



CITY OF  
NAPA

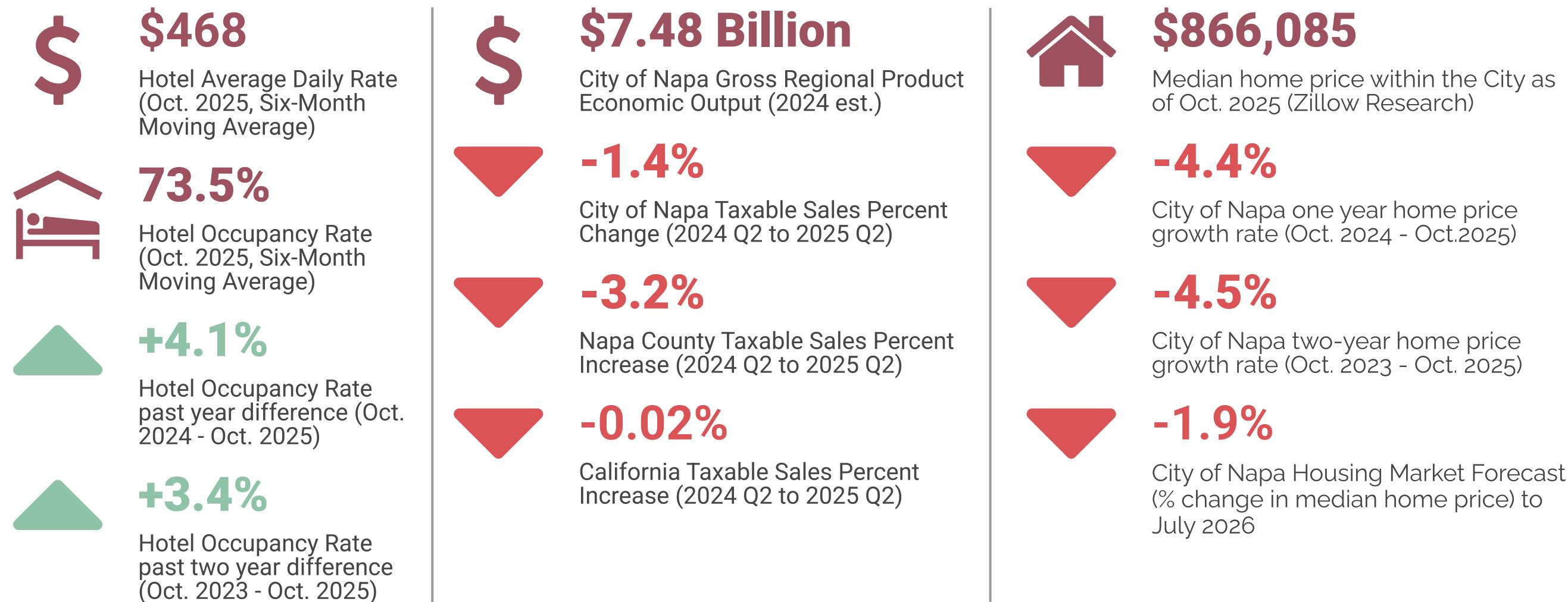
ATTACHMENT 1

# Economic Development Dashboard

These key indicators gauge the city of Napa's economic performance and are updated on a quarterly basis as needed

