

San Francisco County Industry Growth and Location Quotients

Q4 -2025

Produced by

National Economic Education Delegation

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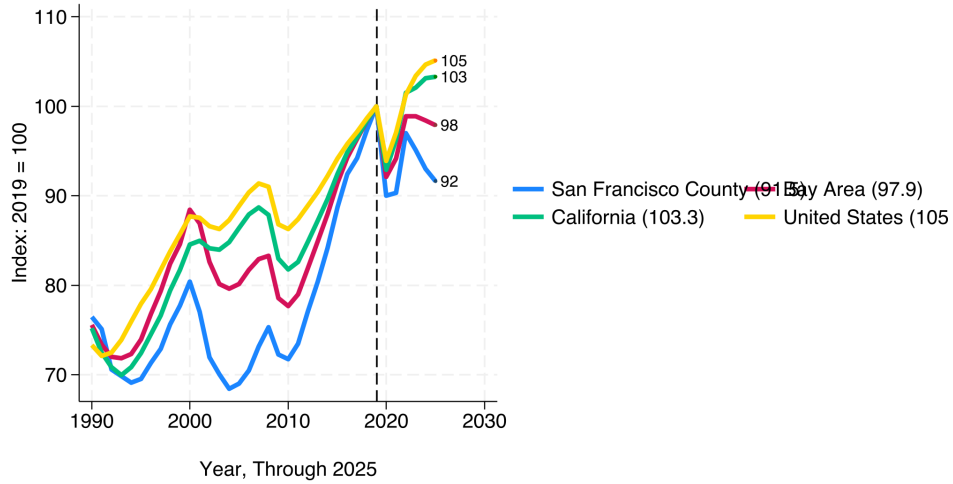
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1. Nonfarm Employment

Figure 1 - 1: Regional Growth Relative to California and the United States



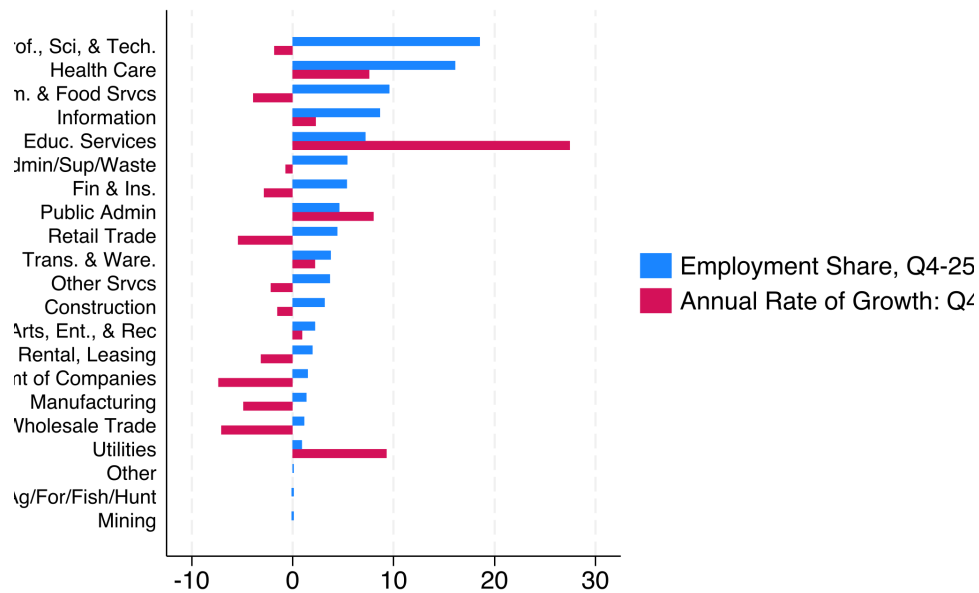
Source: BLS, Quarterly Census of Employment and Wages
 Note: Data points are annual averages of quarterly data. 2025 data are through Q4.
 Graph by: National Economic Education Delegation (www.NEEDEcon.org)

Table 1.1: Total Nonfarm Employment Growth (Q4 of each year.)

