



THE IMPACT OF LIFE SCIENCE IN ORANGE COUNTY

Orange County is currently home to more than 48,000 life science jobs, having added about 2,500 new jobs over the past five years. Average earnings for these jobs are \$86,000. The data suggest that Orange County is undergoing a substantial shift among the life science industry subsectors with Medical Devices Manufacturing being highly competitive.

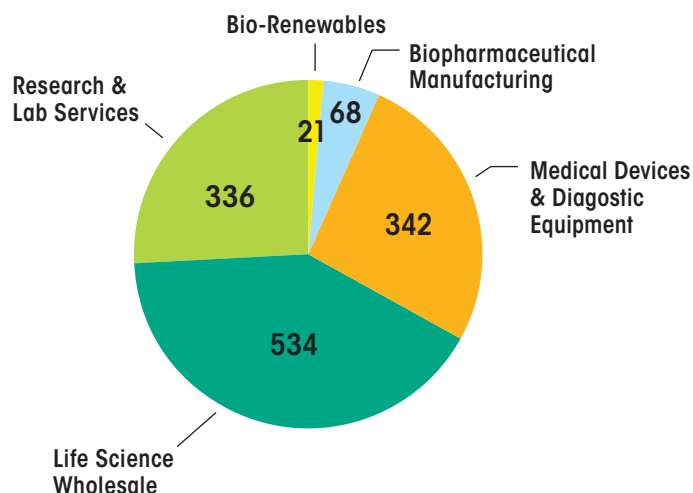
Medical Devices Manufacturing is a highly competitive subsector in Orange County.

ANNUAL ECONOMIC IMPACT

DESCRIPTION	IMPACT
Economic Activity	\$33 billion
Gross Area Product	\$17.4 billion
Attributable Jobs	121,000
Labor Income	\$9.8 billion

The industry generates \$33 billion in annual economic activity.

BREAKDOWN OF LIFE SCIENCE COMPANY SECTORS



There are 1,301 life science establishments in Orange County.


NIH Funding

Private and public institutions, including universities, labs, and companies in Orange County received \$126 million of California's total \$3.6 billion of NIH funding in 2016. This funding provides the resources to support cutting edge research in the region. The comparatively small amount is reflective of the relative lack of a major research university.

Orange County received \$126 Million in Research Funding from National Institutes of Health (NIH) for FY2016.

SUBSECTOR

EMPLOYMENT IN 2016

 Bio-Renewables	546
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Includes biofuels, specialty enzymes and chemicals, algae research, and key elements of agriculture.

 Biopharmaceutical Manufacturing	3,827
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The production of medicines, botanicals, pharmaceuticals, in-vitro diagnostic substances, and biological products.

 Medical Devices & Diagnostic Equipment	23,673
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Laboratory equipment and supplies, optical instruments, electromedical apparatus, surgical and medical instruments, and dental equipment.

 Life Science Wholesale	8,774
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Wholesaling and distributing medical equipment and supplies and the wholesaling of drugs and related products.

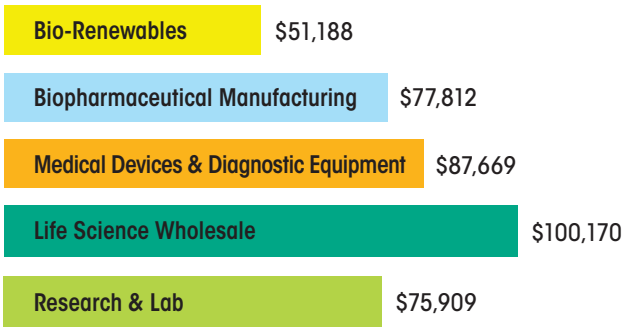
 Research & Lab Services	11,229
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Research and development in biotech, medical laboratories, and industries representing testing laboratories, as well as higher education.

Economic Impact data prepared by TClower & Associates

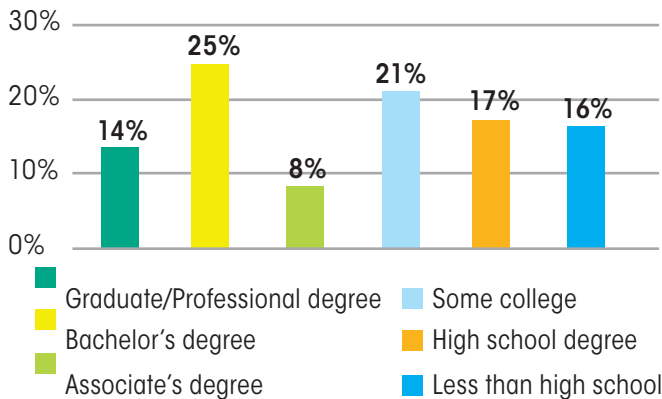


AVERAGE WAGES ACROSS SUBSECTORS



The annual average industry wage was \$86,004 with Life Science Wholesale topping the industry at \$100,170.

EDUCATIONAL ATTAINMENT



Orange County has a well educated workforce with 14% of the region's population having obtained a graduate or professional degree and 25% having obtained a bachelor's degree, both well above national percentages. Almost 70% of Orange County adults have at least some college education, though there is substantial competition for the most skilled workers across industries in this diversified economy.

This is a condensed summary of the Economic Impact Report produced by Biocom and TClower & Associates. For the full report, please visit our website: www.biocom.org

FOREIGN EXPORTS OF LIFE SCIENCE PRODUCTS

SUBSECTOR	EXPORTS
Bio-Renewables	\$189 million
Biopharmaceutical Manufacturing	\$576 million
Medical Devices & Diagnostic Equipment	\$2.8 billion
Life Science Wholesale	\$350 million
Research & Lab Services	\$95 million
TOTAL LIFE SCIENCE INDUSTRY	\$4 billion

Life science exports in Orange County totaled more than \$4 billion in 2015, driven by almost \$2.9 billion in Medical Devices and Diagnostic Equipment shipments.

About Biocom

Biocom is the largest, most experienced leader and advocate for California's life science sector. We work on behalf of more than 900 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.

Founded in 1995 in San Diego, Biocom provides the strongest public voice to research institutions and companies that fuel the local and state-wide economy. Our goal is simple: to help our members produce novel solutions that improve the human condition. In addition to its San Diego headquarters, Biocom has continuous staff presence in Los Angeles, San Francisco, Sacramento, Washington, D.C. and Tokyo. Our broad membership benefits apply to biotechnology, pharmaceutical, medical device, genomics and diagnostics companies of all sizes, as well as to research universities and institutes, clinical research organizations, investors and service providers.