CITY OF  
NAPA **ECONOMIC  
DEVELOPMENT**

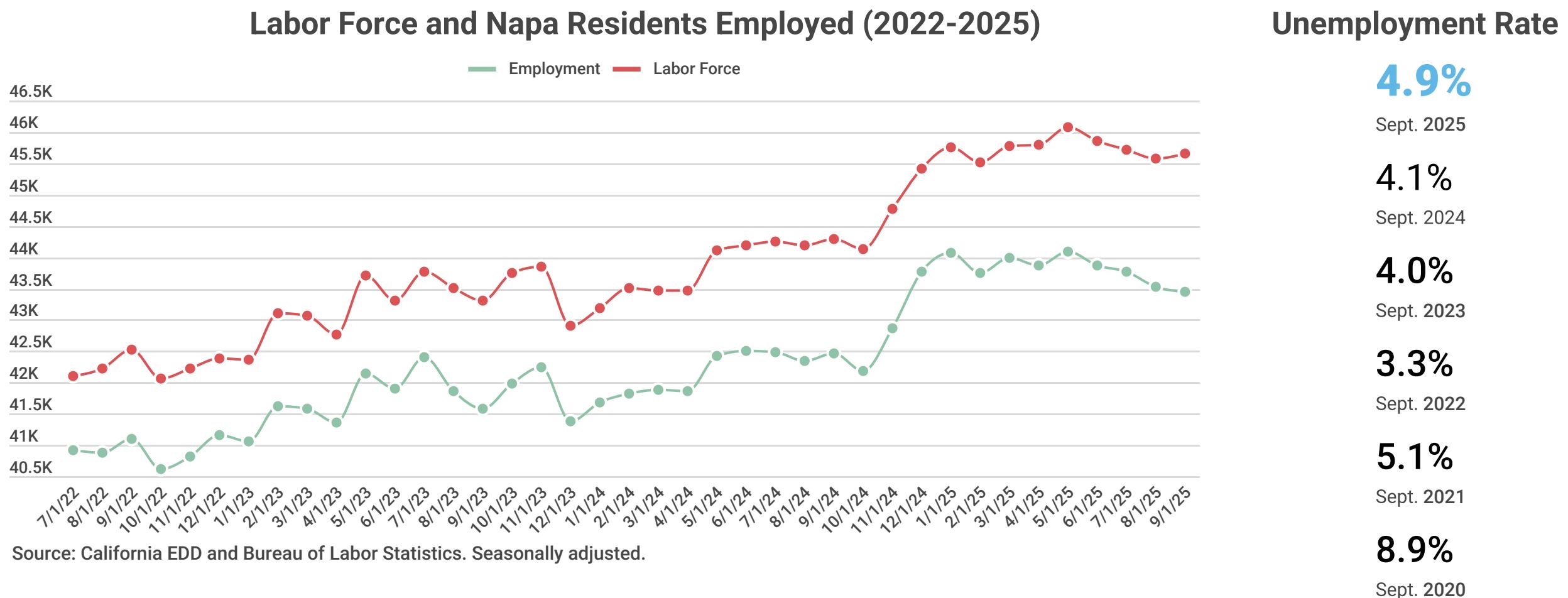
## The City's Economy at a Glance



# Labor Force and Employment

**Takeaway:** Napa's labor force increased by approximately 1,370 residents from Q3 2024 to Q3 2025. Napa's number of employed residents increased by approximately 970 workers from Q3 2024 to Q3 2025, pushing Napa's unemployment rate to 4.9 percent after seasonal adjustments as of Sept 2025, up from 4.3 percent in June 2025. Napa County stands at 4.6 percent unemployment after seasonal adjustments in Sept 2025; Napa's unemployment rate continues to rise based on regional economic conditions and challenging jobs for new labor-force entrants. The city of Napa and Napa County remain strong labor markets regionally, even with recent headwinds.

**Description:** The city of Napa's labor force (red line in the graph) is determined by the number of residents working or looking for work. Employed residents (green line in the graph) live in Napa and have jobs. This illustrates how many Napa residents are employed compared to the overall workforce.

