



Life Sciences Property Supply & Demand Analysis

Scottish Enterprise Geographical Area

2025

Contents

Key Takeaways for Scottish Enterprise Geographical Area	3
Introduction & Report Overview	5
Life Sciences Markets in Context	10
Talent	16
Funding	19
Demand Analysis	25
Supply Analysis	32
Regional Overviews	35
Sources	60

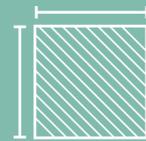
Key Takeaways

for Scottish Enterprise geographical area



1.2M SQ FT
(111,483 SQ M)

Total size
of enquiries



140

Enquiries in
the past 2 years



700K SQ FT
(65K SQ M)

Lab
enquiries



65%

Of enquiries
are for biotech



72%

Of enquiries
are for expansion



150K SQ FT
(14K SQ M)

Existing available
lab supply



260K SQ FT
(24K SQ M)

Existing remaining
office supply



777K SQ FT
(72K SQ M)

Pipeline supply of
offices & labs



Key Takeaway:

“Pipeline lags and viability issues threaten to outpace demand, slowing sector growth”

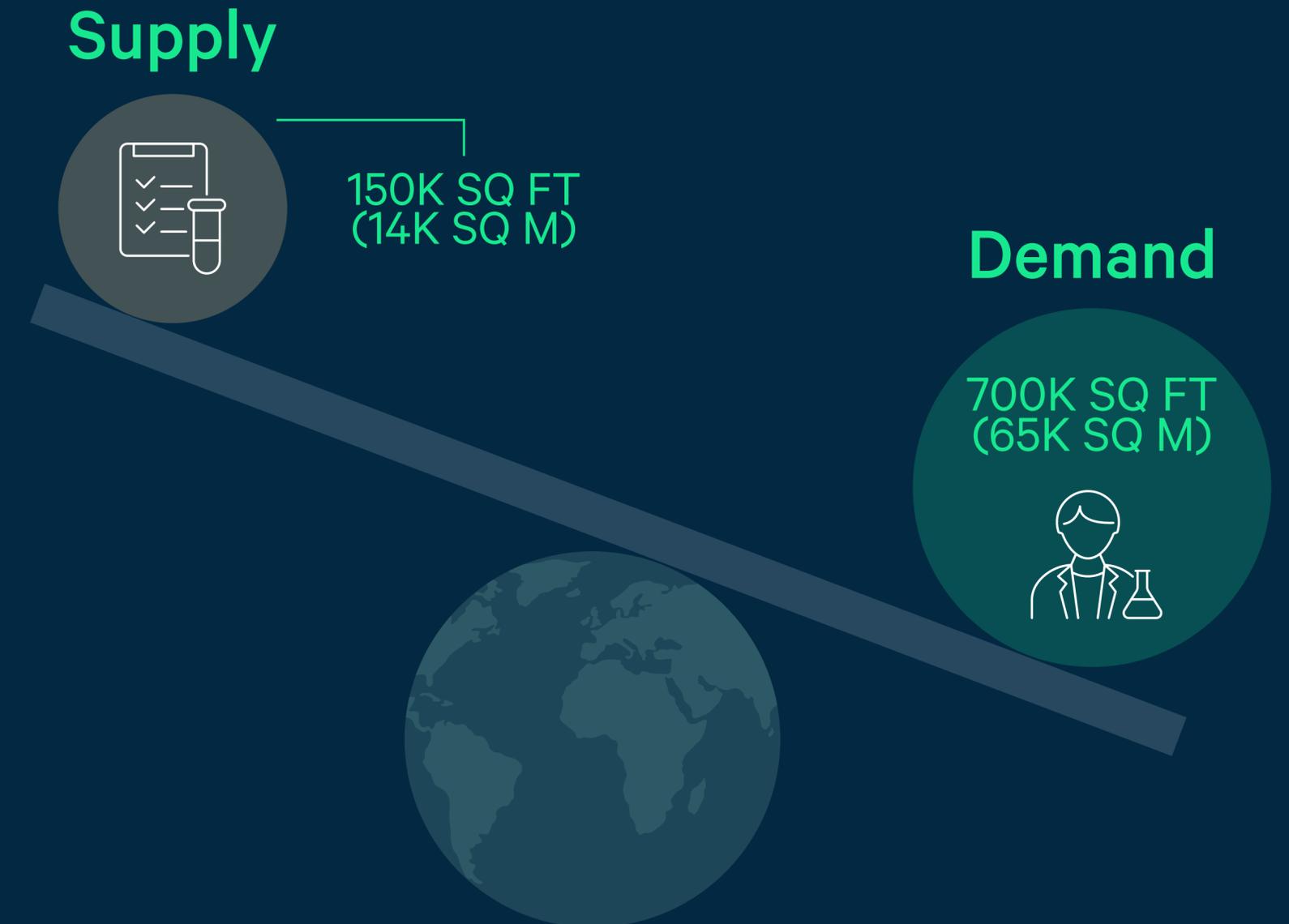
Supply Pipeline vs Demand Imbalance

Supply levels remain low, with notable variation in provision across the major clusters of Edinburgh, Glasgow, Dundee, and Aberdeen. While each region has some existing infrastructure, there are clear gaps - particularly in grow-on space for scaling companies and in large-scale, mixed-use manufacturing facilities such as TechBox* and Good Manufacturing Practice (GMP) manufacturing. These shortages risk slowing the sector’s momentum, as the lack of suitable space could hinder the ability of businesses to expand and attract investment at critical stages of growth. While new life sciences schemes are beginning to emerge across Scottish Enterprise geographical area, a significant portion of the pipeline remains at an early stage - uncommitted and without planning consent.

This lack of certainty poses a real risk of unmet demand over the next 3–5 years, particularly as the sector continues to grow and scale-up activity accelerates. Development viability remains a key challenge, as evidenced by the fact that many existing schemes have only progressed with public sector funding support. It remains important that sustainable development is based upon commercial market rents being achieved to help underpin development.

However, without speculative development to bridge this gap, the market may struggle to deliver space at the pace required.

*Flexible, hybrid industrial accommodation combining lab, office, and warehouse located within a life sciences cluster location.



01

INTRODUCTION & REPORT OVERVIEW

5

01 / Introduction & Report Overview

Across the Scottish Enterprise geographical area there are a number of science parks, innovation centres and university campuses that support R&D across the **Life Sciences sector**.

This analysis, produced by **CBRE** on behalf of **Scottish Enterprise** and **Scottish Government**, provides a detailed breakdown and analysis of supply and demand for **laboratory, office and manufacturing space** within the Scottish Enterprise geographical area.

