

Trends in the Washington State Life Science Industry



Washington's growing life science industry encompasses multinational corporations, innovative startups, world-class academic and non-profit research institutions, and government laboratories. The state is a global leader in biotechnology, medical device, global health, biofuels, bioagriculture, and veterinary medicine. Washington is emerging as a leader in regenerative and personalized medicine.



12% Life Sciences Job Growth in WA State 2007-2013



\$1.1 Billion in Transactions (IPOs, M&A activity, and Venture Equity) in 2014

Statewide Presence

71
Washington cities host 567 life science companies and research organizations (see back page)

182
Biopharma Companies

274
Medical Device Companies

92
Non-profit research institutions

Employment

5th
Largest employment sector in the state and growing

34,200
Over 34,000 individuals employed directly in life science jobs

92,400
Total life science sector jobs supported in Washington State

Economic Impact

\$11.4B
Added to Washington State's GDP

\$7.1B
In personal income

\$83,000
Average annual wage for life sciences jobs

\$53,000
Average wage for other WA private sector jobs

Policy Priorities

Stable and supportive business, tax and regulatory policies

Available risk capital covering all stages of the business cycle

Well-funded world class research

Educated workforce and talent pool

Patience and long-term perspective

An Economist's Viewpoint

“ Federal research funding remains a bright spot for life sciences in Washington. For Fiscal Year 2014, National Institutes of Health grants to Washington organizations totaled \$858 million, up from \$835 million in FY 2013. The state's share of NIH grants has grown from 3.5 percent in FY 2007 to 4.0 percent in FY 2014. ”

— Kriss Sjolom, Vice President, Research and Economist, WRC

71 Washington Cities Host Life Science Employers

Life Science Firms/Organizations by City

CITY	BIOTECH/ PHARMA	MEDTECH/ DIGITAL HEALTH	NON- PROFIT, RESEARCH, ACADEMIC	OTHER
Arlington		2		
Auburn	1			
Bainbridge Island	3	1		
Ballard		1		
Battle Ground		1		
Bellevue	12	18	4	
Bellingham		3		
Black Diamond		1		
Blaine		3		
Bothell	17	14	2	1
Camas		1		
Carlsborg		1		
Cheney			1	
Coupeville		1		
Duvall		1		
Edmonds		1		
Ellensburg			1	
Everett	1	4		1
Federal Way		3	1	
Ferndale		2		
Friday Harbor		2		
Gig Harbor	1	1		
Hansville	2			
Hobart		1		
Issaquah		6	2	
Joint Base Lewis McChord			1	
Kenmore	1	1	1	
Kennewick	1		1	
Kent		5		
Kirkland	6	12	1	2
Lakewood		1		
Liberty Lake		2		
Lynden		1		
Lynnwood	2	2		
Maple Valley		2		
Mercer Island	3	3		

CITY	BIOTECH/ PHARMA	MEDTECH/ DIGITAL HEALTH	NON- PROFIT, RESEARCH, ACADEMIC	OTHER
Mill Creek	1	1		
Monroe		2		
Moses Lake	1			
Mountlake Terrace		1	1	
Newcastle		2		
Mukilteo		1	1	
Normandy Park	1	1		
Olympia			1	
Pasco		1		
Point Roberts	1			
Port Orchard		1		
Poulsbo		3		
Pullman	2	3	1	1
Puyallup				1
Redmond	9	21		1
Renton		1	2	
Richland		4	3	
Sammamish	1	3	1	
Seattle	95	101	55	4
Shoreline	3		1	
Silverdale				1
Snohomish	1			
Snoqualmie		1		
Spokane	8	8	6	4
Stanwood	1			
Sumas		1		
Tacoma	3		3	
Tukwila		2	1	
Tulalip	1			
University Place		1		
Vancouver	2	12		1
Vashon	2	1		
Walla Walla		1		
Woodinville	1	4		1
Yakima			1	1
567 TOTAL COMPANIES	182	274	92	19

**OTHER INCLUDES

Air Quality Improvement, BioAgriculture, BioFuels, Cannabis Testing/Research, Clean Technology, Clean Water and Energy, Clinic, Dental Laboratory, Environmental BioSensing, Healthcare Delivery, Industrial Biotechnology, Laboratory Automation, Natural Medicine, Regulated Testing Laboratory, Sustainability