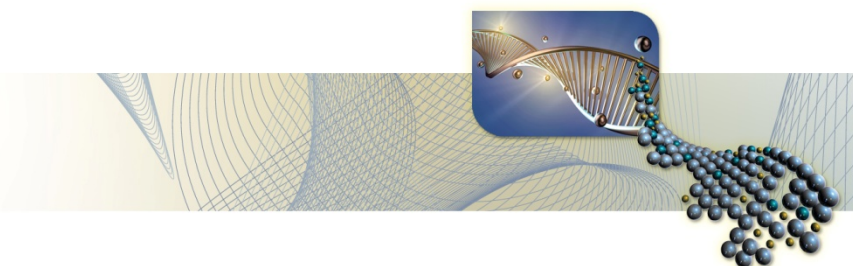


INDIANA



Indiana has a highly specialized and growing bioscience industry. The State has a specialized employment concentration in three of four major bioscience subsectors—drugs and pharmaceuticals (location quotient of 2.79), medical devices and equipment (2.22), and agricultural feedstock and chemicals (2.07). Academic bioscience research expenditures totaled \$511 million in 2008, with at least \$100 million each in medical, biological, and agricultural sciences. Funding from the National Institutes of Health totaled \$260 million in 2009 and baseline funding of Indiana institutions has grown by 7.2 percent since 2004 while nationally baseline funding has declined. Venture capital in the State held relatively steady from 2007 through 2009 while much of the national sector saw declines in funding. Human biotechnology and medical/health services represented the majority of the \$277 million in venture capital invested in Indiana bioscience companies during the last six years. Of 1,930 patents granted in the same period, the dominant shares were in pharmaceuticals, surgical and medical instruments, and other medical equipment.

●●● Bioscience Performance Metrics

Summary of State Performance in Selected Bioscience-related Metrics

Metrics	Indiana	United States	Rank*
Bioscience Industry, 2008			
Total Bioscience Industry Employment, 2008	52,832	1,420,324	I
Bioscience Industry Location Quotient, 2008	1.72	n/a	I
Biosciences Industry Establishments, 2008	798	47,593	II
Academic R&D Expenditures, FY 2008			
Bioscience R&D (\$ thousands)	\$511,481	\$31,818,810	20
Bioscience Share of Total R&D	53.6%	61.3%	35
Bioscience R&D Per Capita	\$80.07	\$104.54	34
Change in Bioscience R&D, FY 2004–08	20.8%	22.3%	26
NIH Funding, FY 2009			
Total, Including ARRA Funds (\$ thousands)	\$259,636	\$25,837,590	24
Per Capita Funding	\$40.42	\$84.16	36
Change in Baseline Funding, FY 2004–09**	7.2%	-4.7%	15
Change in Total Funding, FY 2004–09	28.4%	14.6%	19
Clinical Trials, Initiated 2009	408	5,299	18
Higher Education Degrees in Bioscience Fields, AY 2008	3,211	161,811	16
Employment in Bioscience-related Occupations, 2008	11,950	717,510	20
Bioscience Venture Capital Investments, 2004–09 (\$ millions)	\$276.9	\$60,099	26
Bioscience and Related Patents, 2004–09	1,930	75,593	16

*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.

