



SAN DIEGO'S LIFE SCIENCES CLUSTER

The life sciences cluster is a major driver of San Diego's innovation economy. The region has more than 1,100 life sciences companies and more than 80 independent and university-affiliated research institutes.¹

These research institutes, which include The Scripps Research Institute and the Sanford Burnham Prebys Medical Discovery Institute, provide the region's life sciences cluster with breakthrough technologies that fuel company growth and product development. Major pharmaceutical companies including Eli Lilly, Pfizer, GlaxoSmithKline and Takeda maintain a presence in San Diego to foster collaboration with major research institutes, universities and small biotechnology companies. These unique assets, combined with one of the most talented workforces in the world, make San Diego one of the top life sciences markets in the world.

HIGHLIGHTS

- » **Economic impact:** Life sciences activity accounts for more than \$31.8 billion in total economic impact in San Diego.²
- » **Lab space:** San Diego boasts more than 11 million square feet of lab space, concentrated mid-county around the Torrey Pines, University Town Center and Sorrento Mesa neighborhoods.³
- » **STEM graduates:** San Diego County higher education institutions produce more than 7,000 STEM graduates annually, fueling the growth of the industry.⁴
- » **Jobs:** Life sciences employees on average earn more than \$170,000 annually, more than any other traded cluster in San Diego County.²
- » **VC:** Venture capital investment in life sciences in San Diego County totaled more than \$660 million in 2015.³

KEY COMPANIES

- | | | |
|----------------------|------------------------|----------------------------|
| » ALMA Life Sciences | » GlaxoSmithKline | » ResMed |
| » BD | » Human Longevity Inc. | » Takeda |
| » Eli Lilly | » Illumina | » Thermo Fisher Scientific |
| » Genentech | » Pfizer | |



INNOVATION



MILITARY



TOURISM



LOCAL

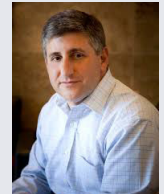


INTELLECT

SPOTLIGHT

David Weitz, Takeda California

Leveraging more than 25 years of experience in research, business, legal and IP, David is head of TCAL and global research externalization. He leads Takeda's 250 person research site in San Diego, which focuses on gastroenterology and central nervous system diseases. David leverages local academic and industry partnerships to expand Takeda's global research efforts.



RESOURCES

Biocom

Biocom is the largest regional life sciences association in the world and represents more than 825 member companies. biocom.org

San Diego Entrepreneurs Exchange

SDEE supports new companies in the life sciences and technology fields, and sponsors networking and educational events. sdentrepreneurs.org

San Diego Biotechnology Network

San Diego Biotechnology Network was founded in 2008 with the goal of providing high quality, face to face networking among professionals working directly in the biotech space. sdbn.org

Wireless Life Sciences Alliance

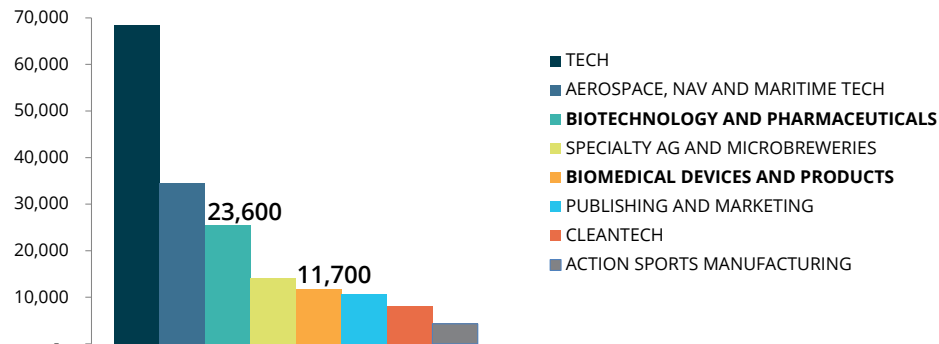
WLSA is a global trade organization that brings CEOs from the world's most innovative wireless health companies together with business leaders and researchers in healthcare and technology, to accelerate business opportunities and improve healthcare. wirelesslifesciences.org

BY THE NUMBERS

Employment Numbers

San Diego's life sciences cluster is made up of two segments: biomedical devices and products and biotechnology and pharmaceuticals. In 2014, life sciences accounted for **35,300** jobs in the San Diego region.

**Employment Comparisons
within San Diego Region's Innovation Economy**



Employment by Key Industries in Life Sciences

Industry	Employment	Avg Annual Pay	LQ*
Res/Dev Phys, Eng, Life Sciences (ex Biotech)	4,100	\$179,500	4.80
Surgical and Medical Instrument Mfg	2,400	\$92,000	2.15
Surgical Appliance and Supplies Mfg	1,800	\$89,100	1.76
Dental Equipment and Supplies Mfg	700	\$76,300	5.00
Other Shared Industries within Cluster	2,700	\$60,700	
Biomedical Devices and Products	11,700	\$115,000	2.50
Research and Development in Biotechnology	9,600	\$149,900	6.96
Res/Dev Phys, Eng, Life Sciences (ex Biotech)	7,000	\$179,500	4.80
In-Vitro Diagnostic Substance Mfg	3,800	\$121,600	17.55
Other Shared Industries within Cluster	3,200	\$79,800	
Biotechnology and Pharmaceuticals	23,600	\$144,500	4.06
Total Life Sciences	35,300	\$134,900	

*LQ=Location Quotient

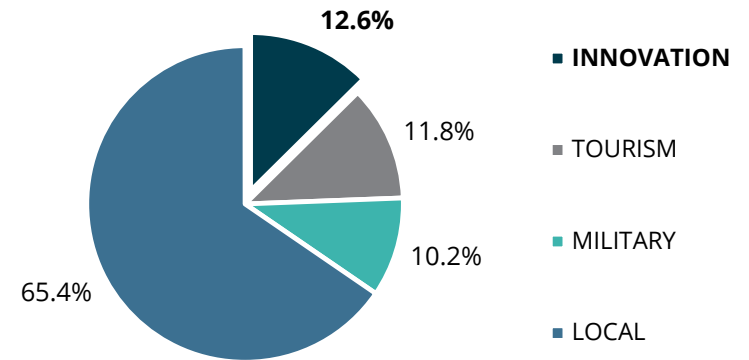
Sources: Introduction: 1. [Biocom Economic Impact Report](#), 2014 Highlights: 2. [Biocom Economic Impact Report](#), 2014 3. JLL, [Life Sciences Outlook](#), 2015 4. EMSI, San Diego MSA Academic Completions, 2015

Our Economies

The vitality of San Diego's economy is reliant upon the strength of the region's four economic drivers – innovation, military, tourism and local.

Life sciences is an intrinsic part of San Diego's innovation economy. As of 2014, innovation was responsible for almost 13 percent of the region's total jobs.

**Employment Comparisons
Across the San Diego Region's Economies**



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