

# San Mateo County Industry Growth and Location Quotients

## Q4 -2025

Produced by

National Economic Education Delegation

June 2, 2026

Jon Haveman, Executive Director

415-336-5705 or Jon@NEEDEcon.org

## **Contents**

1. Nonfarm Employment	2
2. Location Quotients: Graphical History	4
3. Location Quotients: 2-digit NAICS	6
4. Location Quotients: 3-digit NAICS	7
5. Location Quotients: 4-digit NAICS	8



# 1. Nonfarm Employment

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

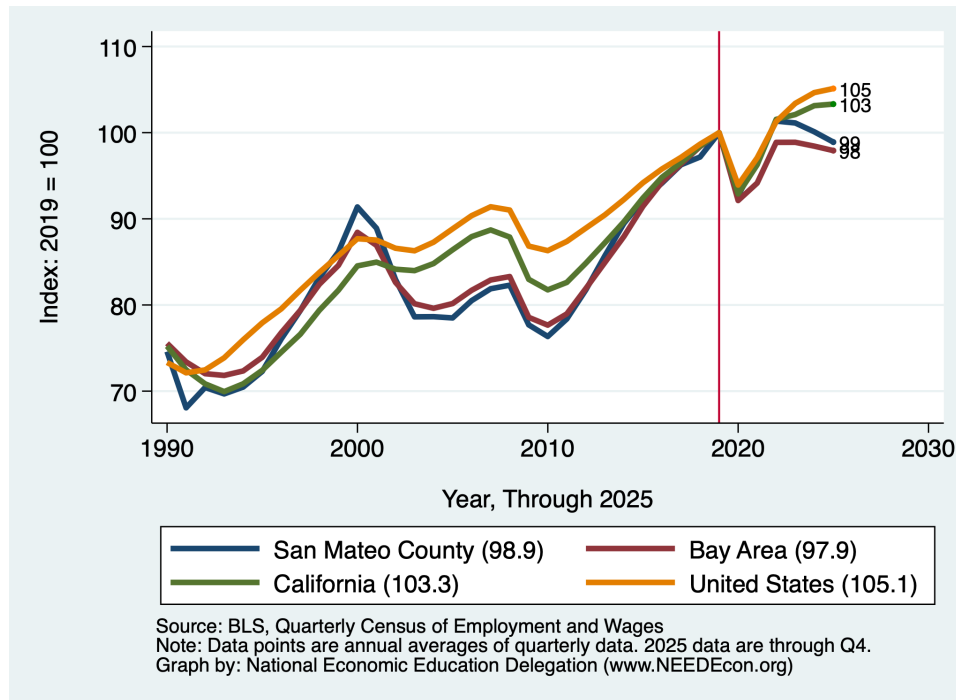
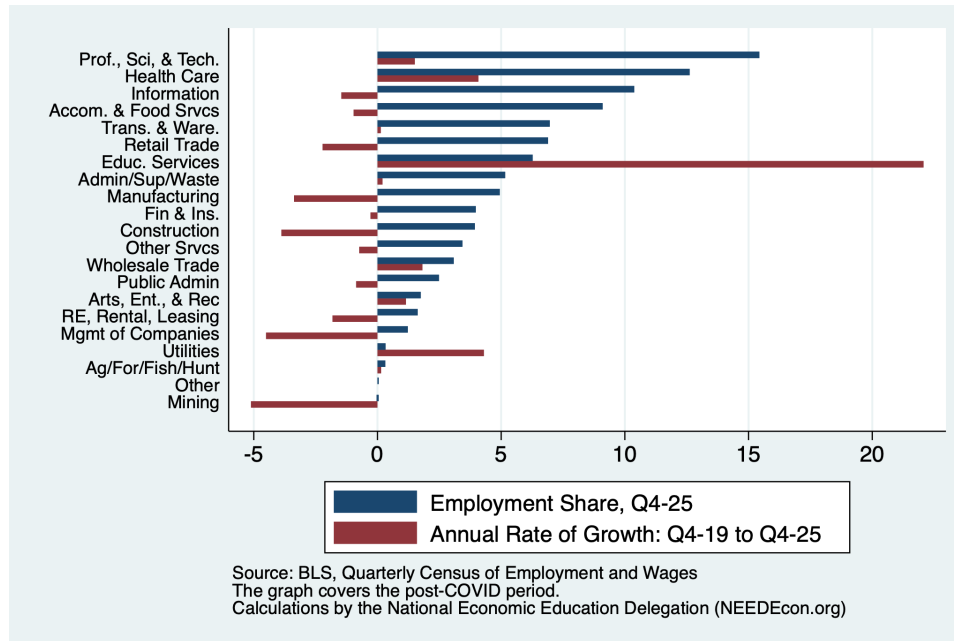


Table 1.1: Total Nonfarm Employment Growth (Q4 of each year.)

