

Sonoma County Manufacturing Industry Evolution

Focus on Post-Recession Recovery

Q4 -2025 Update

Produced by

National Economic Education Delegation

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1. Manufacturing Sector Employment Growth Since 1990

Table 1.1: Manufacturing Employment Summary for Q4 -2025

	Share of Total Empl	Current Employment	Inc. Over Last Qtr (#)	Percent Growth Relative to:				
				Last Qtr	Last Year	Q4-19	Q1-10	.COM Peak*
Sonoma County	8.4	17,340	-498	-2.8	-9.5	39.0	-2.7	-40.9
Bay Area	6.4	253,769	-3,308	-1.3	0.5	-15.5	-1.7	-42.6
California	6.5	1,203,206	-19,130	-1.6	-2.4	-8.8	-1.1	-34.6
United States	8.0	12,562,052	-73,168	-0.6	-1.1	-1.8	10.5	-27.3

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: Manufacturing Employment Growth Comparison with California and U.S.

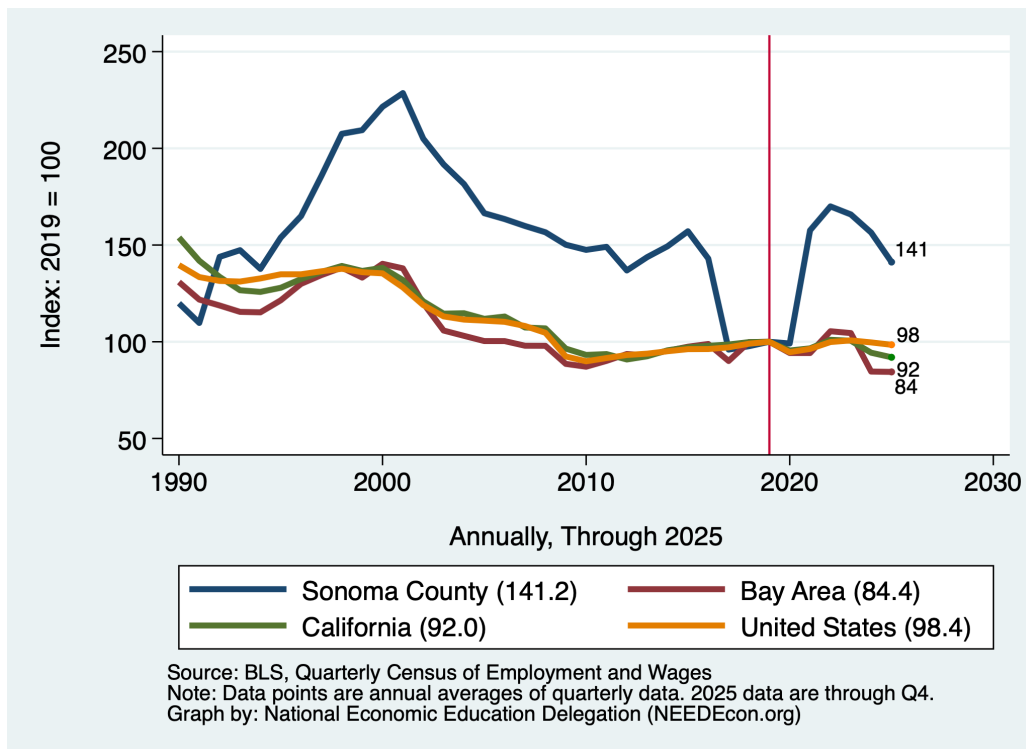


Figure 1 - 2: Employment Growth

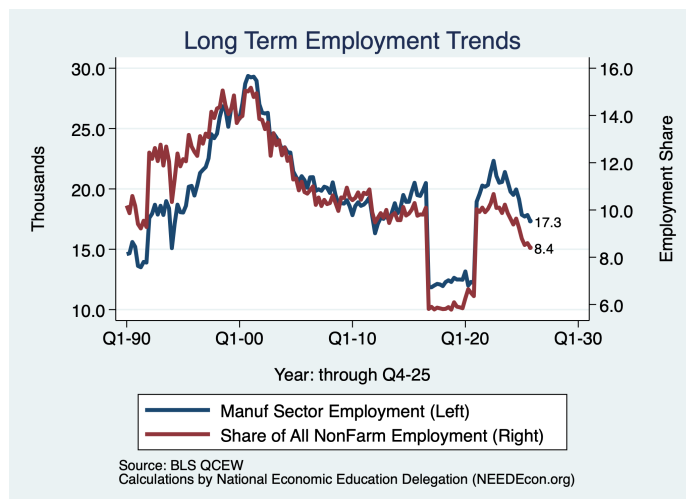
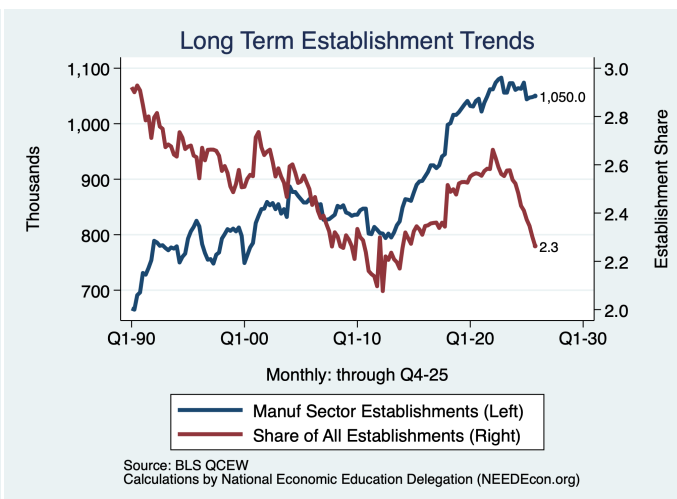
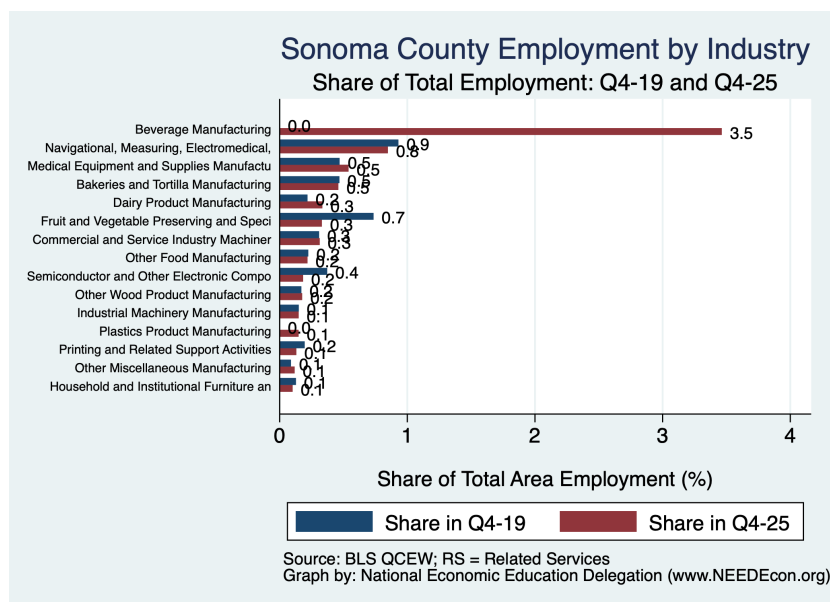


Figure 1 - 3: Establishment Growth



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

Figure 2 - 1: 4-Digit Manufacturing Sector Shares



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

Graphs present only Q4 data for each year for the 10 4-digit NAICS sectors with the largest share of total employment.

