

San Mateo County Manufacturing Industry Evolution

Focus on Post-Recession Recovery

Q4 -2023 Update

Produced by

Marin Economic Consulting

June 5, 2024

Jon Haveman, Principal

415-336-5705 or Jon@MarinEconomicConsulting.com

Contents

1. Manufacturing Sector Employment Growth Since 1990	2
2. Overview of Employment Changes Since the Onset of the Great Recession	3
3. Graphical Display of 4-digit Location Quotient Evolution by Industry	4

1. Manufacturing Sector Employment Growth Since 1990

Table 1.1: Manufacturing Employment Summary for Q4 -2023

	Share of Total Empl	Current Employment	Inc. Over Last Qtr (#)	Percent Growth Relative to:				
				Last Qtr	Last Year	.COM Peak*	Q4-07	Q1-10
San Mateo County	4.3	18,103	-1,007	-5.3	-19.3	-37.7	57.9	15.8
California	7.2	1,316,740	-21,141	-1.6	-1.8	-27.5	8.3	-8.6
United States	8.3	12,868,449	-98,572	-0.8	-0.3	-26.3	13.2	-6.7

Source: BLS, QCEW; Calculations by Marin Economic Consulting

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

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

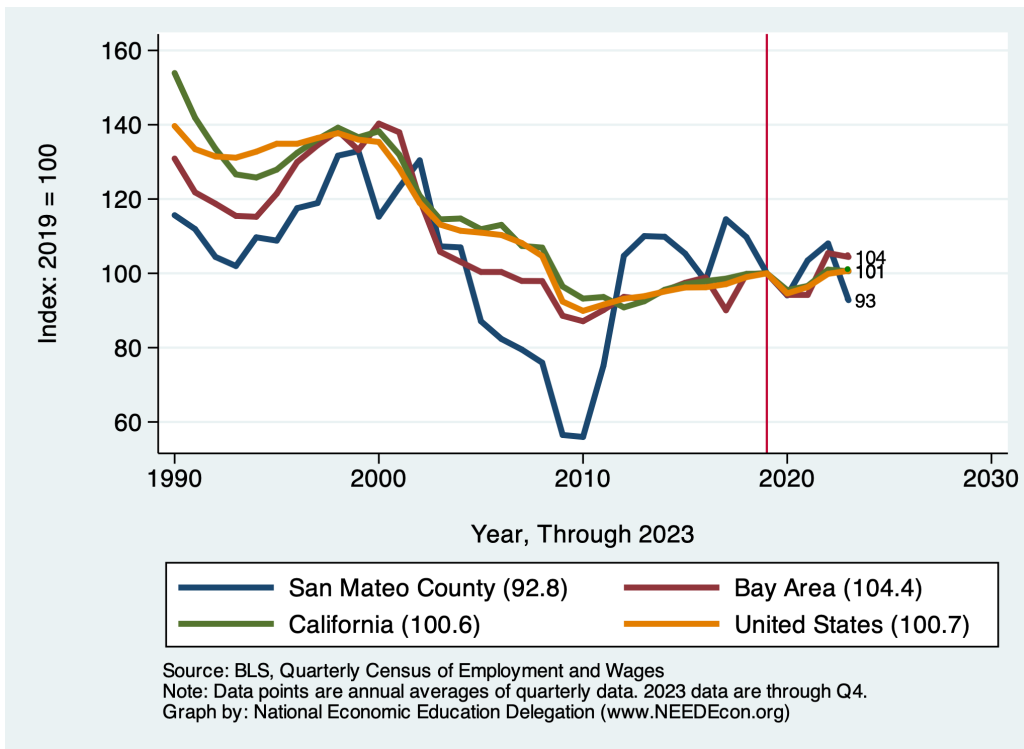


Figure 1 - 2: Employment Growth

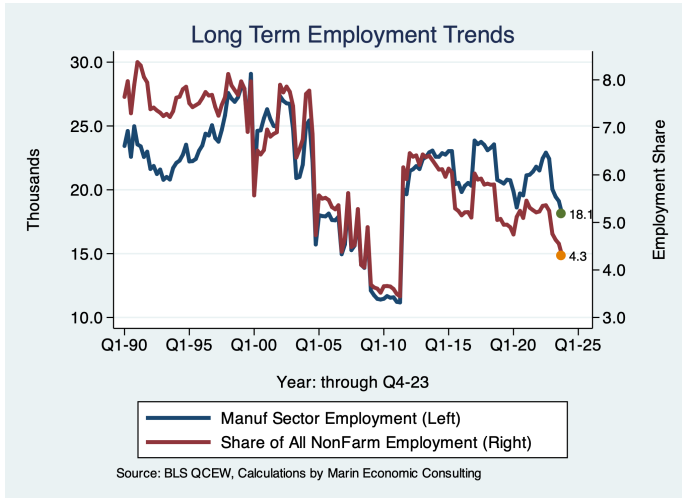
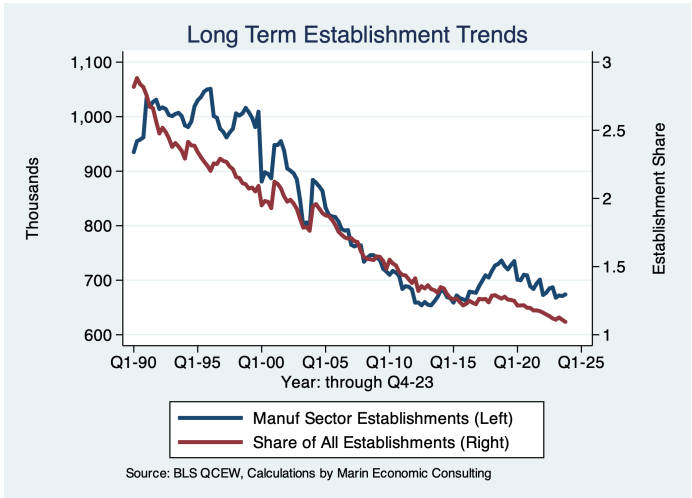
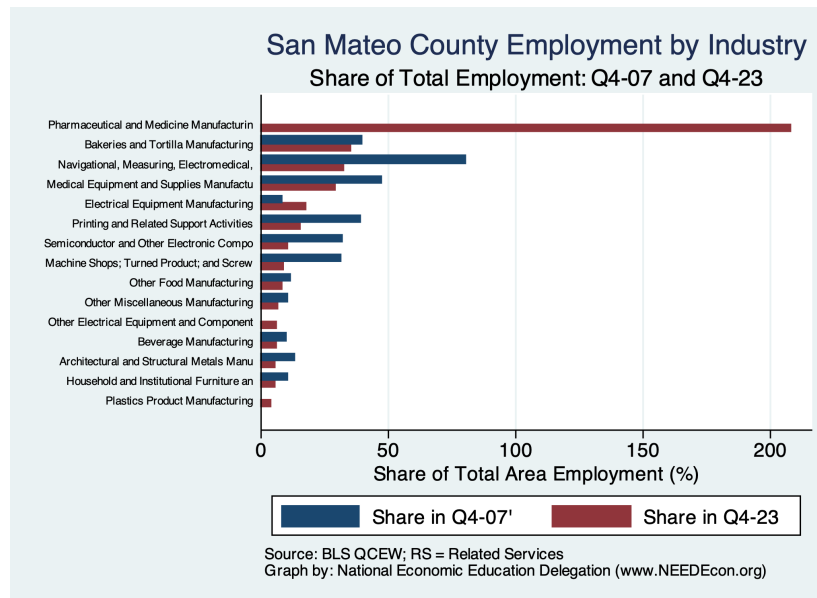