Region	Current Employment	Year over Year Change (#)	Annual Rate of Growth						
			Over last:				Since:		
			Year	2 Years	3 Years	5 Years	2010	2000	1990
San Mateo County	415,525	2,201	0.5	-0.7	-1.0	1.6	1.9	0.2	0.9
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



**Table 1.2: Nonfarm Employment Growth by 2-Digit NAICS Category (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
Ag, For, Fish, & Hunting	1,320	-21	-1.6	-5.1	-5.7	-1.1	-1.5	-2.3	-1.7
Mining	52	-12	-18.8	-12.0	-8.3	-4.0	4.1		-1.4
Utilities	1,358	-58	-4.1	6.9	1.3	4.9	-1.1	1.7	11.1
Construction	16,362	45	0.3	-3.7	-2.4	-3.6	1.8	-0.8	0.2
Manufacturing	20,545	263	1.3	-4.3	-6.9	-3.3	-1.5	-1.8	-1.1
Wholesale Trade	12,810	-890	-6.5	-3.0	3.7	4.8	1.0	-0.7	-1.0
Retail Trade	28,656	-1,141	-3.8	-1.9	-1.2	-1.1	-1.0	-1.1	-0.8
Trans. & Ware.	28,934	2,887	11.1	8.1	3.5	4.3	0.7	-1.0	-0.6
Information	43,138	4,268	11.0	-7.7	-9.5	-3.9	9.2	2.5	11.1
Fin & Ins.	16,524	-14	-0.1	0.6	-1.5	0.1	1.6	0.0	0.4
RE, Rental, Leasing	6,755	63	0.9	0.1	-0.2	3.3	1.6	-0.7	-0.8
Prof., Sci., & Tech.	64,142	-6,275	-8.9	-2.3	-0.6	2.1	4.5	2.2	6.7
Mgmt of Companies	5,096	147	3.0	-2.6	-4.5	-4.3	1.0	-2.8	2.7
Admin, Support, & Waste	21,443	-195	-0.9	-4.0	-3.1	4.9	1.1	-1.0	0.5
Educ. Services	26,067	-289	-1.1	0.3	1.7	31.8	26.6	23.2	18.1
Health Care & Soc. Asst.	52,441	2,187	4.4	5.0	5.5	5.9	5.4	4.6	4.8
Arts, Ent., & Rec	7,264	217	3.1	5.1	6.2	18.6	1.8	2.6	0.5
Accom. & Food Svcs	37,816	633	1.7	1.5	2.5	11.3	1.9	1.7	1.6
Other Svcs	14,270	19	0.1	2.2	2.7	4.9	0.1	0.2	0.6
Public Admin	10,330	182	1.8	3.2	0.9	0.3	0.5	0.1	-0.2
Other	201	185	1,132.7	28.4	170.0	4,006.7	-5.4	-3.9	-2.8

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

## 2. Location Quotients: Graphical History

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

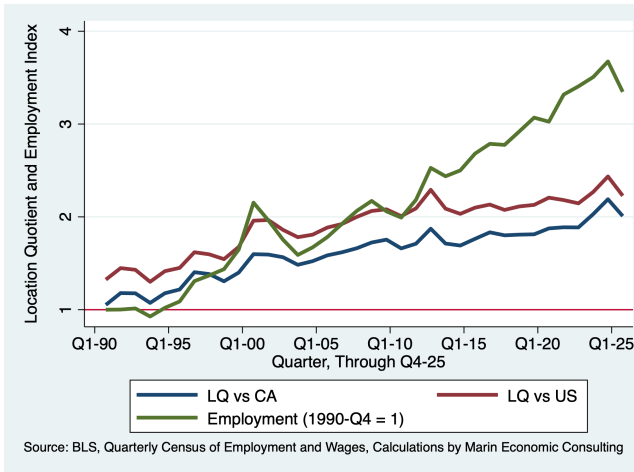


Figure 2 - 2: Health Care & Soc. Asst.