Figure 3 - 1: 31-33: Manufacturing

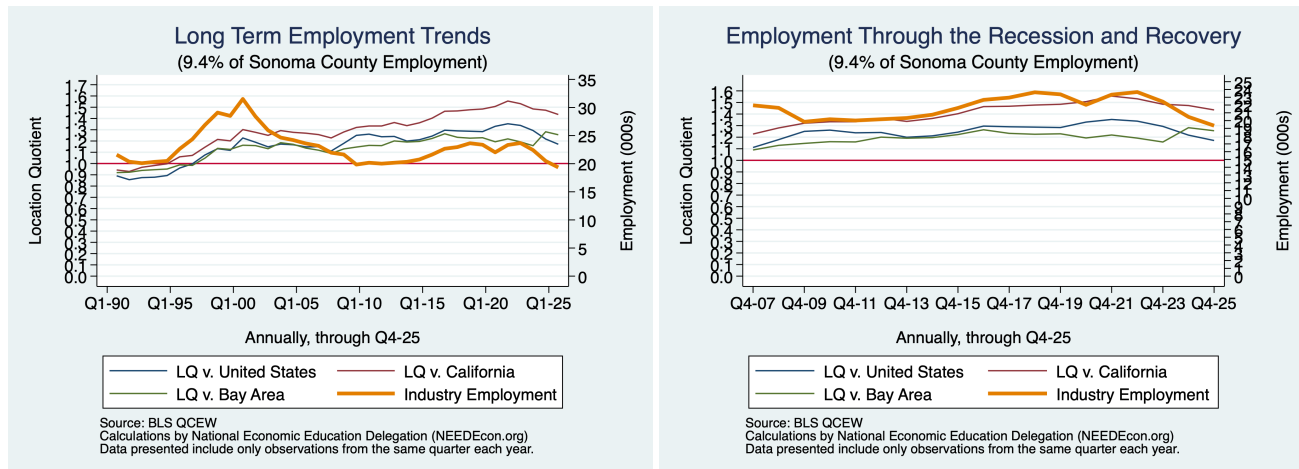


Figure 3 - 2: 3121: Beverage Manufacturing

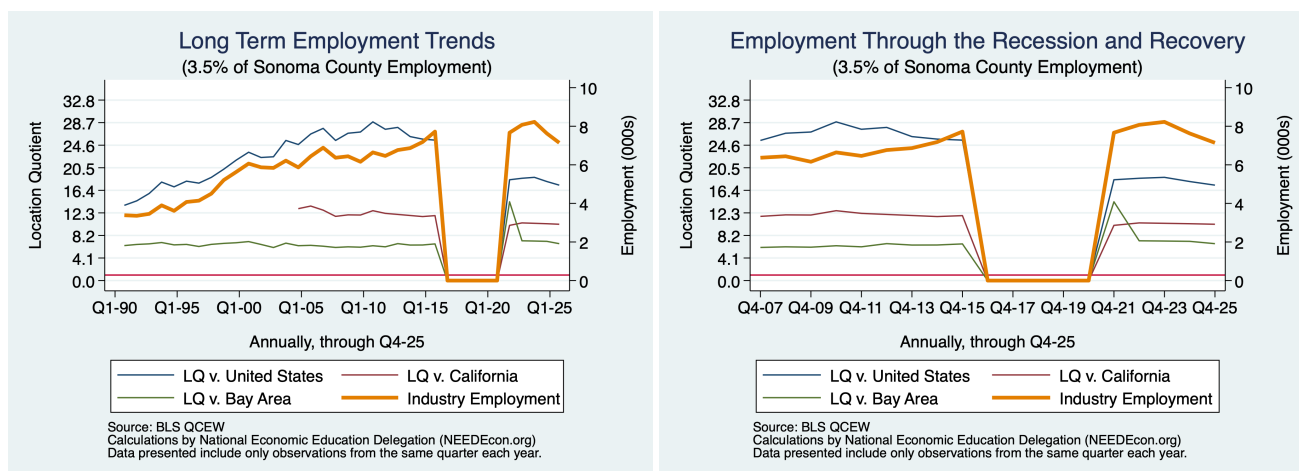


Figure 3 - 3: 312: Beverage and Tobacco Product Manufacturing

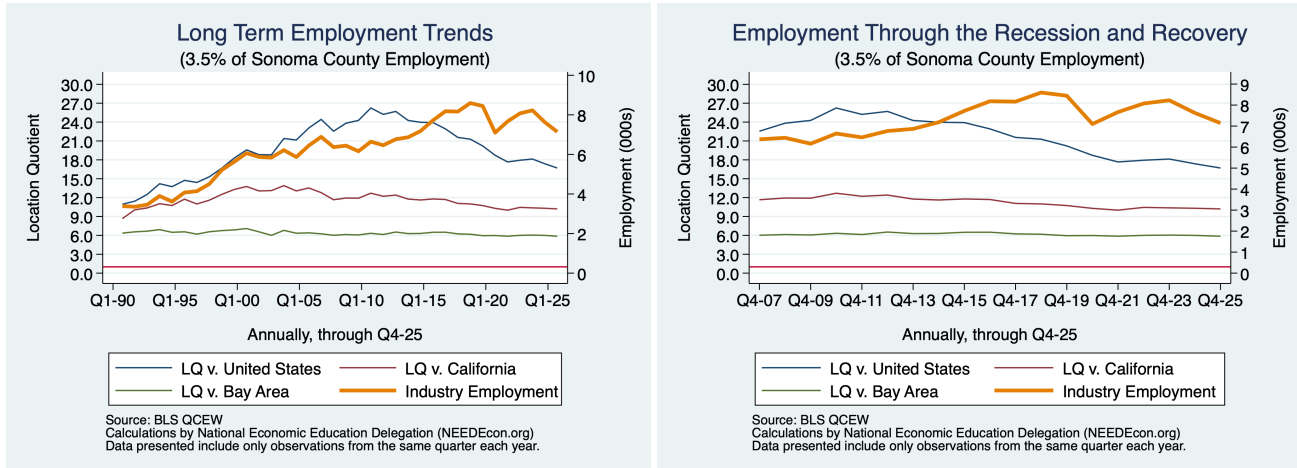


