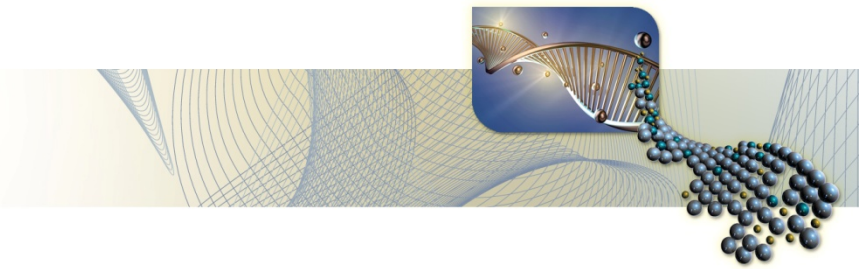


DELAWARE



Delaware is highly specialized in its overall concentration of bioscience industry employment (location quotient of 1.61), though the State industry has contracted overall since 2001. Two bioscience subsectors show employment specialization: medical devices and equipment (location quotient 2.18) and research, testing and medical laboratories (1.89). Academic research expenditures in biosciences were \$37 million in 2008, with a heavy concentration in the agricultural sciences, and an overall growth rate of 27 percent, higher than the national rate. Funding from the National Institutes of Health has increased slightly, up 2.7 percent in baseline funding over the last six years, and when additional 2009 funding from the American Recovery and Reinvestment Act (ARRA) are included this growth rate is a strong 34 percent. The 1,002 patents issued in the last six years were well diversified and placed Delaware substantially higher than its rank by population.

●●● Bioscience Performance Metrics

Summary of State Performance in Selected Bioscience-related Metrics

Metrics	Delaware	United States	Rank*
Bioscience Industry, 2008			
Total Bioscience Industry Employment, 2008	7,247	1,420,324	IV
Bioscience Industry Location Quotient, 2008	1.61	n/a	I
Biosciences Industry Establishments, 2008	158	47,593	V
Academic R&D Expenditures, FY 2008			
Bioscience R&D (\$ thousands)	\$37,005	\$31,818,810	51
Bioscience Share of Total R&D	27.8%	61.3%	50
Bioscience R&D Per Capita	\$42.23	\$104.54	47
Change in Bioscience R&D, FY 2004–08	27.3%	22.3%	12
NIH Funding, FY 2009			
Total, Including ARRA Funds (\$ thousands)	\$39,163	\$25,837,590	44
Per Capita Funding	\$44.25	\$84.16	33
Change in Baseline Funding, FY 2004–09**	2.7%	-4.7%	19
Change in Total Funding, FY 2004–09	34.2%	14.6%	11
Clinical Trials, Initiated 2009	70	5,299	47
Higher Education Degrees in Bioscience Fields, AY 2008	489	161,811	47
Employment in Bioscience-related Occupations, 2008	2,700	717,510	42
Bioscience Venture Capital Investments, 2004–09 (\$ millions)	\$5.6	\$60,099	48
Bioscience and Related Patents, 2004–09	1,002	75,593	25

*State ranking figures for bioscience industry employment metrics are calculated as quintiles (I=Top Quintile; V=Bottom Quintile). All other metrics are ranked 1-52.

**Baseline Funding does not include American Recovery and Reinvestment Act (ARRA) funds for 2009.

For source notes, see end of State Profile.