Region	Current Employment	Year over Year Change (#)	Annual Rate of Growth						
			Over last: Year	2 Years	3 Years	5 Years	Since: 2010	2000	1990
San Francisco County	703,276	-4,002	-0.6	-1.2	-1.9	1.1	1.8	0.5	0.6
Bay Area	3,956,965	2,608	0.1	-0.3	-0.4	1.5	1.7	0.4	0.8
California	18,413,900	47,570	0.3	0.6	0.5	2.3	1.8	0.9	1.1
United States	156,854,848	386,112	0.2	0.6	0.9	2.2	1.4	0.8	1.2

Source: BLS, QCEW; Calculations by National Economic Education Delegation

Figure 1 - 2: Industry Shares and Growth



Source: BLS, Quarterly Census of Employment and Wages
The recovery refers to the post-2010 period. The recovery from the Great Recession.
Calculations by Marin Economic Consulting

Table 1.2: Nonfarm Employment Growth by 2-Digit NAICS Category (Q4 of each year.)

Region	Current Employment	Year over Year Change (#)	Over last: Year	Annual Rate of Growth					
				2 Years	3 Years	5 Years	Since: 2010	2000	1990
Ag, For, Fish, & Hunting	206	26	14.3				-2.3	1.1	-1.6
Mining	60	49	429.4				-2.8	-0.1	
Utilities	6,560	-3	-0.1	-0.4	-0.4	9.6		433.3	983.6
Construction	22,380	316	1.4	-0.5	-1.7	-0.7	3.7	0.3	0.7
Manufacturing	9,680	-878	-8.3	-9.4	-8.8	-4.3	0.5	-2.2	-2.1
Wholesale Trade	8,168	-915	-10.1	-7.8	-7.5	-5.7	-1.6	-1.8	-1.9
Retail Trade	31,190	-1,429	-4.4	-4.4	-5.9	-3.4	-1.7	-1.5	-1.1
Trans. & Ware.	26,552	-1,127	-4.1	2.6	0.3	6.9	45.5	9.1	6.2
Information	60,902	724	1.2	-1.0	-1.8	2.8	14.3	2.7	6.2
Fin & Ins.	37,900	-454	-1.2	-5.3	-6.8	-3.0	-0.2	-1.1	-1.2
RE, Rental, Leasing	13,763	-149	-1.1	-1.0	-2.8	-0.3	1.2	0.2	-0.2
Prof., Sci., & Tech.	130,455	-3,289	-2.5	-3.6	-5.0	-1.3	5.1	2.7	2.8
Mgmt of Companies	10,580	-719	-6.4	-4.2	-7.7	-7.0	-2.0	-2.6	4.3
Admin, Support, & Waste	38,221	1,443	3.9	0.1	-1.4	3.5	0.6	0.0	-0.4
Educ. Services	50,704	-782	-1.5	0.4	1.1	45.5	13.6	10.9	10.1
Health Care & Soc. Asst.	113,348	3,314	3.0	3.0	3.0	9.3	10.8	8.0	6.1
Arts, Ent., & Rec	15,715	262	1.7	0.5	2.4	16.6	1.8	1.0	1.8
Accom. & Food Svcs	67,392	1,559	2.4	-0.5	0.4	14.1	0.0	0.3	0.8
Other Svcs	26,078	-1,521	-5.5	-2.1	-1.1	3.5	-2.3	-0.7	0.0
Public Admin	32,632	-1,173	-3.5	0.2	1.9	10.0	3.0	0.1	-0.1
Other	790	745	1,681.2	80.6	697.8	15,773.3	-3.8	-3.9	-2.8

Source: BLS, QCEW; Calculations by National Economic Education Delegation

2. Location Quotients: Graphical History

Figure 2 - 1: Prof., Sci., & Tech.

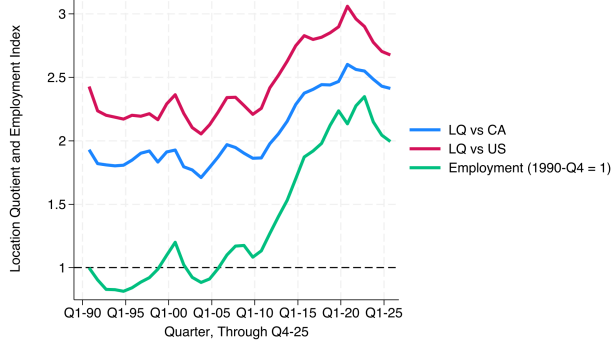


Figure 2 - 2: Health Care & Soc. Asst.