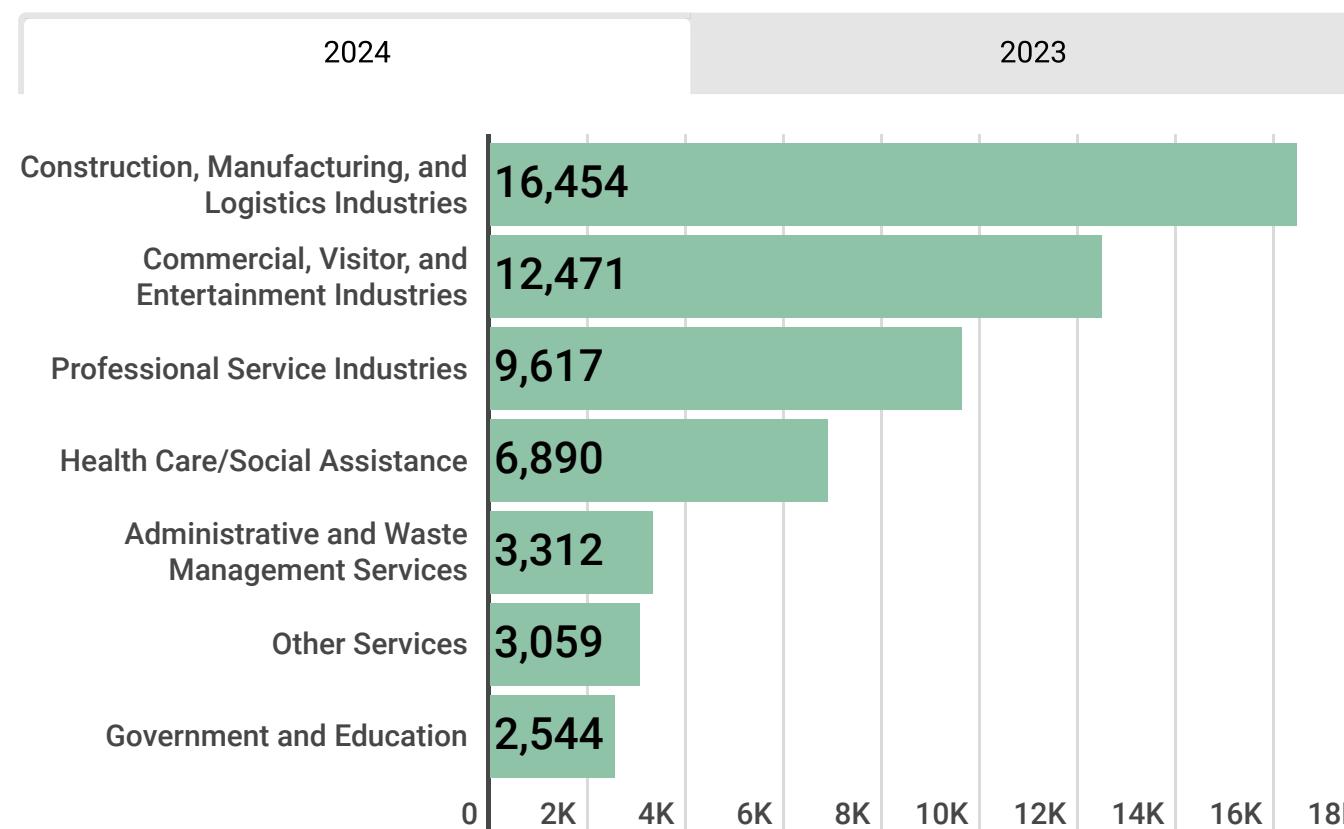


# Employment by Industry (Jobs in the City of Napa)

**Takeaway:** The number of people working for Napa-based employers is estimated to be 54,347 in 2024 (the estimate for 2023 was 54,008 jobs or +0.6 percent growth). At 16,454 jobs, construction, manufacturing (incl. wine making), and logistics workers hold the largest share of employment within Napa. The next group is the commercial, visitor, and entertainment industries, with 12,471 jobs. Professional services in the private sector employ approximately 9,617 workers; healthcare and social assistance, including public health, are the third highest industries, with 6,890 jobs.

**Description:** The graph and table below show the estimated number of jobs in the city of Napa for 2024, including employed residents and inbound commuters. These are the latest data as of December 2025, with updates expected for December 2026 through 2025.

## Jobs in the city of Napa (includes Residents and inbound Commuters) (2024)



Source: California EDD, Census Bureau, EMSI (Lightcast)

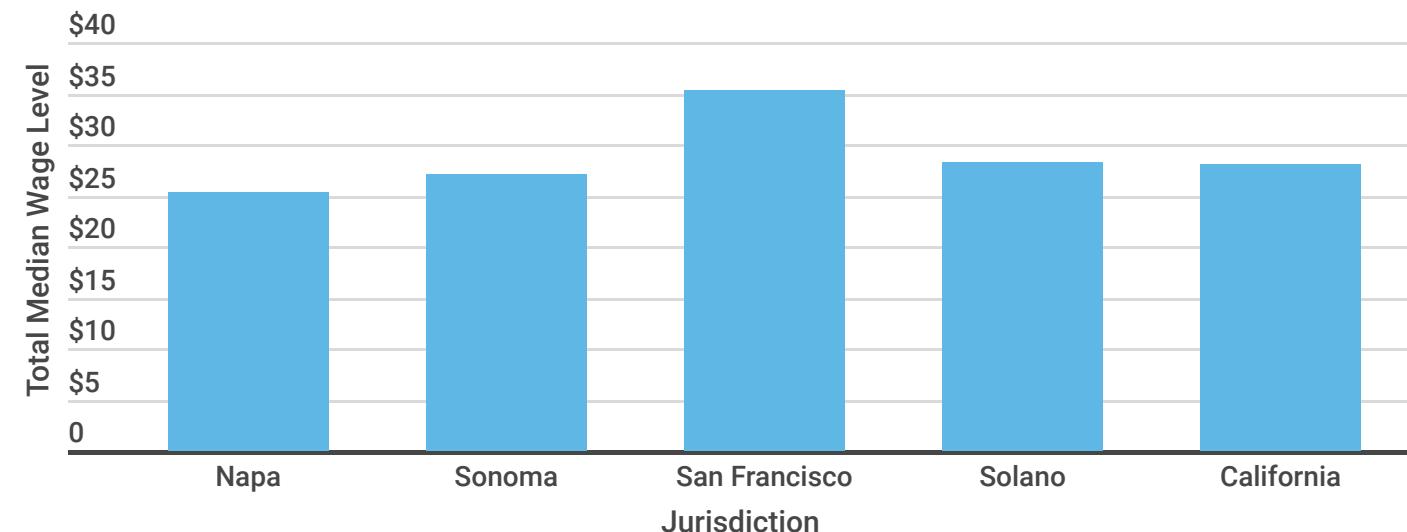
Industry	2024	2023
<b>Construction, Manufacturing, and Logistics Industries</b>	<b>16,454</b>	<b>16,523</b>
Agriculture	3,769	3,682
Mining	20	20
Utilities	86	84
Construction	3,277	3,310
Manufacturing	6,142	6,142
Wholesale	1,100	1,211
Transport/Logistics/Warehousing	2,060	2,074
<b>Commercial, Visitor, and Entertainment Industries</b>	<b>12,471</b>	<b>12,171</b>
Retail	4,740	4,740
Arts and Events	1,452	1,249
Hotels/Motels and Restaurants	6,279	6,182
<b>Government and Education</b>	<b>2,544</b>	<b>2,561</b>
Education	924	896
Government	1,620	1,665

# Median Wages by Occupation

**Takeaway:** The median wage for jobs worked in 2025 within the City of Napa is \$25.36 for all industries combined (+\$0.74 from 2024, +3.0%), where the median in Sonoma is \$26.51, San Francisco's metropolitan area (including Alameda and San Mateo counties) is \$35.56, and California is \$27.38 (the 2025 data are not yet available for San Francisco city and county alone or Marin County as of June 1, 2025). These data indicate that overall wages in Napa are competitive with those in adjacent Sonoma County and lower than in Solano County. For Napa, construction jobs had more than a 14% wage increase since 2024. Napa as a city economy is a significant portion of Napa County's labor market in terms of jobs available and a variety of positions.