Figure 1 - 3: Establishment Growth



2. Overview of Employment Changes Since the Onset of the Great Recession

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

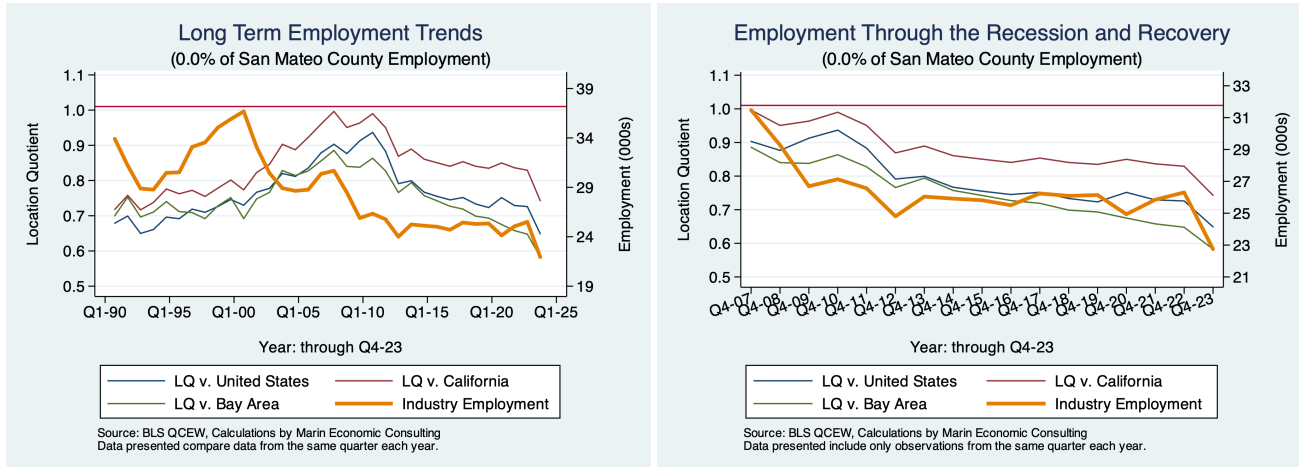


Figure 3 - 2: 325: Chemical Manufacturing

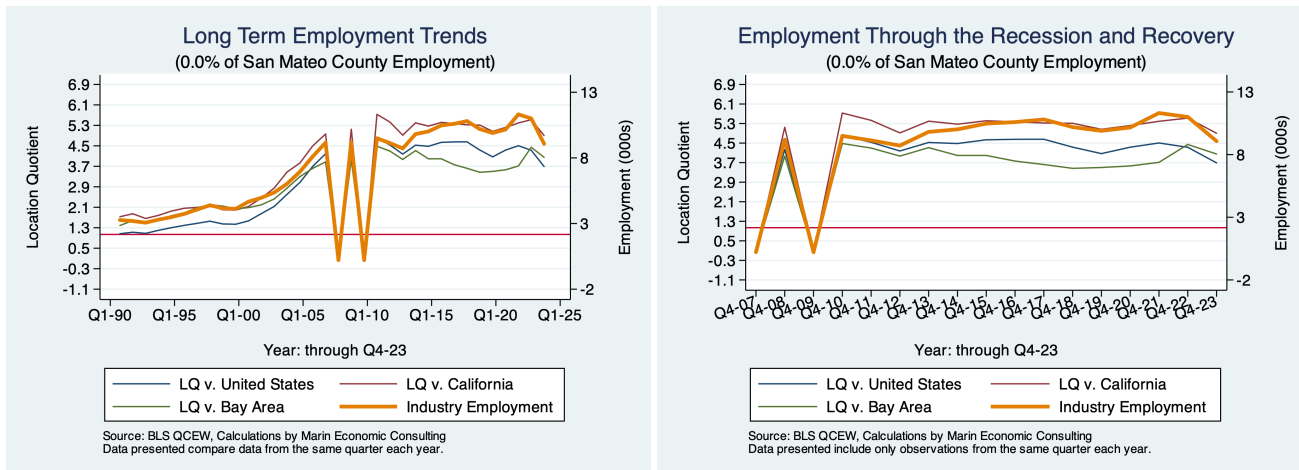