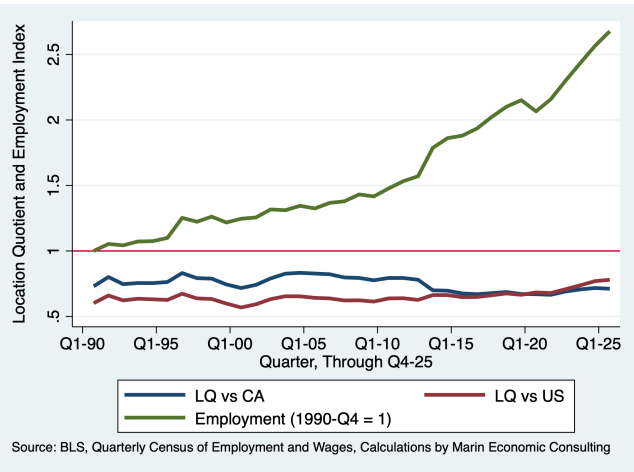


Figure 2 - 3: Information

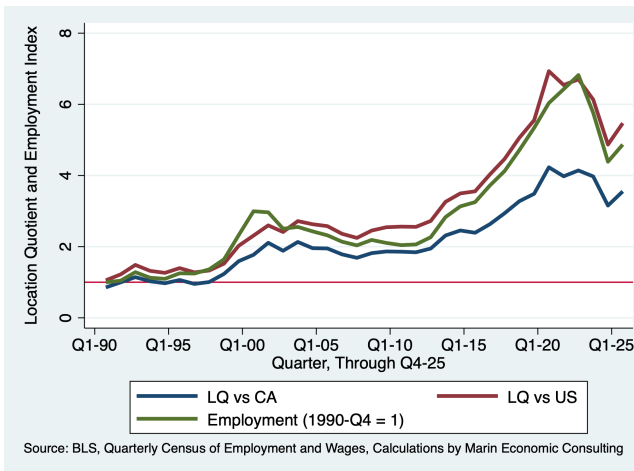


Figure 2 - 4: Accom. & Food Svcs

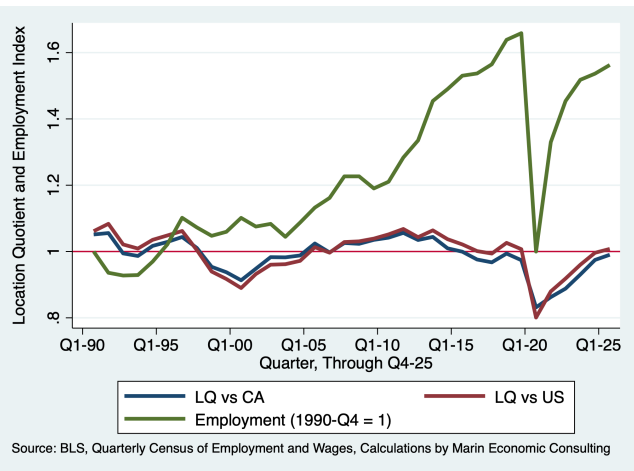


Figure 2 - 5: Trans. & Ware.