**Description:** The chart and table show the median wage level by occupation for selected jurisdictions and California overall. The complete list of occupations can be viewed by scrolling on the table.

## Median Wages by Occupation (2025)



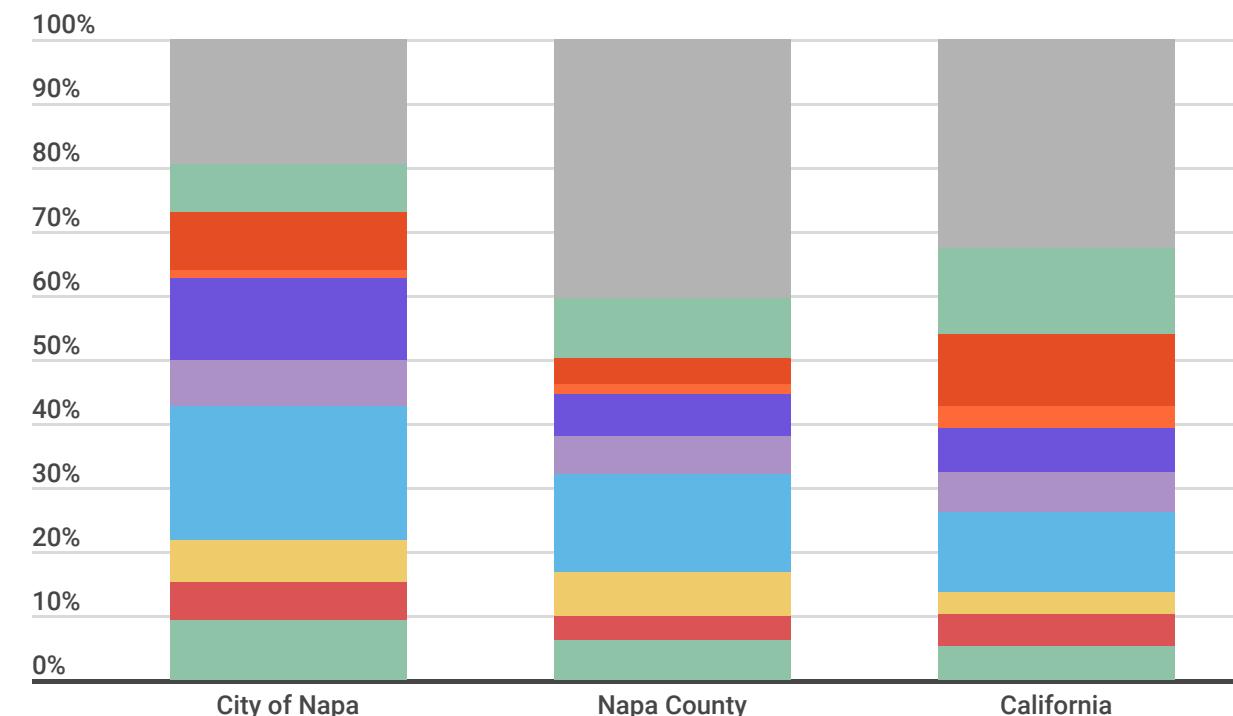
Occupation Type	Napa	Sonoma	SF	Solano	CA
Management	\$62.33	\$60.49	\$82.31	\$62.05	\$68.02
Business and Financial Operations	\$40.67	\$40.97	\$54.06	\$42.14	\$46.05
Computer and Mathematical	\$46.30	\$49.75	\$74.51	\$51.05	\$67.18
Architecture and Engineering	\$48.23	\$58.12	\$61.05	\$54.13	\$59.00
Life, Physical, and Social Science	\$35.69	\$42.69	\$57.19	\$48.05	\$47.54
Community and Social Service	\$30.37	\$31.59	\$35.94	\$34.95	\$31.24
Legal	\$51.26	\$52.09	\$71.89	\$46.74	\$63.85
Educational Instruction and Library	\$31.88	\$32.18	\$35.90	\$32.47	\$32.42
Arts, Design, Entertainment, Sports, and Media	\$30.63	\$30.97	\$44.97	\$27.87	\$38.27
Healthcare Practitioners and Technical	\$61.46	\$64.67	\$72.50	\$66.48	\$59.26
Healthcare Support	\$18.42	\$18.80	\$19.92	\$17.99	\$17.73
Protective Service	\$28.07	\$28.19	\$36.90	\$46.27	\$27.44

Source: California EDD and Bureau of Labor Statistics (2024).

