**Introduction and Overview**

The 4th edition of the 'Pharmaceutical & Biotechnology Construction Sector Report - UK 2018-2022' focuses on the market size, value and activity in the Pharmaceutical, Medical Technology, Medical and Industrial Biotechnology sectors in the UK, the key players and geographical areas of manufacturing and R&D concentration.

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**Key issues covered in the report:**

- Introduction to the biopharmaceutical, medical technology and associated sub-sectors.
- Market size, value, key players and geographical areas of concentration.
- Detailed analysis of pharmaceutical clusters and centres of excellence in the UK.
- Overview of the main manufacturing and R&D facilities in the UK.
- Analysis of Government initiatives, resource and capital funding for science R&D.

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**Areas of particular interest:**

- Review of the main challenges facing the pharmaceutical sector.
- Analysis of the potential long-term impact of Brexit on the UK pharmaceutical sector.
- Review of leading specialist supply companies to the Pharma industry.
- Major engineering construction companies involved in the pharmaceutical and biotechnology sectors including contractors, consultants and architects.
- Capital expenditure levels for both pharmaceutical R&D and manufacturing in the UK.
- Analysis of construction costs/ issues in the design of pharmaceutical R&D and manufacturing facilities.
- Detailed profiles of the top pharmaceutical and biotechnology companies operating in the UK.

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**Some of the companies includes:**

ABB, AECOM, AMEC Foster Wheeler, Armac, BDP, Bilfinger Berger, Bouygues Energies & Services, Cavendish Engineers, Environmental Engineering, ISG, Jacobs, Kier, Laing O’Rourke, M+W, Merit Merrell, Morgan Sindall, PM Group, SDC, Shepherd
CONSTRUCTION ACTIVITY IN THE UK BIOPHARMACEUTICAL SECTOR

- Construction market overview - total construction output to 2022.
- Market size and output - current situation; market prospects; construction pipeline.
- Capital expenditure in the UK biopharmaceutical sector.
- UK science parks and university innovation campuses.
- Enterprise zones - university enterprise zones; catapult centres.
- Construction issues - construction costs; contamination control issues; clean rooms; containment laboratories.

CONSTRUCTION CAPABILITY AND SUPPLY

- Overview of the supply chain.
- Key engineering and construction companies/contractors in the UK biopharmaceutical sector.
- Value of projects by sub sector.
- Engineering & construction contractor profiles.
- Other contractors in the pharmaceutical/biotech sector.
- Specialist clean room construction, supply and services.

PHARMACEUTICAL INDUSTRY MARKET SIZE AND OVERVIEW

- Market definition, size and value.
- Global pharmaceutical market.
- UK pharmaceutical market - biopharmaceutical sector; medical technology sector; digital health sector; genomics sector.
- Location of biopharmaceutical manufacturing sites.
- Pharmaceutical/biotechnology clusters.
- Future of pharmaceutical manufacturing operations in the UK.
- Value of pharmaceutical industry to the UK economy - UK trade in pharmaceuticals; sales of drugs to the NHS.
- Pharmaceutical R&D in the UK - government funding for science R&D; total funding; capital funding.
- Market drivers and key Issues in the pharmaceutical industry.
- Implications of Brexit for the UK pharmaceutical sector.

LEADING COMPANIES IN THE SECTOR

- Pharmaceutical company league tables.
- Global pharmaceutical companies.
- Profiles of leading pharmaceutical companies in the UK.
- Other pharmaceutical/biotechnology SME’s - biotechnology - therapeutics/diagnostics; biotechnology/biopharm R&D.
Report Summary
The UK is one of the largest pharmaceutical markets in the world, and the sector makes a greater contribution to the UK economy than any other industrial sector. Pharmaceuticals account for 9% of UK manufacturing output and almost 5% of total exports. Investment activity has been slowly increasing over the last couple of years with confidence beginning to return to the market and this looks set to continue into 2016-17, despite the ongoing threat of global economic uncertainty and the more recent threat of the UK's exit from the EU.

The level of construction output in the pharmaceutical sector has also grown in recent years, with a focus of developments on high-value laboratories / cleanrooms, some of the most expensive types of building to construct, partly due to requirements for extensive ventilation and cooling systems. The industry is expected to continue to show modest growth over the next few years, reflecting the positive growth factors from the growing UK pharmaceutical industry, but constrained by the economic uncertainty created by the UK's vote to leave the EU.

