



Life Sciences Sector Proposition 2023



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Introduction

Berkshire is the UK's highest performing area in terms of Gross Value Added per filled job. Located within the South East of England's life sciences 'golden triangle' between Cambridge, London and Oxford, and on the M4 knowledge industry corridor (home to many leading tech firms), it is a hugely popular business location for international corporates. Berkshire is home to a long-established life science and healthcare cluster. The presence of global leaders, innovators, strong networks, academic excellence and talent, along with outstanding locational advantages, presents a compelling proposition.

- There are 1,909 Life Science related businesses in Berkshire many of them internationally recognised names. They sustain 18,987 regional jobs which is 28% higher than the national sector average.
- Our world recognised academic institutions delivered c.5050 graduates and post-graduates in 2021/22 many in the 8 major sub sector specialisms; they are the skilled work force that will support future sector growth.
- We have an abundance of leading Research and Development facilities alongside Centres of Excellence.
- Berkshire LEP offers business support programmes and access to finance to support business start-up and scale up that will support future expansion of the sector.

This Berkshire Life Sciences Proposition showcases the life sciences and healthcare ecosystem providing evidence of the value and strategic importance of this sector to the Berkshire and UK economy.

Berkshire Life Sciences businesses by size

1,080 registered businesses
(registered for VAT or PAYE) Of which...

10 large
(more than 250 employees)

25 mid-sized
(50-249 employees)

110 small
(10-49 employees)

935 micro
(0-9 employees)

1,191 unregistered business*
(self-employed, operating below VAT/PAYE thresholds)

There are 1,909 Life Sciences businesses in Berkshire, of which 1,080 (56.6%) are registered for VAT and/or PAYE.

The number of registered Life Sciences businesses in Berkshire grew by an average annual growth rate of approximately 2% between 2012 and 2022, thereby outlining the upward trajectory of the industry within the region.

The vast majority (97%) of registered businesses in Berkshire are micro (0-9 employees) or small (10-49) employee enterprises.**

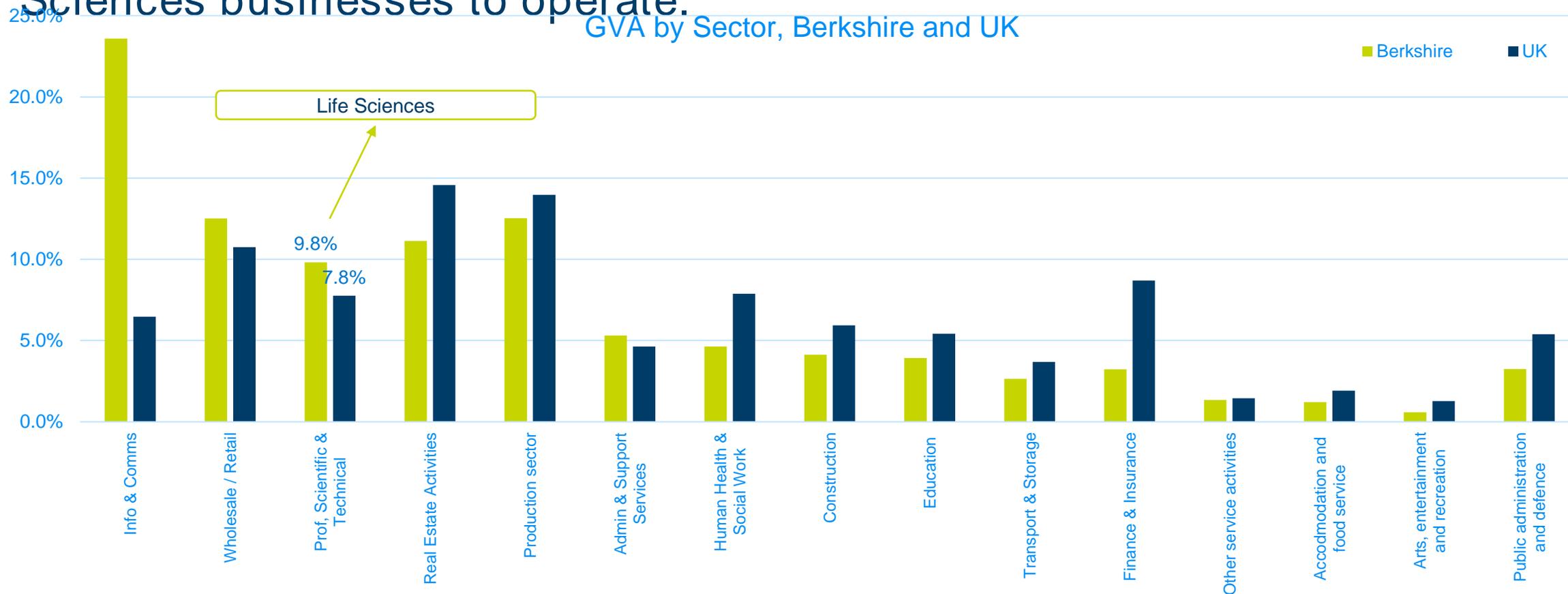
*estimated using Business Population Estimates data for the South East

**definitions vary slightly from those conventionally used in order to illustrate the dominance of firms with zero-four employees

Sources:

[UK Business Counts, 2022, Office for National Statistics](#)
[Business Population Estimates, Department for Business, Energy and Industrial Strategy, 2022](#)

