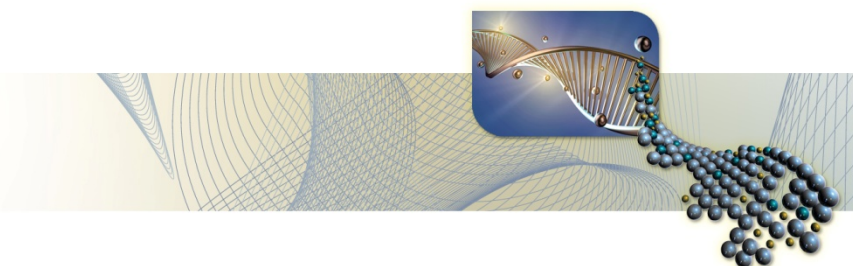


NEW HAMPSHIRE



New Hampshire has an employment specialization in medical devices and equipment (location quotient of 1.44), which has grown slightly faster than the national subsector. Academic bioscience research and development expenditures in 2008 totaled \$164 million, of which \$125 million was in medical sciences. On a per capita basis, New Hampshire's academic R&D in the biosciences and its funding from the National Institutes of Health exceed the national averages. In the last six years, \$199 million in venture capital was invested in State bioscience firms, placing New Hampshire above its population rank. Most venture funds were invested in the medical therapeutics sector, followed by human biotechnology. Surgical and medical instruments has been the focus of innovation in the State, strongly leading the 629 bioscience patents granted during the same six-year period.

●●● Bioscience Performance Metrics

Summary of State Performance in Selected Bioscience-related Metrics

Metrics	New Hampshire	United States	Rank*
Bioscience Industry, 2008			
Total Bioscience Industry Employment, 2008	5,070	1,420,324	IV
Bioscience Industry Location Quotient, 2008	0.75	n/a	III
Biosciences Industry Establishments, 2008	208	47,593	IV
Academic R&D Expenditures, FY 2008			
Bioscience R&D (\$ thousands)	\$164,311	\$31,818,810	37
Bioscience Share of Total R&D	54.4%	61.3%	34
Bioscience R&D Per Capita	\$124.30	\$104.54	12
Change in Bioscience R&D, FY 2004–08	11.8%	22.3%	40
NIH Funding, FY 2009			
Total, Including ARRA Funds (\$ thousands)	\$113,754	\$25,837,590	35
Per Capita Funding	\$85.88	\$84.16	16
Change in Baseline Funding, FY 2004–09**	-13.8%	-4.7%	43
Change in Total Funding, FY 2004–09	14.9%	14.6%	31
Clinical Trials, Initiated 2009	62	5,299	49
Higher Education Degrees in Bioscience Fields, AY 2008	662	161,811	43
Employment in Bioscience-related Occupations, 2008	1,370	717,510	50
Bioscience Venture Capital Investments, 2004–09 (\$ millions)	\$199.3	\$60,099	28
Bioscience and Related Patents, 2004–09	629	75,593	28

*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.