Figure 3 - 4: 311: Food Manufacturing

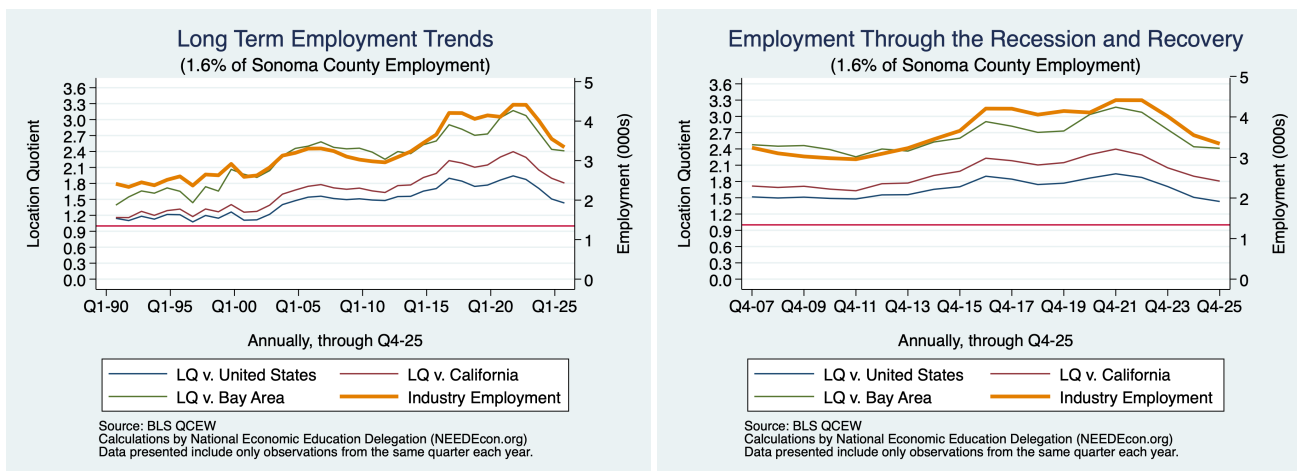


Figure 3 - 5: 334: Computer and Electronic Product Manufacturing

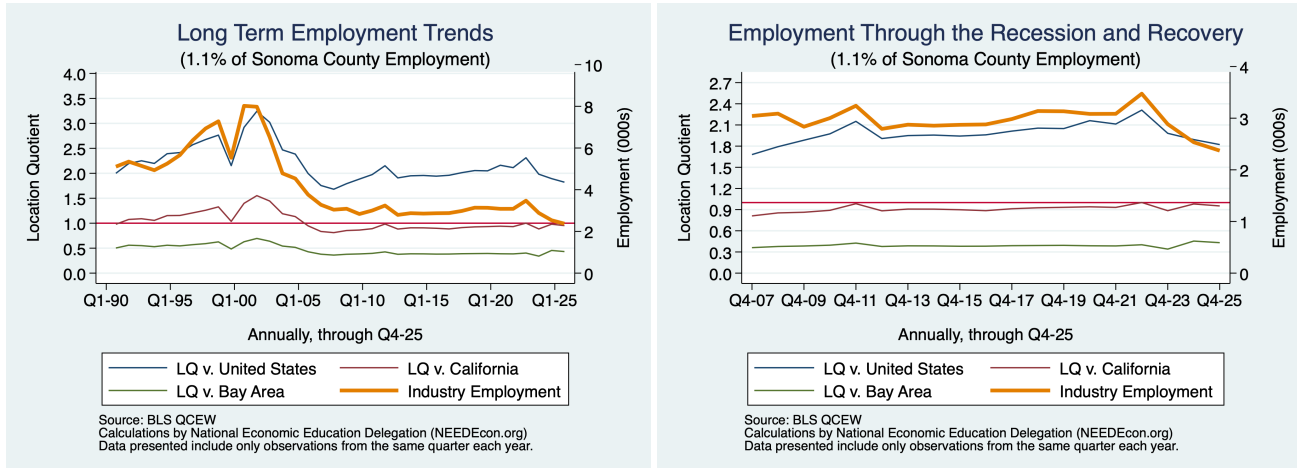


Figure 3 - 6: 3345: Navigational, Measuring, Electromedical, and Control Instruments Manufacturing