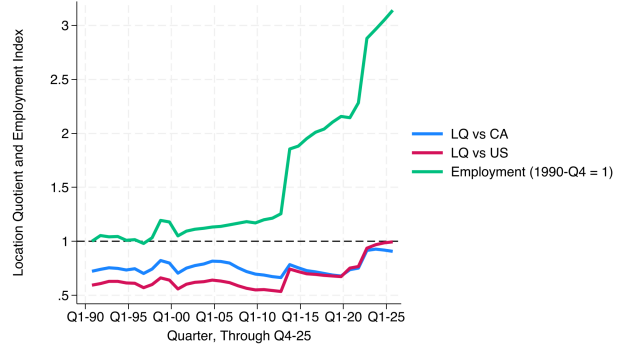


Figure 2 - 3: Accom. & Food Svcs

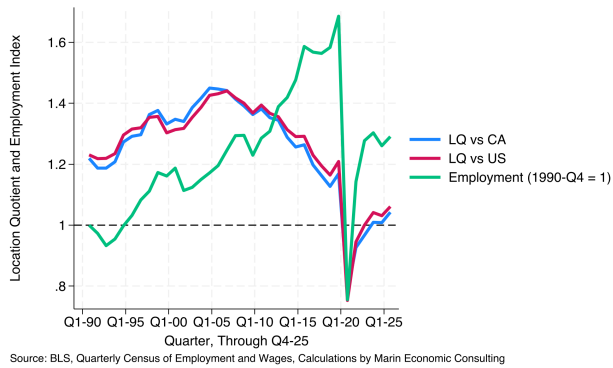


Figure 2 - 4: Information

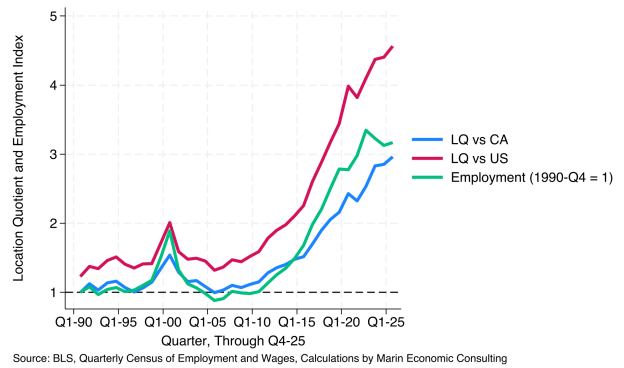


Figure 2 - 5: Educ. Services

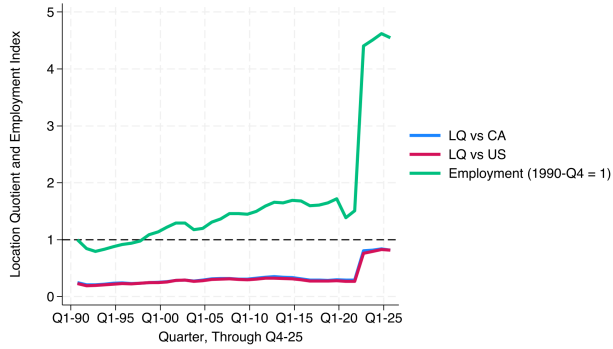


Figure 2 - 6: Admin, Support, & Waste

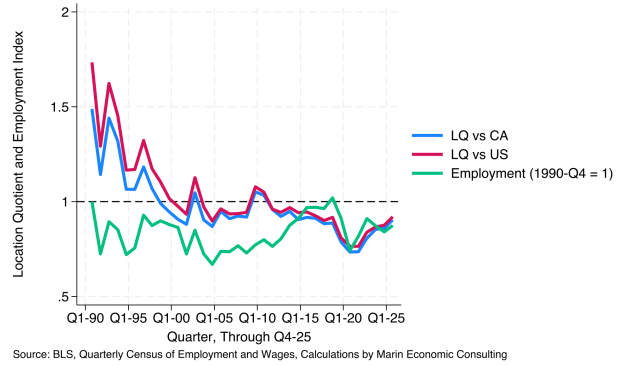


Figure 2 - 7: Fin & Ins.

