



## SAN DIEGO'S LIFE SCIENCES CLUSTER

The life sciences cluster is a major driver of San Diego's innovation economy. The region is home to more than 1,225 life sciences companies and more than 80 independent and university-affiliated research institutes.<sup>1</sup>

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 life-changing 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 \$33.6 billion in total economic impact in San Diego.<sup>1</sup>
- » **Lab space:** San Diego boasts nearly 17 million square feet of lab space, concentrated mid-county around the Torrey Pines, University Town Center, and Sorrento Mesa neighborhoods.<sup>2</sup>
- » **Increased demand:** The San Diego market continues to see demand for life sciences facilities, with more than 2.4 million square feet added since the beginning of 2016 and 500,000 square feet under constructions<sup>2</sup>
- » **Jobs:** Life sciences employees on average earn more than \$117,000 annually, more than any other traded cluster in San Diego County.<sup>1</sup>
- » **Research Funds:** NIH funding in life sciences in San Diego County totaled more than \$830 million in 2016.<sup>1</sup>
- » **STEM graduates:** San Diego County higher education institutions produce more than 7,000 STEM graduates annually, fueling the growth of the industry.<sup>2</sup>

### KEY COMPANIES

- |                      |                         |                            |
|----------------------|-------------------------|----------------------------|
| » ALMA Life Sciences | » Human Longevity, Inc. | » Pfizer                   |
| » BD                 | » Illumina              | » ResMed                   |
| » Eli Lilly          | » Janssen R&D           | » Takeda                   |
| » Genentech          | » Johnson & Johnson     | » Thermo Fisher Scientific |
| » GlaxoSmithKline    | » Innovation, JLABS     |                            |



INNOVATION



MILITARY



TOURISM



LOCAL



INTELLECT

### SPOTLIGHT

#### Kara Bortone, PhD

In her role as Site Head of Johnson & Johnson Innovation, JLABS San Diego, Kara is responsible for external engagement, innovation sourcing, company onboarding, portfolio management, operational excellence, educational programming and P&L. She catalyzes and supports the translation of science and technology into valuable solutions for patients and consumers across the pharmaceutical, medical device and consumer healthcare sectors.



### RESOURCES

#### Biocom

Biocom is the largest regional life sciences association in the world and represents more than 825 member companies.  
[biocom.org](http://biocom.org)

#### Johnson & Johnson Innovation, JLABS

JLABS is a global network of open innovation ecosystems, empowering innovators to create and accelerate the delivery of life-saving, life-enhancing health and wellness solutions to patients. JLABS San Diego has been home to over 100 cutting edge companies over the past 5 years.  
[jlabs.jnjinnovation.com](http://jlabs.jnjinnovation.com)

#### 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](http://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](http://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 2016, the region's life sciences cluster employed 37,790 people across more than 1,225 companies.



### Employment by Key Industries in Life Sciences<sup>5</sup>

Industry	Employment	Avg Annual Pay
Res/Dev Phys, Eng, Life Sciences (ex Biotech)	4,010	\$167,300
Surgical and Medical Instrument Mfg	2,360	\$92,130
Surgical Appliance and Supplies Mfg	1,610	\$98,080
Dental Equipment and Supplies Mfg	810	\$60,250
Other Shared Industries within Cluster	1,700	\$63,610
<b>Biomedical Devices and Products</b>	<b>10,490</b>	<b>\$115,000</b>
Research and Development in Biotechnology	13,010	\$149,845
Res/Dev Phys, Eng, Life Sciences (ex Biotech)	7,010	\$167,295
In-Vitro Diagnostic Substance Mfg	3,880	\$118,036
Other Shared Industries within Cluster	3,400	\$100,670
<b>Biotechnology and Pharmaceuticals</b>	<b>27,300</b>	<b>\$143,680</b>
<b>Total</b>	<b>37,790</b>	<b>\$135,630</b>

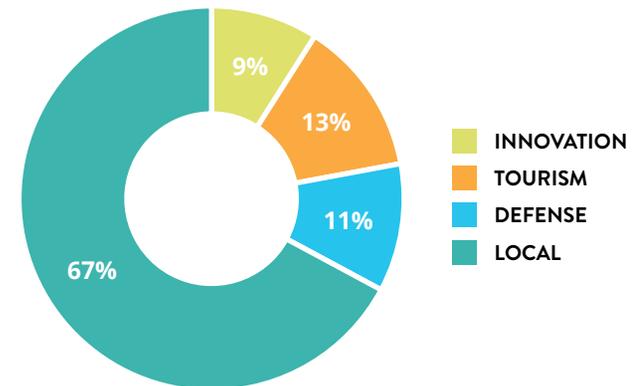
### OUR ECONOMIES

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

Recognized as one of the leading high-tech hubs in the U.S., San Diego's innovation economy is anchored by established life sciences, aerospace, communications, cleantech, and software industries fueled by a collaborative culture and sophisticated support systems focused on commercializing research and growing entrepreneurial, knowledge-based companies.

As of 2016, the innovation economy was responsible for nine percent of the region's total jobs.<sup>5</sup> Life sciences, a key driver behind the region's innovation economy, accounted for more than a quarter of these jobs.

**Employment Comparisons**  
Across the San Diego Region's Economic Drivers<sup>5</sup>



For more information on San Diego's life sciences cluster, please contact:

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Sources: Introduction: 1. [Biocom Economic Impact Report](#), 2017 2. JLL, [Life Sciences Outlook](#), 2017 3. EMSI, Educational Pipeline, 2016 4. San Diego Business Journal, "S.D. Life Science Leasing Footprint Increases 1.1 million square feet," 2017 5. San Diego Regional EDC, Traded Economies Analysis with BLS data, 2016