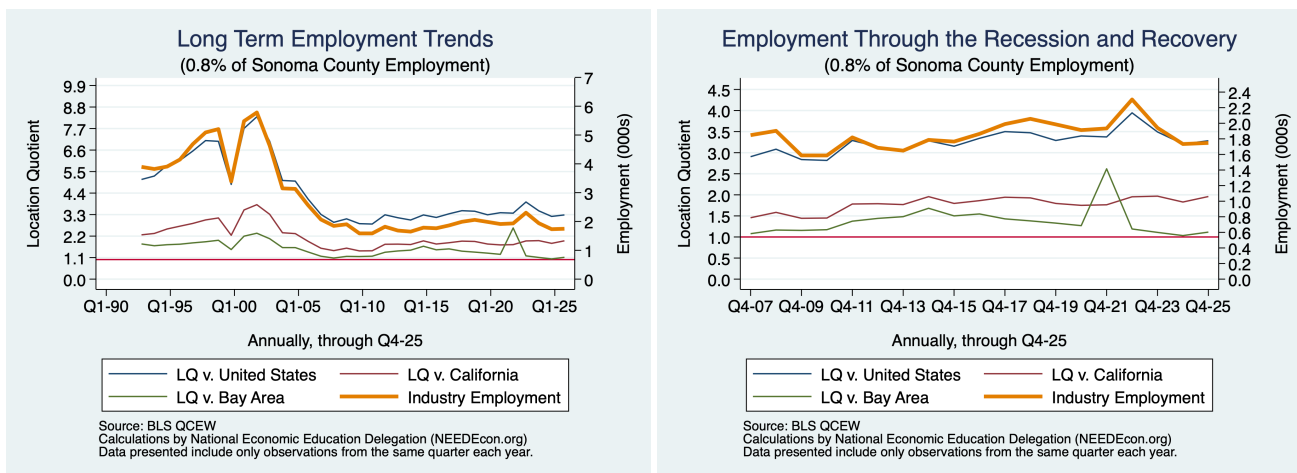


Figure 3 - 7: 339: Miscellaneous Manufacturing

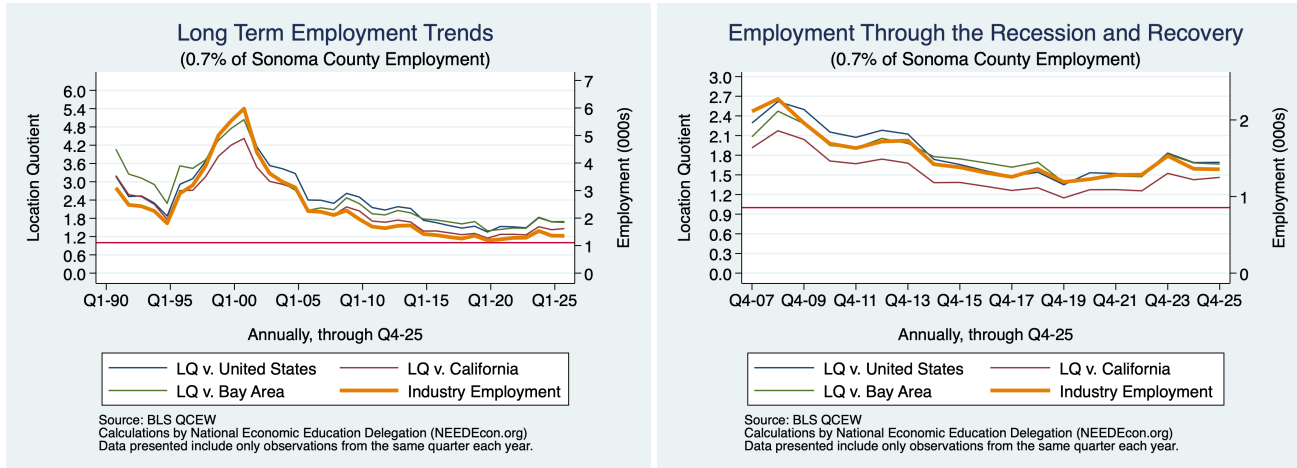


Figure 3 - 8: 333: Machinery Manufacturing