The objective is to identify the **challenges and opportunities** to drive further investment, to help realise its ambitions to be a **£25 billion** Life Sciences sector by **2035**.

This report has been prepared by CBRE on behalf of



01 / Introduction & Report Overview

Objectives

Over the past decade, Scotland's life sciences sector has seen strong expansion, with turnover growing by over 10% year on year reaching over

£10BN
BY 2021

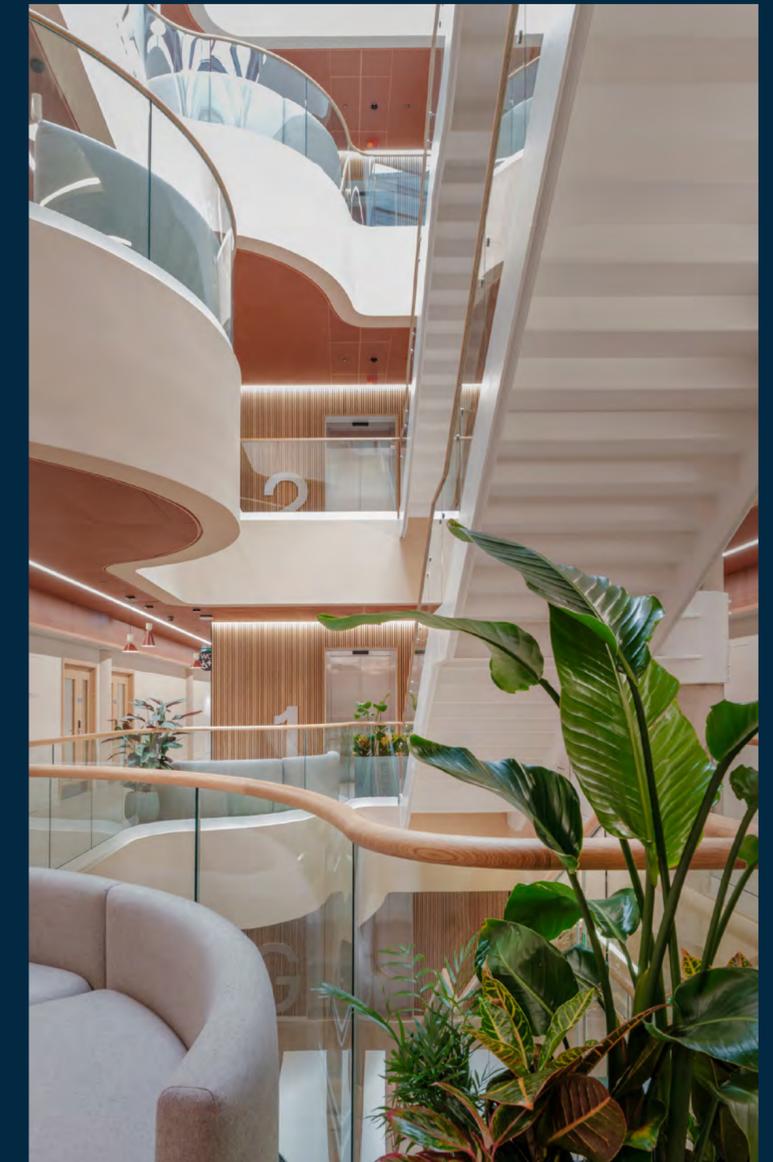
surpassing its original 2025 target five years early.

The latest available data from the Life Sciences Strategy for Scotland 2035 Vision shows that Scotland's 750 life sciences companies collectively generate **£10.5 billion** in turnover and employ around **46,900** people across businesses and Higher Education Institutions, reflecting continued growth since **2021**. Building on this strong performance, the newly published Life Sciences Strategy (November 2025) sets a revised target of **£25 billion turnover** by **2035** and introduces a clear roadmap to achieve it. A key element is the deepening of collaboration between industry, academia and the NHS via initiatives such as the National Innovation Adoption Pathway. It also prioritises skills development and international investment attraction, supported by an initial **£1 million** government commitment and a series of delivery "sprints" designed to scale innovation and position Scotland as a global leader in life sciences.

The objective of this report is to deliver a comprehensive profile of demand for, and supply of, life sciences (human health) accommodation within the Scottish Enterprise geographical area. This includes producing a robust and detailed estimate

of current and future demand for laboratory and associated space, informed by market intelligence and stakeholder engagement. Creating and scaling successful life sciences companies requires the right built infrastructure. A well-functioning property market is fundamental to this ambition, providing access to high-quality, flexible, and digitally connected accommodation in strategically located clusters that meet the needs of early-stage innovators and later-stage growth businesses.

Currently, a shortage of laboratory space and associated infrastructure remains one of the most significant barriers to growth, constraining companies at every stage of their journey. Unlocking the full potential of life sciences will require an ambitious programme of investment and targeted interventions to deliver facilities that enable scaling and retention of businesses critical to Scotland's future economy. Central to shaping this market is transparency of demand. This analysis therefore examines supply and demand dynamics across Scottish Enterprise geographical areas, to inform future development and ensure that infrastructure provision aligns with the sector's growth trajectory and strategic objectives.



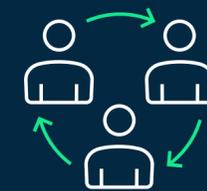
01 / Introduction & Report Overview

Methodology

The analysis for this report employs a comprehensive methodology designed to provide a robust understanding of the life sciences property market, focused within the Scottish Enterprise geographical area of Scotland. Leveraging CBRE's extensive experience, we combine our deep sector expertise with rigorous qualitative and quantitative data analysis and strategic stakeholder engagement.

The methodology is structured in three core parts: estimating demand, estimating supply, and a final summary. Finally, we will synthesize these findings into a comprehensive overview, presenting a clear picture of the market dynamics. The report includes wider context of the UK and Scottish life sciences markets and industry demographics.

This data and analysis will be regularly updated on behalf of Scottish Enterprise and Scottish Government in collaboration with the wider stakeholders to provide a more granular understanding of the market.



We are deeply grateful to all stakeholders whose invaluable contributions of time, expertise and data have shaped the Life Sciences Property Supply & Demand Analysis (2025): Scottish Enterprise Geographical Area. This reflects a strong spirit of collaboration across industry, academia, healthcare and government, and we sincerely thank you for your ongoing support and commitment.

01 / Introduction & Report Overview

Methodology

01 Demand Analysis



Our demand assessment will provide a detailed understanding of current and future requirements for life sciences property. We have undertaken detailed key stakeholder engagement to gather “Active Requirements” data, while acknowledging and addressing potential sensitivities through methods like redaction or NDAs. To forecast future demand, we have analysed key indicators such as venture capital investments and the performance of spin-out companies.