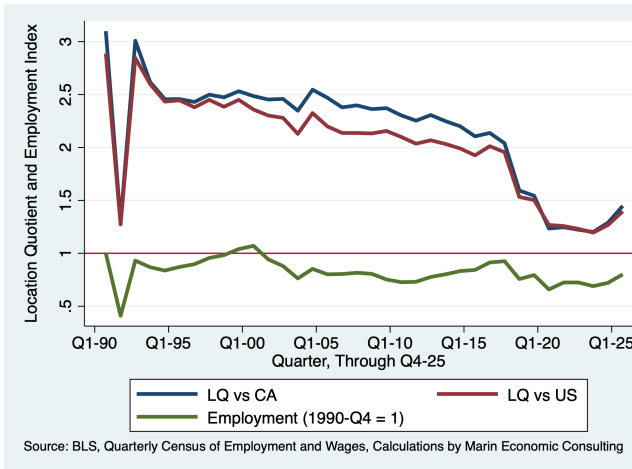


Figure 2 - 6: Retail Trade

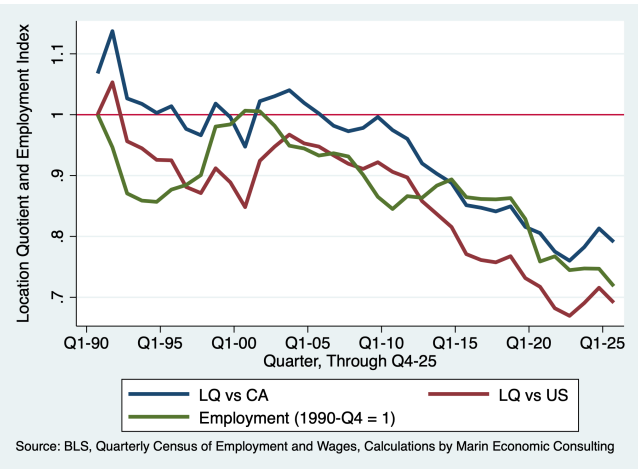


Figure 2 - 7: Educ. Services

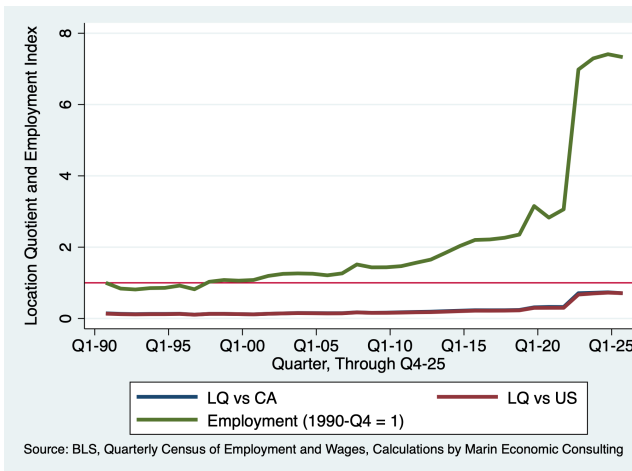
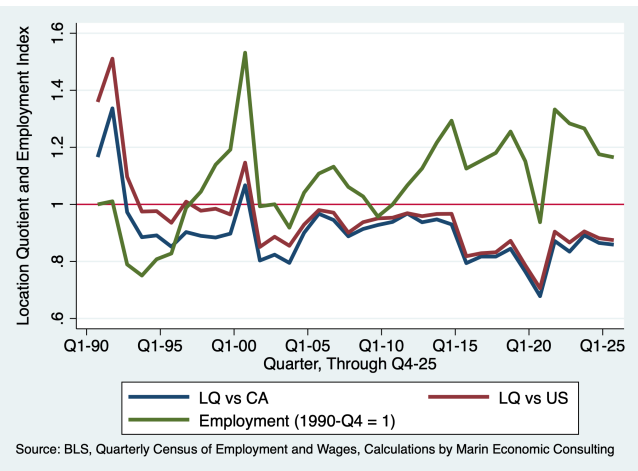


Figure 2 - 8: Admin, Support, & Waste



### 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	0.15	0.15	0.20	0.41	0.41	0.59
Mining, Quarrying, and Oil and Gas Extraction	0.14	0.17	0.06	0.03	0.05	0.02
Utilities	0.50	0.43	0.69	0.58	0.50	0.81
Construction	0.81	0.97	1.03	0.73	0.98	0.90
Manufacturing	0.76	0.84	0.98	0.62	0.74	0.93
Wholesale Trade	0.89	0.69	0.78	0.80	0.68	0.82
Retail Trade	0.79	0.81	0.97	0.69	0.72	0.91
Transportation and Warehousing	1.45	1.23	2.30	1.40	1.27	2.10
Information	3.55	4.23	1.86	5.47	6.93	2.56
Finance and Insurance	1.48	1.30	1.18	0.98	0.99	0.97
Real Estate and Rental and Leasing	0.97	0.88	0.99	1.04	0.97	1.12
Professional, Scientific, and Technical Services	2.01	1.88	1.66	2.23	2.21	2.01
Management of Companies and Enterprises	0.76	1.15	1.04	0.74	1.03	0.95
Administrative and Support and Waste Management and Remediation Services	0.86	0.68	0.94	0.87	0.71	0.95
Educational Services	0.71	0.32	0.17	0.71	0.30	0.17
Health Care and Social Assistance	0.71	0.67	0.79	0.78	0.68	0.64
Arts, Entertainment, and Recreation	0.78	0.70	0.85	0.94	0.72	1.05
Accommodation and Food Services	0.99	0.83	1.04	1.01	0.80	1.05
Other Services (except Public Administration)	1.09	1.08	0.86	1.15	1.04	1.28
Public Administration	0.51	0.51	0.53	0.50	0.50	0.53