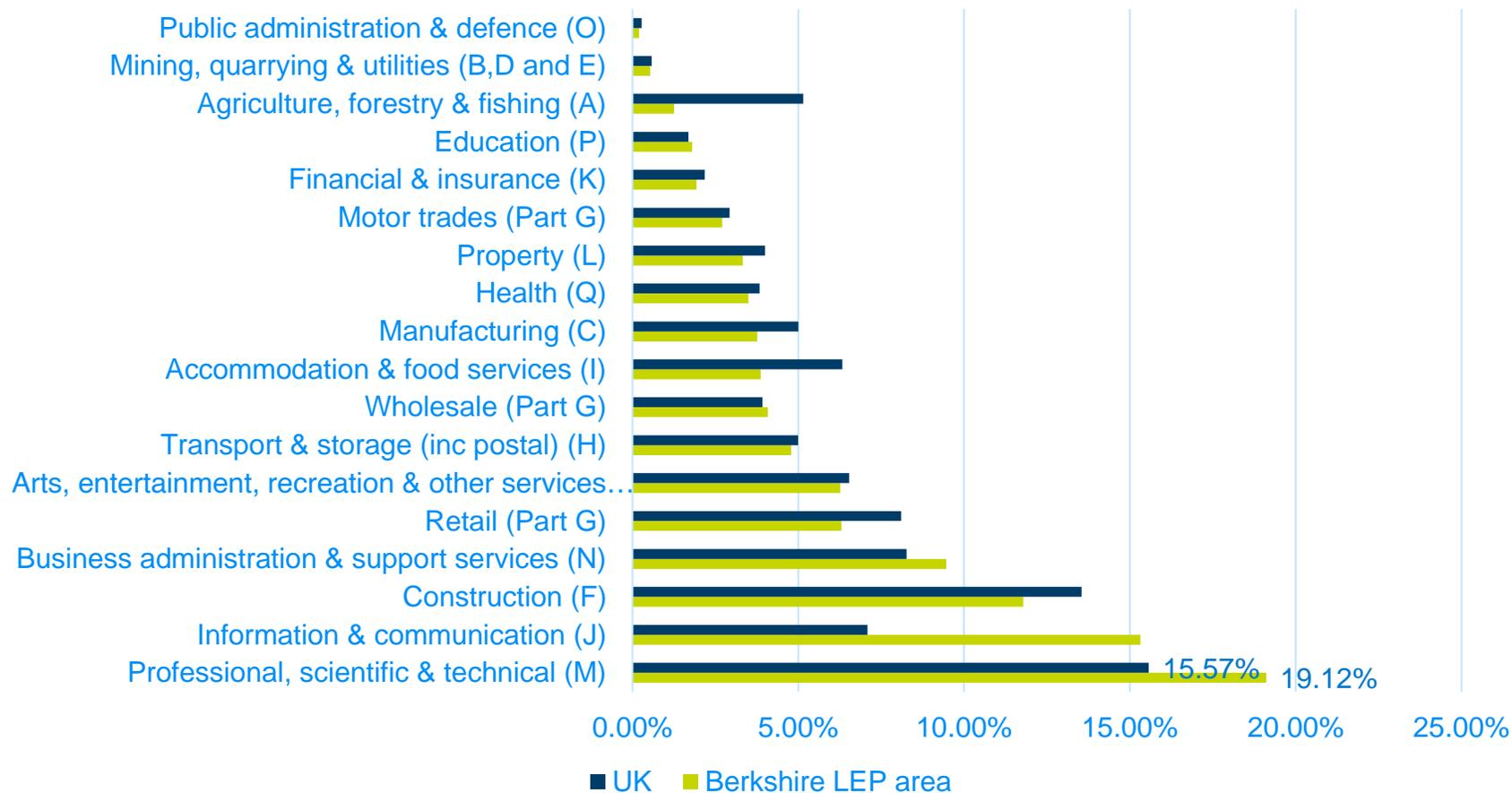
Berkshire enterprises generated Gross Value Added (GVA) of £43.39bn in 2020 (latest figure). 9.8% of this GVA was generated by the Professional, Scientific and Technical sector – over 25% more than the national average. Our strength in science and technology overall supports the Life Sciences sector specifically, which makes Berkshire a highly desirable area for Life Sciences businesses to operate.



Source: [Regional gross value added \(balanced\) by industry: city and enterprise regions, ONS, May 2022 \(table B2\)](#)

Almost one in five Berkshire businesses operate in the Professional, Scientific & Technical arenas which include Life Sciences.

Business count by industry (%)



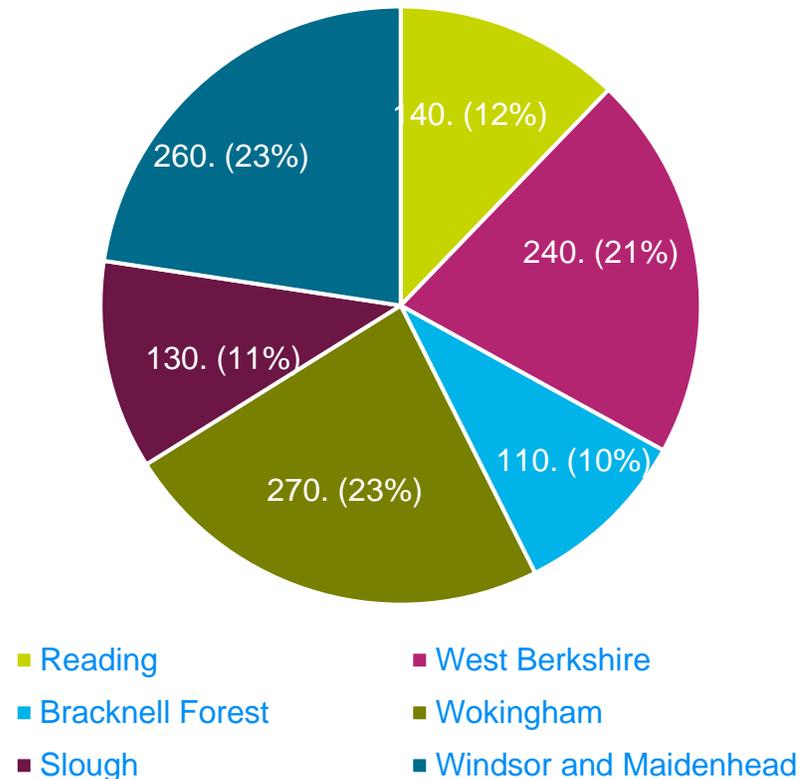
Analysing data using Standard Industrial Classification (SIC) codes enables a comparison to be made between the structure of the economies of Berkshire and the UK as a whole.