02 Supply Analysis

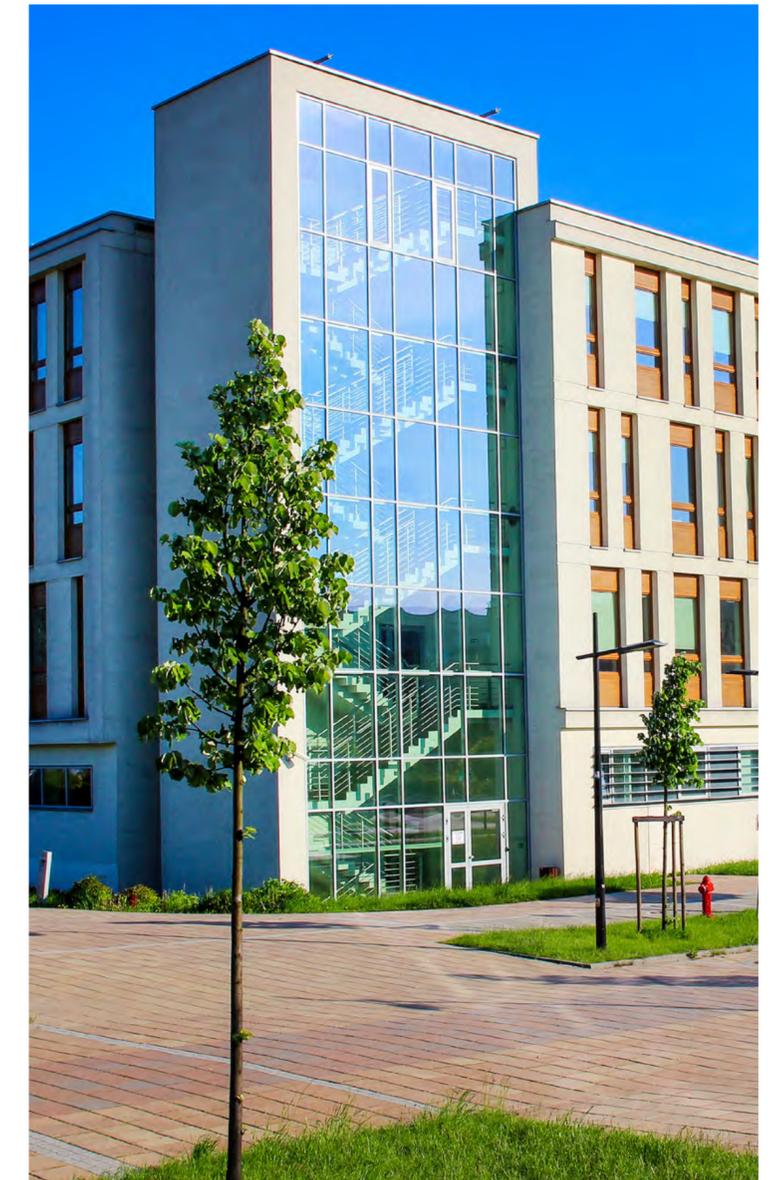


The supply-side analysis has focused on comprehensively mapping the landscape of existing and planned life sciences property. This involved detailed identification and data capture of existing buildings, complemented by the identification of committed and potential future supply. This was achieved through a series of stakeholder engagement sessions, ensuring a robust understanding of the pipeline. The scope of this analysis is specifically focused on dedicated laboratory facilities, and associated or directly linked office spaces (therefore, does not include “lab enabled or traditional office accommodation not marketed for life sciences occupiers) and manufacturing (which are intended/marketed for Life Sciences use) to provide a precise and representative view of the supply landscape.

03 Data



To ensure that occupier demand is accurately assessed and effectively leveraged, it’s crucial that data is collected consistently across the regions. Disparities in format or quality can undermine analysis and lead to fragmented or misleading conclusions. Establishing standardised data collection practices will be key to producing reliable insights and enabling informed decision-making across Scottish Enterprise geographical area’s life sciences ecosystem. While this analysis provides a comprehensive overview, we acknowledge potential data gaps and aim to address them in future series of updates which will be produced.



02

LIFE SCIENCES MARKETS IN CONTEXT

02 / Life Sciences Markets in Context

Life Sciences: UK

One of the **world's most advanced life sciences ecosystems**, underpinning global innovation from vaccines and monoclonal antibodies to CT Scanners and CRISPR therapeutics.

SECTOR VALUE:

£94bn

TURNOVER

250,000

JOBS & GROWING



LIFE SCIENCES COULD GROW BY

£41bn (+165%)

BY 2035 IF CURRENT TRENDS CONTINUE



01

World Class R&D:



Building on scientific strengths with £2bn+ public funding and alignment with UKRI & NIHR.

02

Scale & Investment:



Creating an outstanding place to start, grow and manufacture; up to £520m LSIMF to anchor globally mobile biomanufacturing.

03

Health Innovation & NHS Reform:



Faster adoption and digital transformation through an “innovator passport” and new procurement pathways.

02 / Life Sciences Markets in Context

UK Government Life Sciences Policies

01



Continued commitment to the UK's association with Horizon Europe, providing access to over **£80 billion** in funding for advanced research and innovation projects within the EU framework.

02



Increase in DSIT's R&D budget to **£13.9 billion**, along with record core research funding of **£6.1 billion**.

03



Allocation of **£520 million** to the Life Sciences Innovative Manufacturing Fund (LIMF) to support advanced manufacturing in the sector.

04



Investment of **£40 million** over five years in a Proof-of-Concept Fund, designed to help transform pioneering university research into successful companies.