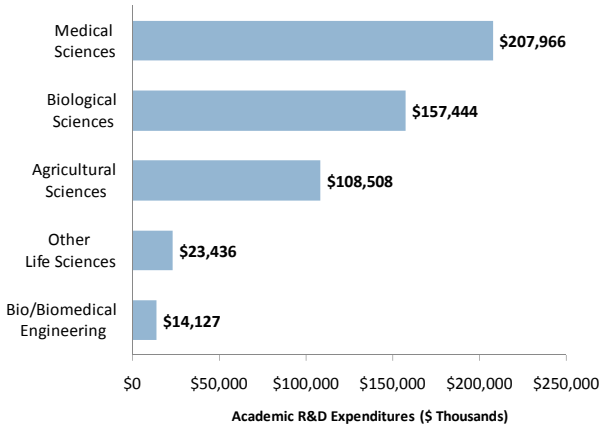
●●● Bioscience Industry Base, 2008

INDUSTRY SUBSECTOR	Indiana		United States	
	2008	2001-08 Change	2008	2001-08 Change
AGRICULTURAL FEEDSTOCK & CHEMICALS				
Establishments	54	61.3%	2,440	16.0%
Employment	5,134	-3.0%	114,793	1.9%
Location Quotient	2.07		n/a	
Direct-Effect Employment Multiplier	8.24		11.33	
Total Employment Impact	42,290		1,284,650	
Average Annual Wage	\$79,619		\$72,279	
DRUGS & PHARMACEUTICALS				
Establishments	43	4.9%	2,771	6.4%
Employment	18,822	1.5%	311,882	2.3%
Location Quotient	2.79		n/a	
Direct-Effect Employment Multiplier	6.84		9.92	
Total Employment Impact	128,727		2,873,278	
Average Annual Wage	\$116,986		\$93,378	
MEDICAL DEVICES & EQUIPMENT				
Establishments	296	2.8%	15,227	0.4%
Employment	20,868	42.2%	435,509	2.0%
Location Quotient	2.22		n/a	
Direct-Effect Employment Multiplier	3.58		4.87	
Total Employment Impact	74,664		2,029,581	
Average Annual Wage	\$59,690		\$63,606	
RESEARCH, TESTING, & MEDICAL LABORATORIES				
Establishments	405	50.9%	27,154	57.7%
Employment	8,008	21.6%	558,140	46.1%
Location Quotient	0.66		n/a	
Direct-Effect Employment Multiplier	2.30		3.30	
Total Employment Impact	18,421		1,853,127	
Average Annual Wage	\$62,484		\$80,785	
TOTAL BIOSCIENCES INDUSTRY				
Establishments	798	26.5%	47,593	28.3%
Employment	52,832	17.2%	1,420,324	15.8%
Location Quotient	1.72		n/a	
Direct-Effect Employment Multiplier	5.00		5.82	
Total Employment Impact	264,102		8,040,636	
Average Annual Wage	\$82,463		\$77,595	
TOTAL PRIVATE SECTOR				
Establishments	155,130	6.1%	8,860,956	13.8%
Employment	2,463,194	-0.9%	113,917,377	3.5%
Average Annual Wage	\$38,457		\$45,229	

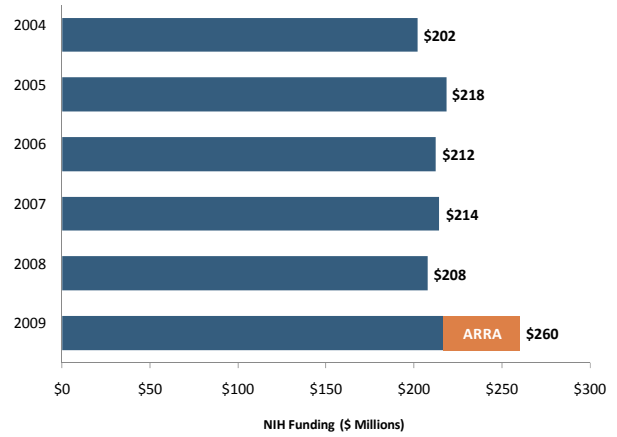
Note: U.S. employment metrics include Puerto Rico. Estimates of total employment impacts do not include Puerto Rico.