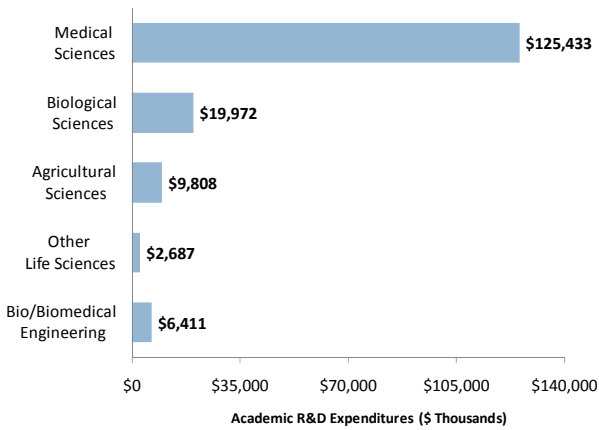
●●● Bioscience Industry Base, 2008

INDUSTRY SUBSECTOR	New Hampshire		United States	
	2008	2001-08 Change	2008	2001-08 Change
AGRICULTURAL FEEDSTOCK & CHEMICALS				
Establishments	2	-51.6%	2,440	16.0%
Employment	5	-97.3%	114,793	1.9%
Location Quotient	0.01		n/a	
Direct-Effect Employment Multiplier	1.23		11.33	
Total Employment Impact	6		1,284,650	
Average Annual Wage	\$71,753		\$72,279	
DRUGS & PHARMACEUTICALS				
Establishments	12	50.0%	2,771	6.4%
Employment	977	43.9%	311,882	2.3%
Location Quotient	0.66		n/a	
Direct-Effect Employment Multiplier	4.09		9.92	
Total Employment Impact	3,997		2,873,278	
Average Annual Wage	\$70,866		\$93,378	
MEDICAL DEVICES & EQUIPMENT				
Establishments	85	4.4%	15,227	0.4%
Employment	2,988	3.2%	435,509	2.0%
Location Quotient	1.44		n/a	
Direct-Effect Employment Multiplier	2.81		4.87	
Total Employment Impact	8,385		2,029,581	
Average Annual Wage	\$52,433		\$63,606	
RESEARCH, TESTING, & MEDICAL LABORATORIES				
Establishments	109	2.9%	27,154	57.7%
Employment	1,099	3.0%	558,140	46.1%
Location Quotient	0.41		n/a	
Direct-Effect Employment Multiplier	2.28		3.30	
Total Employment Impact	2,502		1,853,127	
Average Annual Wage	\$78,517		\$80,785	
TOTAL BIOSCIENCES INDUSTRY				
Establishments	208	4.3%	47,593	28.3%
Employment	5,070	4.9%	1,420,324	15.8%
Location Quotient	0.75		n/a	
Direct-Effect Employment Multiplier	2.94		5.82	
Total Employment Impact	14,891		8,040,636	
Average Annual Wage	\$61,662		\$77,595	
TOTAL PRIVATE SECTOR				
Establishments	47,014	6.4%	8,860,956	13.8%
Employment	541,726	2.0%	113,917,377	3.5%
Average Annual Wage	\$45,274		\$45,229	

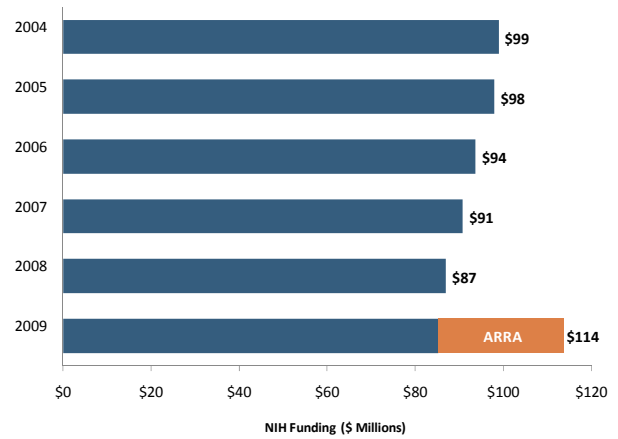
Note: U.S. employment metrics include Puerto Rico. Estimates of total employment impacts do not include Puerto Rico.