# Taxable Sales

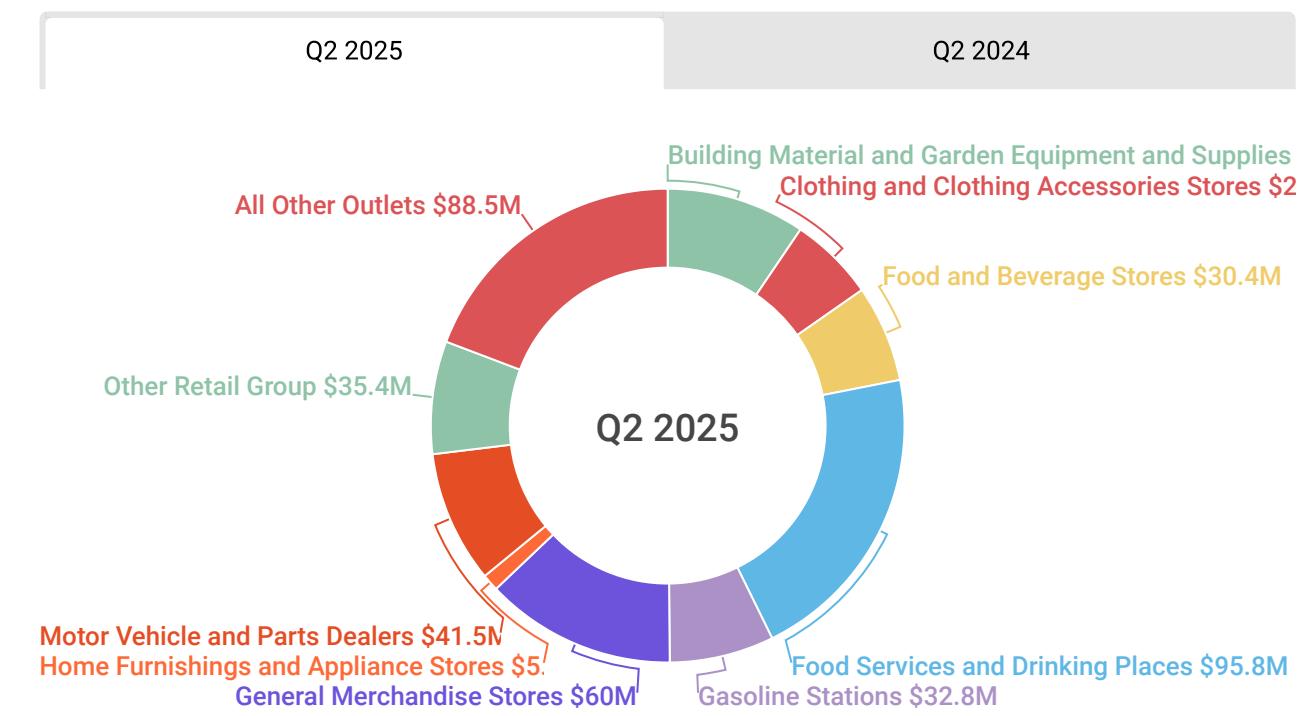
**Takeaway:** The total taxable sales of all retail categories in Napa were \$460 million in Q2 2025, a -1.4% decrease from Q2 2024. However, for the 12 months ending on June 30, 2025, the annualized change from June 30, 2024 (city fiscal year comparison), was -2.1%. For Napa County overall, the change comparing the last two fiscal years to each other was -3.0%. The top retail sector is restaurants and bars (Food Services and Drinking Places) in Q2 2025 at 20.8% (\$95.8 million), followed by general merchandise stores (department and gift stores) sales at 13.0% (\$60 million). The All-Other Outlets category includes various businesses with retail points of sale (winery tasting rooms are examples), with 19.2% (\$88.5 million) of taxable sales. California taxable sales slipped by -1.4% over the last fiscal year and was flat comparing Q2 2025 to Q2 2024, respectively. The latest data are from September 2025. **Description:** The charts below summarize the composition of taxable sales to track business health, which forms the basis of revenue and sales tax revenue generated for the City.

**Composition of Taxable Sales (Q2 2025)**



Source: California Department of Tax and Fee Administration

**Comparison of city of Napa Taxable Sales by Major Retail Category (Q2 2025, Q2 2024)**



Numbers may not add up due to rounding.

Source: California Department of Tax and Fee Administration

# Business Licenses

**Takeaway:** Overall, the number of new business starts for Q3 2025 has outpaced the number of closed licenses. Service-related businesses made up most of the latest starts and closures, indicating the swing of these business types compared to other types. Q3 has seen fewer business opening compared to Q1 (130) and Q2 (113). The total new business starts for year-to-date is 324 compared to 65 closings.

**Description:** The table below illustrates the number of businesses in the City Limits that either (1) applied for a new business license with a start date or (2) closed out a license within each quarter in 2025. Business Category sectors are specific business types used as descriptors by the City of Napa for aggregation. Scroll to see full table.

