

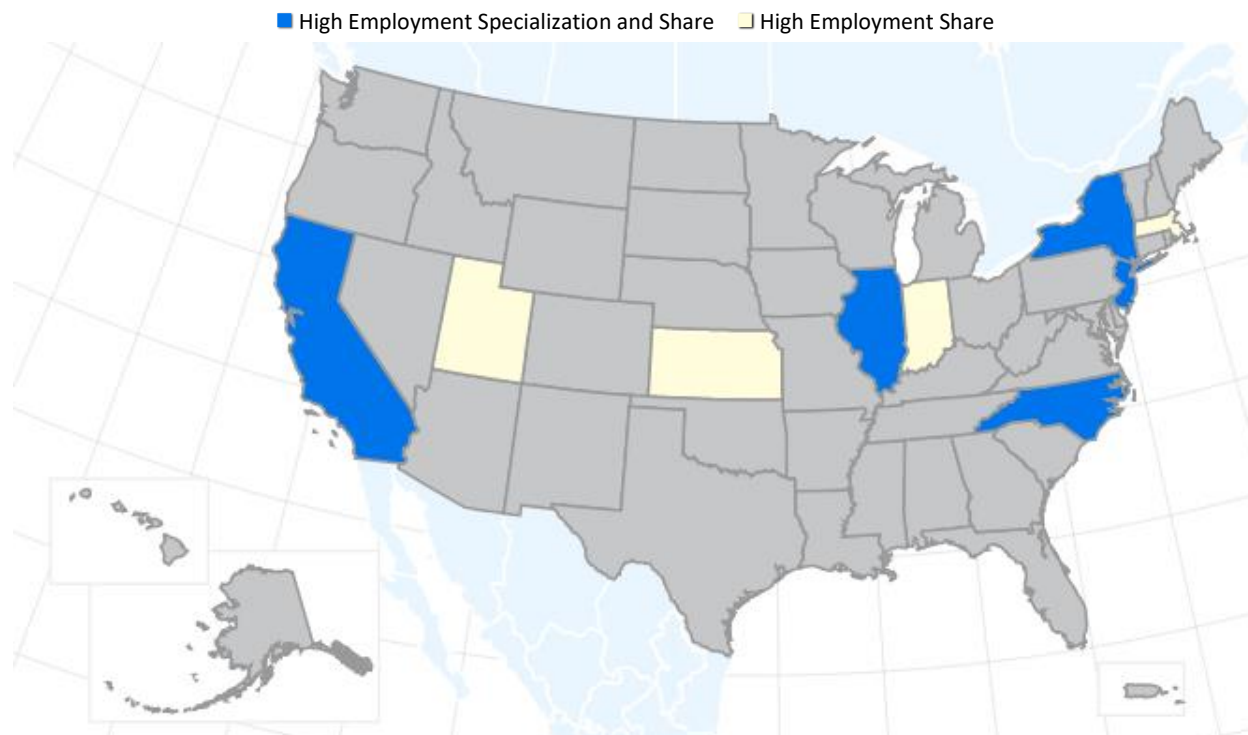
U.S. Industry Report

Biopharmaceuticals Cluster

The Biopharmaceuticals cluster includes Medicinal and Botanical Manufacturing (NAICS 325411), Pharmaceutical Preparation Manufacturing (NAICS 325412), Biological Product (except Diagnostic) Manufacturing (NAICS 325414), and In-Vitro Diagnostic Substance Manufacturing (NAICS 325413) industries. As of 2016, there are **2,364 establishments** across the United States that employ **249,811 professionals**, earning an **average annual wage of \$95,450**. The following five states offer high employment specialization *and* share.

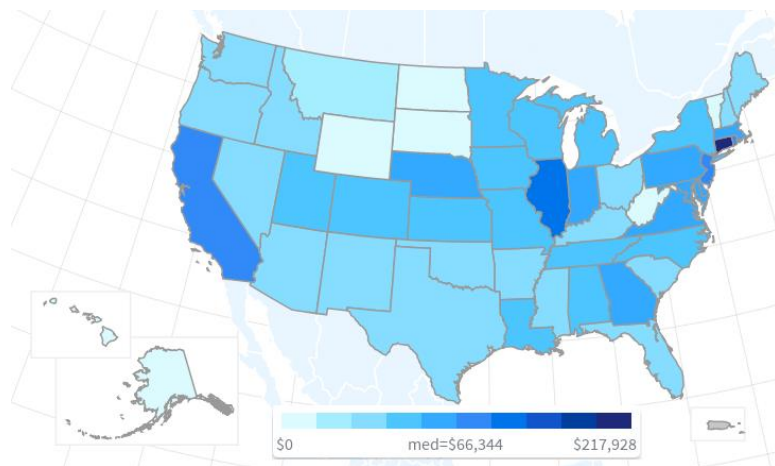
NORTH CAROLINA	NEW JERSEY	CALIFORNIA	ILLINOIS	NEW YORK
Location Quotient 2.8	Location Quotient 2.1	Location Quotient 1.6	Location Quotient 1.6	Location Quotient 1.4
Establishments 76	Establishments 161	Establishments 430	Establishments 73	Establishments 142
Employment 20,114	Employment 14,710	Employment 47,589	Employment 16,878	Employment 20,526

Top States by Specialization & Share



Source: [U.S. Cluster Mapping Project](#)