Bioscience Performance Metrics

Bioscience Academic R&D Expenditures in Indiana, FY 2008

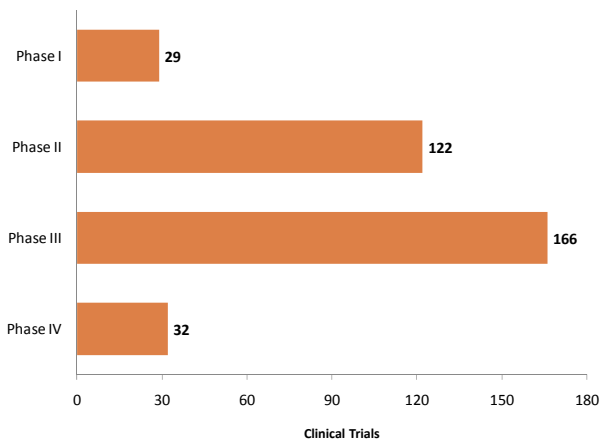


NIH Awards in Indiana, 2004–2009

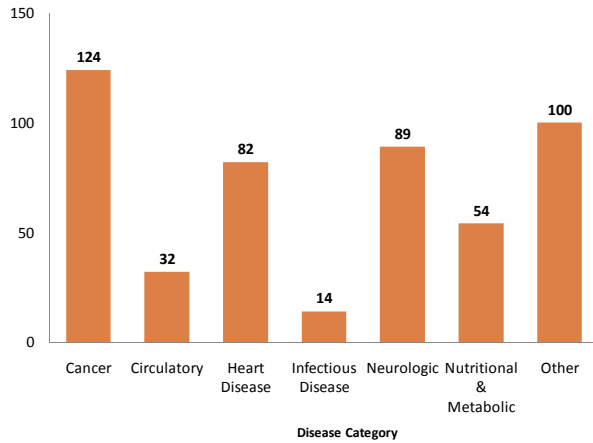


Recent Clinical Trial Activities

Clinical Trials by Phase in Indiana, 2009

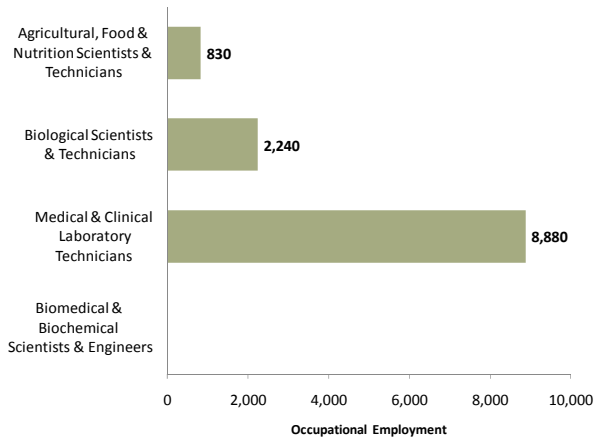


Clinical Trials by Major Disease Category in Indiana, 2009

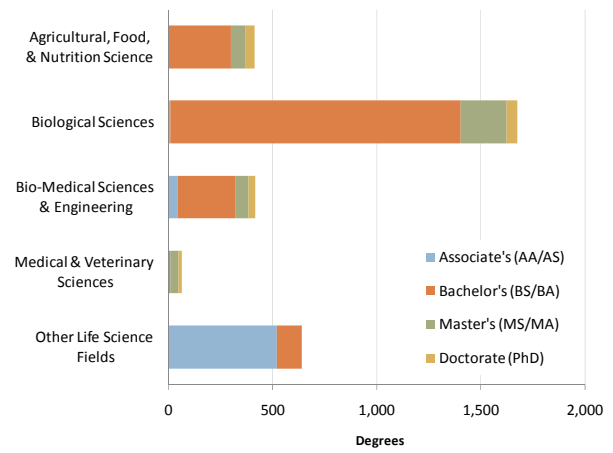


Bioscience Talent Base

Bioscience-related Occupational Employment in Indiana, 2008

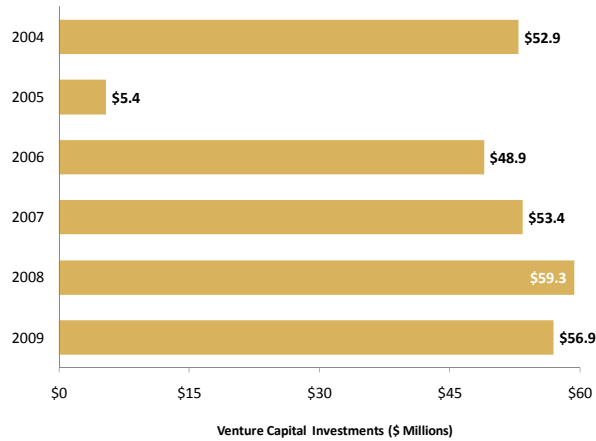