Although the volume of work has increased, tender opportunities are becoming increasingly competitive resulting in tighter margins and, despite renewed activity, many UK pharmaceutical producers are not significantly increasing levels of capital expenditure. Increasing specialisation within the pharmaceutical industry has brought about varied opportunities to design and develop R&D facilities, production processes, and assembly of drug delivery systems, as well as construction and maintenance of highly specialised production facilities and associated service or support facilities.

The Government has announced a forward pipeline of over £1.9bn worth of capital projects in the pharmaceutical and biotechnology sectors between now and 2020. In addition to these confirmed capital projects, a number of expansion plans have been announced by leading pharmaceutical companies, which should be of interest to construction companies and their supply chains operating in the pharmaceutical sector.

List of contents
Contents Listing
1. INTRODUCTION 7
   1.1 INTRODUCTION 7
   1.2 SOURCES OF INFORMATION 7
2. SUMMARY AND MARKET PROSPECTS 9
   2.1 SUMMARY 9
   2.2 UK PHARMACEUTICALS SECTOR - MARKET PROSPECTS 11
3. ECONOMIC ENVIRONMENT 14
   3.1 GDP 14
   3.2 INFLATION & INTEREST RATES 15
   3.3 UNEMPLOYMENT 16
   3.4 HOUSEHOLD CONSUMPTION 16
   3.5 HOUSING & CONSTRUCTION 17
4. CONSTRUCTION ACTIVITY IN THE UK PHARMACEUTICAL AND BIOTECHNOLOGY SECTORS 20

4.1 NON-RESIDENTIAL CONSTRUCTION OUTPUT 20

4.1.1 Non-Residential Construction Output by Sector 21

4.2 DEFINITION - PHARMACEUTICALS AND BIOTECHNOLOGY 23

4.3 MARKET SIZE - PHARMACEUTICALS AND BIOTECH INDUSTRY BY VALUE 23

4.3.1 Current Situation 23

4.3.2 Market Prospects 24

4.3.3 Construction Pipeline 25

4.4 CAPITAL EXPENDITURE IN THE PHARMACEUTICAL SECTOR 28

4.5 SCIENCE PARKS / UNIVERSITY INNOVATION CAMPUSES 30

4.6 ENTERPRISE ZONES 33

4.6.1 University Enterprise Zones 35

4.6.2 Catapult Centres 35

4.7 CONSTRUCTION ISSUES IN THE PHARMACEUTICAL INDUSTRY 36

4.7.1 Construction Costs 36

4.7.2 Contamination Control Issues 37

5. CONSTRUCTION CAPABILITY AND SUPPLY CHAIN 40

5.1 OVERVIEW OF THE SUPPLY CHAIN 40

5.2 KEY CONSTRUCTION COMPANIES AND CONTRACTORS IN THE PHARMACEUTICAL & BIOTECH SECTOR 40

5.2.1 Value of Projects by Sub Sector 40

5.2.2 Engineering & Construction Contractor Profiles 42

5.3 SPECIALIST CLEAN ROOM CONSTRUCTION, SUPPLY AND SERVICES 50

6. PHARMACEUTICAL INDUSTRY MARKET SIZE AND OVERVIEW 54
7.2.2 Johnson & Johnson 85
7.2.3 Merck KGaA 86
7.2.4 Teva 87
7.2.5 Baxter Healthcare 88
7.2.6 Sanofi 88
7.2.7 AstraZeneca 89
7.2.8 Abbott 90
7.2.9 Novartis 90
7.2.10 Pfizer 91
7.2.11 Other Global Pharma Companies in the UK 92
7.3 OTHER PHARMACEUTICAL/BIOTECHNOLOGY COMPANIES 93
7.3.1 Biotechnology - Therapeutics/Diagnostics 93
7.3.2 Biotechnology / Biopharm R&D 94
7.3.3 Pharmaceutical 95

Tables & Contents

CHART 1: ESTIMATED VALUE OF CONSTRUCTION OUTPUT IN THE PHARMACEUTICALS AND BIOTECH INDUSTRY BY VALUE (£M AT CURRENT PRICES) 2013-2022 10