## Open and Closed Business Licenses (2025)

	Q3 2025	Q2 2025	Q1 2025
Business Category	Number of New Starts	Number of Closed	Difference
Accomodation	0	0	0
Retail Sales	13	2	11
Restaurant/Bar/Food	5	5	0
Art/Entertainment	1	1	0
Beauty/Massage	9	2	7
Services	49	12	37
Tasting Room/Wine Sales	3	4	-1
Manufacturing/Wine Production	1	0	1

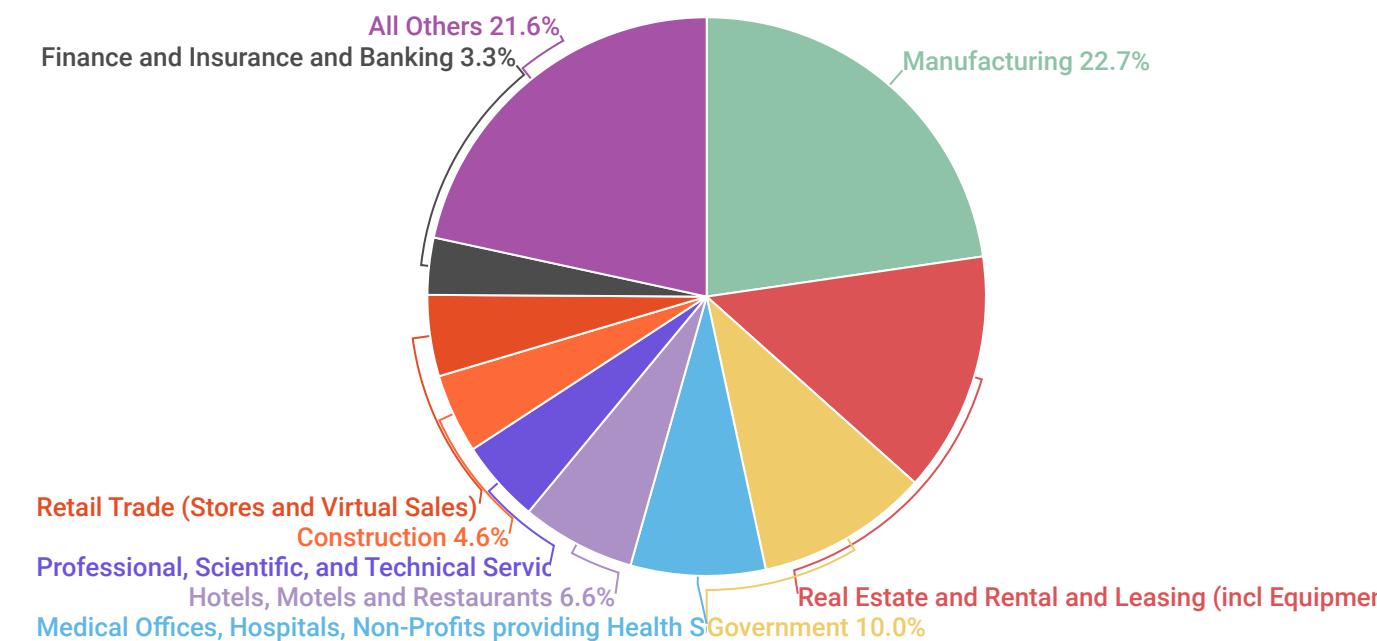
Source: HdL

# Economic Output

**Takeaway:** Napa's top industries are Manufacturing (including wineries where bottled wine is produced), Real Estate, Rental and Leasing, Government, Medical Services, and Visitor-Serving (Hotels, Motels, and Restaurants). The latest data are from December 2024.

**Description:** This chart tracks the top economic drivers in Napa's economy. It summarizes the estimated economic output from various industries within the city economy for 2023 in 2021 dollars. The total economic output of Napa County is approximately \$11.8 billion, while the city economy is \$7.48 billion (in 2021 inflation-adjusted dollars for 2023), of which the Napa city economy contributes approximately 68.4% of the total economic output.