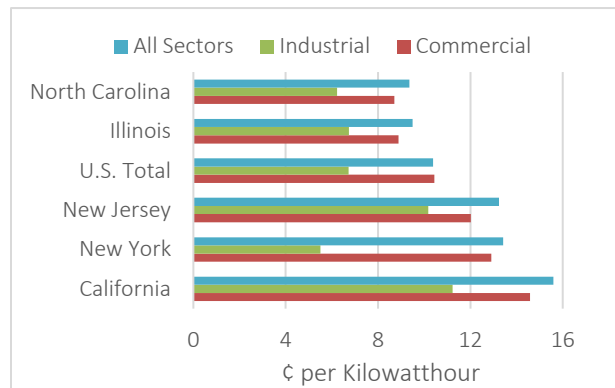
2016 Average Annual Cluster Wages



IL	\$144,412
CA	\$120,717
NJ	\$118,553
USA	\$95,450
NY	\$74,113
NC	\$69,745

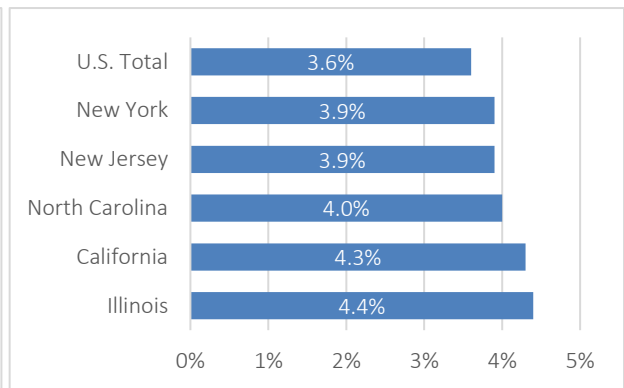
Source: *U.S. Cluster Mapping Project*

Energy Costs (March 2019)



Source: *Energy Information Administration, Electric Power Monthly*

Unemployment Rates (April 2019)



Source: *Bureau of Labor Statistics*

State Cluster Trends (2011-2016)

Highest % ↑ in Employment	CONNECTICUT	ARIZONA	HAWAII	VERMONT	GEORGIA
	35%	24%	24%	14%	14%
2016 Employment	2,363	3,926	175	770	3,458
Most New Establishments	CALIFORNIA	FLORIDA	COLORADO	UTAH	TEXAS
	+75	+30	+29	+22	+19
2016 Establishments	430	135	72	73	116
Highest ↑ in Location Quotient	VERMONT	WEST VIRGINIA	CONNECTICUT	ARIZONA	KANSAS
	+0.85	+0.66	+0.58	+0.58	+0.49
2016 LQ	1.53	4.40	0.75	0.90	1.74

Source: *U.S. Cluster Mapping Project*

Definitions

Cluster – A cluster is a regional concentration of related industries that arise out of the various types of linkages or externalities that span across industries in a particular location.

Establishment – An establishment is a single physical location at which business is conducted or services or industrial operations are performed. It is not necessarily identical with a company or enterprise, which may consist of one or more establishments. When two or more activities are carried on at a single location under a single ownership, all activities generally are grouped together as a single establishment

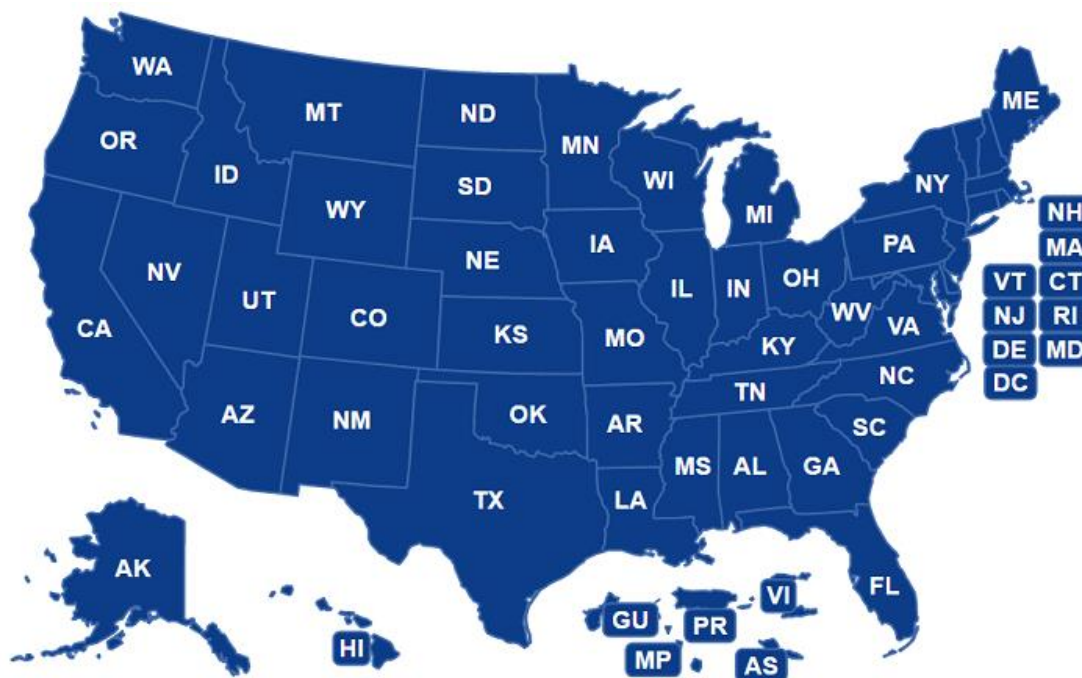
Location Quotient – A location quotient greater than 1 indicates a higher than average cluster concentration in a location.

NAICS – The North American Industry Classification System is the standard used by Federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy.

High Employment Share – States with high employment *share* rank among the top 10 percent of states with employment information by number of employees in an industry.

High Employment Specialization – States with high employment *specialization* have a location quotient ranking among the top 25 percent of states with employment information for an industry.

U.S. States and Territories



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