Bioscience Performance Metrics

Bioscience Academic R&D Expenditures in New Hampshire, FY 2008

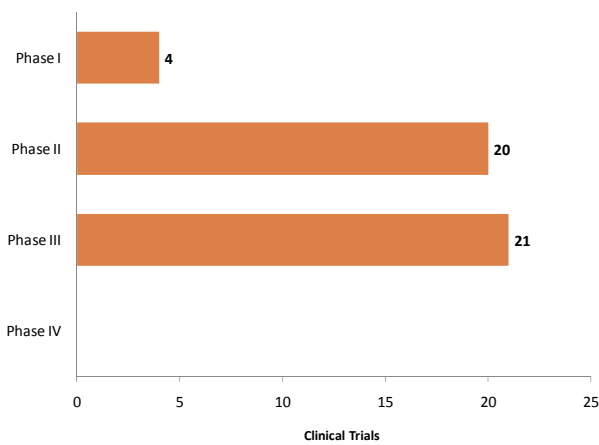


NIH Awards in New Hampshire, 2004–2009

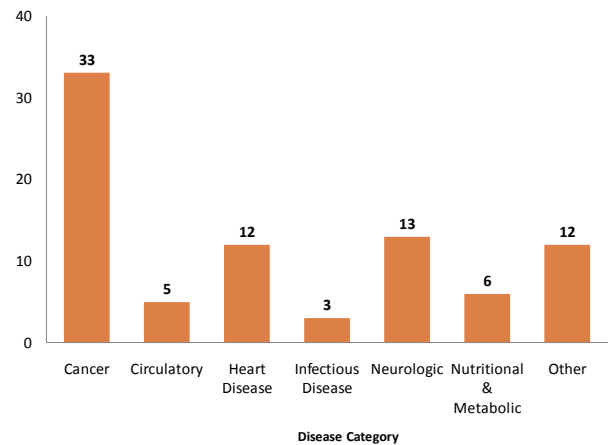


Recent Clinical Trial Activities

Clinical Trials by Phase in New Hampshire, 2009

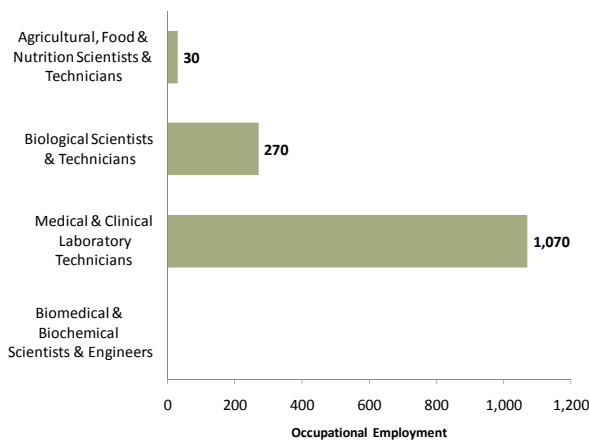


Clinical Trials by Major Disease Category in New Hampshire, 2009

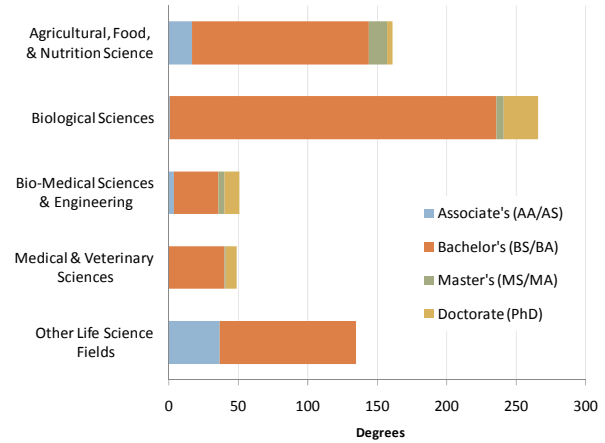


Bioscience Talent Base

Bioscience-related Occupational Employment in New Hampshire, 2008

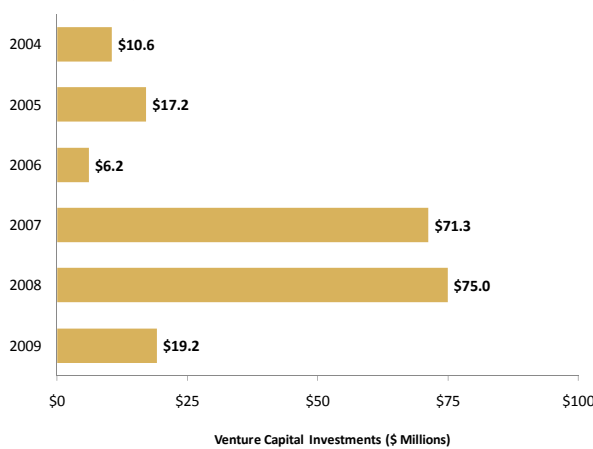


Bioscience-related Degrees in New Hampshire, AY 2008