19.12% of Berkshire firms operate 'professional, scientific and technical' industry

Berkshire has a significantly higher concentration of firms in this sector than the national average – over double.

Number of Core Life Sciences Companies by Local Authority

Number of organisations in sector, %



There are 54,445 companies in core Life Sciences in the UK with 1,145 in Berkshire (see left).

The South East as a whole hosts 9,465 companies within the core Life Sciences sector, meaning that Berkshire hosts over 12% of Life Sciences related businesses within the South East.

The core Life Sciences sector (comprised of the Eight Major Life Sciences Sub Sector Specialisms found on Slide 11) employed almost 19,000 people in Berkshire in 2021.

Some of the major Life Sciences companies located in Berkshire



Life Sciences Sector

Eight Major Life Sciences Sub Sector Specialisms

Manufacture of basic pharmaceutical products

Manufacture of pharmaceutical preparations

Manufacture of irradiation, electromedical and electrotherapeutic equipment

Manufacture of medical and dental instruments and supplies

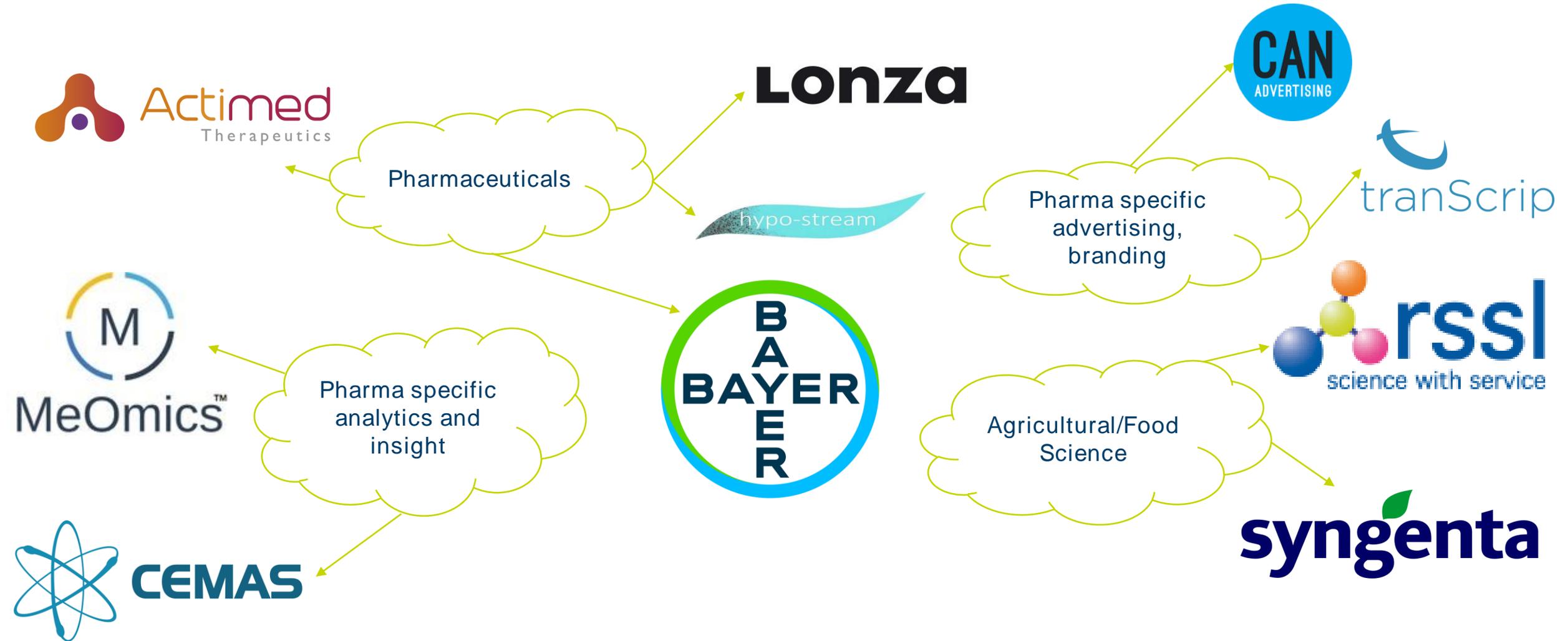
Wholesale of pharmaceutical goods

Research and experimental development on biotechnology

Other research and experimental development on natural sciences and engineering

Other professional, scientific and technical activities n.e.c.

Examples of Life Sciences Specialisms in Berkshire



640 scale-ups

(2016-2019 IDBR data, ONS,
cited in [ScaleUp Review 2021](#) [ScaleUp Institute](#))

142 visible scale-ups
(firms being tracked by [Beauhurst](#) in August 2022 and meeting OECD definition)

649 high growth and high growth potential firms
(all firms being tracked by [Beauhurst](#), August 2022)

640 firms in Berkshire are classified as 'scale-ups'*, of which 545 are turnover scale-ups, 240 are employment scale-ups and 145 scaled both their employees and turnover.

