

California

The U.S. Bioscience Economy:

Advancing Innovation and Strengthening States and Regions



California remains the nation's largest bioscience employer, with 334,448 industry jobs across 15,719 business establishments in 2025. Employment was modestly lower than in 2021, declining by 1.5 percent, while research, testing, and medical laboratories, the state's largest subsector, grew by 2.5 percent. California retains specialized employment concentrations in research, testing, and medical laboratories as well as medical devices and equipment, with location quotients of 1.55 and 1.63, respectively. The state's overall bioscience employment concentration is 25 percent above the national average. Annual bioscience wages averaged \$185,005, 90 percent higher than the state's private sector average. Bioscience-related R&D expenditures at California universities totaled \$9.3 billion in FY 2024, and state institutions received \$5.2 billion in NIH funding in FY 2025. Venture capital investments in bioscience companies totaled \$109.9 billion from 2021 through 2025, while state inventors were affiliated with 42,682 bioscience-related patents. California remains among the top quintile of states in most measures of innovation ecosystem position and performance.

BIOSCIENCE PERFORMANCE METRICS

Summary of State Performance in Selected Bioscience-related Metrics

METRIC		California	United States	Quintile
Bioscience Industry, 2025	Bioscience Industry Employment	334,448	2,312,617	I
	Bioscience Industry Location Quotient	1.25	n/a	I
	Bioscience Industry Establishments	15,719	156,463	I
Academic Bioscience R&D Expenditures, FY 2024	Bioscience R&D (\$ thousands)	\$9,320,750	\$68,902,940	I
	Bioscience Share of Total R&D	68%	63%	II
	Bioscience R&D Per Capita	\$237	\$203	II
NIH Funding, FY 2025	Funding (\$ thousands)	\$5,247,523	\$36,741,235	I
	Funding Per Capita	\$133	\$107	II
Bioscience Venture Capital, 2021-25	Investments (\$ millions)	\$109,879.54	\$297,644	I
Bioscience-Related Patents, 2021-25	Total Patents	42,682	138,607	I

State ranking figures for bioscience performance metrics are calculated as quintiles, where I = top quintile, III = middle quintile, and V = bottom quintile. For source notes, see end of State Profile.

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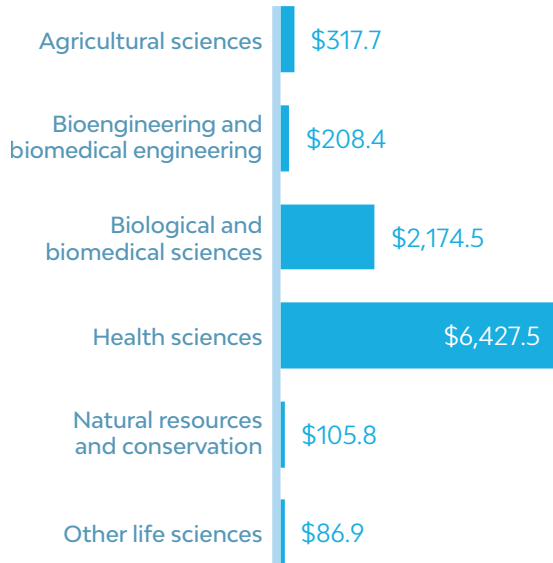
INDUSTRY SUBSECTOR		California		United States	
		2025	2021-2025 Change	2025	2021-2025 Change
Agricultural Feedstock and Industrial Biosciences	Establishments	189	-0.7%	2,158	10.7%
	Employment	3,436	-16.1%	71,331	2.2%
	Location Quotient	0.41		n/a	
	Average Annual Wage	\$90,889	15.7%	\$105,506	14.7%
Bioscience-Related Distribution	Establishments	5,893	4.8%	68,949	10.0%
	Employment	66,663	-0.8%	667,651	10.7%
	Location Quotient	0.86		n/a	
	Average Annual Wage	\$154,981	23.6%	\$144,792	19.0%
Medical Devices and Equipment	Establishments	1,637	-0.7%	13,595	24.6%
	Employment	81,327	-0.7%	430,363	1.9%
	Location Quotient	1.63		n/a	
	Average Annual Wage	\$143,310	10.1%	\$110,757	13.9%
Pharmaceuticals	Establishments	889	9.7%	7,880	31.0%
	Employment	42,565	-13.5%	363,904	5.4%
	Location Quotient	1.01		n/a	
	Average Annual Wage	\$170,414	4.5%	\$146,506	16.3%
Research, Testing, and Medical Laboratories	Establishments	7,111	17.6%	63,881	37.0%
	Employment	140,457	2.5%	779,368	8.1%
	Location Quotient	1.55		n/a	
	Average Annual Wage	\$230,119	14.2%	\$167,555	13.7%
Total Bioscience Industry	Establishments	15,719	9.8%	156,463	22.1%
	Employment	334,448	-1.5%	2,312,617	7.0%
	Location Quotient	1.25		n/a	
	Average Annual Wage	\$185,005	14.1%	\$145,188	16.0%
Total Private Sector	Establishments	1,912,118	18.0%	11,985,043	12.5%
	Employment	15,544,576	6.7%	133,872,972	8.5%
	Location Quotient	1.00		n/a	
	Average Annual Wage	\$97,184	12.4%	\$78,863	16.3%