05

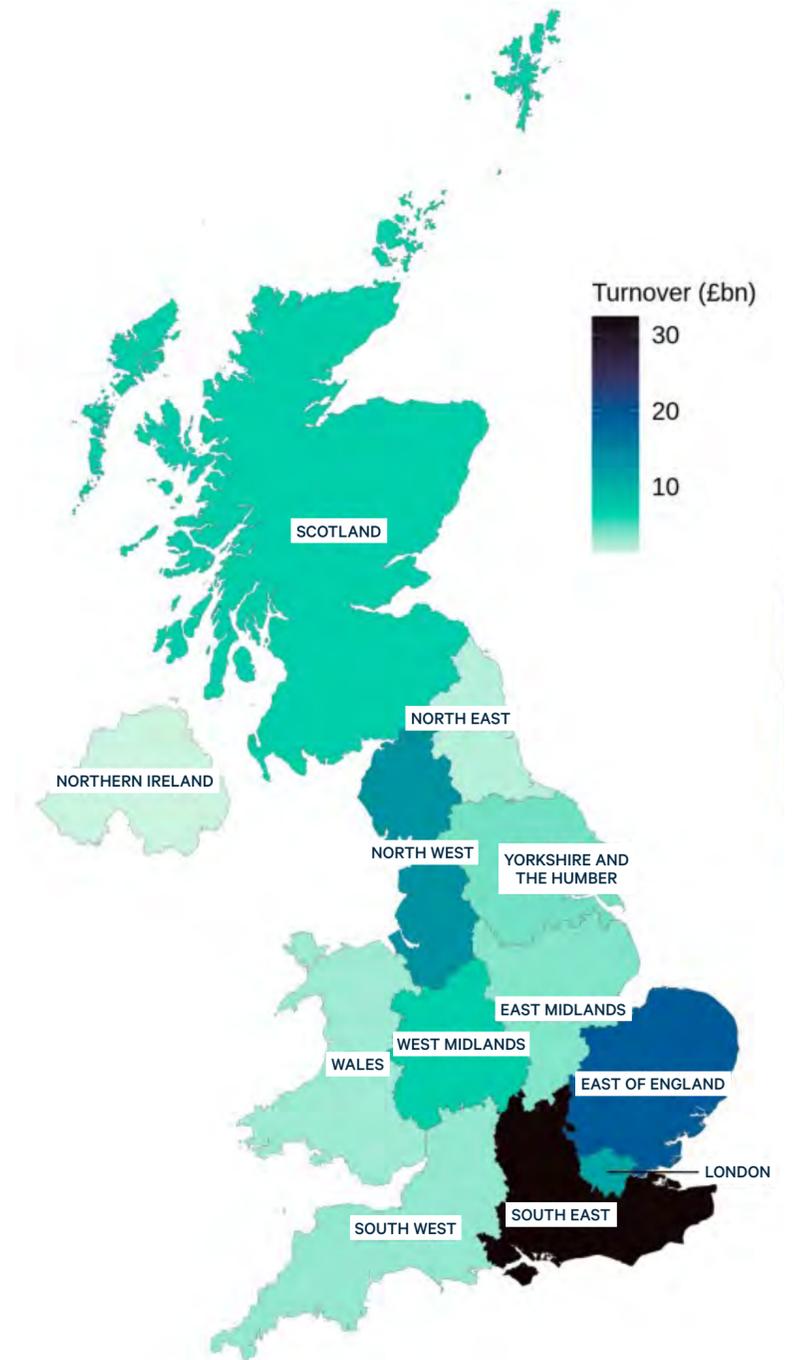


The Mansion House Compact is aiming to open new funding channels. Major pension funds are already working on vehicles to increase investment in early-stage ventures, with further developments anticipated.

06



Investment of up to **£600 million** (with Wellcome Trust) to create a secure, AI-ready health data platform.



02 / Life Sciences Markets in Context

What will be shaping life sciences in the next 5 years

Political Influence will be crucial



Industry needs strong support from UK government. There has been renewed commitment throughout 2025 with the UK Industrial Strategy and associated Life Sciences Plan which has tied with a stabilisation of VC funding.

Addressing the Drug Patent Cliff



Pharma is facing a significant patent cliff beginning in 2027, and companies are exploring strategies beyond acquisitions. Leasing commercial lab space and opening incubators are becoming popular approaches to discovering and developing future drugs. These efforts aim to mitigate potential revenue losses and ensure sustained innovation.

Transforming the Approach to Internal Innovation



Pharmaceutical companies are changing how they access talent pools by deploying task forces to target specific expertise. This shift reflects a growing need for agility and precision in addressing complex challenges such as drug development, regulatory compliance and advanced data analytics.

Ongoing Scientific Evolution



Scientific progress shows no signs of slowing down, with novel modalities and ideas emerging daily. As cell and gene therapies become established, the focus will shift to the next evolution of these technologies.

AI-Accelerated Life Sciences R&D



AI is rapidly being adopted to analyse medical imaging, drug discovery and diagnostics, leveraging NHS datasets – reducing development timelines and cut costs – delivering precision treatments more quickly.

Sustainability



Sustainability will become a defining priority, driven by Net Zero commitments, investor ESG requirements, and rising energy costs. Companies are increasingly retrofitting with renewable energy, incorporating green certifications and driving innovation in green manufacturing and bio-based products.

02 / Life Sciences Markets in Context

Life Sciences: Scotland

01



World-Class Research & Innovation

Scotland boasts globally recognised universities and research institutes driving breakthroughs in genomics, precision medicine, and advanced therapeutics.

02



Strong Clinical Trial Capability

Home to the Institute for Regeneration and Report (IRR), Europe's largest stem cell research concentration, and supported by the Cell & Gene Therapy Catapult.

03



Advanced Manufacturing Excellence

Scotland hosts the CPI Medicines Manufacturing Innovation Centre and National Manufacturing Institute Scotland, embedding sustainable, efficient processes early in R&D.

04



Rich Health Data & Digital Capability

Secure, interoperable health data and AI-driven platforms enable faster clinical trials, drug discovery and real world evidence generation.

05



Aquaculture and Industrial Biotechnology

Scotland leads Europe in animal health and aquaculture research, supporting sustainable food production and bio-based manufacturing innovation.

14

KEY STATISTICS



£10.5bn
TURNOVER (IN 2022)