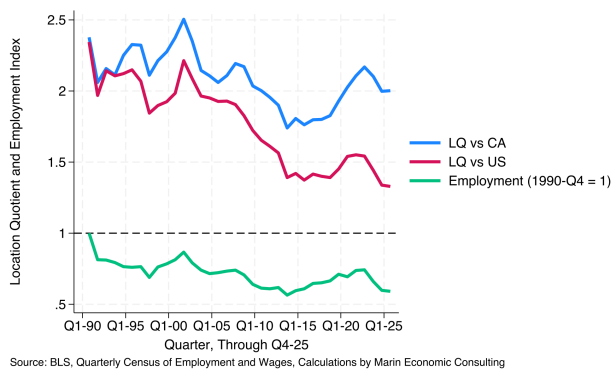
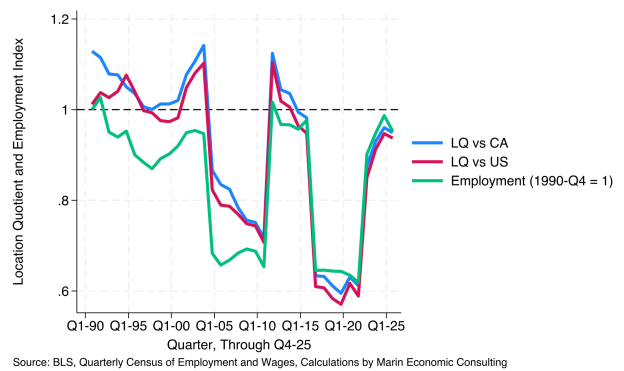


Figure 2 - 8: Public Admin



3. Location Quotients: 2-digit NAICS

**Table 3.1: Location Quotients for 2-Digit NAICS Industries
(Q4 of each year.)**

NAICS Industry	LQ vs California			LQ vs United States		
	Current	5 Years Ago	2000	Current	5 Years Ago	2000
Agriculture, Forestry, Fishing and Hunting	0.01	0.00	0.02	0.04	0.00	0.06
Mining, Quarrying, and Oil and Gas Extraction	0.10	0.00	0.11	0.02	0.00	0.04
Utilities	1.43	1.01	0.00	1.66	1.17	0.00
Construction	0.65	0.65	0.67	0.59	0.65	0.58
Manufacturing	0.21	0.24	0.19	0.17	0.21	0.18
Wholesale Trade	0.33	0.44	0.44	0.30	0.43	0.46
Retail Trade	0.51	0.58	0.70	0.44	0.51	0.65
Transportation and Warehousing	0.79	0.59	0.17	0.76	0.61	0.16
Information	2.96	2.43	1.15	4.56	3.98	1.59
Finance and Insurance	2.00	2.03	2.00	1.33	1.54	1.65
Real Estate and Rental and Leasing	1.17	1.22	1.21	1.25	1.35	1.38
Professional, Scientific, and Technical Services	2.41	2.60	1.86	2.68	3.06	2.26
Management of Companies and Enterprises	0.93	1.66	2.05	0.90	1.49	1.88
Administrative and Support and Waste Management and Remediation Services	0.90	0.74	1.03	0.92	0.77	1.05
Educational Services	0.81	0.29	0.32	0.82	0.27	0.31
Health Care and Social Assistance	0.91	0.74	0.69	1.00	0.75	0.55
Arts, Entertainment, and Recreation	1.00	0.93	1.08	1.20	0.95	1.33
Accommodation and Food Services	1.04	0.78	1.38	1.06	0.75	1.39
Other Services (except Public Administration)	1.18	1.21	1.40	1.24	1.17	2.08
Public Administration	0.95	0.63	0.72	0.94	0.62	0.71