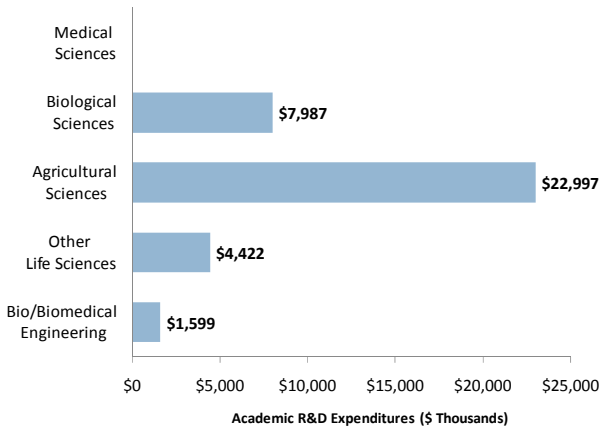
●●● Bioscience Industry Base, 2008

INDUSTRY SUBSECTOR	Delaware		United States	
	2008	2001-08 Change	2008	2001-08 Change
AGRICULTURAL FEEDSTOCK & CHEMICALS				
Establishments	5	-33.1%	2,440	16.0%
Employment	241	-64.1%	114,793	1.9%
Location Quotient	0.66		n/a	
Direct-Effect Employment Multiplier	3.77		11.33	
Total Employment Impact	906		1,284,650	
Average Annual Wage	\$94,922		\$72,279	
DRUGS & PHARMACEUTICALS				
Establishments	10	150.0%	2,771	6.4%
Employment	647	-22.8%	311,882	2.3%
Location Quotient	0.65		n/a	
Direct-Effect Employment Multiplier	4.59		9.92	
Total Employment Impact	2,967		2,873,278	
Average Annual Wage	\$81,133		\$93,378	
MEDICAL DEVICES & EQUIPMENT				
Establishments	37	25.4%	15,227	0.4%
Employment	3,008	-5.9%	435,509	2.0%
Location Quotient	2.18		n/a	
Direct-Effect Employment Multiplier	3.13		4.87	
Total Employment Impact	9,423		2,029,581	
Average Annual Wage	\$74,279		\$63,606	
RESEARCH, TESTING, & MEDICAL LABORATORIES				
Establishments	106	91.7%	27,154	57.7%
Employment	3,351	-9.8%	558,140	46.1%
Location Quotient	1.89		n/a	
Direct-Effect Employment Multiplier	2.21		3.30	
Total Employment Impact	7,392		1,853,127	
Average Annual Wage	\$107,312		\$80,785	
TOTAL BIOSCIENCES INDUSTRY				
Establishments	158	63.6%	47,593	28.3%
Employment	7,247	-13.9%	1,420,324	15.8%
Location Quotient	1.61		n/a	
Direct-Effect Employment Multiplier	2.85		5.82	
Total Employment Impact	20,689		8,040,636	
Average Annual Wage	\$90,850		\$77,595	
TOTAL PRIVATE SECTOR				
Establishments	29,574	18.4%	8,860,956	13.8%
Employment	361,149	2.2%	113,917,377	3.5%
Average Annual Wage	\$47,648		\$45,229	

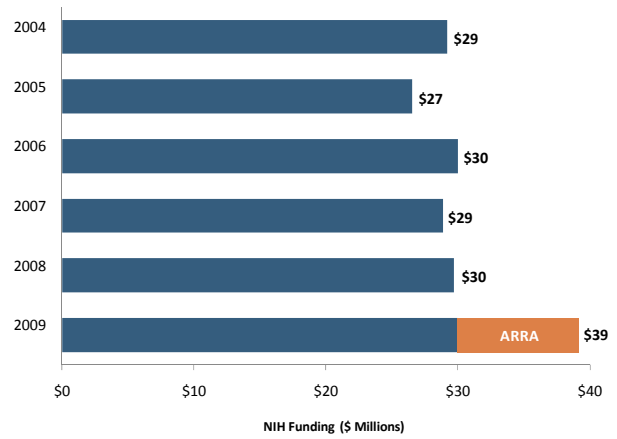
Note: U.S. employment metrics include Puerto Rico. Estimates of total employment impacts do not include Puerto Rico.