46,000+
EMPLOYED



750+
ORGANISATIONS



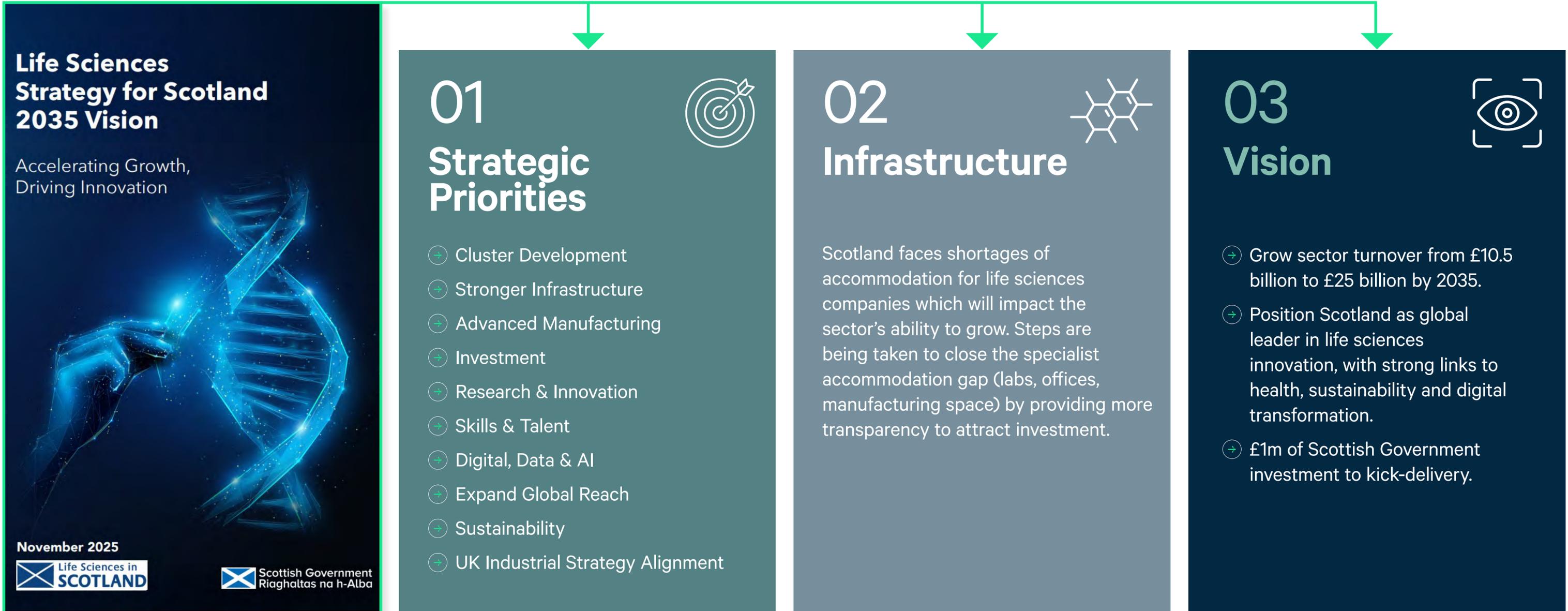
£37m
FOR CRDC

Sources: Scottish Government Sector Briefing – Life Sciences 2025

Figures refer to wider Life Sciences Cluster.

02 / Life Sciences Markets in Context

Life Sciences: Scotland



03

TALENT

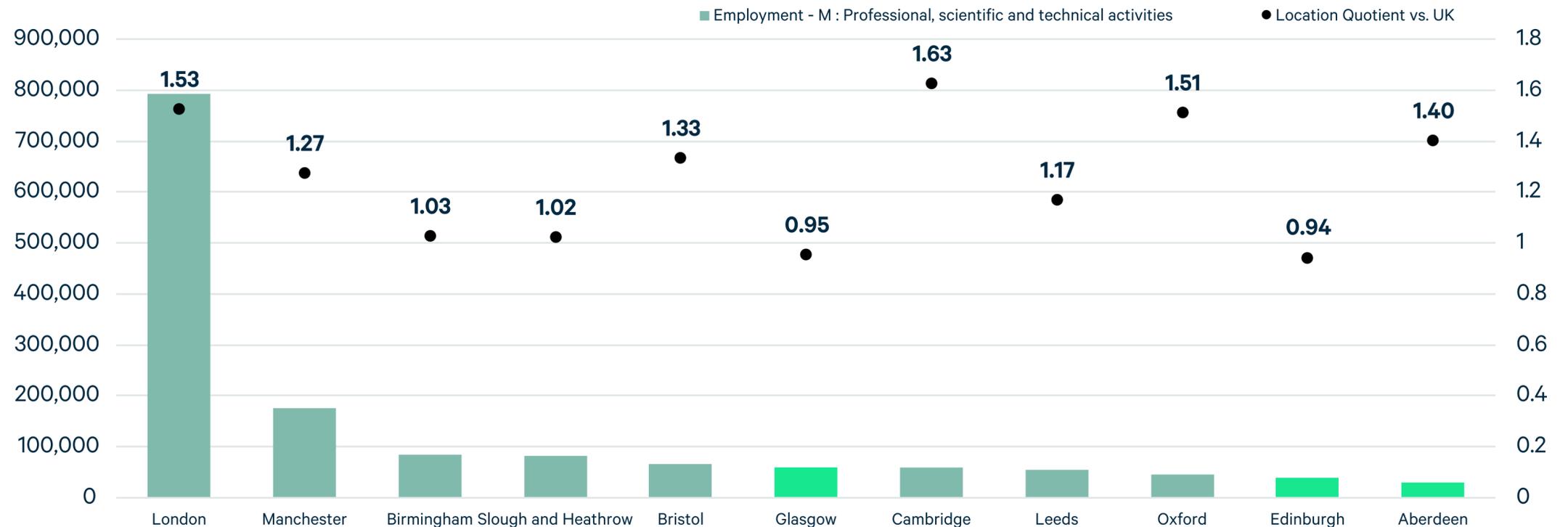
03 / Talent

Employment in Scotland within Life Sciences and aligned industries

- Key markets in Scotland are Glasgow, Edinburgh and Aberdeen for professional for professional activities that include and are aligned with Life Sciences employment.
- Glasgow and Edinburgh are similar in scale to the other two Golden Triangle locations of Oxford and Cambridge, though lack the comparative specialism of these markets.
- Life sciences employers are increasingly seeking advanced digital, AI and regulatory skills, alongside more transferable attributes such as leadership and communication; often found within the professional, scientific and technical sector, in particular within consultancy, R&D and technical services.

A Location Quotient > 1 demonstrates that a market has a higher density of employment in an industry/activity (in this case Professional, Scientific & Technical employment) than the national average.

UK Markets in Context



Sources: Business Register & Employment Survey, ESRI 2025

03 /
TalentKey Headlines for Scotland
Life Sciences Talent

01

**Technical & Analytical Skills on the rise**

Laboratory, technical skills and scientific expertise are the fastest growing skills and are likely driven by demand. In addition, softer skills are required. These include being able to communicate and analyse, allowing insights to land with different audiences.

02

**New graduates are more highly qualified**

There is a growing demand for more specialised skills and graduates looking to enhance their employability. This is indicated by the increasing number of graduates attaining a Master's degree, rising by almost 50%, while the number of those attaining only a Bachelor's degree has decreased by close to 25%.

03

**Flexibility front of mind**

Flexibility has moved to trump remuneration for employees within Life Sciences. Alongside this, workers are looking for employers that offer exciting work, the opportunity to develop their career, and an environment that is positioned to support a healthy work/life balance.