Source: BLS, QCEW; Calculations by National Economic Education Delegation

4. Location Quotients: 3-digit NAICS

**Table 4.1: Location Quotients for 3-Digit NAICS Industries
(Q4 of each year.)**

NAICS Industry	LQ vs California			LQ vs United States		
	Current	5 Years Ago	2000	Current	5 Years Ago	2000
Utilities	1.43	1.01	0.00	1.66	1.17	0.00
Construction of Buildings	1.33	1.35	1.22	1.25	1.43	1.15
Heavy and Civil Engineering Construction	0.57	0.41	0.42	0.38	0.30	0.28
Specialty Trade Contractors	0.43	0.45	0.51	0.41	0.48	0.47
Food Manufacturing	0.30	0.39	0.31	0.24	0.31	0.27
Computer and Electronic Product Manufacturing	0.49	0.44	0.11	0.93	1.00	0.25
Merchant Wholesalers, Durable Goods	0.34	0.38	0.40	0.29	0.35	0.40
Merchant Wholesalers, Nondurable Goods	0.27	0.46	0.51	0.29	0.52	0.58
Food and Beverage Stores	0.65	0.60	0.70	0.65	0.60	0.73
Transit and Ground Passenger Transportation	3.80	2.82	0.48	3.43	2.69	0.42
Support Activities for Transportation	0.77	0.90	0.87	0.90	1.14	1.09
Couriers and Messengers	0.95	0.64	0.68	1.10	0.74	0.66
Motion Picture and Sound Recording Industries	0.41	0.37	0.42	1.18	1.29	1.46
Telecommunications	1.18	1.23	0.99	0.83	0.94	0.94
Data Processing, Hosting and Related Services	5.29	6.96	0.82	7.62	8.63	0.55
Other Information Services	4.23	3.53	2.61	8.08	8.31	3.22
Credit Intermediation and Related Activities	1.59	1.95	1.54	1.03	1.49	1.30
Securities, Commodity Contracts, and Other Financial Investments and Related Activities	4.56	4.20	4.70	3.61	3.55	4.11
Insurance Carriers and Related Activities	0.86	0.96	1.26	0.53	0.69	0.98
Real Estate	1.30	1.32	1.32	1.44	1.52	1.53
Professional, Scientific, and Technical Services	2.41	2.60	1.86	2.68	3.06	2.26
Management of Companies and Enterprises	0.93	1.66	2.05	0.90	1.49	1.88
Administrative and Support Services	0.91	0.73	1.05	0.93	0.77	1.07
Waste Management and Remediation Services	0.80	0.78	0.76	0.78	0.75	0.71
Educational Services	0.81	0.29	0.32	0.82	0.27	0.31
Ambulatory Health Care Services	0.58	0.59	0.57	0.60	0.57	0.53
Hospitals	1.38	0.48	0.64	1.04	0.37	0.49
Nursing and Residential Care Facilities	0.40	0.43	0.60	0.33	0.33	0.40
Social Assistance	1.12	1.19	1.25	2.09	2.04	0.92
Performing Arts, Spectator Sports, and Related Industries	1.78	1.58	2.22	2.57	2.56	3.07
Museums, Historical Sites, and Similar Institutions	3.37	3.52	3.94	2.97	2.94	3.36
Amusement, Gambling, and Recreation Industries	0.50	0.37	0.49	0.59	0.35	0.60
Accommodation	1.34	1.33	2.27	1.40	1.29	2.33
Food Services and Drinking Places	0.99	0.70	1.21	1.01	0.68	1.22
Repair and Maintenance	0.32	0.31	0.46	0.30	0.30	0.48
Personal and Laundry Services	1.01	0.95	1.27	1.09	0.85	1.24
Religious, Grantmaking, Civic, Professional, and Similar Organizations	1.89	2.20	1.89	2.06	2.16	1.99
Private Households	2.11	2.02	1.64	3.33	2.52	6.78
Executive, Legislative, and Other General Government Support	0.63	0.72	0.90	0.42	0.45	0.56
Justice, Public Order, and Safety Activities	0.92	0.24	0.29	1.12	0.30	0.40
Administration of Human Resource Programs	1.49	0.97	1.64	2.33	1.50	2.26
Administration of Environmental Quality Programs	0.65	0.30	0.50	1.07	0.45	0.73
Administration of Economic Programs	1.75	1.54	2.18	1.87	1.61	2.37

Source: BLS, QCEW; Calculations by National Economic Education Delegation

Note: Top 50 industries, by employment share.

5. Location Quotients: 4-digit NAICS

Table 5.1: Location Quotients for 4-Digit NAICS Industries (Q4 of each year.)

