



1 in 6

US job gains occurred
in California between
2013 and 2018.



\$4.2 billion

in research funding from
National Institutes of Health
(NIH) for FY2018.



11,725

Life Science
establishments

THE IMPACT OF LIFE SCIENCE IN CALIFORNIA

California's Life Science Industry provides 428,283 direct jobs statewide, with an average annual earnings of \$95,750. Total jobs in the state (direct/indirect/induced) was 1,293,858 in 2018 and economic activity generated \$346B. The strongest related occupations are Biochemists and Biophysicists; Microbiologists; Medical Scientists; and technicians supporting Agricultural and Food Sciences and Biological industries.



Annual Economic Impact

	IMPACT
Economic Activity	\$346B
Market Value of Goods & Services	\$195.8B
Total Jobs (direct/indirect/induced)	1,293,858
Labor Income (salaries/wages/benefits paid)	\$104B



NIH Funding

California received more than \$4.2B in NIH funding in fiscal year 2018, driving the incredible pace of innovation in the state in the Life Science industry, more than any other state by at least 25%. The top five award recipients in FY2018 were University of California, San Francisco (UCSF), Stanford, University of California, San Diego (UCSD), University of California, Los Angeles (UCLA) and University of Southern California (USC).

Source: NIH (4/12/2019)



Subsector Employment & Establishments

	Employment in 2018	Establishments
BioRenewables Includes biofuels, specialty enzymes and chemicals, algae research, and key elements of agriculture	31,060	1,491
Biopharmaceutical Manufacturing The production of medicines, botanicals, pharmaceuticals, in-vitro diagnostic substances, and biological products.	49,942	600
Medical Devices & Diagnostic Equip Laboratory equipment and supplies, optical instruments, electromedical apparatus, surgical and medical instruments, and dental equipment.	77,819	2,312
Life Science Wholesale Wholesaling and distributing medical equipment and supplies and the wholesaling of pharmaceuticals and related products.	27,159	1,962
Research & Lab Services R&D in biotechnology, related areas of nanotechnology, medical laboratories, and portions of industries representing testing laboratories, other R&D services, and higher education.	242,303	5,360

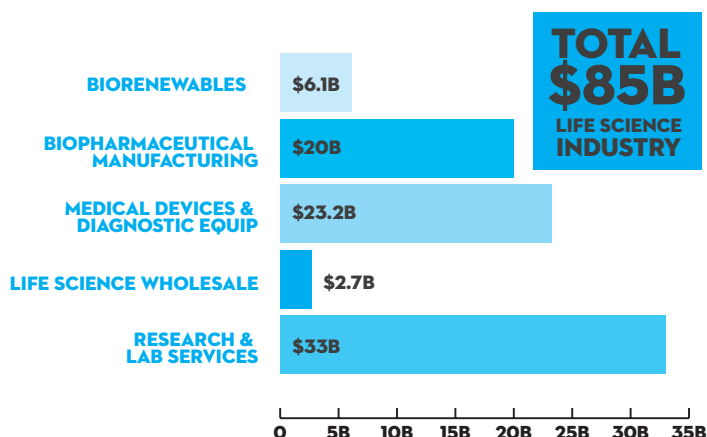
'Establishment' refers to an individual facility/physical location.
Some firms have multiple locations, which would each be counted separately.

BIOCOM'S 2019 CALIFORNIA ECONOMIC IMPACT REPORT: CALIFORNIA

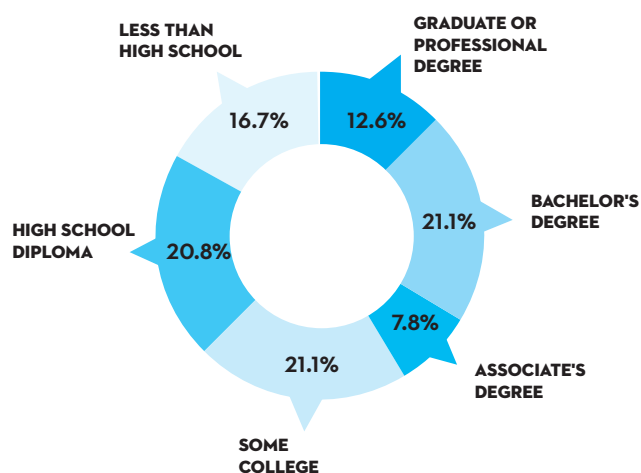
Subsector Average Wage

BIORENEWABLES	BIOPHARMACEUTICAL MANUFACTURING	MEDICAL DEVICES & DIAGNOSTIC EQUIP	LIFE SCIENCE WHOLESALE	RESEARCH & LAB SERVICES	ALL LIFE SCIENCES
\$44,968	\$180,502	\$122,905	\$129,616	\$96,737	\$95,750

Foreign Exports of Life Science Products



Educational Attainment



For full report visit: www.biocom.org/eir

Biocom is the largest, most experienced leader and advocate for California's life science sector. We work on behalf of more than 1,200 members to drive public policy, build an enviable network of industry leaders, create access to capital, introduce cutting-edge STEM education programs, and create robust value-driven purchasing programs. Founded in 1995 in San Diego, Biocom provides the strongest public voice to research institutions and companies that fuel the local and state-wide economy. Our goal is simple: to help our members produce novel solutions that improve the human condition. In addition to our San Diego headquarters, Biocom operates core offices in Los Angeles and the San Francisco Bay Area, satellite offices in Washington, D.C. and Tokyo, and has a continuous staff presence in Sacramento. Our broad membership benefits apply to biotechnology, pharmaceutical, medical device, genomics and diagnostics companies of all sizes, as well as to research universities and institutes, clinical research organizations, investors and service providers.

This is a condensed summary of the Biocom's 2019 California Economic Impact Report produced by Biocom and TClower & Associates. Note that as a result of the structural changes in our industry definitions/NAICS codes, the data and analysis in this edition of the Biocom California Life Science Economic Impact Report should not be compared to previous editions.

