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employment and establishments was
Research & Lab Services



\$847 million
in research funding from
National Institutes of Health
(NIH) for FY2019



440
Life Science
establishments

THE IMPACT OF LIFE SCIENCE IN THE CITY AND COUNTY OF SAN FRANCISCO

San Francisco City and County cover the same geographical borders. This region's Life Science industry directly employed 19,139 people in 2019 with average annual earnings of \$147,260. The industry supported 29,140 jobs in the region (direct/indirect/induced) in 2019 and generated \$7.5B in economic activity. The largest sector in the city/county by employment and establishments was Research & Lab Services, more than all the other sectors combined.

Annual Economic Impact

	IMPACT
Economic Activity	\$7.5B
Market Value of Goods & Services	\$5.47B
Total Jobs (direct/indirect/induced)	29,140
Labor Income (salaries/wages/benefits paid)	\$3.29B

NIH Funding

California received more than \$4.59B in NIH funding in fiscal year 2019 with \$847M flowing to the City and County of San Francisco, the highest NIH funding of the 9 counties of the Bay Area. 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.	26	4
Biopharmaceutical Manufacturing The production of medicines, botanicals, pharmaceuticals, in-vitro diagnostic substances, and biological products.	192	11
Medical Devices & Diagnostic Equip Laboratory equipment and supplies, optical instruments, electromedical apparatus, surgical and medical instruments, dental equipment and dental product producing laboratories.	492	44
Life Science Wholesale Wholesaling and distributing medical equipment and supplies, and the wholesaling of pharmaceuticals and related products.	1,222	76
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.	17,207	305
TOTAL	19,139	440

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

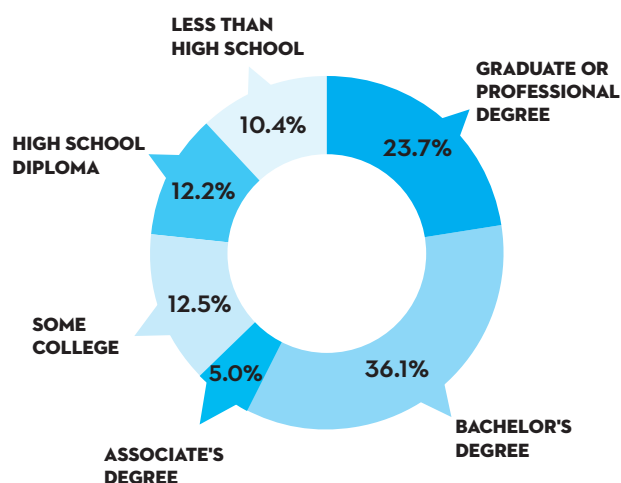
Subsector Average Wage

	BIORENEWABLES	BIOPHARMACEUTICAL MANUFACTURING	MEDICAL DEVICES & DIAGNOSTIC EQUIP	LIFE SCIENCE WHOLESALE	RESEARCH & LAB SERVICES	ALL LIFE SCIENCES
San Francisco City and County	\$69,573	\$154,320	\$109,466	\$147,569	\$148,357	\$147,260

City and County of San Francisco Policy Priorities

San Francisco's Mission Bay is home to a high concentration of incubators and small companies that have close connections to UC San Francisco. The Life Sciences industry has also expanded to other areas of The City such as SOMA and Dogpatch. Recent obstacles to industry development have included competing for space with tech companies, lack of available space to locate companies, and inequity in the application of tax policies. Biocom works with California Strategies in San Francisco to educate the Board of Supervisors and other decision makers on the impacts of land use and tax policies on our industry.

Educational Attainment



The City and County of San Francisco has a distinct competitive advantage in overall education attainment, with almost 60% of the adult population achieving at least a bachelor's degree and almost 24% holding a graduate degree.

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.