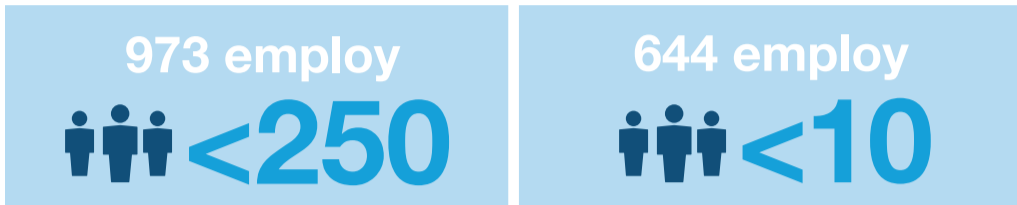


UK Medical Biotechnology Sector Strength & Opportunity 2014

Companies, Employment and Turnover



The remainder of the sector is composed of the specialist service & supply chain that supports both the medical biotechnology and pharmaceutical sectors.

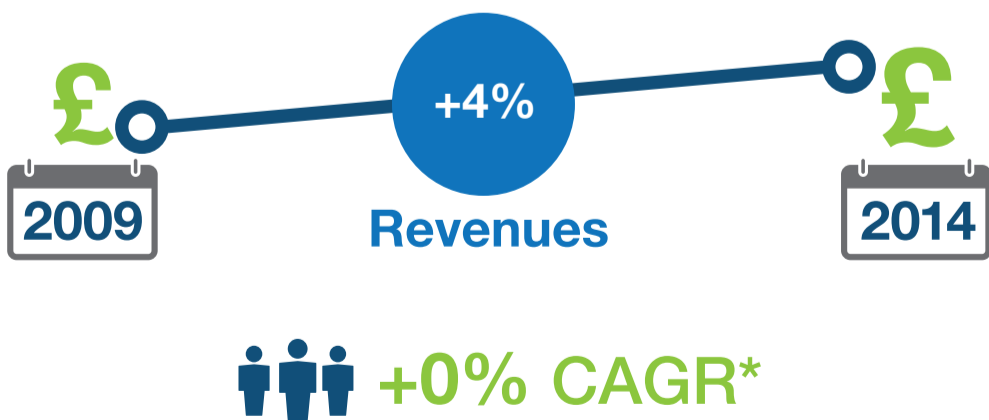


Largest Segments by Employment and Revenue

- Small Molecules**
The top 3 R&D segments for employment and revenue are those containing companies developing therapies based on small molecule, antibody and therapeutic protein technology.
 - Antibody**
 - Therapeutic Proteins**
- These 3 segments account for 22% of employment and 36% of revenue.**

Growth Trends

Over 2009 to 2014 a sample of over 250 medical biotechnology companies showed CAGR trend of less than 0.1% increase in employment while the revenue trend was 4% CAGR.

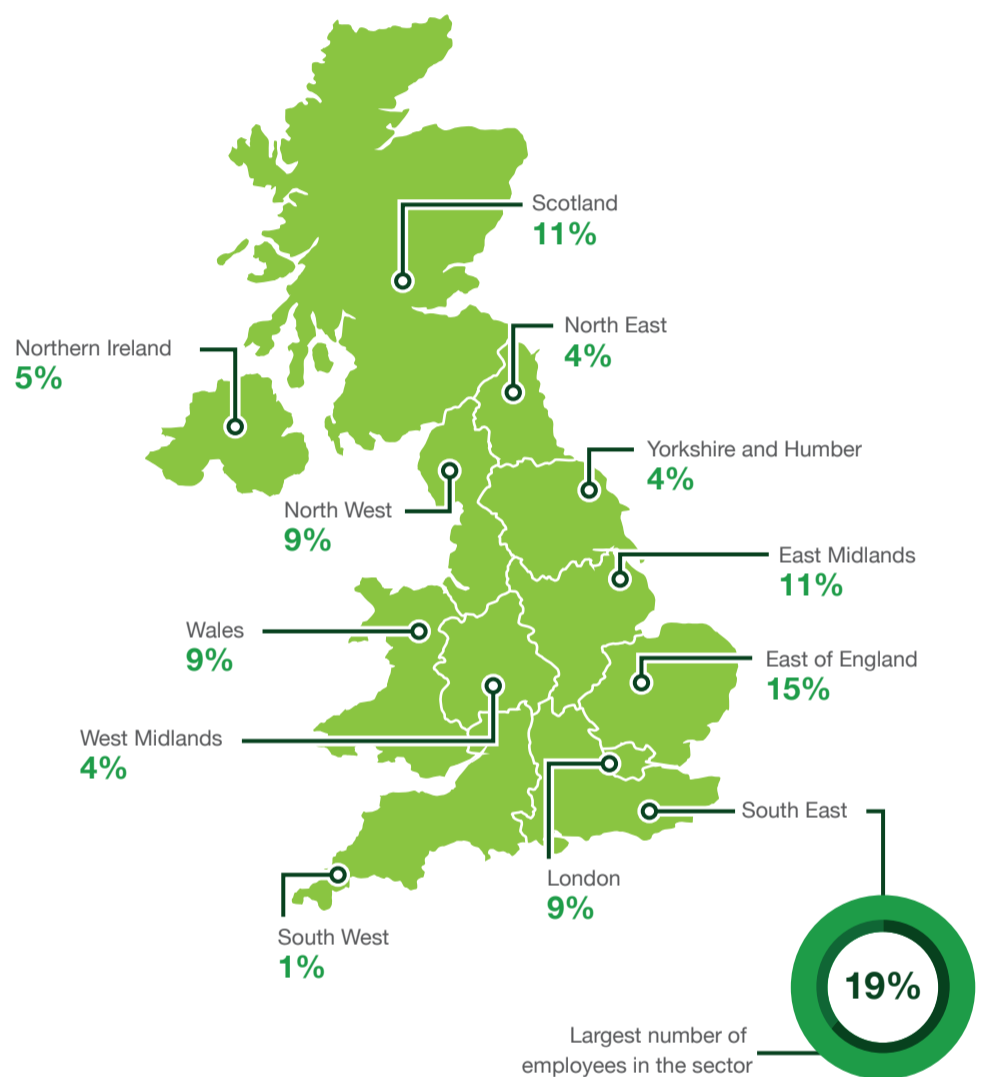


Top 3 segments showing fastest growth trends in employment were:

Therapeutic Proteins	15%
Small Molecules	14%
Advanced Therapy Medicinal Products	9%

* CAGR = Compound Annual Growth Rate

Distribution of Employment Across UK



Service and Supply Chain

An essential cluster of specialist suppliers supports the medical biotechnology and pharmaceutical sectors in the UK. Does not include: Non-life science companies.

- Contract Research and Manufacturing**
- Equipment and Consumables Suppliers**
- Clinical Research Organisations**



80% of total supply chain employment and revenue

For more info : www.lifesciences.ukti.gov.uk

www.gov.uk/government/collections/bioscience-and-health-technology-database-annual-reports