

Sonoma County Life Sciences Industry Evolution

Focus on Post-Recession Recovery

Q4 -2025 Update

Produced by

National Economic Education Delegation

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Contents

1. Life Science Sector Employment Growth Since 1990	2
2. Overview of Employment Changes Since the Onset of the COVID Pandemic	4
3. Graphical Display of 4-digit Location Quotient Evolution by Industry	5
4. Descriptions and References	8



1. Life Science Sector Employment Growth Since 1990

Table 1.1: Life Sciences Employment Summary for Q4 -2025

	Share of Total Empl	Current Employment	Inc. Over Last Qtr (#)	Percent Growth Relative to:				
				Last Qtr	Last Year	.COM Peak*	Q4-07	Q1-10
Sonoma County	1.8	3,668	-199	-5.1	-3.6	-68.7	-15.1	-4.2
Bay Area	4.0	158,397	-1,635	-1.0	-4.5	34.6	84.9	63.2
California	2.2	402,942	-3,152	-0.8	-1.6	17.6	19.8	22.4
United States	1.5	2,324,528	-20,812	-0.9	-0.3	30.2	23.6	25.7

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

* .COM Peak refers to the quarter of peak employment for Sonoma County during the Tech bubble.

Figure 1 - 1: Life Sciences Employment Growth Comparison with California and U.S.

