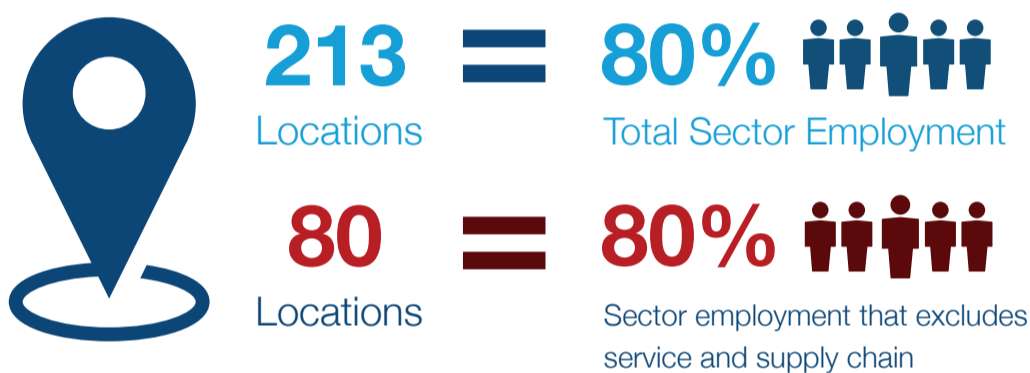


# UK Biopharmaceutical Sector Strength & Opportunity 2015

## Companies, Employment and Turnover



## Largest Segments by Revenue

- Small Molecules**  
75% of the sector that excludes the service and supply chain employed by Global Top 25
- Therapeutic Proteins**  
Companies who obtain the majority of their revenue from medicines based on small molecules employ the largest percentage. 67% of employment in the small molecule segment is in the Global Top 25 pharmaceutical companies.
- Vaccines**

## Growth Trends

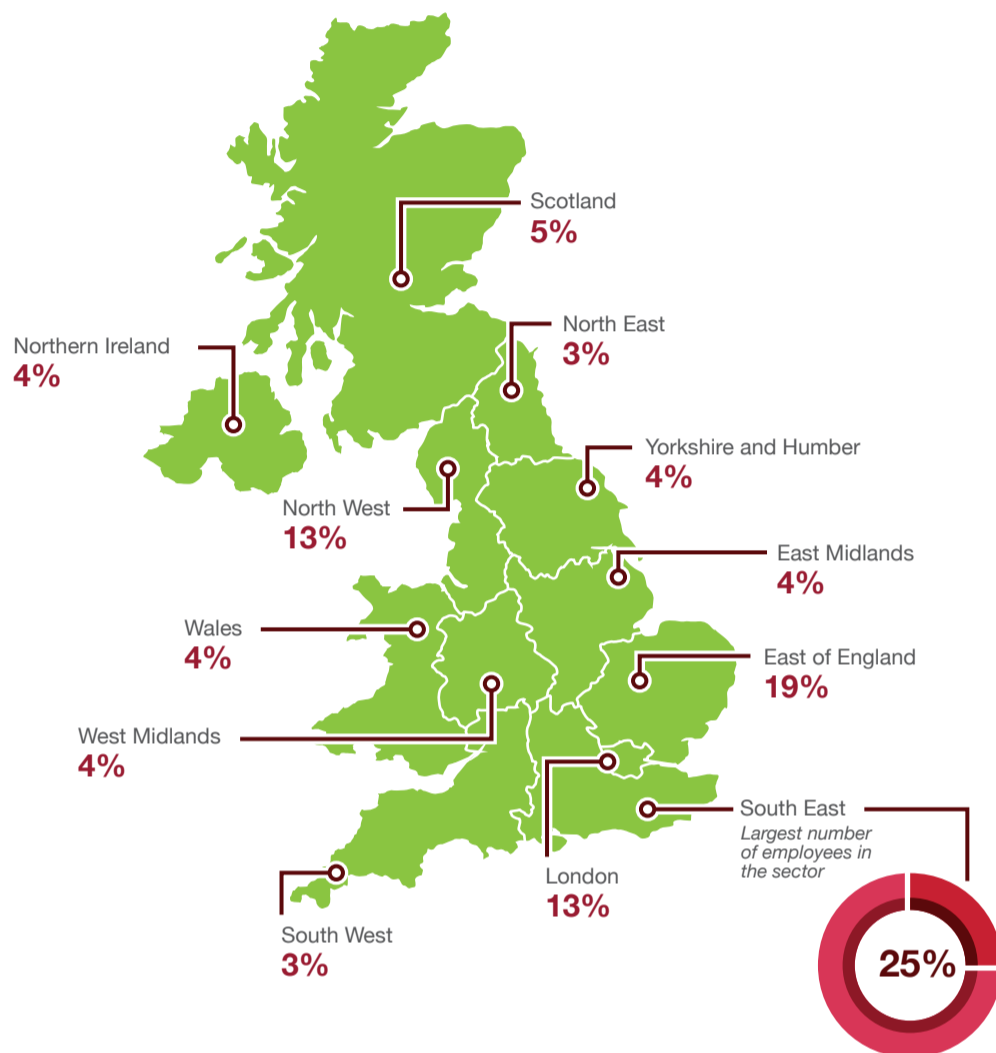
Over 2011 to 2015 the sector trend data shows a small decrease in estimated employment, while revenue decreased by -1.3% CAGR. The majority of the employment and revenue reduction was in the small molecule segment dominated by the larger biopharmaceutical companies.

Over the same period the service and supply chain employment grew at a CAGR of 3.7%.



\* CAGR = Compound Annual Growth Rate

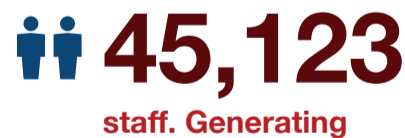
## Distribution of Employment Across UK



## 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**



Employment in the service & supply chain grew by 3.7% CAGR over 2011-2015 and 4.8% CAGR in revenue



Advanced Therapy Medicinal Products employment has grown by 6% over 2011-2015 the highest of the therapy segments.

Clinical Research organisations employment has grown by 13% over 2015-2015 the highest for the whole sector.

For More Info : [www.lifesciences.ukti.gov.uk](http://www.lifesciences.ukti.gov.uk)

[www.gov.uk/government/collections/bioscience-and-health-technology-database-annual-reports](http://www.gov.uk/government/collections/bioscience-and-health-technology-database-annual-reports)