Of these, 142 are 'visible', in that we can identify who they are via the data they submit to Companies House.

These 142 are part of a wider cohort of 649 high-growth or high growth potential companies we can identify using data supplied by Beauhurst**

*using the OECD definition of:
firms with at least 10 employees, with 20% average annual growth in either turnover or employees over a three-year period
Source: [ScaleUp Review 2021](#) [ScaleUp Institute](#).
Note: IDBR stands for Inter-Departmental Business Register

**www.beauhurst.com

High growth / High growth potential firms

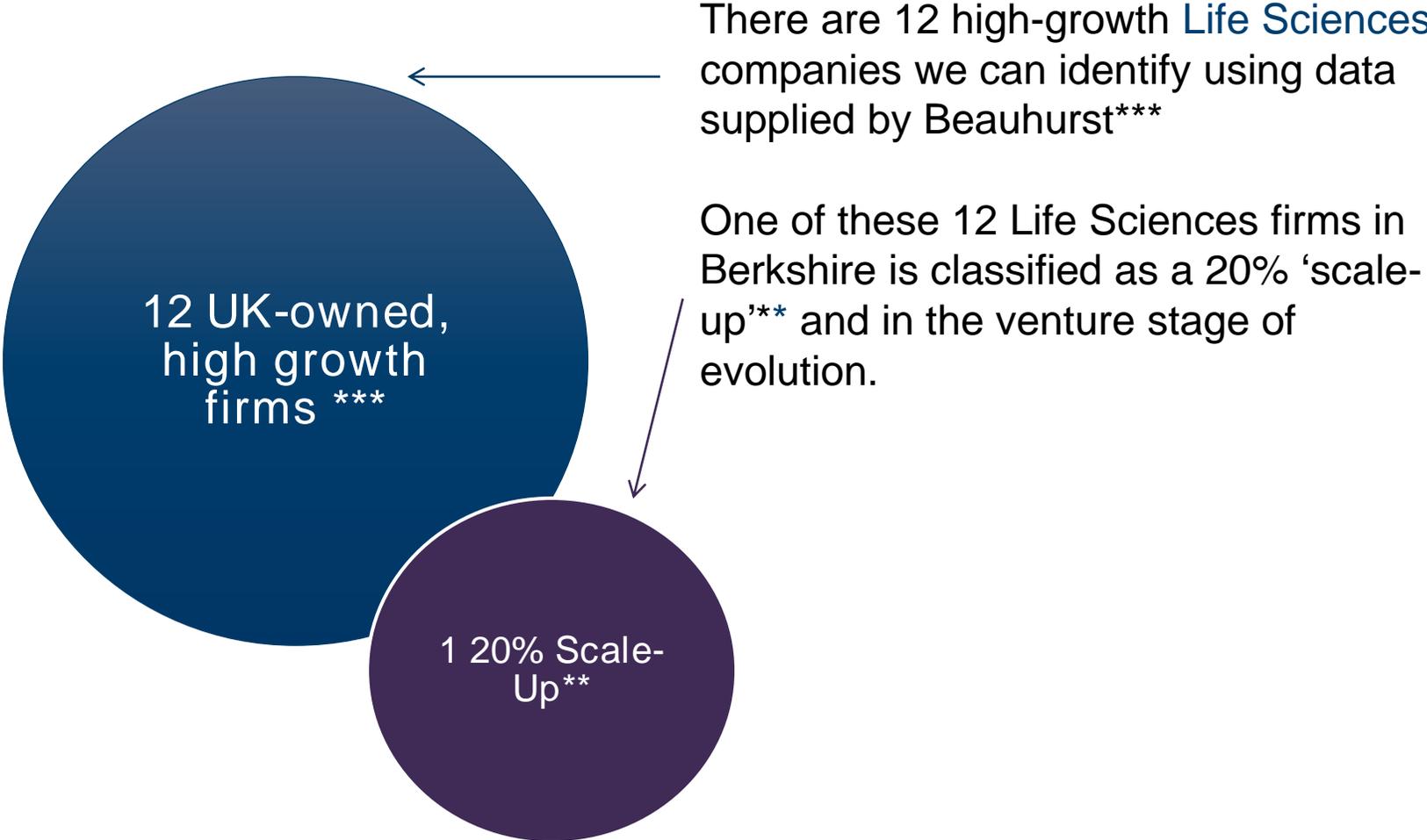
Although all unitary authorities have seen an increase in high growth or high growth potential firms in the past year, some have seen a greater increase than others; Reading, West Berkshire and Windsor & Maidenhead with particularly noticeable increases.

Conversely, Bracknell Forest followed by Slough have the least number of high growth / high growth potential firms.

Source: [Tracked high-growth list firms by Unitary Authority, Beauhurst, August 2022](#)



Berkshire also has 12 High Growth Life Sciences companies, one of which is a Scale-up. This demonstrates the LEP area's focus on providing economic and business support to assist start-up and scale up businesses to grow.



