



2019 CALIFORNIA ECONOMIC IMPACT REPORT CITY OF SAN DIEGO



80,229
Total jobs attributable to the Life Science industry (direct, indirect and induced)



\$921 million
in research funding from National Institutes of Health (NIH) for FY2018.



860
Life Science establishments



Strongest occupations in the City of San Diego in our industry are Biochemists, Biophysicists, Microbiologists, Biological Scientists, Medical Scientists, and Biological Technicians.

THE IMPACT OF LIFE SCIENCE IN CITY OF SAN DIEGO

The City of San Diego's Life Science industry directly employed 35,855 people in 2018 with average annual earnings of \$128,587 per year. Total jobs in the city (direct/indirect/induced) was 80,229 in 2018 and economic activity generated \$18.6B. There was solid job growth in Biopharmaceutical Manufacturing, Medical Devices and Diagnostic Equipment and Research & Lab Services sectors between 2013 and 2018. City of San Diego has had a long-time dominance in the Life Science industry, one example of which is that City of San Diego boasts more than 4 times the concentration of Biochemists and Biophysicists as the national average.

Annual Economic Impact

	IMPACT
Economic Activity	\$18.6B
Market Value of Goods & Services	\$11B
Total Jobs (direct/indirect/induced)	80,229
Labor Income (salaries/wages/benefits paid)	\$7B

NIH Funding

California received more than \$4.2B in NIH funding in fiscal year 2018 with \$921M flowing to City of San Diego's universities, labs and companies to support research in the life science industry. City of San Diego received almost all of the funding flowing to the County of San Diego, which is approximately 22% of the total awards in California.

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	249	11
Biopharmaceutical Manufacturing The production of medicines, botanicals, pharmaceuticals, in-vitro diagnostic substances, and biological products.	3,624	56
Medical Devices & Diagnostic Equip Laboratory equipment and supplies, optical instruments, electromedical apparatus, surgical and medical instruments, and dental equipment.	4,171	82
Life Science Wholesale Wholesaling and distributing medical equipment and supplies and the wholesaling of pharmaceuticals and related products.	2,714	198
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.	25,097	513

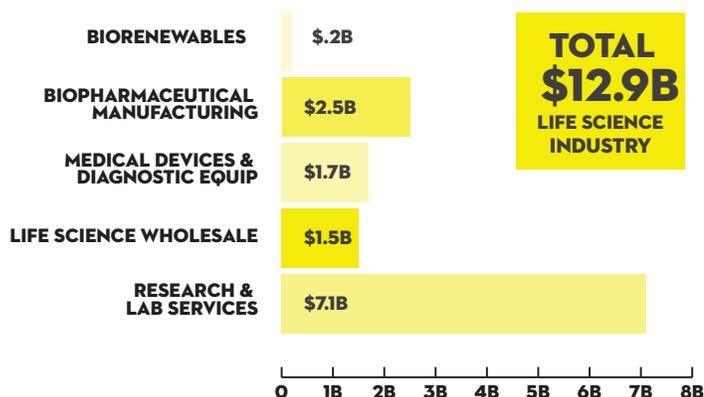
Establishment refers to an individual facility/physical location. Some firms have multiple locations, which would each be counted separately.

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

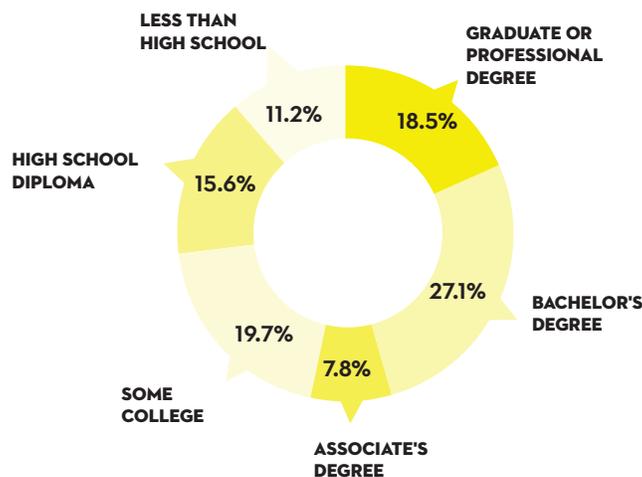
Subsector Average Wage

	BIORENEWABLES	BIOPHARMACEUTICAL MANUFACTURING	MEDICAL DEVICES & DIAGNOSTIC EQUIP	LIFE SCIENCE WHOLESALE	RESEARCH & LAB SERVICES	ALL LIFE SCIENCES
City of San Diego	\$48,815	\$154,352	\$139,547	\$155,120	\$126,440	\$128,587

Foreign Exports of Life Science Products



Educational Attainment



Lifes Science Innovation Companies

City of San Diego has 386 Life Science Innovation Companies.

	COMPANY COUNT
BioRenewables	2
Biopharmaceutical Manufacturing	70
Medical Devices & Diagnostic Equip	33
Research & Development	281

'Life Science Innovation Company' refers to companies in a subset of industry subsectors encompassing those who are doing work at the cutting edge of our industry (see full list of subsectors in Appendix 3 of Biocom's 2019 California Economic Impact Report Databook). This should not be confused with 'Establishments,' which includes all physical locations of each company in the region in all industry subsectors.

Advocacy Roots

Biocom was founded as an advocacy organization in 1995 around the issue of access to water. At the time, San Diego was experiencing severe drought conditions, and city council was discussing temporary water shut offs. Our members depend on a reliable, constant source of water for everyday activities; interruption of these supplies could mean millions of dollars lost in delicate research. When council members agreed not to shut off water for our companies, we saw the impact that the life science community could have when coming together as a united voice, and Biocom was born.

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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.

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.