Figure 3 - 3: 3254: Pharmaceutical and Medicine Manufacturing

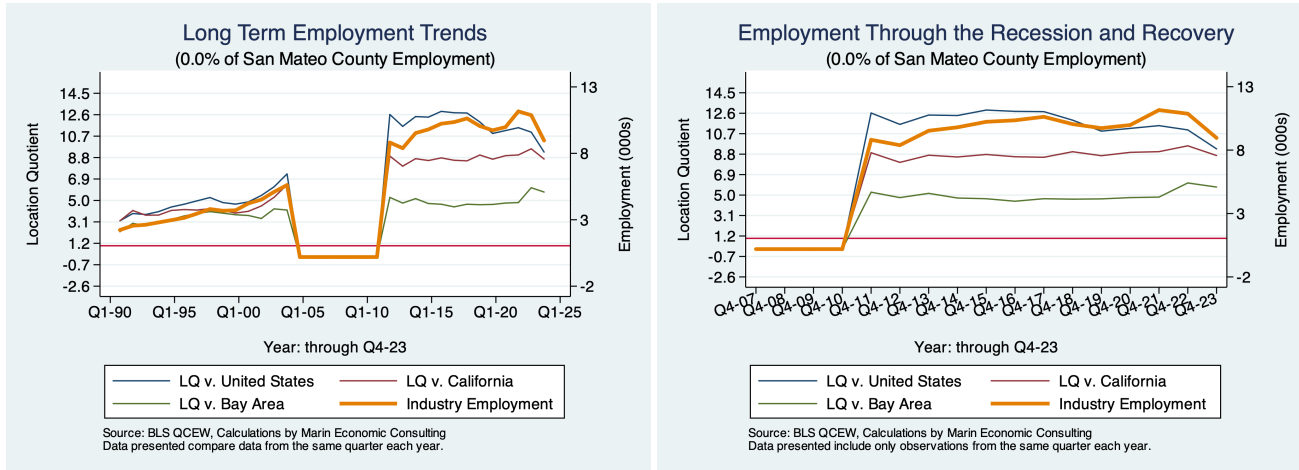


Figure 3 - 4: 334: Computer and Electronic Product Manufacturing

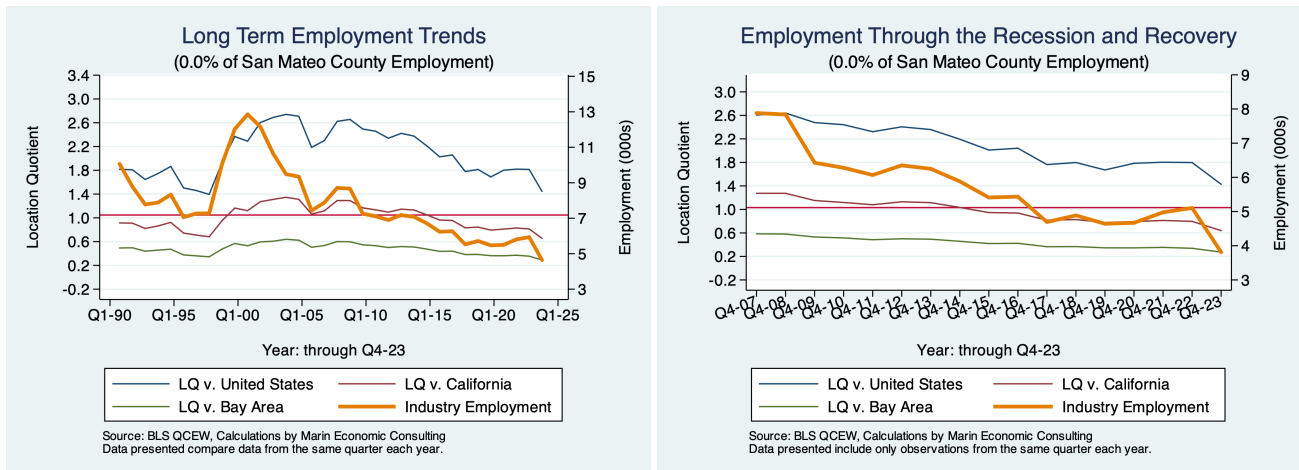


Figure 3 - 5: 311: Food Manufacturing

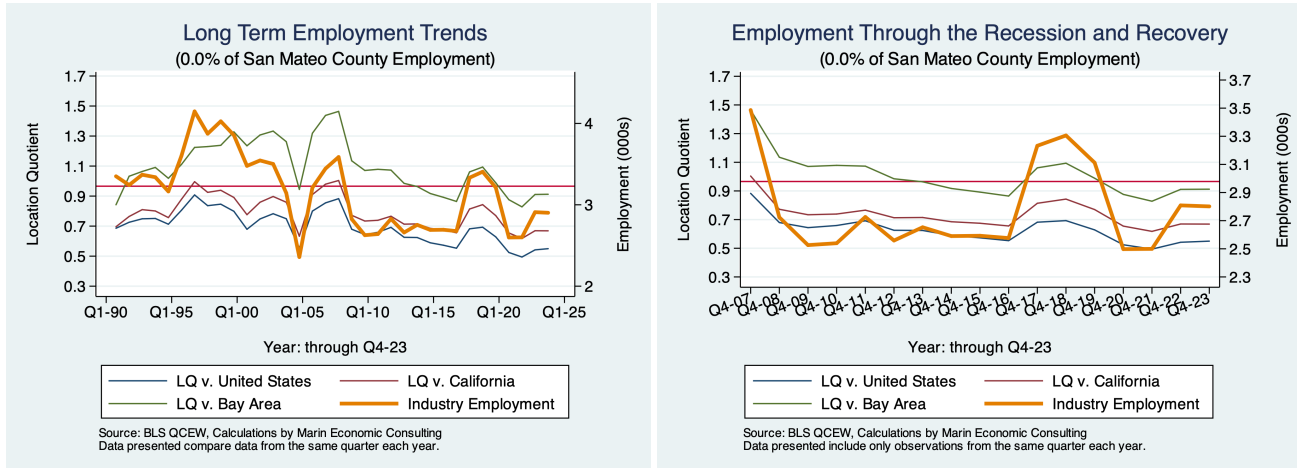