** Firms being tracked by [Beauhurst](http://www.beauhurst.com) in March 2023 and meeting OECD definition (firms with at least ten employees, with 20% average annual growth in either turnover or employees over a three-year period. These are part of a wider cohort of 586 high-growth or high growth potential companies across all sectors in Berkshire we can identify using data supplied by Beauhurst

*** (all firms being tracked by [Beauhurst](http://www.beauhurst.com), March 2023)

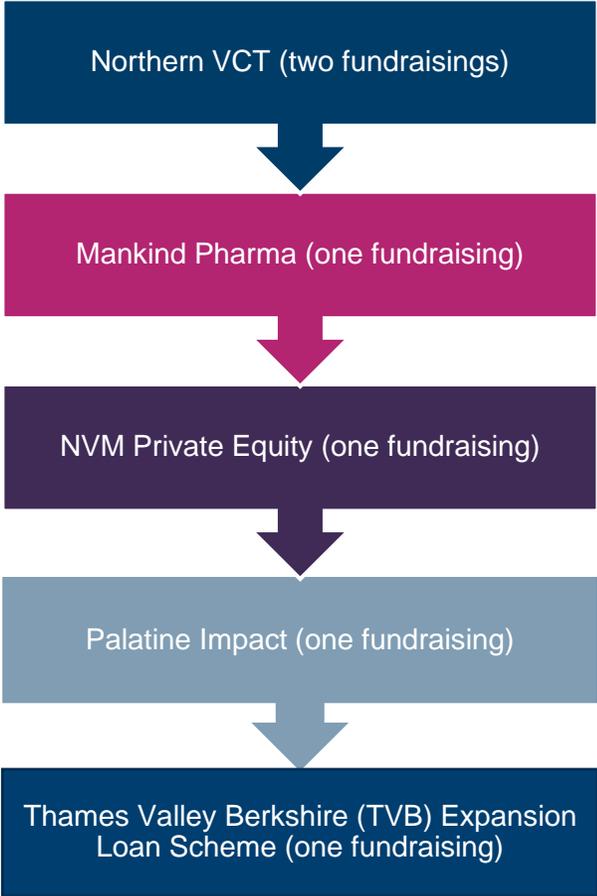
The 12 Life Sciences High Growth firms are spread across four of the six Berkshire local authorities

By unitary authority, Wokingham and Windsor & Maidenhead dominate the area in terms of the number of high growth life sciences firms.

Source: Tracked Seed, Venture, Growth and Established Life Sciences Companies by Unitary Authority, Beauhurst, March 2023.



Top five funders of these Life Sciences companies by number of fundraisings



Berkshire-based FTSE 100 companies

Company	Location	Sector
Centrica	Windsor	Energy services and solutions
Convatec	Reading	Medical products and technologies
GlaxoSmithKline	M Maidenhead and Slough	Pharmaceuticals & Biotechnology
National Grid plc	Wokingham	Gas, Water & Multi-utilities
Prudential plc	Reading	Life Insurance
Reckitt Benckiser	Slough	Household Goods & Home Construction
Sage Group	Reading and Winnersh	Software & Computer Services
Segro	Slough	Real Estate Investment Trusts
SSE plc	Reading	Gas, Electricity & Multi-utilities
Vodafone Group	Newbury and Bracknell	Mobile Telecommunications



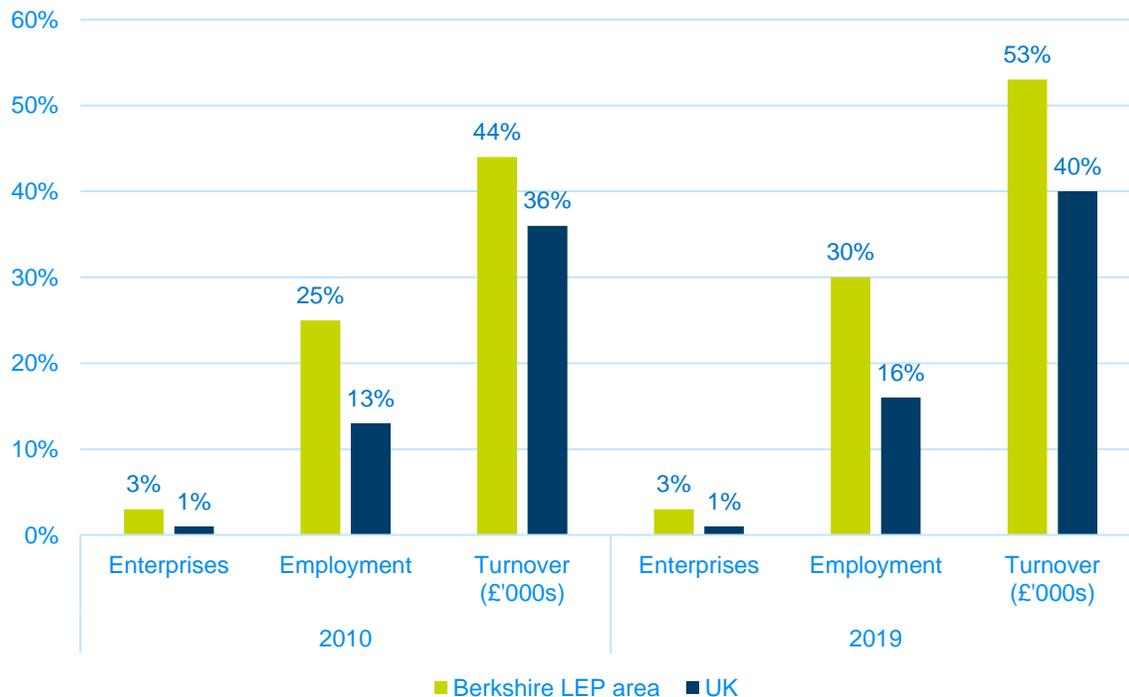
...and a myriad of other large public and world-renowned private sector enterprises

Name	Employees (local estimate)	Location
NHS	16,500	Various
Six Unitary Authorities	9,300	Various
Vodafone	5,000	Newbury and Bracknell
AWE	5,000	Aldermaston and Burghfield
University of Reading	4,000	Reading
Waitrose (HQ and distribution centre)	3,400	Bracknell
Microsoft	3,400	Wokingham (Thames Valley Park)
Telefonica O2	5,000	Slough
GlaxoSmithKline	2,000	Maidenhead and Slough
Merlin (Legoland)	2,000	Windsor
Oracle	2,500	Wokingham (Thames Valley Park)
Royal Mail	2,000	Slough
SSE	2,000	Reading
Fujitsu	1,600	Bracknell
Virgin Media	1,500	Reading (Green Park)

*Where local employee data is available

International economy

Foreign-Owned Companies: contribution to employment and turnover



According to the latest available ONS data from 2020, Berkshire has the highest concentration of Foreign-Owned Companies of all LEP areas.