04

**Scotland Universities driving Pipeline**

The data indicates that the top 10 universities attended for Life Sciences talent in Scotland, are Scottish institutions, primarily in Glasgow and Edinburgh. Key topics studied are Chemistry, Medicine and Biology.

05

**Glasgow and Edinburgh connected to key UK markets**

Both Glasgow and Edinburgh show strong talent flow between themselves and other key UK markets, in particular London, as well as key northern markets such as Manchester, Newcastle and Leeds, demonstrating the appeal of Scotland for life sciences talent.

04

FUNDING

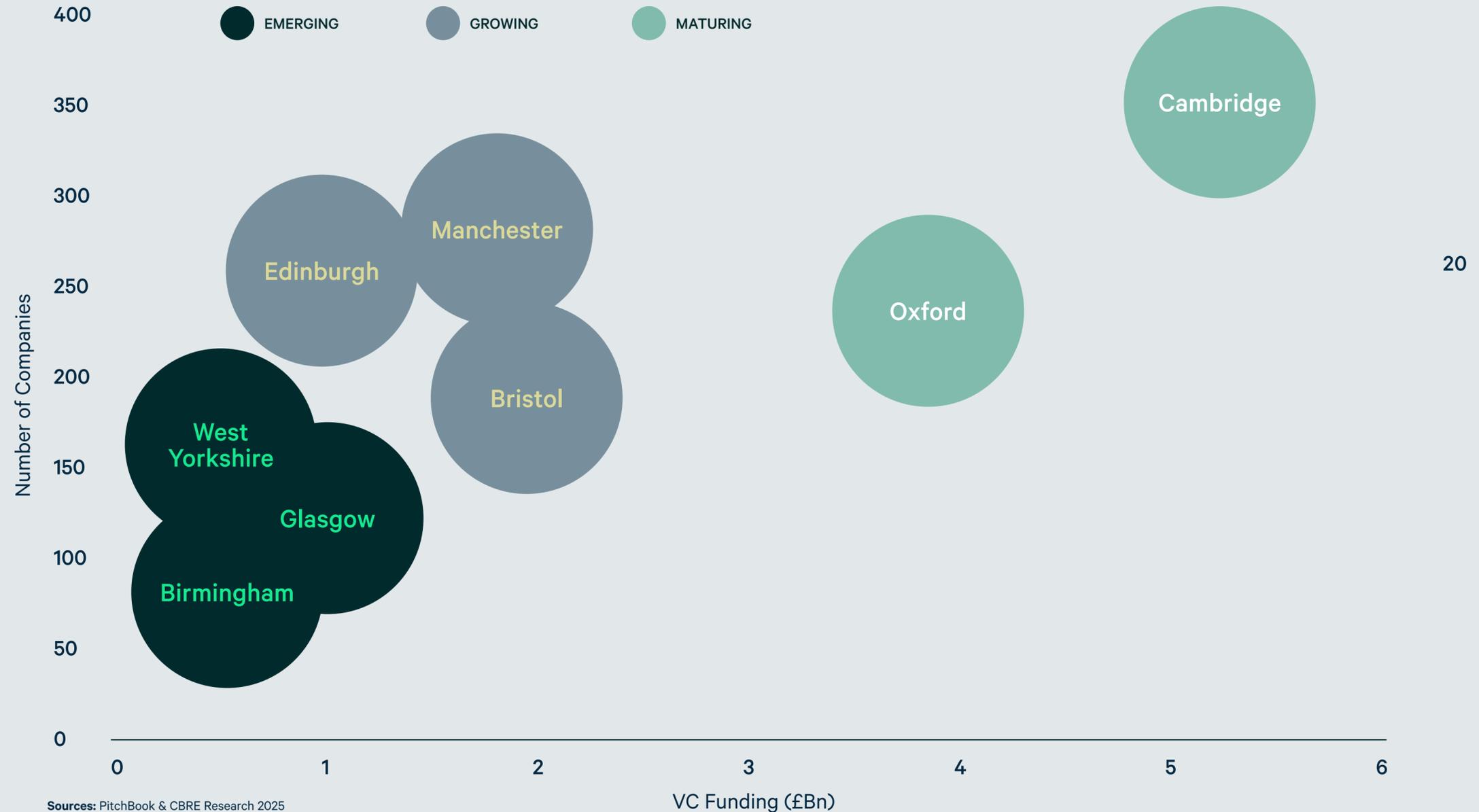
04 / Funding

VC Funding in context

Access to capital, particularly for research and development, is crucial for driving the organic growth of innovative companies. The “Golden Triangle” of London, Cambridge, and Oxford dominate the UK’s life sciences landscape with established ecosystems and a high concentration of high-growth businesses.

Scottish cities, particularly Glasgow and Edinburgh, are already prominent within the UK landscape. As these cities continue to evolve and mature, the companies in receipt of VC funding, will be critical to the future growth and strength of the local ecosystem.

VC funding for companies in high-growth innovation driven sectors
 (excluding industries not relevant to life sciences and technology
 (e.g. financial services, back office process innovation, etc))



Sources: PitchBook & CBRE Research 2025

04 / Funding

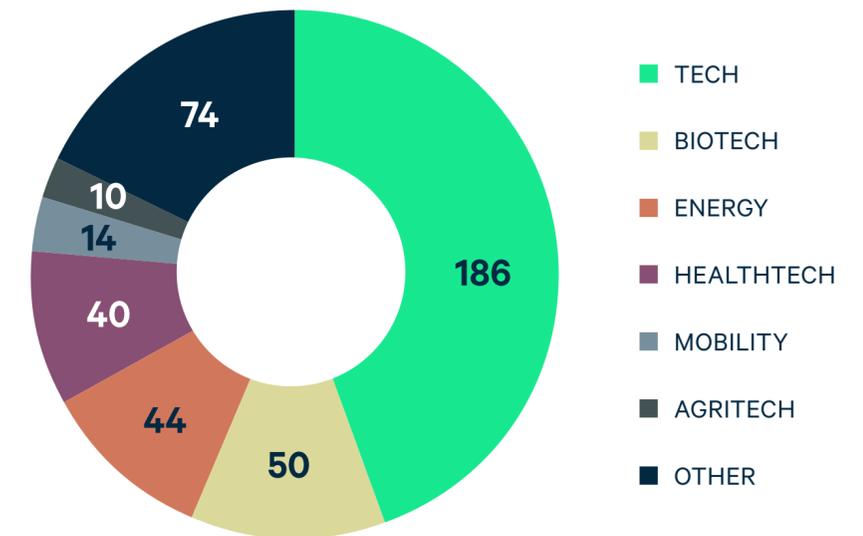
Scotland: A Diverse Company Mix

The composition of companies and the largest fundraisers in Scotland remains tech-dominated. However, there is a healthy representation of life sciences companies across various stages of development, with a notable number of VC deals occurring this year. Bio Tech leads the way, which aligns with Scotland’s historical strengths, but we are also seeing increased spinouts in health tech and energy. This trend is in line with the natural progression of an emerging innovative ecosystem.