Figure 3 - 6: 339: Miscellaneous Manufacturing

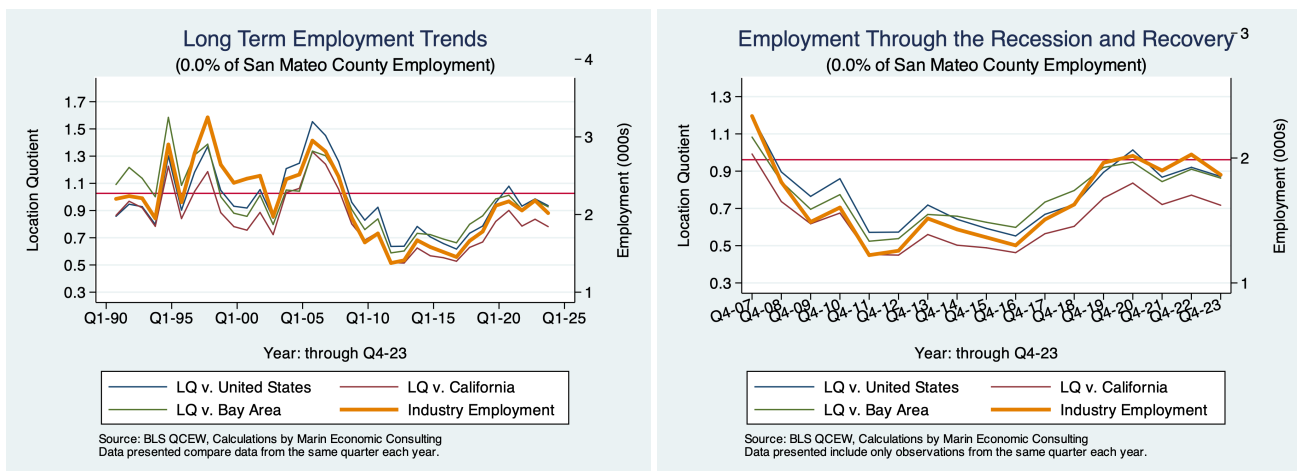


Figure 3 - 7: 3118: Bakeries and Tortilla Manufacturing

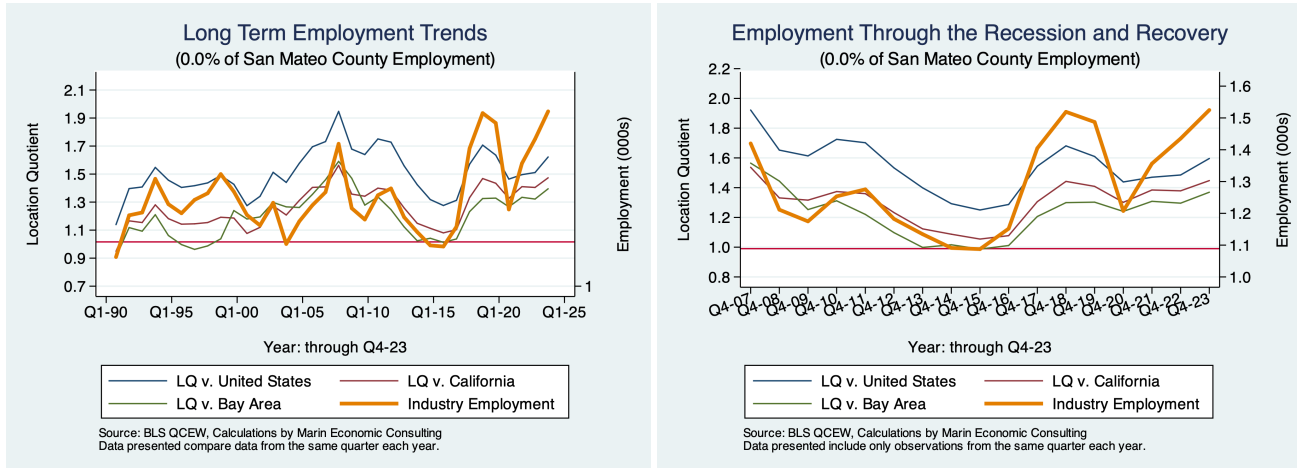


Figure 3 - 8: 3345: Navigational, Measuring, Electromedical, and Control Instruments Manufacturing

