The Welsh Life Science Industries

Gwyn Tudor
Forum Manager - MediWales
Established 1992

130 members from Industry, academic and clinical organisations in Wales

Owned by its members with directors drawn from senior members of the sector

Networking
Representation
Communication
The Life Science Sectors

**Medical Technology** - Medical devices to be used for human beings in the; diagnosis, prevention, monitoring, treatment or alleviation of disease; ... compensation for an injury or handicap; investigation, replacement or modification of the anatomy or of a physiological process; and control of conception.

**Medical Biotechnology** - The discovery, development and manufacture of biopharmaceuticals; offering specialised sector specific services, to pharmaceutical companies; and SMEs involved in the discovery and development of small molecule drugs.

**Industrial Biotechnology** - The use of biological substances, systems and processes to produce materials, chemicals and energy, but excludes the production of primary pharmaceutical products. Products include; bio-ethanol fuel, bio-polymers, pharmaceutical intermediaries, paper and organic acids.

**Pharmaceuticals (Big Pharma)**
Large pharmaceutical companies involved in the development and manufacture of small molecules.

Data source: Strength and Opportunity, HM Government, 2009
The Life Science Sectors

Products involving biological systems either during their manufacture or once they are in use.

R&D led
Long time-to-market requiring significant pre-revenue investment
IP important to protecting this investment
Global markets with large global niches
Highly regulated
Complex high value contracts
Collaboration and close university and clinical links
Global Markets

Medical Technology
Estimated worth £150-170bn.
Growth rates forecast at 10% per annum over the next 5-6 years.
Drivers include, aging populations increasing affluence, increased healthcare expenditure in developed countries and increased expectations of modern healthcare standards in developing countries.

Medical Biotechnology
Estimated worth £45-48bn.
Growth rates of more than 20% pa 2002-07.
Drivers include ‘explosion’ in knowledge in areas of human biology including genetics, biochemistry, and physiology.

Industrial Biotechnology
Estimated worth £35-53bn.
Reported as having potential to reach sales of £150-£360bn in the chemical sector alone by 2025.

Data source: Strength and Opportunity, HM Government, 2009
UK Markets

Medical Technology
Estimated turnover £10.6bn. 2,771 companies employing 52,000 people. 98% of companies are SMEs, 43% are less than 10 years old. Major sub sectors are wound care, in-vitro diagnostics, orthopedic devices and single use technology each with over £1bn turnover.

Medical Biotechnology
Estimated turnover of £4.2bn. 777 companies employing over 24,000 people. 90% of companies have fewer than 10 employees. Largest sub sectors are small molecules, antibodies and therapeutic proteins which account for 53% of turnover.

Industrial Biotechnology
Estimated turnover of £230m. 64 companies employing 1,600 people. The top three sub sectors are pharmaceutical intermediaries, biofuels, and fine & specialty chemicals which make up 77% of turnover.

Pharmaceuticals
Turnover over £16bn in 2007. Employed around 67,000 people in 596 companies.

Data source: Strength and Opportunity, HM Government, 2009
Welsh Life Science

Companies
323 Companies active in the sector
15,000 Employees
£1.3Bn Turnover
£19% Growth over 3 years

Medical Technology Strengths
Wound care
Aids for the disabled and mobility
Diagnostics
E-health
Welsh Life Science
Wales - Strengths/Opportunities

Vibrant interconnected, self aware sector
Access to key opinion leaders and facilities
Close collaboration between academic, clinical and business sectors
Globally recognised academic expertise
Academia engaged with industry
Smaller and leaner NHS
Strong Government support
Wales - Challenges

Playing a role in the global market
Building an attractive inward investment picture
Access to appropriate finance
Appropriate start up and inward investment facilities
Retaining strong Government support

Clinical access and engagement
Improve patient care
Reduce healthcare costs
Deliver economic growth

Thank you