

BIOTECH PROFILES

Madison's Biotechnology Industry: Profile by Sector

Madison Wisconsin is widely acknowledged as one of the premier emerging biotechnology clusters in the United States, driven largely by the world class research at the University of Wisconsin-Madison. The cluster comprises a critical mass of nearly 150 companies whose expertise and programs span the full spectrum of life science R&D, manufacturing, preclinical and clinical evaluation, and commercialization.

Sector Focus	No. of Companies
Medical or Lab Devices	46
Lab Reagents or Services	42
Pharmaceuticals	32
Food & Agribusiness	22
Human Diagnostics	17
Drug Manufacturing	10
CRO	4
Bioinformatics or Software	4
Other	6

Note: Individual companies may be reported in multiple sectors.
Data as of November 2009

Madison and the upper Midwest region have long been leaders in fostering innovation in medical and lab devices. Today the area's highest technology concentration continues to be in this sector even as the industry diversifies and grows. Not only does it encompass the largest number of local companies (46), but it includes many of the life science sector's largest employers. The sector's expertise and success have not been lost on industry leaders – numerous companies have had their strategies and technologies validated through acquisition. Sector-leading companies having national and global reach include:

- **GE Healthcare** – Anesthesia and critical care ventilation equipment
- **ThermoFisher Scientific** – Molecular spectroscopy and microanalysis products
- **Gilson** – Analytical instrumentation & liquid handling equipment
- **Bruker AXS** – Analytical X-ray systems
- **CareFusion Corporation** (fka Cardinal Health NeuroCare) – Monitoring and screening products for neurological, vascular and auditory conditions
- **Roche NimbleGen** – DNA microarrays and services
- **TomoTherapy** – Radiation therapy systems

The lab reagents and services sector has also evolved into a regional strength. **Promega Corporation** has been an industry pioneer, creating and commercializing many innovations since its founding in 1978. Today this privately held company has grown into a major employer with over 500 local employees and nearly 1,000 employees globally. Joining them are business units affiliated with other major companies, such as **Life Technologies**, **Becton Dickenson**, **Harlan Laboratories** and **Roche**, as well as smaller companies focused on key innovative technologies such as stem cells (e.g. **Cellular Dynamics International**).

Given the high resource requirements and longer product development timelines associated with pharmaceuticals and human diagnostics, it is not surprising that these two sectors have matured more slowly. Nevertheless these sectors hold great promise and are gaining in critical mass and industry recognition. Sector leaders include **Scientific Protein Laboratories**

(heparin and other APIs), **Roche Madison** (RNAi therapeutics), **Hologic-Third Wave Technologies** (molecular diagnostics), and **King Pharmaceuticals** (thrombin). Complementing this sector is a growing presence of drug manufacturers, led by **SAFC Pharma** (small molecule APIs) and **Catalent Pharma Solutions - Middleton** (monoclonal antibodies).

Food & Agribusiness has been a core component of the Madison biotech community from its earliest days. Recognizable international leaders include **Monsanto** (transgenic plants), **Danisco** (food ingredients), and **ABS Global** (animal genetics).

Lastly, while the number of players in the Contract Research Organization space is few, the presence of two industry stalwarts – **Covance Laboratories** and **PPD Inc.**, with 2,000 and 650 local employees respectively providing analytical, preclinical and clinical testing services – is a key driver underlying the robustness of the Madison life science industry.

With nearly 10,000 people now employed in the local life science industry, Madison has established itself as one of the preeminent centers of excellence for this dynamic and growing global industry. Core competencies in biology, biochemistry, genetics, engineering, physics and computer sciences, and other technologies that are key to this multidisciplinary industry are world class. A culture of innovation and discovery is firmly entrenched. The commercial infrastructure is diversified and spawning new companies at a healthy pace. Together these assets can be expected to fuel ongoing industry growth and individual career opportunities.

If you'd like to identify all companies in a given sector, on the navigation menu select Company Search > Search By Key Criteria. On this Custom Search screen, select Business Sectors from the Filter#1 menu, and then select the sector of interest from the secondary dropdown menu.

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