



2020 CALIFORNIA ECONOMIC IMPACT REPORT

SAN DIEGO COUNTY

The Life Science industry generated **\$41.3B** in economic activity in 2019



\$1.01 billion in research funding from National Institutes of Health (NIH) for FY2019



1,751 Life Science establishments

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 68,063 people in 2019, with an average annual earnings of \$130,411. Total jobs in the region (direct/indirect/induced) was 175,350 in 2019 and economic activity generated \$41.3B. Several Life Sciences occupations in San Diego County show high to very high location quotients, which indicates competitive advantage for key industry capabilities. This is led by Biochemist and Biophysicist occupations where the proportion of total jobs in San Diego County is 4.8 times higher than the national average.

Annual Economic Impact

	IMPACT
Economic Activity	\$41.3B
Market Value of Goods & Services	\$23.8B
Total Jobs (direct/indirect/induced)	175,350
Labor Income (salaries/wages/benefits paid)	\$14.05B

NIH Funding

California received more than \$4.59B in NIH funding in fiscal year 2019, with \$1.01B 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 (4/2020)

Subsector Employment & Establishments

	Employment in 2019	Establishments
BioRenewables Includes biofuels, specialty enzymes and chemicals, algae research, and key elements of agriculture.	1,563	65
Biopharmaceutical Manufacturing The production of medicines, botanicals, pharmaceuticals, in-vitro diagnostic substances, and biological products.	7,565	119
Medical Devices & Diagnostic Equip Laboratory equipment and supplies, optical instruments, electromedical apparatus, surgical and medical instruments, dental equipment and dental product producing laboratories.	11,900	241
Life Science Wholesale Wholesaling and distributing medical equipment and supplies, and the wholesaling of pharmaceuticals and related products.	4,623	394
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.	42,412	932

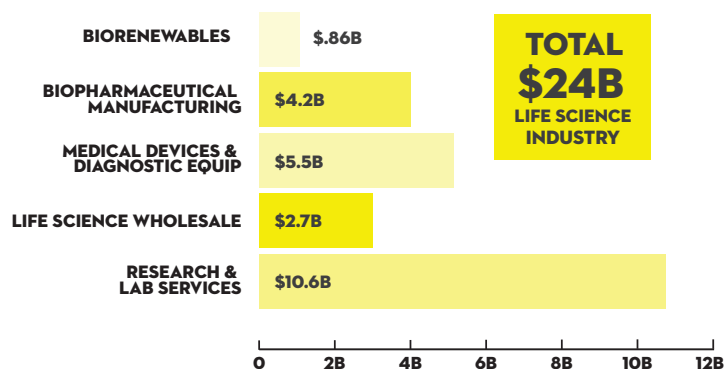
*'Establishment' refers to an individual facility/physical location. Some firms have multiple locations, which would each be counted separately.

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

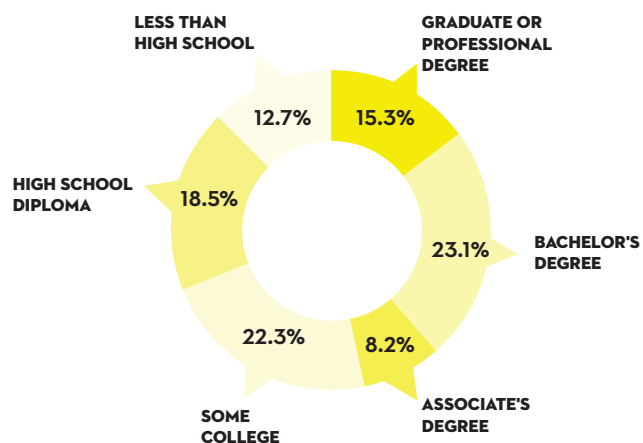
Subsector Average Wage

	BIORENEWABLES	BIOPHARMACEUTICAL MANUFACTURING	MEDICAL DEVICES & DIAGNOSTIC EQUIP	LIFE SCIENCE WHOLESALE	RESEARCH & LAB SERVICES	ALL LIFE SCIENCES
SAN DIEGO COUNTY	\$52,158	\$149,676	\$140,984	\$166,903	\$122,915	\$130,411

Foreign Exports of Life Science Products



Educational Attainment



Life Science Innovation Companies

San Diego County has 960 Life Science Innovation Companies.

	COMPANY COUNT
BioRenewables	4
Biopharmaceutical Manufacturing	96
Medical Devices & Diagnostic Equip	68
Research & Lab Services	792

Life Science Innovation Company refers to the unique company count in the most innovative sectors of the life science industry. These sectors include industrial biotechnology & biofuels, biopharmaceuticals, medical devices & diagnostics equipment, and research & lab services. This should not be confused with 'Establishments' which includes all physical locations of each company in the region in all industry subsectors. For more information, refer to Appendix 3 of Biocom's 2020 California Economic Impact Report Databook.

Advocacy Roots

Biocom was founded 25 years ago to educate San Diego elected officials about water needs of the life science industry; constant, reliable access is necessary to carry out delicate research processes. We continue to advocate for dependable utility access, land use incentives, and consistent permitting processes for our members in San Diego. Recently, we have been diversifying our policy work to include advocacy for expanded transportation networks, the building of middle-income housing, and enhanced infrastructure maintenance as these issues become more important for employee attraction and retention throughout the region.

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.