



2021 CALIFORNIA ECONOMIC IMPACT REPORT

NORTH BAY

The North Bay includes the four counties of Marin, Napa, Solano, and Sonoma counties. The Life Science industry directly employed 15,323 individuals and generated \$18.5 billion in economic activity in Total Business Sales. The industry supported 32,854 jobs and \$3.8 billion of labor income in the North Bay. The largest Life Science sub-sector in 2020 was Biopharmaceuticals, followed by Research and Manufacturing.



15,323

people in the region were directly employed by Life Science companies in 2020



\$18.5B

generated in economic activity in Total Business Sales in 2020

2020 Annual Economic Impact

| | Total Jobs | Labor Income | Total Business Sales | Gross Regional Product |
|---------------|---------------|------------------------|-------------------------|-------------------------|
| Marin County | 11,198 | \$1,555,322,590 | \$7,657,975,809 | \$4,673,783,441 |
| Napa County | 1,137 | \$73,304,247 | \$229,324,677 | \$111,327,639 |
| Solano County | 8,645 | \$1,153,319,934 | \$7,227,084,575 | \$4,578,767,569 |
| Sonoma County | 11,874 | \$1,082,984,061 | \$3,397,039,526 | \$1,828,455,777 |
| Total | 32,854 | \$3,864,930,832 | \$18,511,424,587 | \$11,192,334,426 |

SOURCE: IMPLAN, FBEI

2020 Key Metrics

| | Establishments | Unique Companies | Direct Employment | Average Compensation | Share of Total Employment |
|---------------|----------------|------------------|-------------------|----------------------|---------------------------|
| Marin County | 170 | 150 | 4,760 | \$200,318 | 2.5% |
| Napa County | 47 | 45 | 720 | \$67,449 | 0.7% |
| Solano County | 98 | 93 | 4,329 | \$213,520 | 2.3% |
| Sonoma County | 193 | 136 | 5,514 | \$125,363 | 1.9% |
| Total | 508 | 424 | 15,323 | | |

SOURCE: IMPLAN, CA EDD, NIH, FBEI

2020 Innovation Funding from the NIH

\$26.2M

Total NIH Funding

| | NIH Funding |
|---------------|--------------|
| Marin County | \$23,309,291 |
| Napa County | \$0 |
| Solano County | \$1,892,381 |
| Sonoma County | \$994,000 |

SOURCE: NIH, FBEI



For full report visit www.biocom.org/eir

2020 Life Science Employment by Sub-Sector by County

| | Marin County | Napa County | Solano County | Sonoma County |
|----------------------------|--------------|-------------|---------------|---------------|
| Biotechnology | 389 | 119 | 322 | 602 |
| Biopharmaceuticals | 3,028 | 12 | 2,546 | 370 |
| Medical Device & Equipment | 163 | 103 | 412 | 2,183 |
| Research & Manufacturing | 1,108 | 388 | 1,039 | 1,485 |
| Scientific/Research Tools | 71 | 96 | 1 | 846 |
| Food & Agriculture Biotech | 2 | 1 | 8 | 27 |

SOURCE: IMPLAN, FBEI

Biotechnology: Research entities involved in nanotechnology as well as biotechnology.

Biopharmaceuticals: Pharmaceutical manufacturers of a wide range of products as well as distributors.

Medical Devices & Equipment: Manufacturers of a large array of products for health care, including optical instruments, surgical apparatus and dental supplies.

Research & Manufacturing: Research and development conducted at colleges/universities or in private medical laboratories.

Scientific/Research Tools: Manufacturers of laboratory instruments, chemicals and other devices used for measuring, displaying and controlling research processes.

Food & Agriculture Biotech: Cellular grown meat and seafood as well as biorenewables used in agriculture and crop production.

2020 Educational Attainment by County

Marin County has the highest educated adult population in the North Bay with 59% of adults having a Bachelor's or graduate degree. This compares to 49% for the Bay Area region as a whole and 35% statewide. Napa County (36%) and Sonoma County (37%) also exceed the statewide level.

| | CA | Bay Area | Marin County | Napa County | Solano County | Sonoma County |
|---|-----|----------|--------------|-------------|---------------|---------------|
| Less than 9th grade | 9% | 6% | 5% | 8% | 6% | 5% |
| 9th to 12th grade, no diploma | 7% | 5% | 3% | 7% | 5% | 5% |
| High school graduate (includes equivalency) | 21% | 16% | 11% | 18% | 24% | 19% |
| Some college, no degree | 21% | 17% | 16% | 23% | 27% | 24% |
| Associate's degree | 8% | 7% | 6% | 8% | 10% | 10% |
| Bachelor's degree | 22% | 28% | 36% | 22% | 19% | 23% |
| Graduate or professional degree | 13% | 21% | 23% | 14% | 10% | 14% |

SOURCE: U.S. CENSUS, FBEI

Policy Priorities

The North Bay is comprised of Marin, Napa, Solano, and Sonoma Counties. The life science industry in the North Bay includes a wide range of companies and research institutions, with Biopharmaceuticals being the largest sub-sector. Marin County and Solano County are the primary concentrations of biotech research and biopharmaceutical manufacturing in the four-county region.

Our North Bay members have shared concerns about accessibility to water as state drought conditions prompt local municipalities to consider water usage restrictions. Our members depend on a reliable, constant water source for everyday business; interrupting these supplies could mean millions of dollars lost in delicate research.

Our members also express concerns around affordable housing and availability of a skilled pool of workers.

For over 25 years, Biocom California has helped move the life science industry forward with transformative resources that enable companies to make meaningful connections. With a membership base of over 1,500 companies, we connect our members to each other so they can collaborate and work stronger and smarter together. We connect organizations to capital investment and purchasing solutions so they can grow faster and work more efficiently. We're their link to advocacy that fights for innovation and we provide an environment where their business and talent can thrive. Biocom California is how the life science industry gets connected.