Bioscience Performance Metrics

Bioscience Academic R&D Expenditures in Delaware, FY 2008

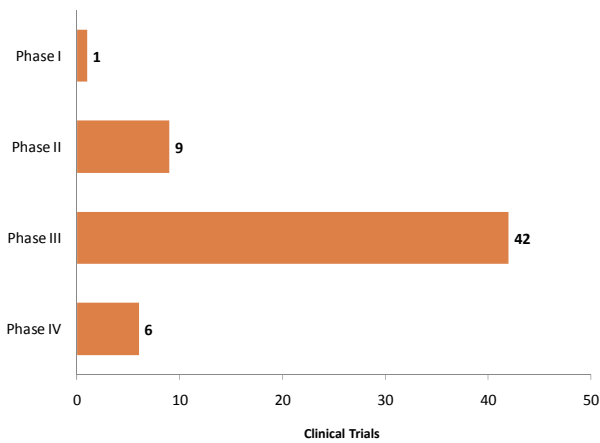


NIH Awards in Delaware, 2004–2009

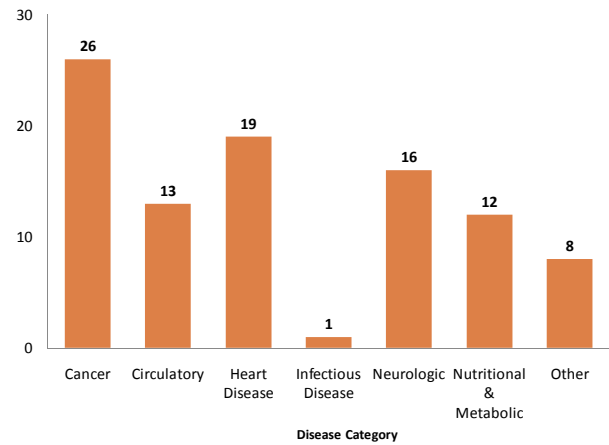


Recent Clinical Trial Activities

Clinical Trials by Phase in Delaware, 2009

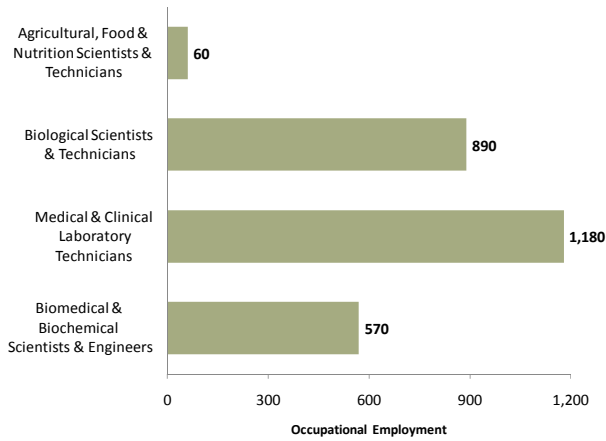


Clinical Trials by Major Disease Category in Delaware, 2009

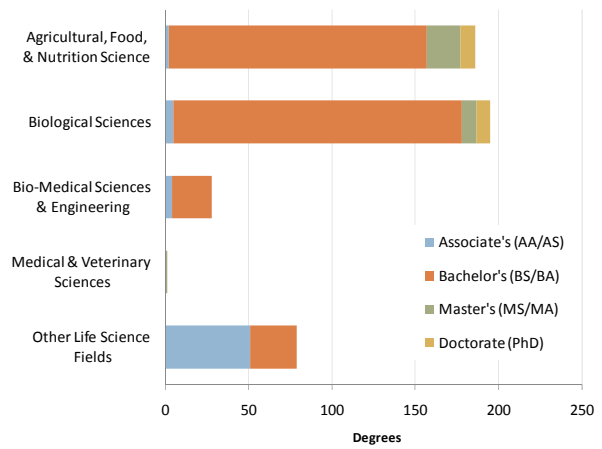


Bioscience Talent Base

Bioscience-related Occupational Employment in Delaware, 2008

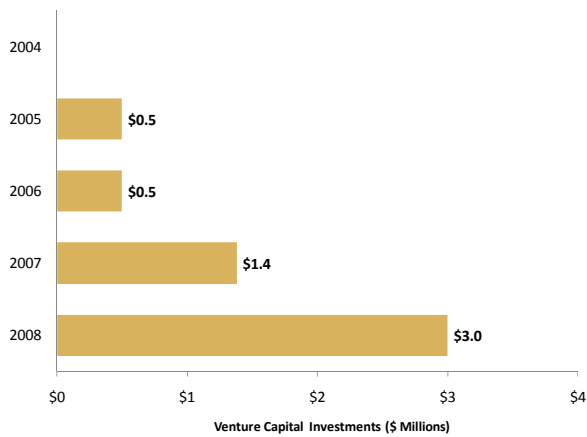


Bioscience-related Degrees in Delaware, AY 2008

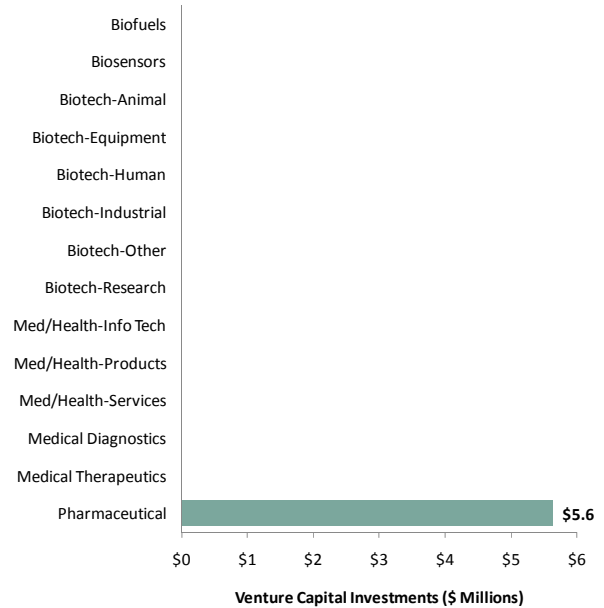


Bioscience Venture Capital

Bioscience-related Venture Capital Investments in Delaware, 2004–2009

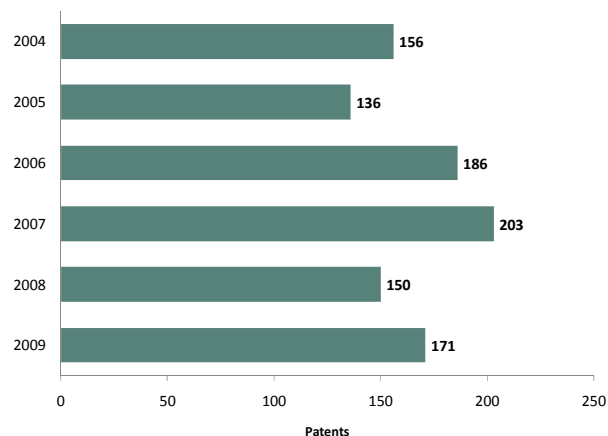


Bioscience-related Venture Capital Investments in Delaware by Segment, 2004–2009

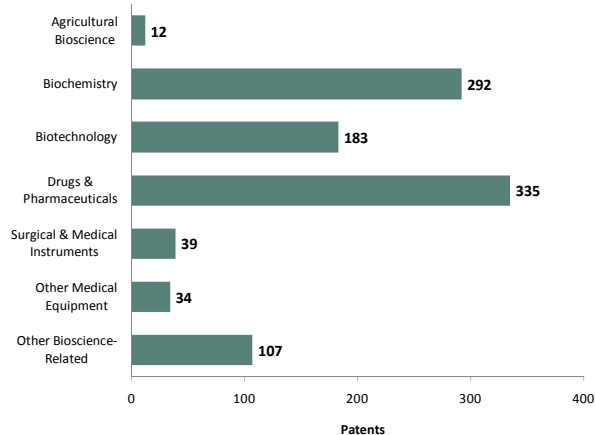


●●● Bioscience Patents

Bioscience-related Patents in Delaware, 2004–2009



Bioscience-related Patents by Classification Group in Delaware, 2004–2009



State Bioscience Contact

Delaware BioScience Association

1 Innovation Way, Suite 300
 Newark, DE 19711
 P: (302) 452-1104
 F: (302) 452-1101
www.delawarebio.org

Source Notes:

Employment, Establishment, and Wage Data: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW) industry data provided by the Minnesota IMPLAN Group, 2001 and 2008.

Employment Multipliers: U.S. Bureau of Economic Analysis RIMS II Employment Multipliers, 2006 (most currently available).

Academic R&D Expenditures: National Science Foundation (NSF) Survey of Research and Development Expenditures at Universities and Colleges, 2004 and 2008.

NIH Funding: National Institutes of Health, Office of Extramural Research, Award Trends, Dollars Awarded by State, 2004 and 2009.

Clinical Trials: National Institutes of Health, Clinicaltrials.gov, trials that were initiated in 2009.

Higher Education Degrees: National Center for Educational Statistics, Integrated Postsecondary Education Data System (IPEDS), 2008.

Occupational Employment: U.S. Bureau of Labor Statistics, Occupational Employment Statistics (OES) survey data, 2008.

Venture Capital: Thomson Reuters' VentureXpert Database, 2004–2009, as of January 15, 2010.

Patents: U.S. Patent & Trademark Office data as available from the Thomson Reuters' Delphion Patent Analysis Database, 2004–2009, as of January 15, 2010.

For a more detailed discussion of the data and methodology used, please see the Appendix to the full national report. ©2010