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	0.50	0.43	0.69	0.58	0.50	0.81
Construction of Buildings	1.33	1.76	1.51	1.25	1.86	1.42
Specialty Trade Contractors	0.69	0.76	1.00	0.66	0.81	0.91
Food Manufacturing	0.76	0.69	0.77	0.60	0.56	0.69
Chemical Manufacturing	4.71	5.18	5.69	3.37	4.29	4.77
Computer and Electronic Product Manufacturing	0.60	0.76	1.09	1.16	1.75	2.41
Electrical Equipment, Appliance, and Component Manufacturing	1.90	0.88	0.76	1.16	0.55	0.53
Merchant Wholesalers, Durable Goods	0.84	0.68	0.79	0.72	0.63	0.79
Merchant Wholesalers, Nondurable Goods	0.99	0.68	0.70	1.04	0.77	0.80
Motor Vehicle and Parts Dealers	0.77	0.72	0.93	0.60	0.57	0.79
Building Material and Garden Equipment and Supplies Dealers	0.92	0.89	1.11	0.72	0.73	0.94
Food and Beverage Stores	0.88	0.92	1.09	0.89	0.92	1.12
Air Transportation	6.94	7.37	14.74	6.03	6.99	11.80
Truck Transportation	0.43	0.35	0.46	0.35	0.28	0.33
Transit and Ground Passenger Transportation	2.58	1.49	1.25	2.33	1.42	1.10
Support Activities for Transportation	2.44	1.81	2.63	2.86	2.28	3.29
Couriers and Messengers	0.95	1.25	1.80	1.09	1.43	1.75
Warehousing and Storage	0.27	0.16	0.31	0.27	0.19	0.30
Motion Picture and Sound Recording Industries	0.64	0.34	0.47	1.85	1.18	1.65
Telecommunications	1.20	0.99	0.83	0.84	0.75	0.80
Data Processing, Hosting and Related Services	3.49	3.19	3.73	5.02	3.95	2.50
Credit Intermediation and Related Activities	1.58	1.25	0.97	1.03	0.95	0.82
Securities, Commodity Contracts, and Other Financial Investments and Related Activities	2.94	2.93	2.31	2.33	2.48	2.02
Insurance Carriers and Related Activities	0.58	0.63	0.74	0.36	0.45	0.57
Real Estate	0.86	0.85	0.87	0.95	0.98	1.01
Rental and Leasing Services	1.43	1.07	1.42	1.34	0.98	1.45
Professional, Scientific, and Technical Services	2.01	1.88	1.66	2.23	2.21	2.01
Management of Companies and Enterprises	0.76	1.15	1.04	0.74	1.03	0.95
Administrative and Support Services	0.86	0.68	0.92	0.88	0.71	0.94
Educational Services	0.71	0.32	0.17	0.71	0.30	0.17
Ambulatory Health Care Services	0.90	0.85	0.93	0.92	0.83	0.87
Hospitals	0.48	0.48	0.62	0.36	0.36	0.48
Nursing and Residential Care Facilities	0.80	0.66	0.70	0.66	0.51	0.46
Social Assistance	0.64	0.62	0.91	1.19	1.06	0.67
Amusement, Gambling, and Recreation Industries	0.98	1.07	1.00	1.15	1.00	1.24
Accommodation	0.98	0.82	1.10	1.03	0.79	1.12
Food Services and Drinking Places	0.99	0.83	1.03	1.00	0.80	1.04
Repair and Maintenance	1.02	0.89	0.99	0.93	0.85	1.04
Personal and Laundry Services	1.12	1.18	1.45	1.21	1.06	1.42
Religious, Grantmaking, Civic, Professional, and Similar Organizations	0.80	0.86	0.82	0.87	0.84	0.87
Private Households	2.61	2.53	0.56	4.12	3.17	2.30
Executive, Legislative, and Other General Government Support	0.79	0.73	0.81	0.52	0.46	0.50
Justice, Public Order, and Safety Activities	0.45	0.54	0.48	0.55	0.67	0.66
Administration of Human Resource Programs	0.49	0.03	0.02	0.77	0.05	0.03