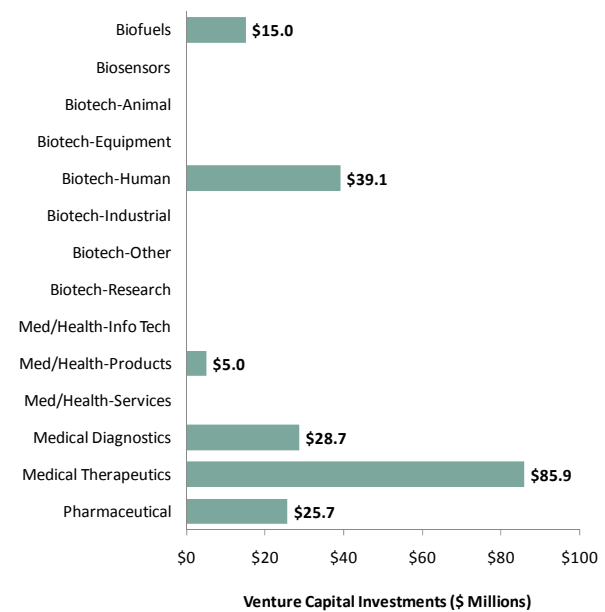


Bioscience Venture Capital

Bioscience-related Venture Capital Investments in New Hampshire, 2004–2009

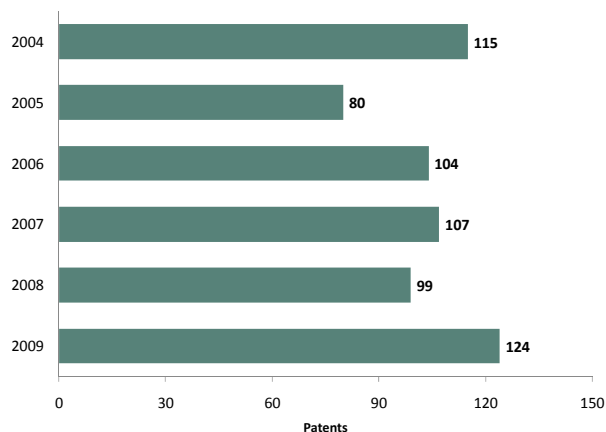


Bioscience-related Venture Capital Investments in New Hampshire by Segment, 2004–2009

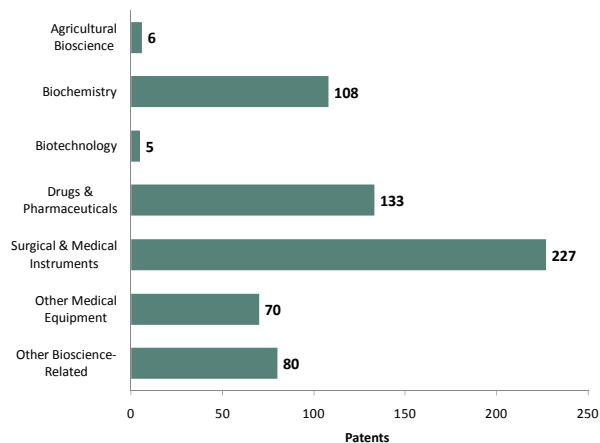


●●● Bioscience Patents

Bioscience-related Patents in New Hampshire, 2004–2009



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



State Bioscience Contact

New Hampshire Bio/Medical Council

PO Box 2395
 Hampton, NH 03843
 P: (603) 271-8444
 F: (603) 271-6784
www.nhbiotech.com

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