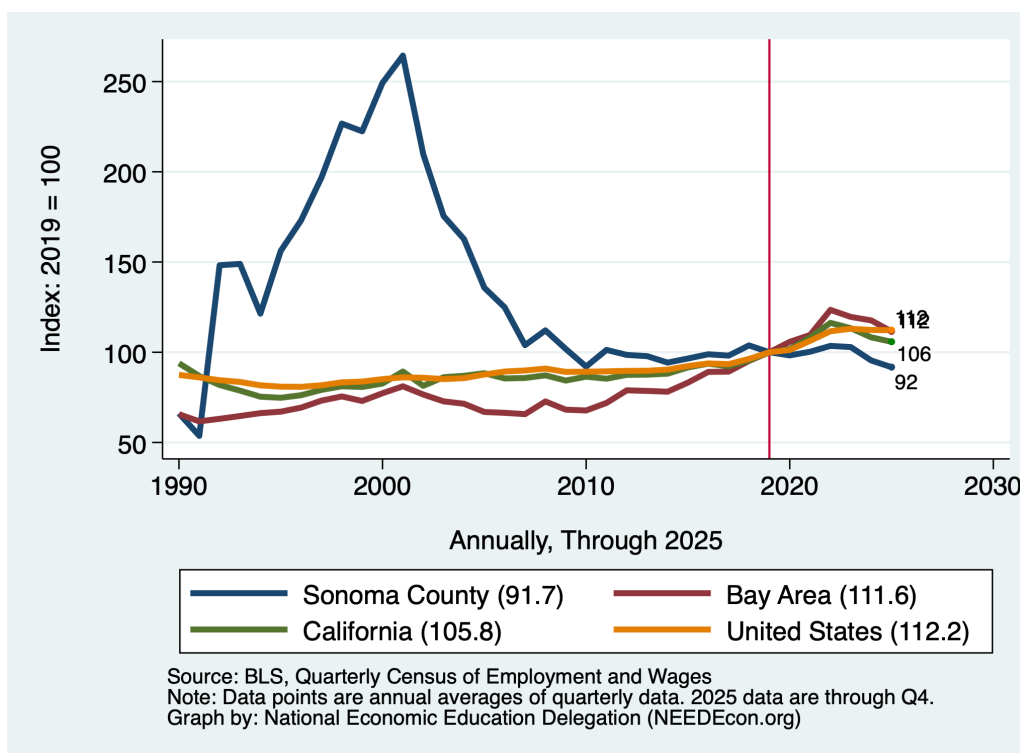


Figure 1 - 2: Employment Growth

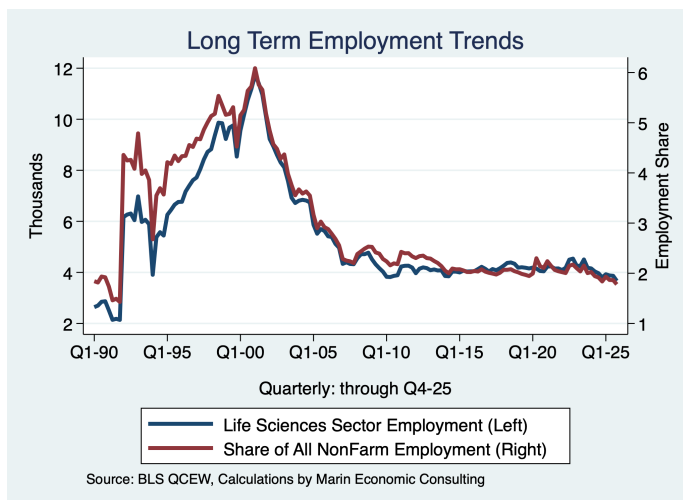
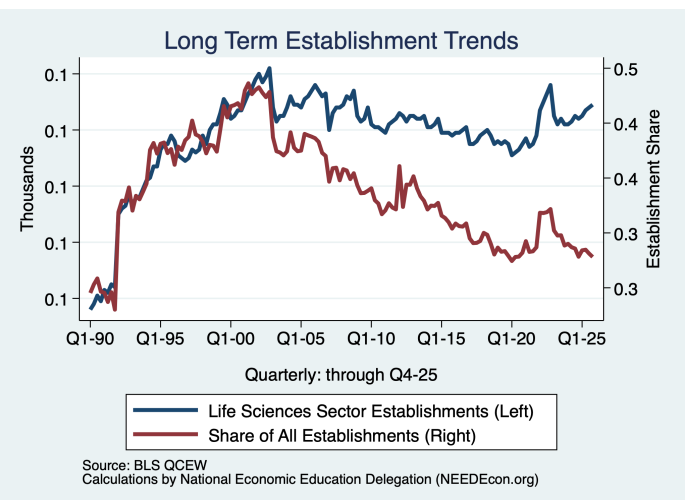
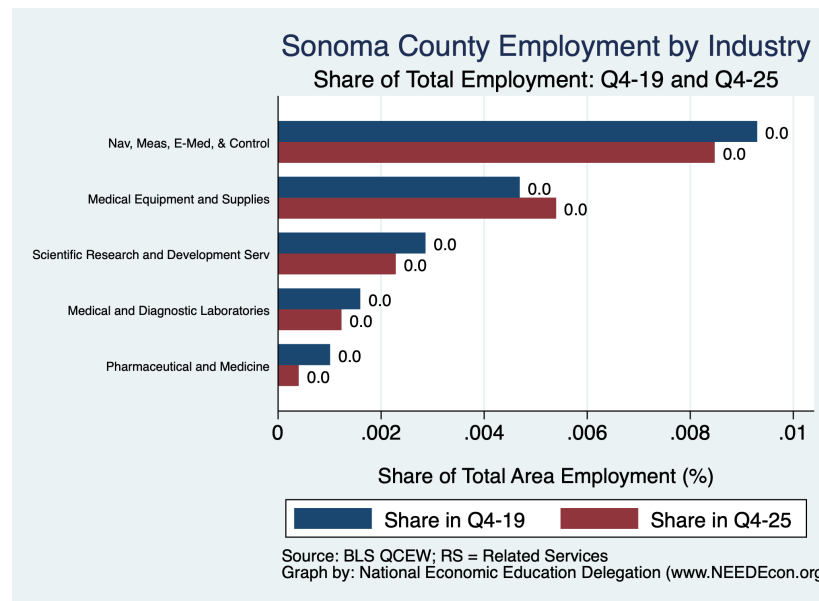


Figure 1 - 3: Establishment Growth



2. Overview of Employment Changes Since the Onset of the COVID Pandemic

Figure 2 - 1: 4-Digit Life Sciences Sector Shares



3. Graphical Display of 4-digit Location Quotient Evolution by Industry

Graphs present only Q4 data for each year for the 5 4-digit NAICS sectors.