NAICS Industry	LQ vs California			LQ vs United States		
	Current	5 Years Ago	2000	Current	5 Years Ago	2000
Residential Building Construction	0.90	1.34	1.14	1.02	1.66	1.36
Nonresidential Building Construction	1.95	1.38	1.35	1.47	1.18	0.96
Building Equipment Contractors	0.56	0.58	0.55	0.47	0.54	0.43
Grocery Stores	0.58	0.55	0.62	0.59	0.55	0.63
Urban Transit Systems	3.75	0.00	0.00	4.83	0.00	0.00
Taxi and Limousine Service	13.15	0.00	2.50	9.60	0.00	1.81
Local Messengers and Local Delivery	3.98	1.90	0.46	4.60	2.57	0.68
Data Processing, Hosting, and Related Services	5.29	6.96	0.82	7.62	8.63	0.55
Depository Credit Intermediation	1.43	1.80	2.05	0.82	1.18	1.69
Nondepository Credit Intermediation	2.09	1.27	0.53	1.53	1.08	0.42
Other Financial Investment Activities	4.28	4.05	4.08	4.07	4.30	4.84
Agencies, Brokerages, and Other Insurance Related Activities	0.93	1.07	1.33	0.65	0.90	1.21
Lessors of Real Estate	1.35	1.50	1.37	1.16	1.33	1.22
Activities Related to Real Estate	1.27	1.13	1.34	1.52	1.44	1.90
Legal Services	2.35	2.47	2.79	2.60	2.62	2.89
Accounting, Tax Preparation, Bookkeeping, and Payroll Services	1.80	1.76	1.49	1.95	1.90	1.72
Architectural, Engineering, and Related Services	1.60	1.53	1.52	1.54	1.59	1.65
Computer Systems Design and Related Services	4.76	4.60	2.44	5.50	5.95	2.95
Management, Scientific, and Technical Consulting Services	1.61	2.35	1.82	1.68	2.68	2.65
Scientific Research and Development Services	1.40	1.39	0.49	2.38	2.42	0.81
Advertising, Public Relations, and Related Services	2.18	3.27	3.21	2.31	3.59	3.87
Other Professional, Scientific, and Technical Services	1.13	1.10	0.94	0.89	0.92	0.87
Management of Companies and Enterprises	0.93	1.66	2.05	0.90	1.49	1.88
Employment Services	0.65	0.47	0.72	0.73	0.54	0.77
Investigation and Security Services	1.78	1.28	1.49	2.46	1.71	1.93
Services to Buildings and Dwellings	0.40	0.66	1.33	0.38	0.66	1.32
Elementary and Secondary Schools	0.39	0.40	0.14	0.38	0.35	0.12
Colleges, Universities, and Professional Schools	2.13	0.52	0.68	1.93	0.46	0.61
Offices of Physicians	0.76	0.74	0.53	0.59	0.58	0.51
Outpatient Care Centers	0.52	0.55	0.76	1.11	1.04	1.00
General Medical and Surgical Hospitals	1.50	0.63	0.13	1.13	0.40	0.10
Individual and Family Services	1.08	1.16	1.31	2.46	2.47	0.94
Child Day Care Services	1.31	1.18	1.02	0.97	0.79	0.69
Museums, Historical Sites, and Similar Institutions	3.37	3.52	3.94	2.97	2.94	3.36
Other Amusement and Recreation Industries	0.73	0.61	0.79	0.74	0.42	0.72
Traveler Accommodation	1.36	1.36	2.31	1.43	1.33	2.38
Special Food Services	1.42	1.39	1.52	1.33	0.99	1.14
Drinking Places (Alcoholic Beverages)	3.13	2.14	2.95	2.18	0.92	1.88
Other Personal Services	1.83	1.83	2.13	1.96	1.91	2.96
Social Advocacy Organizations	2.83	3.81	3.23	3.33	4.18	3.16
Executive, Legislative, and Other General Government Support	0.63	0.72	0.90	0.42	0.45	0.56
Justice, Public Order, and Safety Activities	0.92	0.24	0.29	1.12	0.30	0.40
Administration of Human Resource Programs	1.49	0.97	1.64	2.33	1.50	2.26
Administration of Economic Program	1.75	1.54	2.18	1.87	1.61	2.37

Source: BLS, QCEW; Calculations by National Economic Education Delegation

Note: Top 50 industries, by employment share.