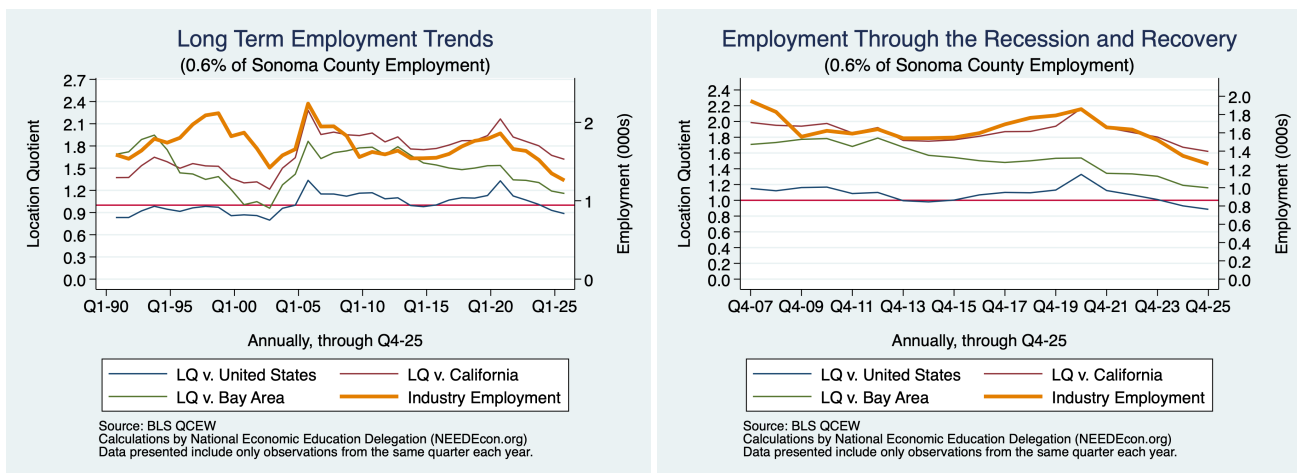


Figure 3 - 9: 3391: Medical Equipment and Supplies Manufacturing

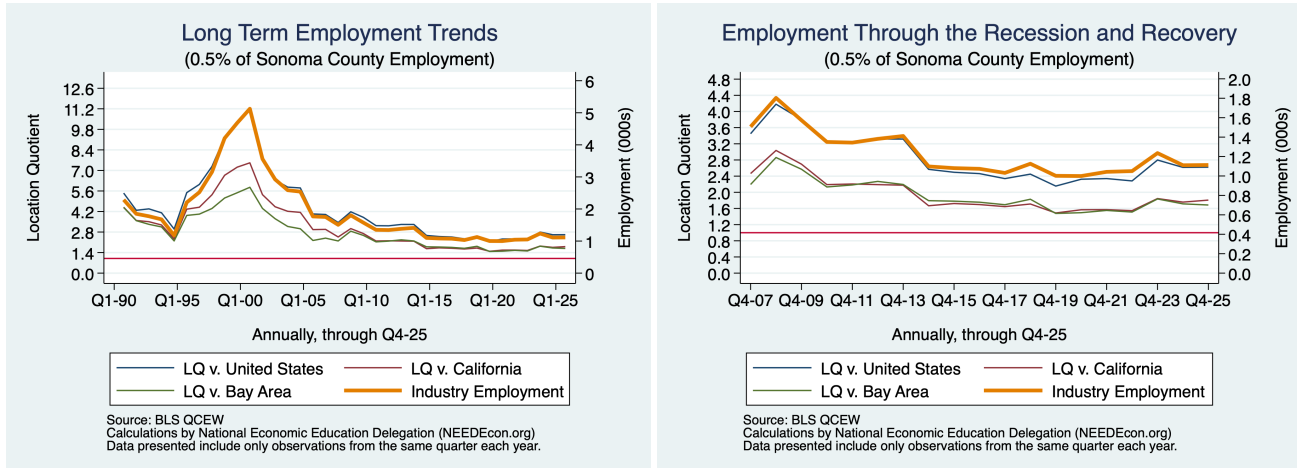


Figure 3 - 10: 3118: Bakeries and Tortilla Manufacturing