CHART 3: INTEREST RATES AND INFLATION (CPI) FROM 2000-2022 16

CHART 4: PDI & SAVINGS RATIO AT CURRENT PRICES 2000-2022 17

TABLE 5: EXCHANGE RATE FLUCTUATIONS 2014-2020 - STERLING TO THE DOLLAR, AND THE EURO, SPOT RATES 18

CHART 6: VALUE OF NON RESIDENTIAL CONSTRUCTION OUTPUT 2013-2022 BY VALUE (£BN AT CURRENT PRICES) 20

CHART 7: NON-RESIDENTIAL CONSTRUCTION OUTPUT (GB) BY SECTOR 2017 - % BY VALUE 21

CHART 8: ESTIMATED VALUE OF CONSTRUCTION OUTPUT IN THE PHARMACEUTICALS AND BIOTECH INDUSTRY BY VALUE (£M AT CURRENT PRICES) 2011-2022 23

TABLE 9: UK SCIENCE AND RESEARCH PROJECTS: FORWARD CONSTRUCTION PIPELINE 26
TABLE 11: UK SCIENCE PARKS - SIZE, GEOGRAPHICAL SPREAD, SECTORS AND KEY PARTNERS 31

TABLE 12: AIRBORNE PARTICULATE CLEANLINESS CLASSES FOR CLEAN ROOMS (BASED ON ISO 14644-1: 2015) 38

TABLE 13: UK PHARMACEUTICAL/BIOTECH SECTOR - CONTRACT AWARDS BY SUB SECTOR MAY 2016 TO JUNE 2018 41

TABLE 14: AIRBORNE PARTICULATE CLEANLINESS CLASSES FOR CLEAN ROOMS (BASED ON ISO 14644-1: 2015) 38

TABLE 15: SIZE OF THE UK LIFE SCIENCES SECTOR BY TURNOVER AND NO. COMPANIES 2016-17 (BIOPHARMACEUTICALS AND MEDICAL TECHNOLOGY) (BY % AND VALUE £BN) 55

TABLE 16: DISTRIBUTION OF UK BIOPHARMACEUTICAL SITES (MANUFACTURING AND R&D) BY GEOGRAPHICAL AREA (%) 57

TABLE 17: BIOPHARMACEUTICAL/MEDICAL TECHNOLOGY SECTORS: MAJOR COMPANIES AND GEOGRAPHICAL LOCATION OF FACILITIES IN THE UK 2018 - MANUFACTURING, R&D, AND PACKAGING & LOGISTICS 58

TABLE 18: BIOTECHNOLOGY CLUSTERS - LONDON/SOUTH EAST/EASTERN AREAS BY SIZE AND VALUE (£BN) 60

TABLE 19: PHARMACEUTICAL TRADE IN THE UK: 2010 - 2017 BY VALUE (£M) 68

TABLE 20: GOVERNMENT RESEARCH & INNOVATION BUDGET 2017-18 TO 2020-21 (£M) 70

TABLE 21: GOVERNMENT RESEARCH & INNOVATION BUDGET 2017-18 TO 2019-20 BY RESEARCH ORGANISATION (£M) 70

TABLE 22: GOVERNMENT SCIENCE INFRASTRUCTURE BUDGET 2017-18 TO 2019-20 BY RESEARCH ORGANISATION (£M) 71

TABLE 23: TOP 25 PHARMACEUTICAL AND BIOTECHNOLOGY COMPANIES BY GLOBAL R&D SPEND 2017 (£BN AND BY % OF RX - PRESCRIPTION SALES) 73

TABLE 24: TOP 20 GLOBAL PHARMACEUTICAL AND BIOTECHNOLOGY COMPANIES BY DRUG PIPELINE SIZE IN 2016 AND 2018 74

TABLE 25: TOP 20 GLOBAL PHARMA COMPANIES BY MARKET SHARE (%) 2017 82

TABLE 26: TOP 20 LIFE SCIENCE COMPANIES IN UK BY NUMBER OF UK MANUFACTURING PLANTS 84

TABLE 27: GSK - KEY UK LOCATIONS 85

TABLE 28: JOHNSON & JOHNSON - KEY UK LOCATIONS 86

TABLE 29: MERCK KGAA - KEY UK LOCATIONS 87

TABLE 30: TEVA - KEY UK LOCATIONS 87

TABLE 31: BAXTER HEALTHCARE - KEY UK LOCATIONS 88

TABLE 32: SANOFI - KEY UK LOCATIONS 89
About AMA Research

Established in 1989, AMA Research is widely recognised as the leading specialist provider of market research to the UK building and construction industries. AMA's research and analysis goes beyond the more commonly available range of statistical and company information to provide expert, informed commentary and in-depth market analysis, making the reports a valuable and relevant resource for understanding the UK's construction and associated markets.

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