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	1.30	1.30	1.36	1.47	1.61	1.62
Nonresidential Building Construction	1.36	2.48	1.75	1.03	2.12	1.24
Building Equipment Contractors	0.76	0.92	1.34	0.64	0.86	1.05
Building Finishing Contractors	0.95	0.85	1.08	1.31	1.26	1.37
Pharmaceutical and Medicine Manufacturing	8.26	8.99	0.00	8.45	11.21	0.00
Drugs and Druggists' Sundries Merchant Wholesalers	3.38	0.97	0.82	3.29	1.11	0.84
Grocery and Related Product Merchant Wholesalers	1.06	0.97	0.95	1.20	1.14	1.13
Automobile Dealers	0.95	0.89	1.13	0.77	0.72	0.97
Building Material and Supplies Dealers	0.96	0.94	1.13	0.77	0.80	0.99
Grocery Stores	0.89	0.94	1.09	0.90	0.94	1.12
Support Activities for Air Transportation	4.85	2.94	4.26	5.40	3.41	4.42
Couriers and Express Delivery Services	0.88	1.11	1.64	1.02	1.23	1.52
Data Processing, Hosting, and Related Services	3.49	3.19	3.73	5.02	3.95	2.50
Nondepository Credit Intermediation	2.77	2.64	2.02	2.03	2.23	1.60
Activities Related to Credit Intermediation	3.00	0.93	0.63	2.97	1.10	0.70
Other Financial Investment Activities	3.66	3.81	3.08	3.48	4.05	3.65
Legal Services	0.73	0.83	0.85	0.81	0.88	0.88
Accounting, Tax Preparation, Bookkeeping, and Payroll Services	0.74	0.85	0.60	0.80	0.92	0.69
Architectural, Engineering, and Related Services	0.89	0.66	0.51	0.86	0.69	0.56
Computer Systems Design and Related Services	2.49	2.10	2.95	2.88	2.72	3.57
Management, Scientific, and Technical Consulting Services	0.86	0.94	1.41	0.90	1.07	2.05
Scientific Research and Development Services	6.88	6.72	4.27	11.70	11.70	7.03
Other Professional, Scientific, and Technical Services	1.20	1.38	1.05	0.95	1.15	0.98
Management of Companies and Enterprises	0.76	1.15	1.04	0.74	1.03	0.95
Employment Services	0.75	0.47	0.87	0.85	0.54	0.93
Investigation and Security Services	0.64	0.69	0.63	0.88	0.93	0.82
Services to Buildings and Dwellings	1.23	1.09	1.32	1.17	1.08	1.31
Elementary and Secondary Schools	0.73	0.77	0.76	0.70	0.68	0.69
Colleges, Universities, and Professional Schools	0.36	0.41	0.10	0.33	0.36	0.09
Other Schools and Instruction	1.53	1.52	1.19	2.35	2.03	1.69
Offices of Physicians	0.67	0.56	0.57	0.52	0.44	0.55
Offices of Dentists	0.94	0.92	1.10	1.08	1.06	1.31
Outpatient Care Centers	0.91	1.01	1.60	1.93	1.91	2.12
Medical and Diagnostic Laboratories	3.72	3.07	1.23	4.04	3.49	1.46
Home Health Care Services	0.79	0.67	1.07	0.51	0.39	0.55
General Medical and Surgical Hospitals	0.32	0.46	0.07	0.24	0.29	0.06
Community Care Facilities for the Elderly	1.26	1.12	1.30	1.22	1.02	1.05
Individual and Family Services	0.59	0.56	0.68	1.35	1.19	0.49
Child Day Care Services	1.34	1.41	1.55	0.99	0.94	1.06
Other Amusement and Recreation Industries	1.15	1.44	1.42	1.17	0.99	1.30
Traveler Accommodation	0.98	0.83	1.11	1.04	0.81	1.14
Special Food Services	2.58	2.48	2.53	2.42	1.78	1.90
Automotive Repair and Maintenance	1.09	1.05	1.17	1.10	1.06	1.28
Private Households	2.61	2.53	0.56	4.12	3.17	2.30
Executive, Legislative, and Other General Government Support	0.79	0.73	0.81	0.52	0.46	0.50
Justice, Public Order, and Safety Activities	0.45	0.54	0.48	0.55	0.67	0.66

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

Note: Top 50 industries, by employment share.