Berkshire has achieved strong Foreign Direct Investment figures in recent years, leading to an increase in the number of Foreign-Owned Companies, from 945 in 2010 to 1,295 in 2019.

Whilst Berkshire's Foreign-Owned Companies only represented 3% of all local businesses in 2019, they generated 30% of local employment and 53% of local turnover.

Since 2010, the proportion of local jobs in Foreign-Owned Companies has increased from 25% to 30%. Slough has the greatest proportion of employment in EU owned firms and Bracknell in 'rest of the world' owned firms.

Source: [ONS, February 2020](#)

12.5% of jobs in Berkshire (64k) are in the Professional, Scientific and Technical sector – 28% higher than the national average (9.8%). Of these, 18,987 are in specifically Life Sciences industries. This demonstrates the strong concentration of **Life Sciences businesses within Berkshire’s wider Scientific sector and outlines the area as an appealing one for Life Sciences businesses to base themselves.**

Life Sciences Industries	All Berkshire Jobs in the Life Sciences Sector (2021)
Manufacture of Basic Pharmaceutical Products	1,233
Manufacture of Pharmaceutical Preparations	441
Manufacture of Irradiation, Electromedical and Electrotherapeutic Equipment	<10
Manufacture of Medical and Dental Instruments and Supplies	1,452
Wholesale of Pharmaceutical Goods	7,680
Research and Experimental Development on Biotechnology	998
Other Research and Experimental Development on Natural Sciences and Engineering	4,624
Other Professional, Scientific and Technical Activities n.e.c.	2,549
Total	18,987

Life Sciences Occupations	Berkshire Jobs in Life Sciences Occupations (2022)
Biological Scientists and Biochemists	1,508
Physical Scientists	637
Laboratory Technicians	1,209
Environment Professionals	894
Natural and Social Science Professionals n.e.c.	635
Medical and Dental Technicians	597
Chemical Scientists	459
Science, Engineering and Production Technicians n.e.c.	669
Pharmacists	511
Chemical and Related Process Operatives	403
Total	7,552

The Life Sciences Talent Pipeline: Graduate/Post Graduate qualifiers from local universities number in excess of 5k

The annual number of degree and post-grad qualifiers from local top-ranking universities, in relevant Life Sciences disciplines, numbered c. 5,050 in 2021/22

Establishments <ul style="list-style-type: none"> • The University of Reading • The University of Oxford • University College London (UCL) • Kings College, London • Imperial College, London • London School of Economics 	Biological and Sport Sciences - Undergraduate qualifiers	Biological and Sport Sciences – Postgraduate qualifiers	Agriculture, food and related studies – Undergraduate qualifiers	Agriculture, food and related studies – Postgraduate qualifiers	Physical Sciences – Undergraduate qualifiers	Physical Sciences – Postgraduate qualifiers
Total within one hour catchment	1205	955	70	105	1515	1200

Source: 1. Times Higher Education University Rankings, 2022
 2. HE qualifiers by HE provider and subject of study - academic year 2021/22, HESA

Access to skills: wage levels for employees in Berkshire are 20.5% higher than the UK average

	Mean wage of employees working in (2022)	YoY change (2021-22)
Bracknell Forest	£37,449	+2.5%
Reading	£36,019	-2.9%
Slough	£35,155	+6.3%
West Berkshire	£36,324	-8.6%
Windsor & Maidenhead	£49,464	+5.9%
Wokingham	£46,994	+11.1%
Berkshire	£40,234	
London	£44,190	+5.1%
UK	£33,402	+6.2%
Berkshire versus UK	20.5%	

Source: [ONS, October 2022](#)

The Life Sciences talent pipeline: the further education output is healthy from a STEM perspective, ensuring that Berkshire will continue to have a highly skilled science workforce in the future

To help meet Life Science based skills demand and drive productivity in Berkshire, we have invested in cutting-edge training provision at several FE and HE sites across Berkshire. Some examples of these include:

- The Applied Science Unit at Reading College.
 - The renovation of a dated laboratory to encourage increased uptake in new and existing science courses. The new lab will provide specialist facilities, and there is a possibility to create an exhibition area to inspire school pupils.
- The Pharma and Life Sciences Lab at Bracknell College.
 - The new facilities include a state-of-the-art laboratory, featuring industry-standard equipment. received £600,000 from Berkshire LEP via the Government's Getting Building Fund for the Pharma Sciences Lab.

[Berkshire Local Skills Report, 2022](#)

Employee engagement from organisations such as RSSL, Syngenta and Bayer includes supporting laboratory and curricula design, supplying visiting speakers and running science events. They are also pledging training and development for College tutors as well as student work placements and apprenticeships.



