Hawaii



The U.S. Bioscience Economy:

Advancing Innovation and Strengthening States and Regions

Hawaii's bioscience industry accounted for 3,465 jobs across 506 business establishments in 2025. Industry employment increased modestly by 1.1 percent from 2021. Research, testing, and medical laboratories anchor Hawaii's bioscience industry, accounting for nearly two-thirds of its employment. Growth in research and medical laboratory activities helped offset declines elsewhere in the industry. Annual bioscience wages averaged $91,975, 36 percent above Hawaii's private sector average. State universities conducted $170.9 million in bioscience-related R&D in FY 2024, and Hawaii institutions received $66.1 million in NIH funding in FY 2025.

BIOSCIENCE PERFORMANCE METRICS

Summary of State Performance in Selected Bioscience-related Metrics

METRIC		Hawaii	United States	Quintile
Bioscience Industry, 2025	Bioscience Industry Employment	3,465	2,312,617	V
	Bioscience Industry Location Quotient	0.39	n/a	V
	Bioscience Industry Establishments	506	156,463	V
Academic Bioscience R&D Expenditures, FY 2024	Bioscience R&D ($ thousands)	$170,939	$68,902,940	V
	Bioscience Share of Total R&D	43%	63%	V
	Bioscience R&D Per Capita	$119	$203	IV
NIH Funding, FY 2025	Funding ($ thousands)	$66,066	$36,741,235	IV
	Funding Per Capita	$46	$107	IV
Bioscience Venture Capital, 2021-25	Investments ($ millions)	$97.71	$297,644	V
Bioscience-Related Patents, 2021-25	Total Patents	193	138,607	V

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.

Hawaii

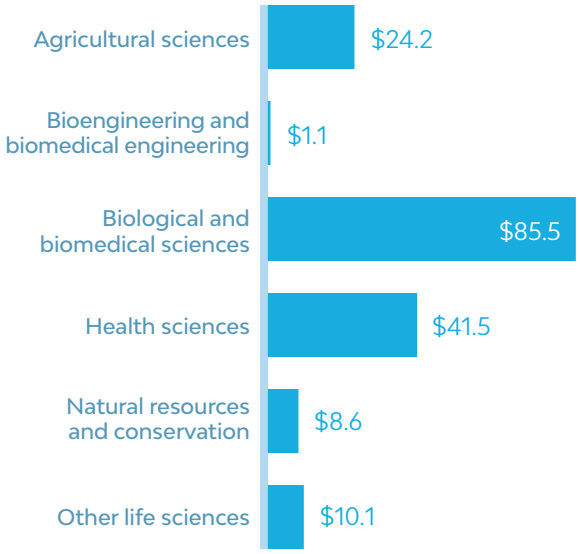
INDUSTRY SUBSECTOR		Hawaii 2025	Hawaii 2021–2025 Change	United States 2025	United States 2021–2025 Change
Agricultural Feedstock and Industrial Biosciences	Establishments	7	40.0%	2,158	10.7%
	Employment	79	24.5%	71,331	2.2%
	Location Quotient	0.28		n/a	
	Average Annual Wage	$61,007	25.3%	$105,506	14.7%
Bioscience-Related Distribution	Establishments	320	11.2%	68,949	10.0%
	Employment	1,113	-2.7%	667,651	10.7%
	Location Quotient	0.43		n/a	
	Average Annual Wage	$120,225	19.9%	$144,792	19.0%
Medical Devices and Equipment	Establishments	4	-17.6%	13,595	24.6%
	Employment	15	-18.8%	430,363	1.9%
	Location Quotient	0.01		n/a	
	Average Annual Wage	$67,397	-15.9%	$110,757	13.9%
Pharmaceuticals	Establishments	6	-4.2%	7,880	31.0%
	Employment	15	-34.1%	363,904	5.4%
	Location Quotient	0.01		n/a	
	Average Annual Wage	$101,590	60.8%	$146,506	16.3%
Research, Testing, and Medical Laboratories	Establishments	169	38.8%	63,881	37.0%
	Employment	2,242	3.0%	779,368	8.1%
	Location Quotient	0.74		n/a	
	Average Annual Wage	$79,135	14.3%	$167,555	13.7%
Total Bioscience Industry	Establishments	506	19.0%	156,463	22.1%
	Employment	3,465	1.1%	2,312,617	7.0%
	Location Quotient	0.39		n/a	
	Average Annual Wage	$91,975	16.1%	$145,188	16.0%
Total Private Sector	Establishments	59,740	29.6%	11,985,043	12.5%
	Employment	520,287	10.5%	133,872,972	8.5%
	Location Quotient	1.00		n/a	
	Average Annual Wage	$67,661	18.6%	$78,863	16.3%