## Napa (city) Gross Regional Product (2023)



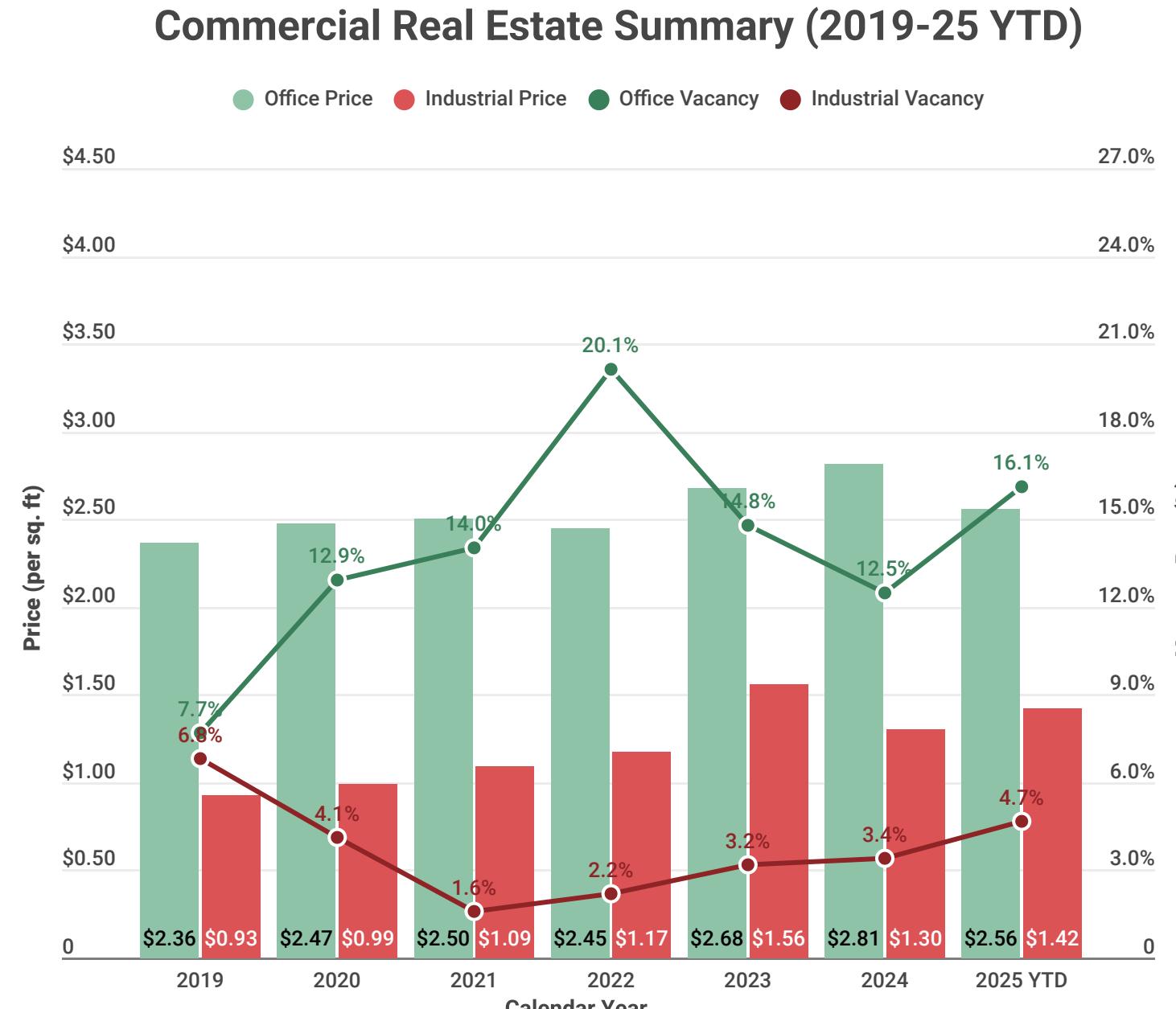
Source: Bureau of Economic Analysis, California EDD, EMSI (Lightcast)

# Commercial Real Estate Summary

**Takeaway:** Office vacancy rates have fallen from their recent heights in 2022 to 16.1 percent in Q3 2025 (2025 YTD). We see that office vacancy has jumped from 12.5 percent to 16.1 percent, indicating a softer office market in 2025. In addition, the price per sq. ft. is lower in Q3 2025 compared to year-end 2024, with prices dropping from \$2.81/sq. ft. to \$2.56/sq. ft. Industrial vacancy has increased year over year since its lowest in 2021, but the price per sq. ft has been steadily increasing year over year.

The trends in the chart suggest that the vacancy rate for office will decrease, especially as interest rates fall slowly through 2026; the vacancy rate for industrial stays consistent between 2 percent and 4 percent. Prices per square foot for both office and industrial will likely continue to have modest increases.

**Description:** The chart (right) shows the relationship between the price per square foot of office and industrial commercial real estate compared to the vacancy rate of each.



Source: Keegan and Coppin (industrial); Colliers (office)

# Visitor and Tourism Trends

**Takeaway:** We consider six-month moving averages for hotel occupancy and average daily rates (ADR). As of October 2025, occupancy rates (on a six-month moving-average basis) increased (4.1 percentage points) compared to October 2024. Average daily rates in Napa decreased approximately \$11.79 per night, comparing the six-month moving average ending in October 2025 (\$467.69) to October 2024 (\$455.90). On a good note, taxable overnight stay prices (revenue per available room or RevPAR) increased by \$26.78 from October 2024 to October 2025, almost double the RevPAR change between July 2024 and July 2025 reported in the previous quarter. The latest data are as of October 2025 and suggest that competition for traveler spending has increased and Napa's hoteliers have adjusted well.

**Description:** Occupancy rates measure how full hotels and lodging are during a particular time. This helps indicate the visitor activity for overnight stays and informs the Transient Occupancy Tax (TOT) revenue forecast. The average daily rate (ADR) refers to the average cost of a one-night stay. Using six-month moving averages reduces seasonal and episodic reasons for changes in these data and focuses more on trends.