Centres of excellence



Firms undertaking significant R&D activity in Berkshire:

- AkzoNobel
- Mars
- Mondelēz
- Johnson & Johnson
- Thales
- Syngenta
- AWE
- Gillette (P&G)
- Costain
- Vodafone (5G)
- Hanovia (UV technology)
- RSSL

Key Centres of Excellence:

- [Agrimetrix, University of Reading](#)
- [Bracknell Enterprise & Innovation Hub](#)
- [BSRIA \(Engineering\)](#)
- [Centre for Integrative Neuroscience and Neurodynamics \(CINN\)](#)
- [Deloitte Cyber Intelligence Centre](#)
- [EIT Food, University of Reading](#)
- [European Centre for Medium-Range Weather Forecasting](#)
- [National Foundation for Educational Research](#)
- [Institute for Environmental Analytics, University of Reading](#)
- [Thames Valley Science Park](#)
- [Thatcham Research \(Car Safety Research\)](#)
- [TRL \(Transport Research\)](#)

The University of Reading: Agriculture, food and health research

The University of Reading works with farming networks and the leading agricultural universities to ensure investment in research and development can support the environmental, production and technological innovations adopted by farmers. [Find out more.](#)

They are the institutional host for a unique collaboration between government, academia and industry, providing data and data capabilities to meet the most pressing needs of the agri-food sector.

Reading is the North-West Europe Cluster lead of this EU-funded collaboration, supporting co-created research with partners ranging from multinationals and major supermarkets through to local Agri-Food start-ups.

[Business in Berkshire Report, 2021-22](#)



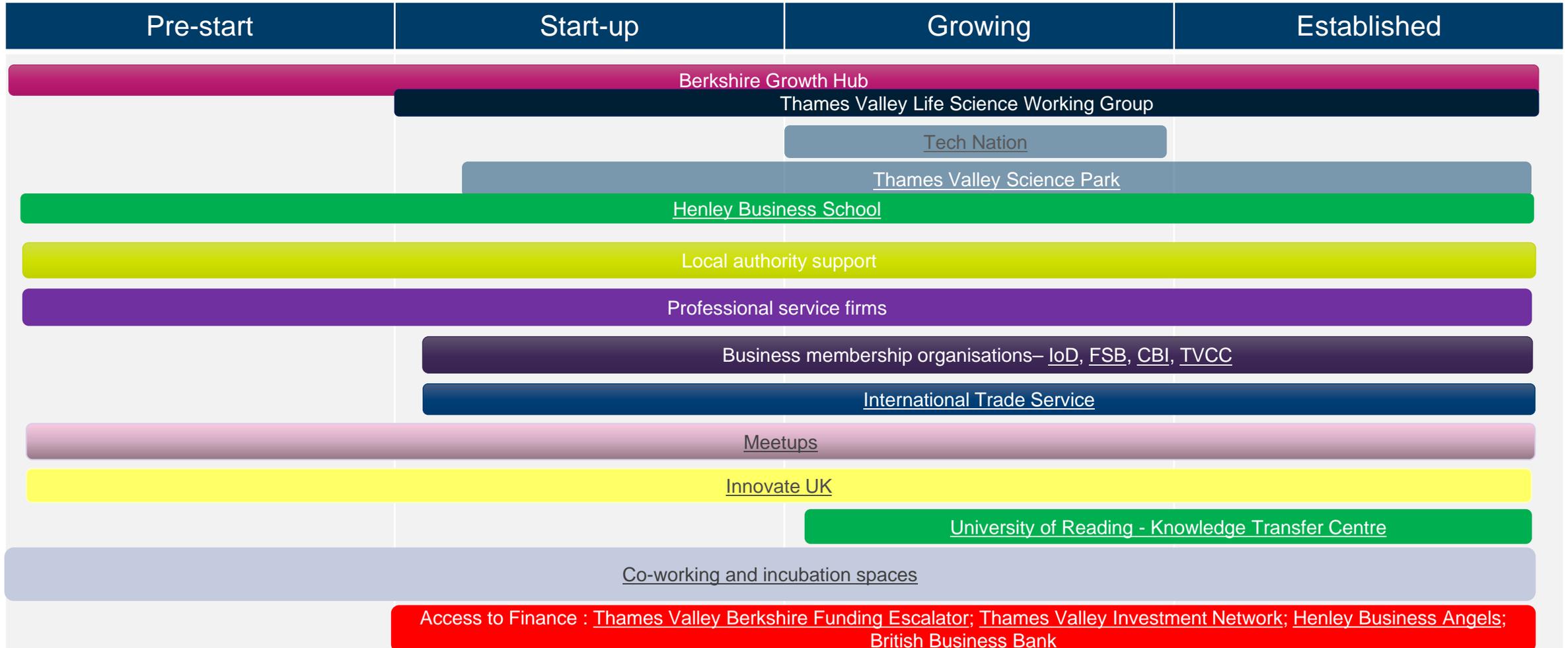
University of Reading

Research Divisions

- [Agri-Food Economics and Social Science](#)
- [Biomedical Sciences and Biomedical Engineering](#)
- [Food and Nutritional Sciences](#)
- [Pharmacy](#)
- [Psychology and Clinical Language Sciences](#)
- [Sustainable Agriculture and Food Systems](#)

Local Business support ecosystem

Advice & knowledge exchange services which can be accessed through the Berkshire Growth Hub



ACCESS TO FINANCE

In addition to national funding opportunities, local sources of funding for certain types of businesses (some of which is restricted to Berkshire based firms) are listed here.

More details on these and national opportunities are available from the [Berkshire Growth Hub](#) and the [British Business Bank](#)

About	
TVB Funding Escalator	The LEP has created a funding escalator providing an expansion loan scheme and a short-term trade loan scheme to eligible SMEs in Berkshire which is managed by The FSE Group. FSE fund managers offer guidance and support during the application process and further help after the loan is made.
Thames Valley Investment Network	Part of the OION Ltd group of angel networks, TVIN works with entrepreneurs and companies that are looking to raise finance by connecting them with highly active potential investors
Henley Business Angels	A network of experienced business leaders, successful entrepreneurs and investors. Its aim is to facilitate opportunities for members to invest in and mentor (S)EIS registered early stage businesses launched by entrepreneurs who graduated from or are connected with the Henley Business School and University of Reading

Key Berkshire business support facilitators

With some of the highest start-up and scale-up rates in the country, Berkshire has a strong business support system for new and growing firms.

