

UK Pharmaceutical Sector Strength & Opportunity 2014

Companies, Employment and Turnover



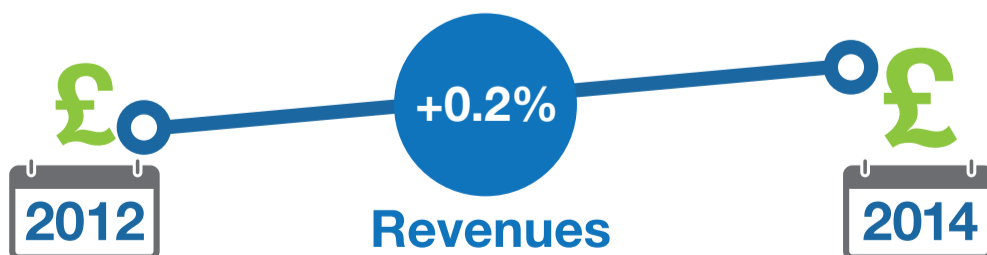
Largest Segments by Employment and Revenue

- Small Molecules** **78% employed by Global Top 20 companies**
- Therapeutic Proteins** Companies who obtain the majority of their turnover from medicines based on small molecules employ the largest proportion of the workforce, and 78% of this group is employed by the global Top 20 companies
- Vaccines**

Growth Trends

Over the period 2011-2014 the sector trend data shows a small increase in estimated turnover, while employment recorded a -2.4% CAGR. The majority of this reduction has been in the small molecule segment

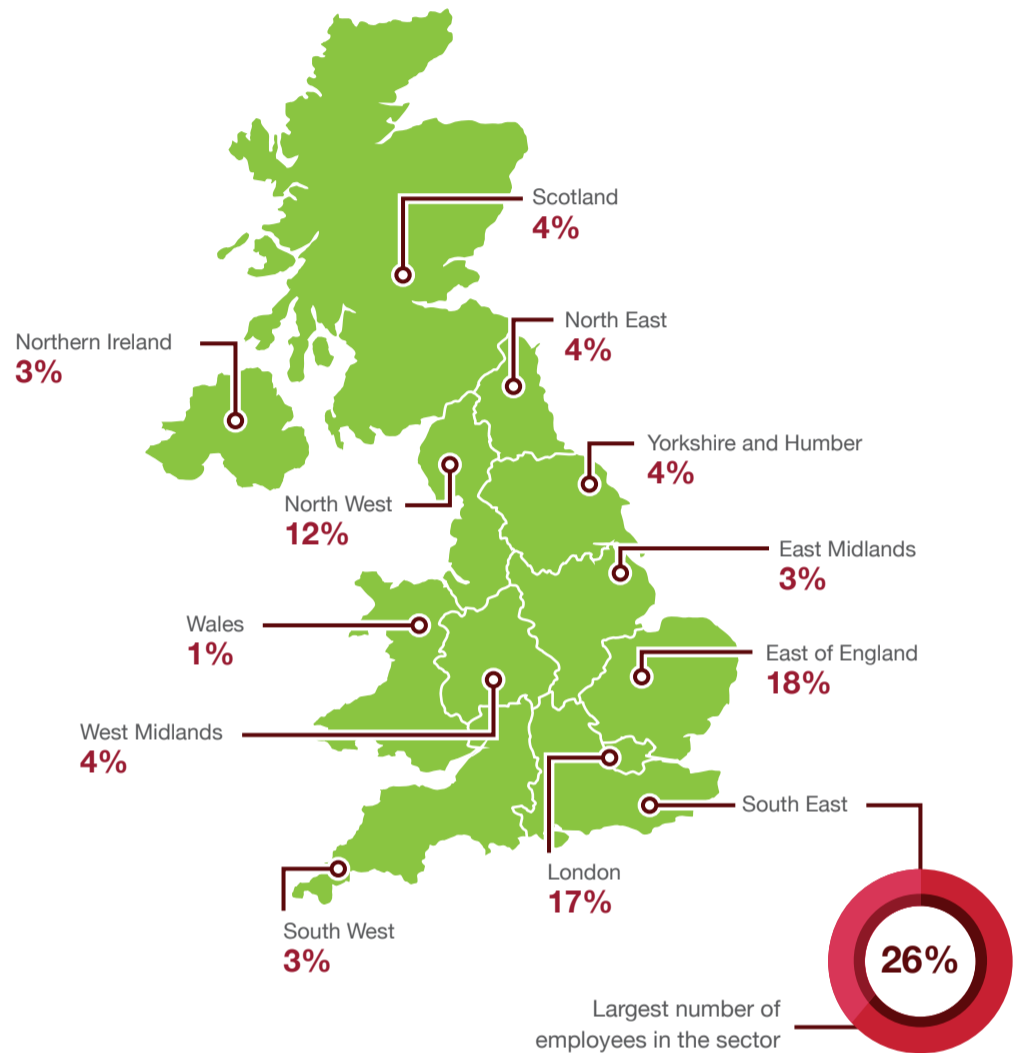
In contrast, the supply chain and services saw an increase in estimated employment over this period



-2.4% CAGR* (2011 - 2014)

* 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**

935
companies. Employing

33,700
staff. Generating

£9.1bn
in revenues

80% of total supply chain
employment and
revenue

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