



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



**\$686.9 million**  
in research funding from  
National Institutes of Health  
(NIH) for FY2019



**1,603**  
Life Science  
establishments

## THE IMPACT OF LIFE SCIENCE IN SAN MATEO COUNTY AND SANTA CLARA COUNTY

"The Bay Area Peninsula" includes the two counties of San Mateo and Santa Clara. Peninsula companies in the Life Science Industry directly employed 72,294 people in 2019 with average annual earnings of \$263,188 per year in San Mateo and \$156,744 per year in Santa Clara. The industry supported 158,836 jobs in the region (direct/indirect/induced) in 2019 and generated \$68.5B 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. Santa Clara County leads the Bay Area in number of Medical Device establishments.

### Annual Economic Impact

	SAN MATEO	SANTA CLARA
Economic Activity	\$44.0B	\$24.5B
Market Value of Goods & Services	\$29.3B	\$16.0B
Total Jobs (direct/indirect/induced)	83,151	75,685
Labor Income (salaries/wages/benefits paid)	\$12.2B	\$9.5B

### NIH Funding

California received more than \$4.59B in NIH funding in fiscal year 2019 with \$686.9M flowing to the Peninsula. San Mateo County garnered \$100.1M and Santa Clara County received \$586.8M.

Source: NIH (4/2020)

### Subsector Employment & Establishments

	Employment in 2019		Establishments	
	SAN MATEO	SANTA CLARA	SAN MATEO	SANTA CLARA
<b>BioRenewables</b> Includes biofuels, specialty enzymes and chemicals, algae research, and key elements of agriculture.	194	373	11	30
<b>Biopharmaceutical Manufacturing</b> The production of medicines, botanicals, pharmaceuticals, in-vitro diagnostic substances, and biological products.	9,929	3,153	32	36
<b>Medical Devices &amp; Diagnostic Equip</b> Laboratory equipment and supplies, optical instruments, electromedical apparatus, surgical and medical instruments, dental equipment and dental product producing laboratories.	2,149	10,293	101	249
<b>Life Science Wholesale</b> Wholesaling and distributing medical equipment and supplies, and the wholesaling of pharmaceuticals and related products.	866	2,128	75	156
<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.	19,297	23,912	357	556
<b>TOTAL</b>	<b>32,435</b>	<b>39,859</b>	<b>576</b>	<b>1,027</b>

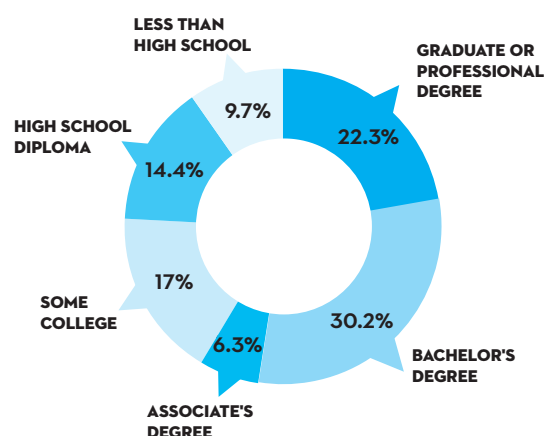
'Establishment' refers to an individual facility/physical location. Some firms have multiple locations, which would each be counted separately.

## Subsector Average Wage (Wages by Sector & County)

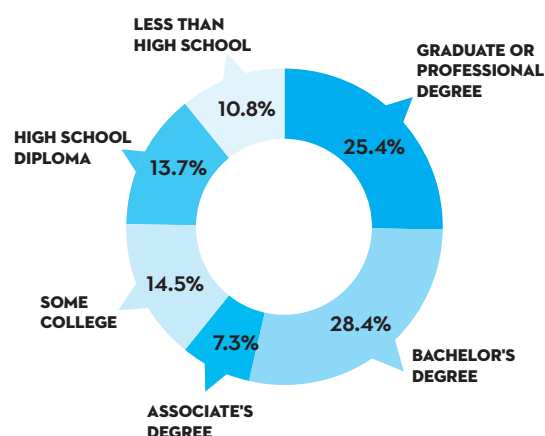
	BIORENEWABLES	BIOPHARMACEUTICAL MANUFACTURING	MEDICAL DEVICES & DIAGNOSTIC EQUIP	LIFE SCIENCE WHOLESALE	RESEARCH & LAB SERVICES	ALL LIFE SCIENCES
San Mateo	\$45,677	\$338,950	\$299,380	\$176,691	\$226,244	\$263,188
Santa Clara	\$63,069	\$196,684	\$181,802	\$184,445	\$139,738	\$156,774

## Educational Attainment

### SAN MATEO



### SANTA CLARA



## Policy Priorities for San Mateo and Santa Clara Counties

The Peninsula is home to the largest concentration of Life Sciences companies in the Bay Area. Many of them are engaged in Research & Lab Services and most of the region's Medical Device & Diagnostics companies are also located here. South San Francisco can be held up as a model for how government can support the growth of a Life Sciences industry cluster. Local elected officials publicly support industry growth, and land use and zoning tools have facilitated the development of more than 200 Life Sciences companies located in a dense area east of Highway 101 in SSF. Further south, Life Sciences companies are located throughout the Peninsula all the way to San Jose, with many companies in and around Palo Alto for proximity to Stanford University and the concentrated venture capital resources located there. The area is renowned for entrepreneurship and, increasingly, the area is giving rise to a number of connected health companies as the Life Sciences and traditional Silicon Valley technologies converge.

Our members on the Peninsula express concerns around affordable housing and connected transit systems; challenges that are evident throughout the Bay Area. Biocom has supported the recent expansion of Caltrain service to South San Francisco. As the Peninsula continues to develop, it is important to locate new housing developments in areas that are close to transit and amenities, in order to avoid additional traffic impacts and collocation issues.

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