



# 2019 CALIFORNIA ECONOMIC IMPACT REPORT

## SAN DIEGO COUNTY



The Life Science industry generated **\$39.4B** in economic activity in 2018.



**\$933 million** in research funding from National Institutes of Health (NIH) for FY2018.



**1,561** Life Science establishments



Due to its growth, the most competitive subsector in San Diego County is Medical Devices and Diagnostic Equipment.

### THE IMPACT OF LIFE SCIENCE IN SAN DIEGO COUNTY

San Diego County continues to have a dominating presence in the Life Science industry. The industry there directly employed 65,572 people in 2018, with an average annual earnings of \$115,170. Total jobs in the region (direct/indirect/induced) was 167,980 in 2018 and economic activity generated \$39.4B. There was solid job growth in Biopharmaceuticals Manufacturing, Medical Devices and Diagnostic Equip, and Research & Lab Services between 2013 and 2018. An example of San Diego County's long time dominance in this industry, it boasts over three times the national average concentration of Biochemists and Biophysicists.

#### Annual Economic Impact

	IMPACT
Economic Activity	\$39.4B
Market Value of Goods & Services	\$22.6B
Total Jobs (direct/indirect/induced)	167,980
Labor Income (salaries/wages/benefits paid)	\$13.3B

#### NIH Funding

California received more than \$4.2B in NIH funding in fiscal year 2018, with \$933M flowing to San Diego County's universities, labs and companies to support research in the life sciences industry. This is the second highest amount of any county in California.

Source: NIH (4/12/2019)

#### Subsector Employment & Establishments

	Employment in 2018	Establishments
<b>BioRenewables</b> Includes biofuels, specialty enzymes and chemicals, algae research, and key elements of agriculture	1,529	66
<b>Biopharmaceutical Manufacturing</b> The production of medicines, botanicals, pharmaceuticals, in-vitro diagnostic substances, and biological products.	7,304	113
<b>Medical Devices &amp; Diagnostic Equip</b> Laboratory equipment and supplies, optical instruments, electromedical apparatus, surgical and medical instruments, and dental equipment.	11,706	229
<b>Life Science Wholesale</b> Wholesaling and distributing medical equipment and supplies and the wholesaling of pharmaceuticals and related products.	4,446	324
<b>Research &amp; Lab Services</b> R&D in biotechnology, related areas of nanotechnology, medical laboratories, and portions of industries representing testing laboratories, other R&D services, and higher education.	40,587	829

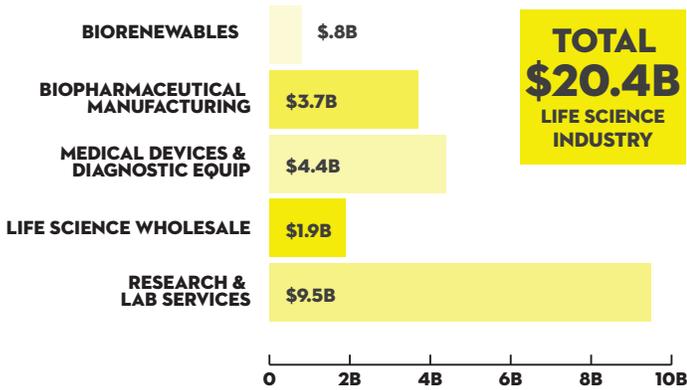
\*Establishment\* refers to an individual facility/physical location. Some firms have multiple locations, which would each be counted separately.

For full report visit: [www.biocom.org/eir](http://www.biocom.org/eir)

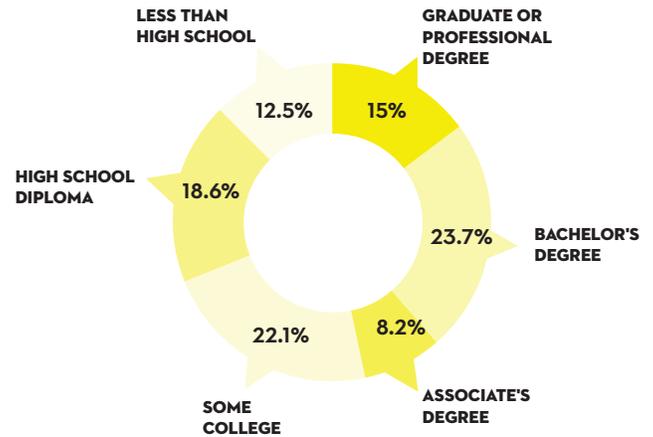
Subsector Average Wage

	BIORENEWABLES	BIOPHARMACEUTICAL MANUFACTURING	MEDICAL DEVICES & DIAGNOSTIC EQUIP	LIFE SCIENCE WHOLESALE	RESEARCH & LAB SERVICES	ALL LIFE SCIENCES
SAN DIEGO COUNTY	\$49,473	\$147,835	\$128,125	\$157,003	\$114,476	\$115,170

Foreign Exports of Life Science Products



Educational Attainment



Lifes Science Innovation Companies

San Diego County has 635 Life Science Innovation Companies.

	COMPANY COUNT
BioRenewables	2
Biopharmaceutical Manufacturing	91
Medical Devices & Diagnostic Equip	64
Research & Development	478

'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.

For full report visit: [www.biocom.org/eir](http://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.

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.