The Berkshire Growth Hub is the local first-stop-shop for business support within Berkshire. It aims to enhance and accelerate business performance and help more businesses to take advantage of national and local support programmes.

<https://berkshiregrowthhub.co.uk>



The Thames Valley Berkshire Funding Escalator provides loans to support early-stage SMEs and offers finance to those that have the potential to deliver growth but are unable to access finance from traditional sources.

<http://www.thefsegroupp.com/thames-valley-berkshire-funding-escalator/>



KEY BUSINESS PARKS GREEN PARK, SLOUGH TRADING ESTATE AND THAMES VALLEY PARK



Green Park, Reading
53 Occupiers
Over 1,600,000 sq. ft of accommodation



Slough Trading Estate, Slough
221 Occupiers
13 current property vacancies
Europe's largest trading estate in single ownership



Thames Valley Park, Reading
23 Occupiers
Over 279,000 sq. ft available
80 acres along the bank of the Thames



ARLINGTON, ARLINGTON SQUARE & NEWBURY BUSINESS PARK



Arlington Business Park, Theale
102 Active Occupiers
Over 83,000 sq. ft available



Arlington Square Business Park,
Bracknell
114 Active Occupiers
74,000 sq. ft available



Newbury Business Park, Newbury
18 Active Occupiers
Over 28,000 sq. ft



WINNERSH TRIANGLE, GREENHAM BUSINESS PARK & ASCOT BUSINESS PARK



Winnersh Triangle, Wokingham
35 Active Occupiers
Over 178,000 sq. ft available



Greenham Business Park, Thatcham
Over 180 Active Occupiers



Ascot Business Park, Ascot
26 Active Occupiers
4,774 sq. ft available



Berkshire also has a wealth of Co-Working/ Innovation spaces including



Work.Life based in Reading



The Curious Lounge based in Reading



The Work Station based in Wokingham



Arena members' hubs based across Berkshire



The Workary Maidenhead based in the Royal Borough of Windsor & Maidenhead



The Porter Building based in Slough



Bracknell Enterprise & Innovation Hub based in Bracknell

BERKSHIRE TRANSPORT LINKS

Airport Connections		
Route	Car	Train
Reading to Heathrow Airport	32 min	43 min
Reading to Gatwick Airport	1 hr 5 min	1 hr 22 min
Reading to Stanstead Airport	1 hr 29 min	1 hr 37 min
Reading to Luton Airport	1 hr 3 min	1 hr 36 min
Reading to Bristol Airport	1 hr 38 min	1 hr 52 min
Reading to Southampton Airport	55 min	41 min

Train Connections	
Route	Duration
Reading to London Paddington	23 min
Reading to Birmingham	1 hr 38 min
Reading to Manchester	3 hr 16 min
Reading to Leeds	2 hr 55 min
Reading to Cardiff	1 hr 28 min
Reading to Bristol	1 hr 9 min
Reading to Edinburgh	5 hr 1 min

Driving Connections



- Major motorway (M4) run horizontally through the Berkshire
- Ease of access to M3 (South East), M5 (West) and M25 (London Circular)

Top 10: Small European Cities of the Future (connectivity)*	Top 10: Micro European Cities of the Future (connectivity)*
1. Slough	7. Windsor

*Source: fDi's European Cities and Regions of the Future 2023 – Winners

Summary: Life Sciences

9.8% of Berkshire's GVA was generated by the Professional, Scientific and Technical sector – over 25% more than the national average

Reading ranks #3 in Europe, and #1 in the UK, for FDI in HQs.

World-class Research and Development facilities and Centres of Excellence. These include the University of Reading and University of Oxford, alongside CoE's such as The Royal Berkshire Hospital

12.5% of jobs in Berkshire (64k) are in the Professional, Scientific and Technical sector – 28% higher than the national average (9.8%)

Life Sciences-related Graduate/Post Graduate qualifiers from local universities numbered in excess of 5k in 2021/22

Berkshire offers a high volume of prestigious office and co-working spaces, with remaining capacity and is still building

Berkshire's transport links are exceptional: its towns top connectivity rankings amongst EU Micro & Small 'cities'

Top 10: Local Enterprise Partnerships of the Future

1. London
2. Greater Manchester
3. Cambridge & Peterborough
4. Thames Valley Berkshire
5. West of England

Top 10: Local Enterprise Partnerships of the Future (Economic Potential)

1. London
2. Thames Valley Berkshire
3. Cambridge & Peterborough
4. Greater Manchester
5. Enterprise M3

Top 10: Local Enterprise Partnerships of the Future (Business Friendliness)

1. London
2. Greater Manchester
3. Thames Valley Berkshire
4. South-East Midlands
5. Leeds City Region



HM Government



Berkshire Growth Hub

Berkshire
Opportunities



Berkshire
LOCAL ENTERPRISE PARTNERSHIP



The Curious Lounge,
1st Floor, Pinnacle Building,
20 Tudor Road, Reading RG1 1NH

Further detail about the Business Eco-
system in Berkshire can be found in the
LEP's Business in Berkshire report

Further detail about investing in Berkshire
including relocation support can be found at
Invest in Berkshire

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Head of Economic Strategy and Research
Berkshire LEP

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Note - Information is correct at the time of preparation of this sector proposition - 2023.