Figure 3 - 1: 3345: Navigational, Measuring, Electromedical, and Control Instruments Manufacturing

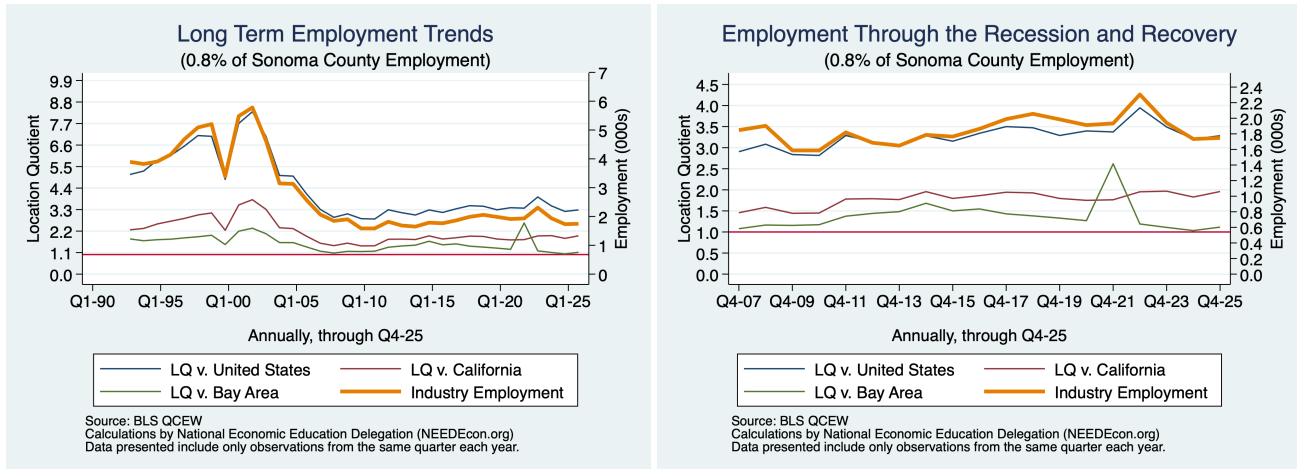


Figure 3 - 2: 3391: Medical Equipment and Supplies Manufacturing

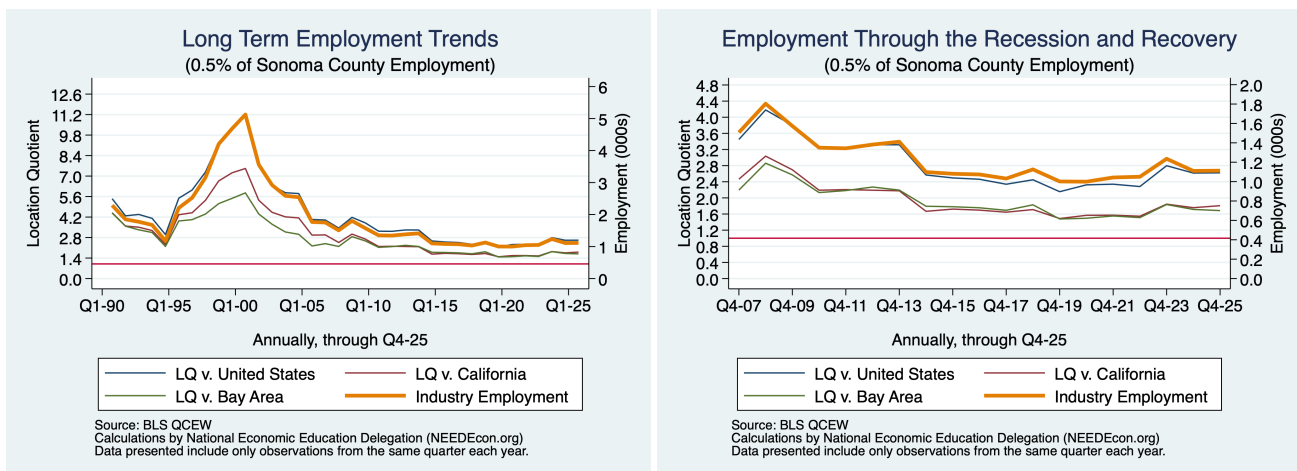


Figure 3 - 3: 5417: Scientific Research and Development Services

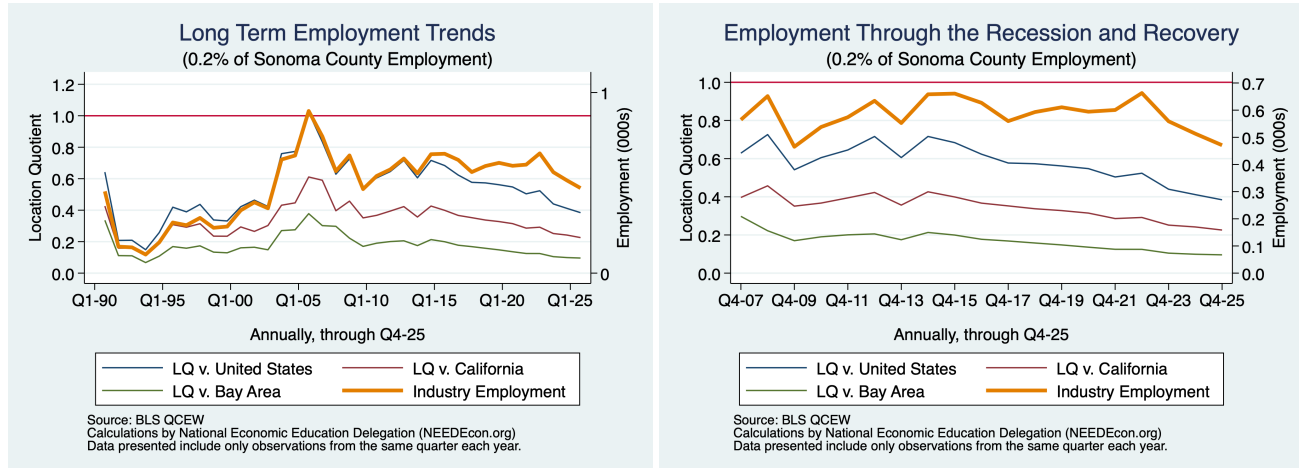


Figure 3 - 4: 6215: Medical and Diagnostic Laboratories

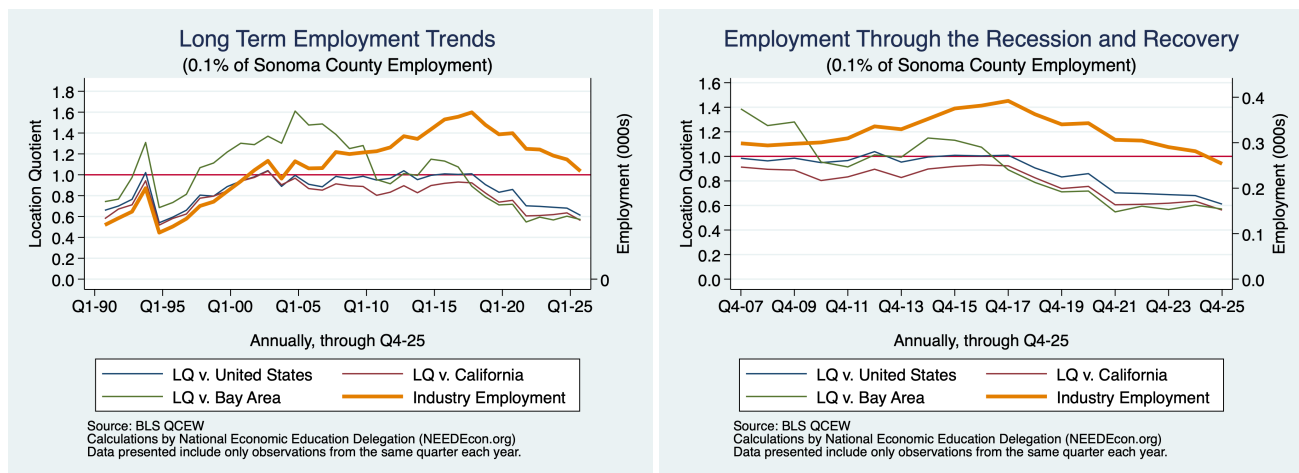
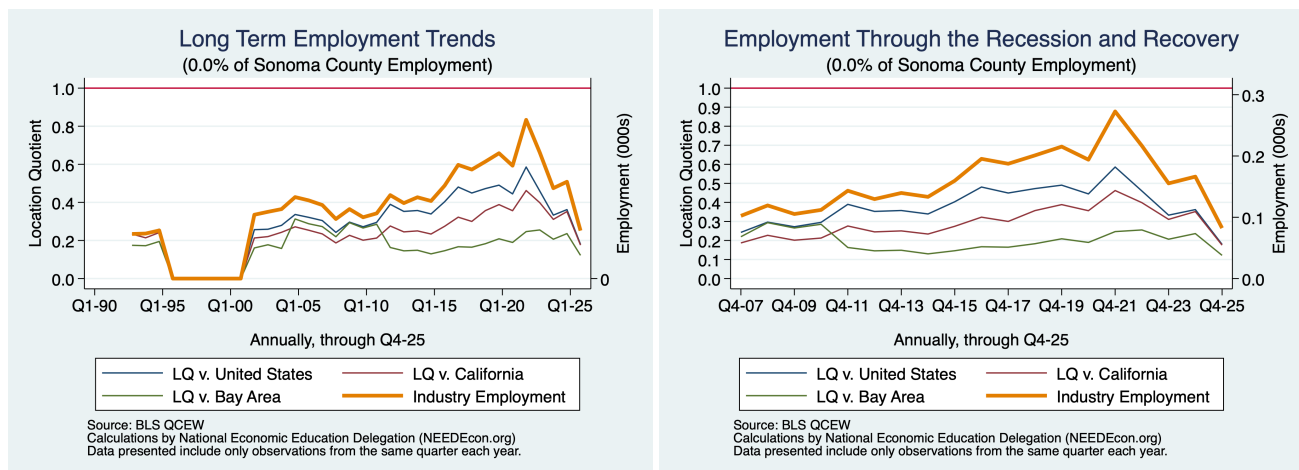


Figure 3 - 5: 3254: Pharmaceutical and Medicine Manufacturing



4. Descriptions and References

The contents of this report illustrate the evolution of Sonoma County Life Sciences employment patterns over time. A particular focus of this report is on the post-Pandemic recovery. This is accomplished by comparing the most recent quarter of data to the same quarter in 2007, the last non-recessionary year for most of California and the United States.

There are several types of data presented. They include:

Employment Levels: Employment levels indicate the number of non-farm payroll employees in each industry.

Employment Shares: Employment shares indicate the proportion of the region's employment that is accounted for by each industry.

Location Quotients: Location quotients are ratios of employment shares. When indicating a location quotient versus the California, it is the region's employment share divided by the employment share in California. Therefore, values greater than one indicate a higher concentration of employment in the industry in question and values less than one indicate a lower concentration. Location quotients are presented versus the Bay Area, California, and the United States, separately.

The data underlying this report are from the Bureau of Labor Statistics: Quarterly Census of Employment and Wages (QCEW). These data are available on a quarterly basis, generally with a 5 month lag from the end of the quarter to the release of the data.

QCEW: The Quarterly Census of Employment and Wages (QCEW) program publishes a quarterly count of employment and wages reported by employers covering 98 percent of U.S. jobs, available at the county, MSA, state and national levels by industry. <http://www.bls.gov/cew/home.htm>

Time Period: The data extend from Q1-1990 through Q4 -2025

Seasonality: There is a significant seasonal component to many industries. The QCEW data are not seasonally adjusted. Rather than seasonally adjusting the data, most comparisons in this report are between the same quarter in different years. The data presented are therefore the actual employment levels compared across years.

Life Sciences Sector Definition: The 4-digit NAICS codes included in the definition of the Life Sciences sector are listed in the table below.

Table 4.1: 4-Digit NAICS Industries Included in Life Sciences Sector Definition

NAICS	Description
3254	Pharmaceutical and Medicine Manufacturing
3345	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing
3391	Medical Equipment and Supplies Manufacturing
5417	Scientific Research and Development Services
6215	Medical and Diagnostic Laboratories