While most deals are early-stage, we have observed a few later-stage transactions, particularly in recent months, as well as growing private equity (PE) activity. This mirrors a global trend where investors are becoming more experienced and confident in the life sciences sector. Scotland also benefits from a robust M&A (Mergers & Acquisitions) market, a hallmark of a maturing ecosystem.

As expected, the IPO market remains relatively inactive, reflecting broader market conditions. However, the overall deal flow and investment activity indicate strong momentum for life sciences in Scotland, positioning it for future growth.

Venture Capital Funded companies by Sector in Scotland (2023-2025 YTD)



Maturing Companies In Scotland



04 / Funding

Top Fund Raises by Sector

TECHNOLOGY		
Company Name	Financing Date	Amount Raised
Build A Rocket Boy	01/24	£93M
Orbex	1/25	£23M
Ace Aquatec	5/25	£11M
Continuum Industries	9/23	£8M
Leap AI	9/24	£8M

BIOTECH		
Company Name	Financing Date	Amount Raised
Trogenix	10/25	£70M
Resolution Therapeutics	9/24	£64M
Cumulus Oncology	8/24	£39M
Chemify	2/23	£37M
EnteroBiotix	4/24	£27M
Causeway Therapeutics	2/23	£14M

ENERGY		
Company Name	Financing Date	Amount Raised
Remarkable Energy	1/23	£44M
Aurora Energy Services	12/23	£20M
Logan Energy	2/24	£5M

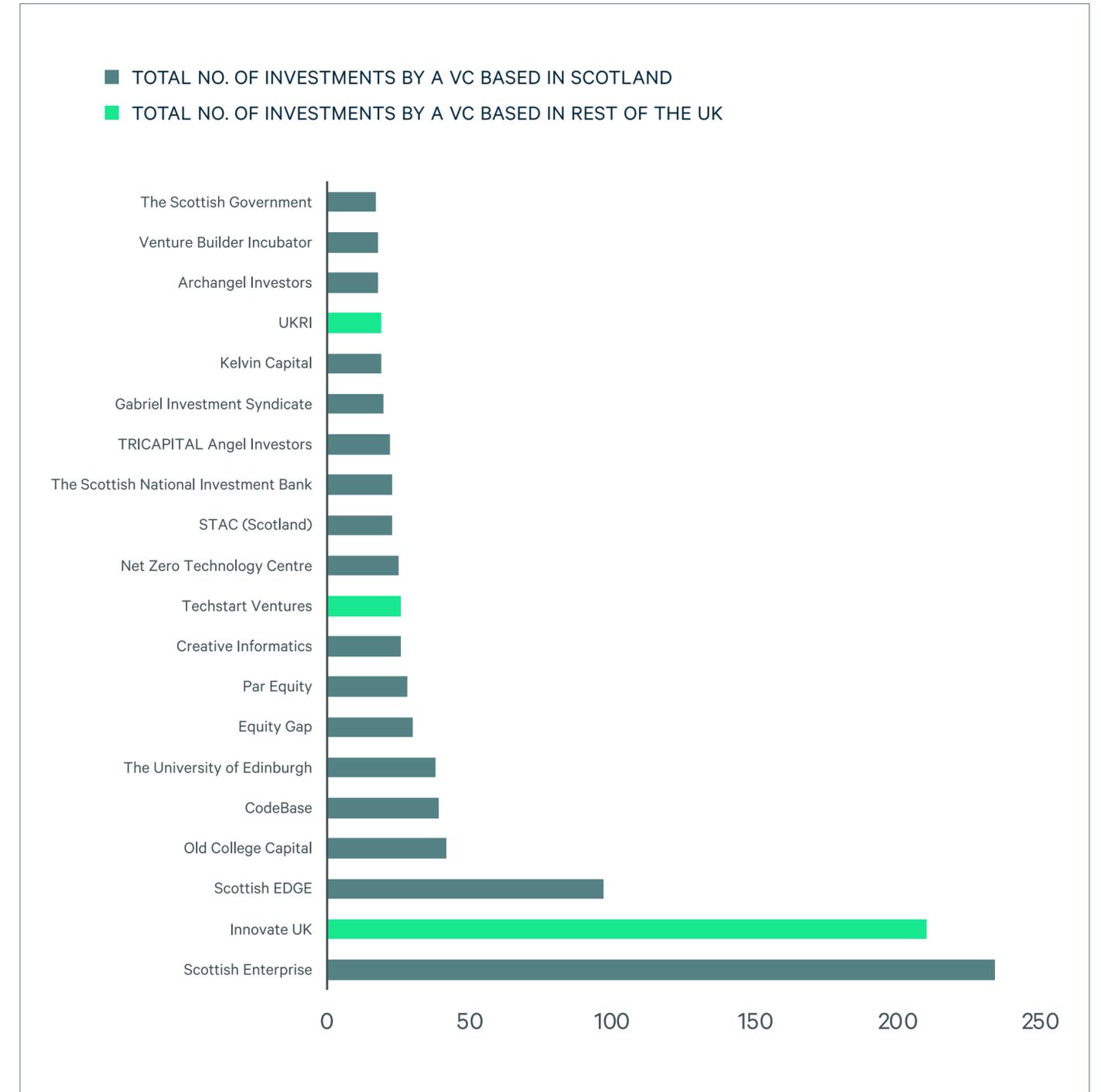
HEALTHTECH		
Company Name	Financing Date	Amount Raised
Mironid	9/23	£8M
Dxcover	1/25	£5M
Calcivis	3/24	£5M
IbisVision	5/23	£5M

04 / Funding

Who is fuelling the commercialisation of innovation?

Scotland’s life sciences and technology sectors stand out for the high proportion of locally headquartered investors, including Scottish Enterprise, Scottish EDGE and Old College Capital. Specialist funds such as Creative Informatics and Par Equity (PXN Group) bring sector-specific expertise, signalling a mature, self-sustaining ecosystem where local capital effectively nurtures high-tech growth and recycles returns into new ventures. A strong pipeline is supported by the prominent role of government-backed and university-affiliated incubators, fostering spin-outs through the most high-risk early stages.