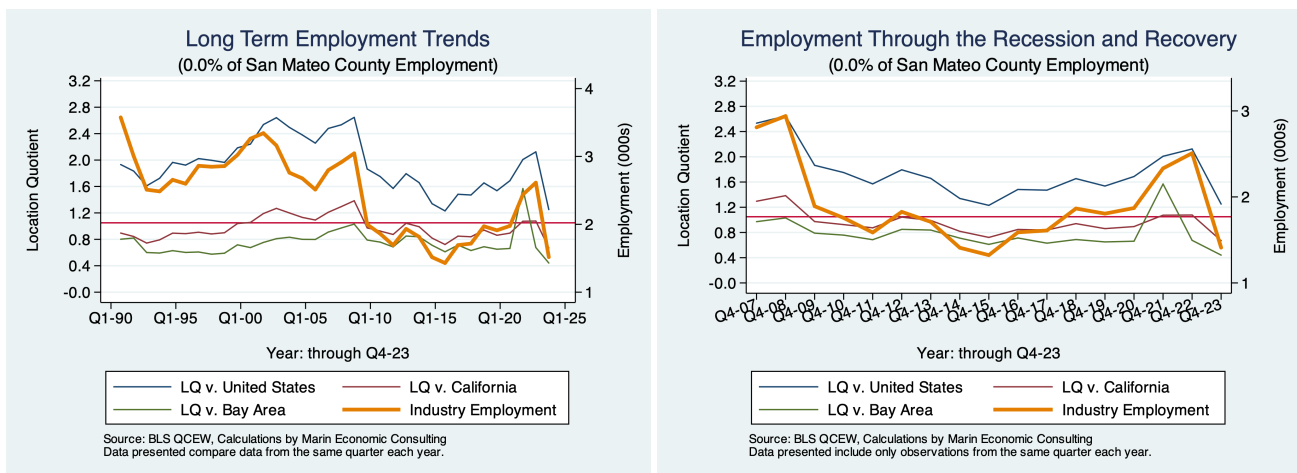


Figure 3 - 9: 3391: Medical Equipment and Supplies Manufacturing

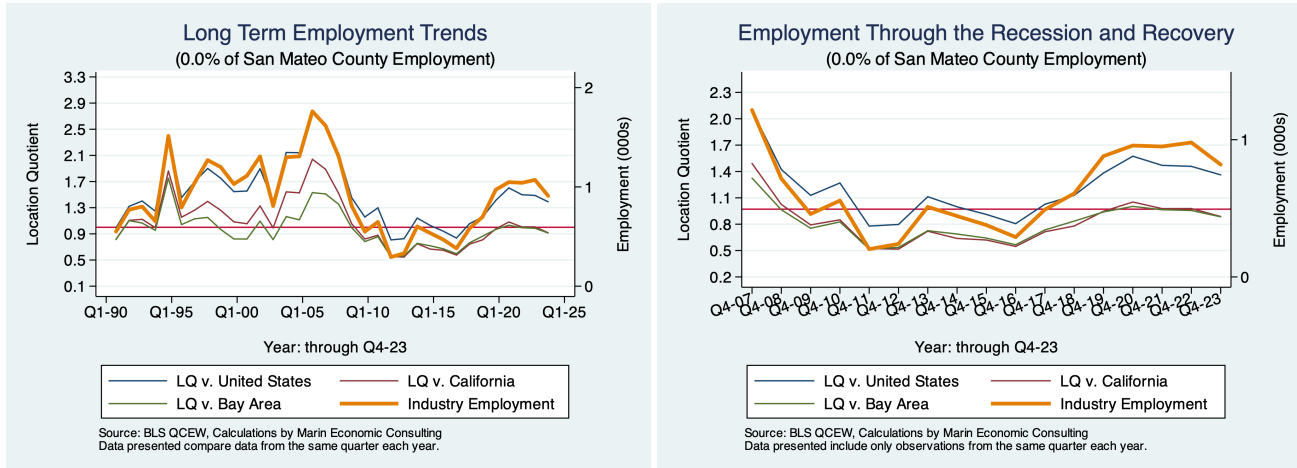


Figure 3 - 10: 335: Electrical Equipment, Appliance, and Component Manufacturing