Note: U.S. employment metrics include Puerto Rico.

BIOSCIENCE RESEARCH IN CALIFORNIA

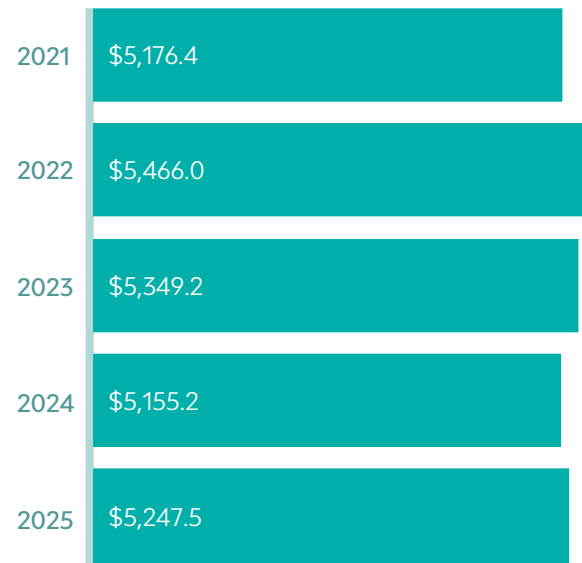
Bioscience Academic R&D Expenditures

\$ Millions, FY 2024



NIH Awards

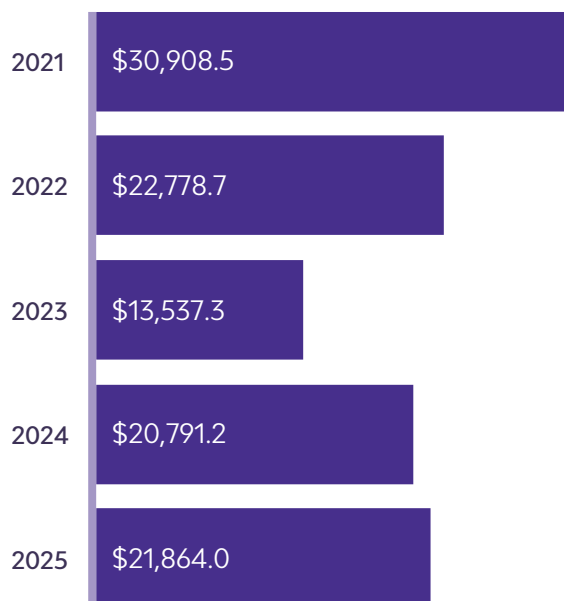
\$ Millions, FY 2021-2025



BIOSCIENCE VENTURE CAPITAL IN CALIFORNIA

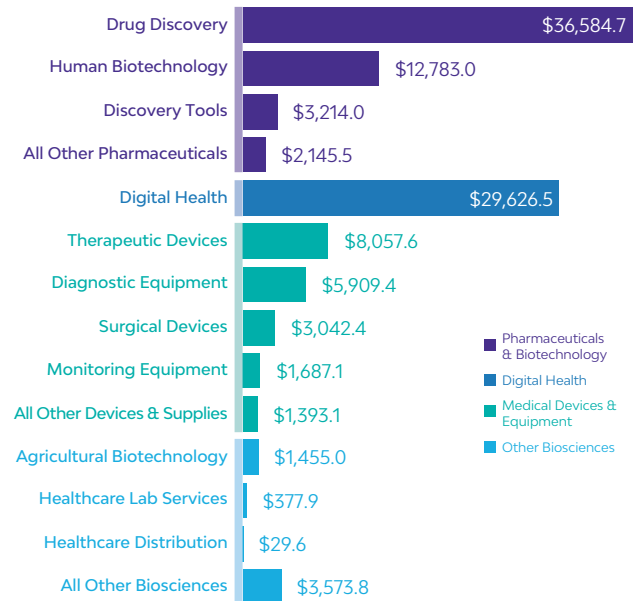
Bioscience-Related Venture Capital Investments

\$ Millions, 2021-2025



Bioscience-Related Venture Capital Investments by Segment

\$ Millions, 2021-2025

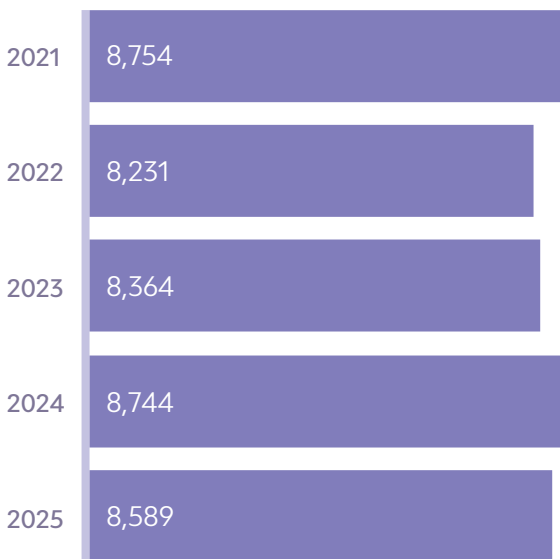


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BIOSCIENCE PATENTS IN CALIFORNIA

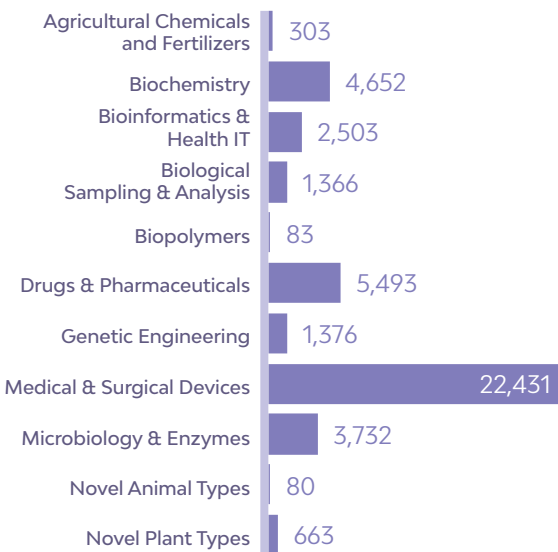
Bioscience-Related U.S. Patents

2021-2025



Bioscience-Related U.S. Patents by Segment

2021-2025



SOURCE NOTES

Employment, Establishments and Wages: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW), enhanced by Lightcast (Datarun 2026.3).

Academic R&D Expenditures: National Science Foundation (NSF), National Center for Science and Engineering Statistics (NCSES), Higher Education Research and Development (HERD) Survey.

NIH Funding: National Institutes of Health, NIH Awards via the NIH RePORT portal.

Venture Capital: PitchBook Data, Inc.

Patents: U.S. Patent & Trademark Office data from the Clarivate Derwent Patent Search patent analysis database.

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