Bioscience-related Degrees in Indiana, AY 2008

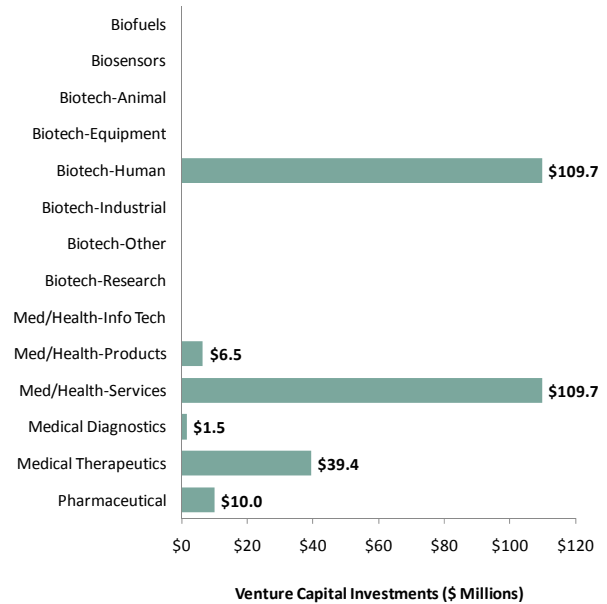


Bioscience Venture Capital

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

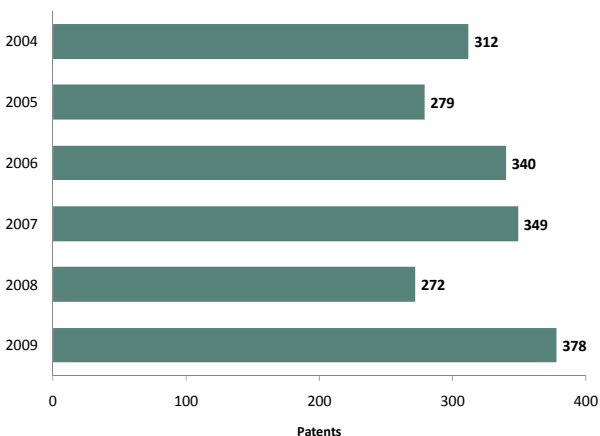


Bioscience-related Venture Capital Investments in Indiana by Segment, 2004–2009

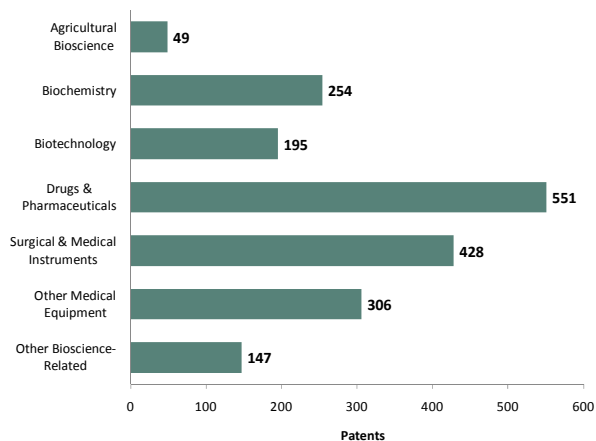


●●● Bioscience Patents

Bioscience-related Patents in Indiana, 2004–2009



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



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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