & Visitors	\$1.6 Billion
Market Stability		Business Environment	
Income Profile		All Businesses	11,113
Median Household Income	\$56,437	Employees	175,478
Average Household Income	\$85,215	Estimated Revenues	\$23.3 Billion
% Owner Occupied Housing	37%	Medium and Large Business	411
% Renter Occupied Housing	63%	Employees	72,785
Educational Attainment		Estimated Revenues	\$9.9 Billion
Total Population (25+)	72,886	Micro & Small Business	10,702
Higher Education	60%	Employees	63,674
Daytime Population	250,757	Estimated Revenues	\$13.4 Billion

Source: Synergos Technologies - PopStats, Miami DDA, Social Compact



Regional Catchment Area Overview		
Demographics	15 MIN	30 MIN
Total Population	1,388,208	1,869,157
Race and Ethnicity		
% White	13%	17%
% Black	26%	24%
% Asian	1%	1%
% Other	2%	2%
% Hispanic (any race)	58%	56%
Median Age	38	40
Total Households	457,684	656,621
Market Stability	15 MIN	30 MIN
Income Profile		
Median Household Income	\$44,284	\$55,823
Average Household Income	\$68,913	\$79,386
% Owner Occupied Housing	56%	67%
% Renter Occupied Housing	44%	33%
Educational Attainment		
Total Population (25+)	935,668	1,298,031
Higher Education	37%	43%
Market Demand	15 MIN	30 MIN
Total Expenditures (Residents)		
All Retail	\$5.8 Billion	\$9.3 Billion
Apparel	\$870 Million	\$1.4 Billion
Grocery	\$2 Billion	\$3.2 Billion
Household Furnishings	\$757 Million	\$1.2 Billion
Music, Radio, Television	\$514 Million	\$822 Billion
Personal Care	\$312 Million	\$520 Billion
Restaurants	\$1.3 Million	\$2.2 Billion

Source: ESRI Online Business Analyst, Miami DDA

Recently Completed (not shown on map)			
2017			
1,821 Condos	723 Apartments	50,000 Office SF	
179,988 SF Retail	250,000 SF Museum		
Eve Apartments 195 Retail SF: 63,000	Broadstone at Brickell Apartments: 372	2121 Wynwood Condos: 10 Retail SF: 7,200	Brickell Heights Condos: 690 Retail SF: 85,000
Hyde Hotel & Residences Condos: 337 Hotel Units: 60 Retail SF: 21,745	Aria on the Bay Condos: 337 Office SF: 35,000	Square Station Apartments: 710 Retail SF: 15,000	PanoramaTower Hotel Units: 208 Apartments: 821 Retail SF: 50,000
2 MiamiCentral Office SF: 190,000	One Paraiso Condos: 276	Paraiso Bayviews Condos: 396	2014 Condos: 888 Apartments: 1,157 Hotel Units: 142 Office SF: 10,141 Retail SF: 3,257
2015 Condos: 1,246 Retail SF: 28,500	2016 Condos: 2,209 Apartments: 1,852 Hotel Units: 899 Office SF: 260,000 Retail SF: 604,800	2017 Condos: 1,821 Apartments: 723 Office SF: 50,000 Retail SF: 179,988 Museum SF: 250,000	2018 Condos: 1,519 Apartments: 2,733 Hotel Units: 328 Office SF: 370,000 Retail SF: 136,394



MARKET INSIGHTS

December 2018

Our Mission:

The Miami Downtown Development Authority's mission is to grow, strengthen and promote the economic health and vitality of Downtown Miami.

As an autonomous agency of the City, the Miami DDA advocates, facilitates, plans and executes business development, planning and capital improvements, and marketing and communication strategies.

We commit to fulfill our mission collaboratively, ethically and professionally, consistent with the Authority's public purpose.

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Important Note:

Information in this document is deemed accurate as of December 2018 and is subject to change without notice.

TRANSPORTATION & INFRASTRUCTURE*

