



The largest sector by employment and establishments was
Research & Lab Services



\$323.4 million
in research funding from
National Institutes of Health
(NIH) for FY2019



959
Life Science
establishments

THE IMPACT OF LIFE SCIENCE IN ALAMEDA COUNTY AND CONTRA COSTA COUNTY

The East Bay includes the two counties of Alameda and Contra Costa. East Bay companies in the Life Science Industry directly employed 40,197 people in 2019 with average annual earnings of \$127,173 per year in Alameda and \$98,688 per year in Contra Costa. The industry supported 98,204 jobs in the region (direct/indirect/induced) in 2019 & generated \$26B in economic activity. The largest sector in the two counties by employment and establishments was Research & Lab Services, more than all the other sectors combined.

Annual Economic Impact

	ALAMEDA	CONTRA COSTA
Economic Activity	\$23.4B	\$2.6B
Market Value of Goods & Services	\$13.7B	\$1.4B
Total Jobs (direct/indirect/induced)	87,242	10,962
Labor Income (salaries/wages/benefits paid)	\$7.7B	\$0.8B

NIH Funding

California received more than \$4.59B in NIH funding in fiscal year 2019 with \$323.4M flowing to the East Bay. Alameda County garnered close to \$316.9M and Contra Costa County received \$6.5M.

Source: NIH (4/2020)

Subsector Employment & Establishments

	Employment in 2019		Establishments	
	ALAMEDA	CONTRA COSTA	ALAMEDA	CONTRA COSTA
BioRenewables Includes biofuels, specialty enzymes and chemicals, algae research, and key elements of agriculture.	247	117	9	10
Biopharmaceutical Manufacturing The production of medicines, botanicals, pharmaceuticals, in-vitro diagnostic substances, and biological products.	3,328	701	49	8
Medical Devices & Diagnostic Equip Laboratory equipment and supplies, optical instruments, electromedical apparatus, surgical and medical instruments, dental equipment and dental product producing laboratories.	8,199	1,277	148	55
Life Science Wholesale Wholesaling and distributing medical equipment and supplies, and the wholesaling of pharmaceuticals and related products.	1,762	475	121	70
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.	21,372	2,719	372	117
TOTAL	34,908	5,289	699	260

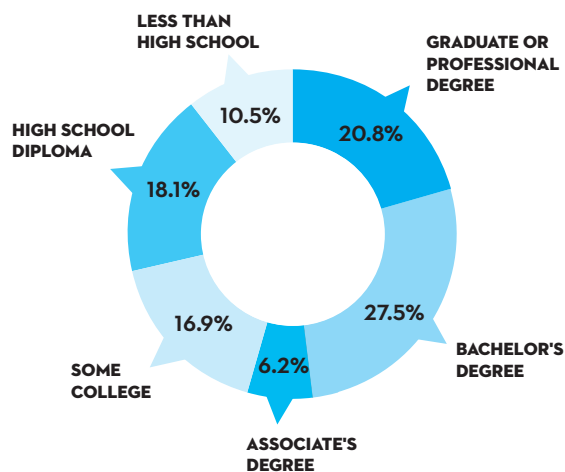
*'Establishment' refers to an individual facility/physical location.
Some firms have multiple locations, which would each be counted separately.

Subsector Average Wage (Wages by Sector & County)

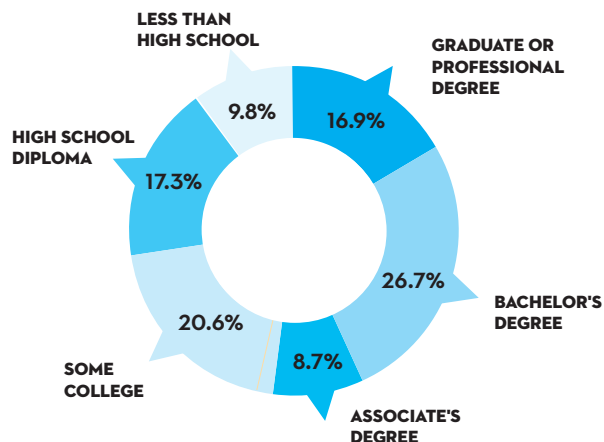
	BIORENEWABLES	BIOPHARMACEUTICAL MANUFACTURING	MEDICAL DEVICES & DIAGNOSTIC EQUIP	LIFE SCIENCE WHOLESALE	RESEARCH & LAB SERVICES	ALL LIFE SCIENCES
Alameda	\$94,936	\$178,266	\$168,290	\$98,985	\$106,139	\$127,173
Contra Costa	\$56,534	\$155,675	\$103,475	\$111,639	\$81,299	\$98,688

Educational Attainment

ALAMEDA



CONTRA COSTA



East Bay Policy Priorities

The East Bay is home to the Berkeley/Emeryville life science cluster, which includes many small, early stage companies that spin out of UC Berkeley. These companies can benefit from concierge assistance through city economic development departments as they navigate permitting processes involved in scale-up following incubator graduation. We have heard from members that they share concerns around affordable housing and connected transit systems; challenges that are evident throughout the Bay Area. Finally, physical security concerns in downtown areas and near Caltrans rights-of-way are important for members located in this area.

Alameda County is also home to a large concentration of companies in Hayward, Fremont and Newark - companies that are typically four times the average size of Bay Area life science companies. Mostly engaged in medical device and biopharmaceutical manufacturing, these companies have benefitted from streamlined permitting services available through city departments. We have heard from members in this area that workforce development programs to ensure a steady skilled pool of workers for manufacturing settings is a top concern.

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

Biocom is the leader and advocate for California's life science sector. We work on behalf of more than 1,300 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 Biocom's 2020 California Economic Impact Report produced by Biocom and Clower & Associates.

For the full report please visit our website: www.biocom.org/eir

The 2020 Databook used the same industry and cluster categories as the 2019 Databook, however, comparisons with data from years before 2019 should be made with caution due to changes in industries definitions, analytical assumptions, and data sources. At the time this data is being prepared, the impact of the global pandemic of COVID-19 is unknown and we must caution readers to consider how current and near-term economic conditions may influence future industry growth.