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

BIOSCIENCE RESEARCH IN HAWAII

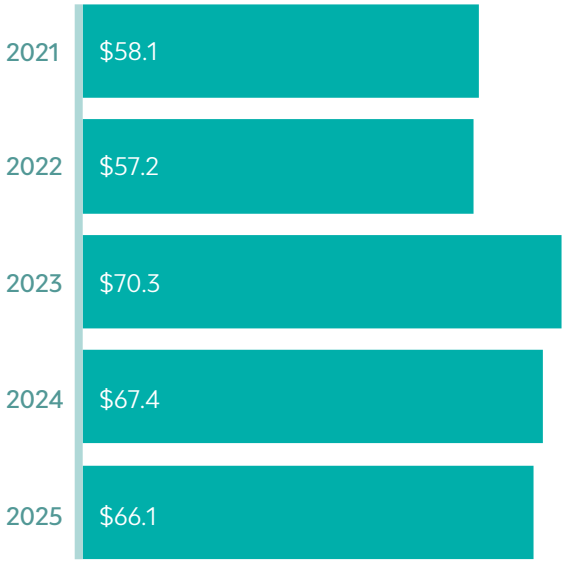
Bioscience Academic R&D Expenditures

$ Millions, FY 2024



NIH Awards

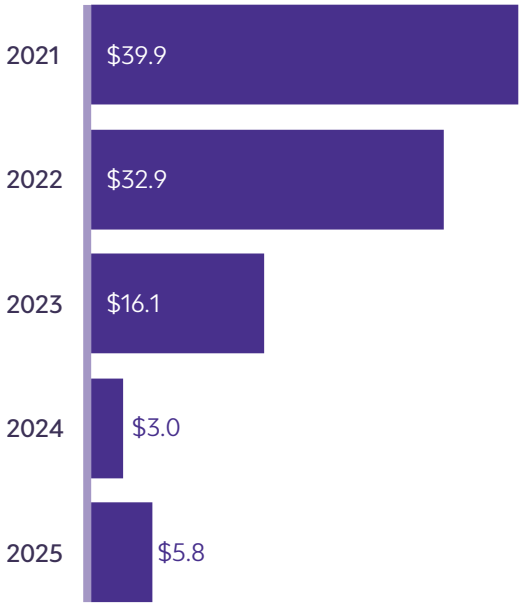
$ Millions, FY 2021-2025



BIOSCIENCE VENTURE CAPITAL IN HAWAII

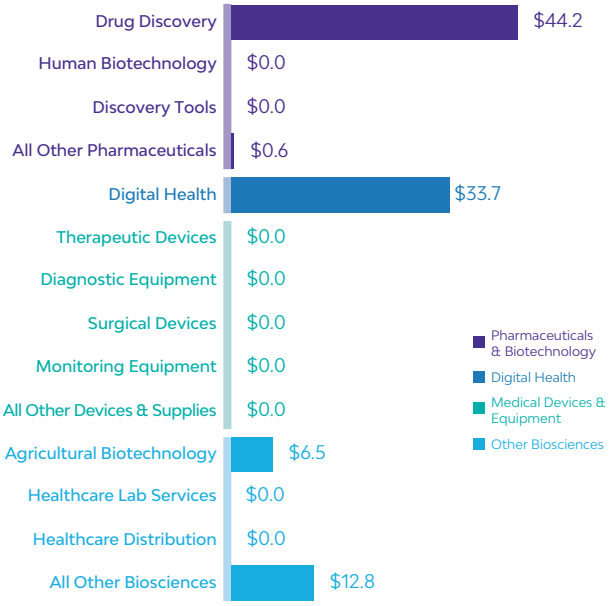
Bioscience-Related Venture Capital Investments

$ Millions, 2021-2025



Bioscience-Related Venture Capital Investments by Segment

$ Millions, 2021-2025

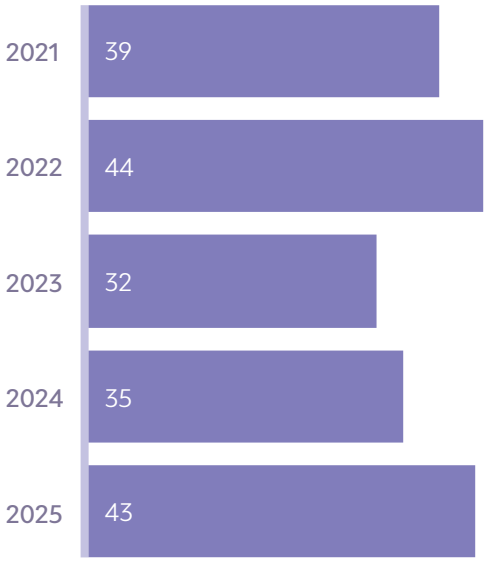


Hawaii

BIOSCIENCE PATENTS IN HAWAII

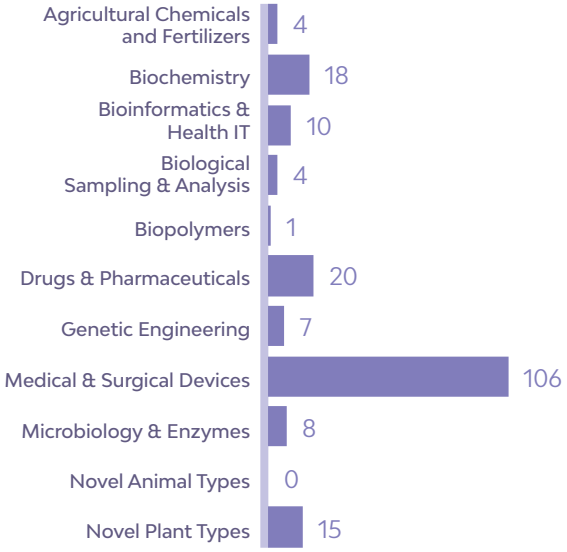
Bioscience-Related U.S. Patents

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.

TECONOMY PARTNERS LLC

Bio Biotechnology Innovation Organization

CSBA Council of State Bioscience Associations