## Hotel Occupancy Rate (Occ) and Average Daily Rate (ADR) in Dollars for 6 Month Moving Average (2022-2025)



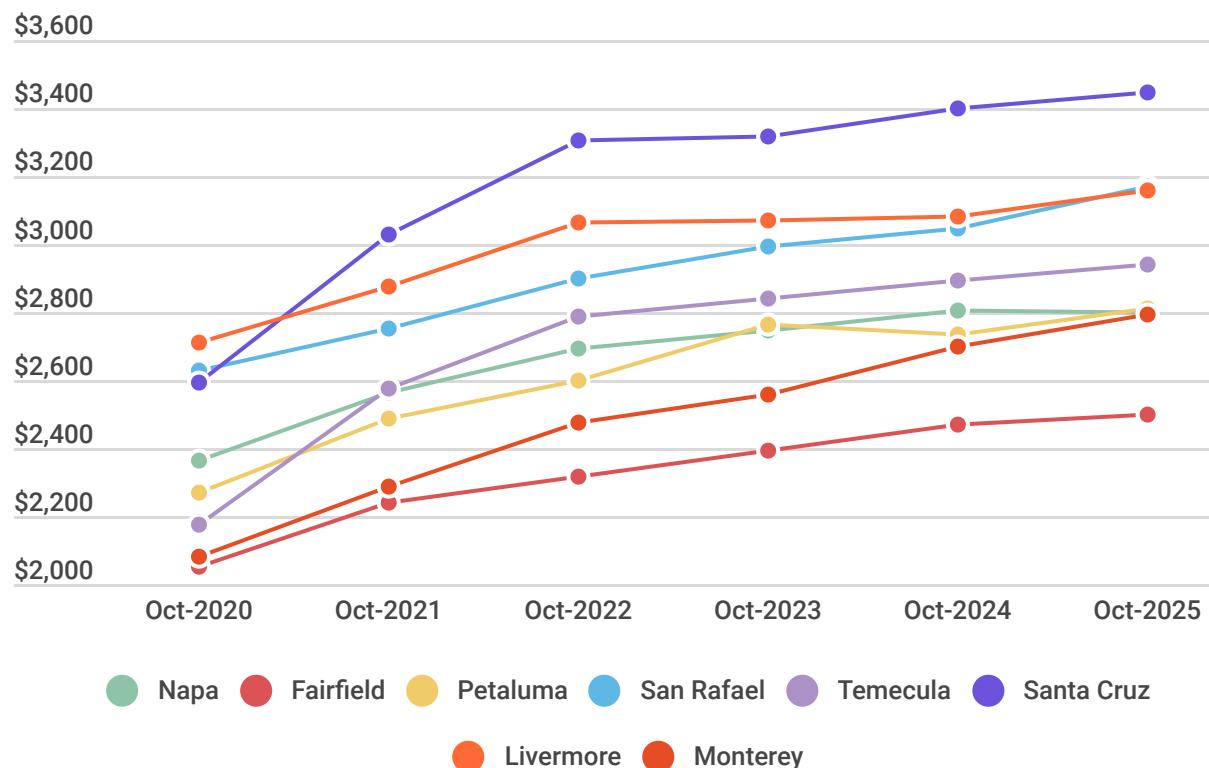
Source: Smith Travel Research

# Median Rent Comparisons

**Takeaway:** Median rents decreased by 0.1 percent in Napa, according to Zillow™ Research, between October 2024 and October 2025. Regionally, the trend remains between 1.0 and 4.0 percent. Home rental prices continue to rise across the region. Livermore, Monterey and Petaluma increased between 2.5 and 3.5 percent over the last year ending in October 2025. San Rafael saw a 4.0 percent increase in rents from October 2024 to October 2025. The latest data are from October 2025.

**Description:** The chart and table provide benchmarks for rental affordability in the Napa housing market. Comparison jurisdictions were chosen due to their similar population size, being a tourism destination, and/or being within a wine region. The rental price medians are calculated using samples of homes, condos, and apartments for rent, but they are primarily dominated by one- and two-bedroom apartments.

**Median Rents by Year and Jurisdiction (2020-2025)**



Place	Oct-2020	Oct-2021	Oct-2022	Oct-2023	Oct-2024	Oct-2025	Change
Napa	\$2,367	\$2,562	\$2,693	\$2,750	\$2,805	\$2,801	-0.1%
Fairfield	\$2,054	\$2,243	\$2,316	\$2,394	\$2,470	\$2,502	1.3%
Petaluma	\$2,269	\$2,487	\$2,600	\$2,764	\$2,734	\$2,812	2.9%
San Rafael	\$2,630	\$2,751	\$2,900	\$2,992	\$3,049	\$3,171	4.0%
Temecula	\$2,174	\$2,574	\$2,786	\$2,842	\$2,893	\$2,940	1.6%
Santa Cruz	\$2,595	\$3,029	\$3,304	\$3,320	\$3,402	\$3,449	1.4%
Livermore	\$2,712	\$2,875	\$3,067	\$3,072	\$3,080	\$3,156	2.5%
Monterey	\$2,080	\$2,288	\$2,476	\$2,561	\$2,702	\$2,797	3.5%
Napa County	\$2,464	\$2,639	\$2,775	\$2,841	\$2,881	\$2,886	0.2%

Source: Zillow™ Research (2020-2025). Current dollars.