Whilst the proportion of international capital entering the Scottish market is relatively low. With the current activity from within the UK (as seen in the Top Investors list), we expect this to shift over time, with growing interest from European investors seeking to diversify beyond their home markets and take advantage of the UK’s research strengths. This trend, already well established in Oxford, Cambridge, and London, is likely to expand to Scotland as companies reach later growth stages and attract larger funding rounds. US-based investors, in particular, are a logical next step in this maturity curve. Known for their appetite for larger deal sizes and higher-risk opportunities, US funds could bring significant scaling power to Scottish life sciences.



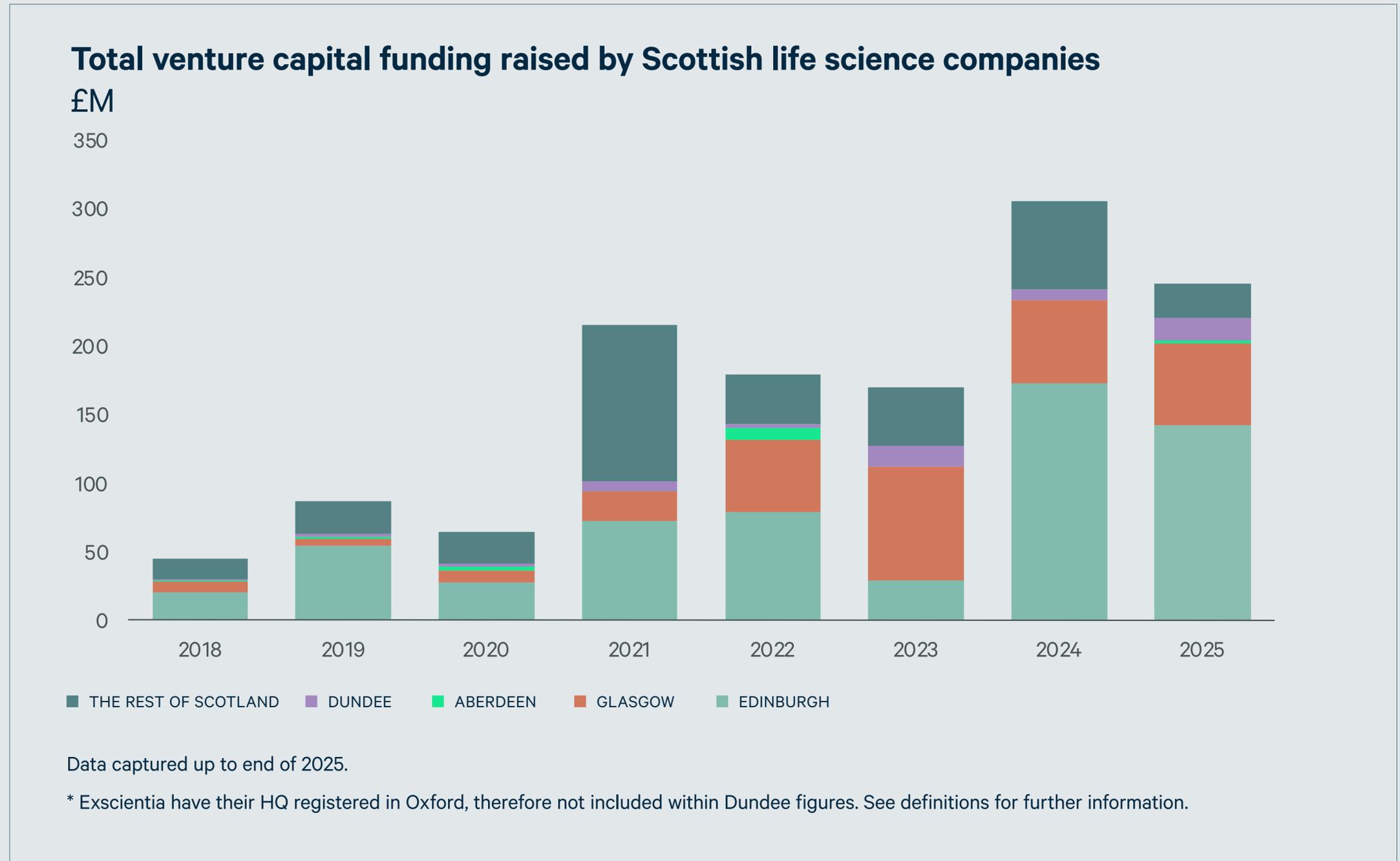
04 / Funding

Life Sciences funding within Scotland

There is a dynamic shift in venture capital (VC) funding for Scottish life sciences companies between 2018 and 2025. Overall, the total VC funding in Scotland has fluctuated significantly, with a dramatic rise in 2021 in line with the wider UK, followed by a mixed picture in subsequent years. There’s a clear trend of investment moving away from a single dominant location, with a more evenly distributed landscape emerging over time.

Edinburgh and Glasgow demonstrate the most significant activity, experiencing periods of both dominance and shifts in funding. While Edinburgh led in 2024, Glasgow showcased impressive growth in 2023 and 2022, indicating a strong and sustained presence. Furthermore, Dundee shows a notable increase in investment in the later years, alongside the “Rest of Scotland”. This indicates a diversification of VC activity beyond the traditional hubs from companies who are potentially growing which could translate into future property demand as demonstrated by Chemify.

Sources: Pitchbook & CBRE Research (2025)



05

DEMAND ANALYSIS

05 / Demand Analysis

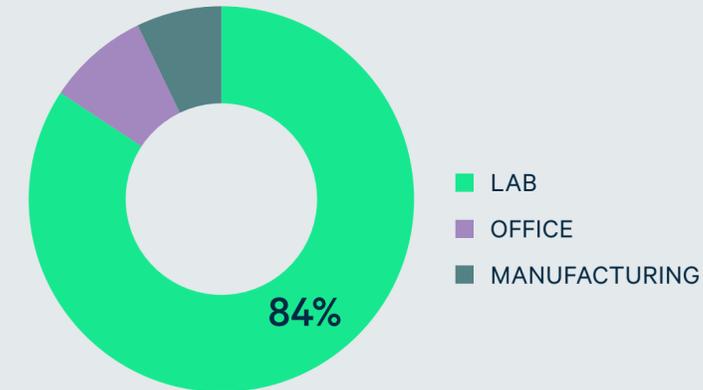
140 Enquiries identified for Scottish Enterprise geographical areas

Success in attracting investment consistently requires a foundation of clear, credible market data intelligence. A robust evidence base, grounded in real identifiable demand from both current and future occupiers is essential. It not only informs strategic decisions, but also fosters confidence, encouraging further investment and supporting broader economic and social outcomes. This insight is vital to unlocking new opportunities in health and life sciences sectors.

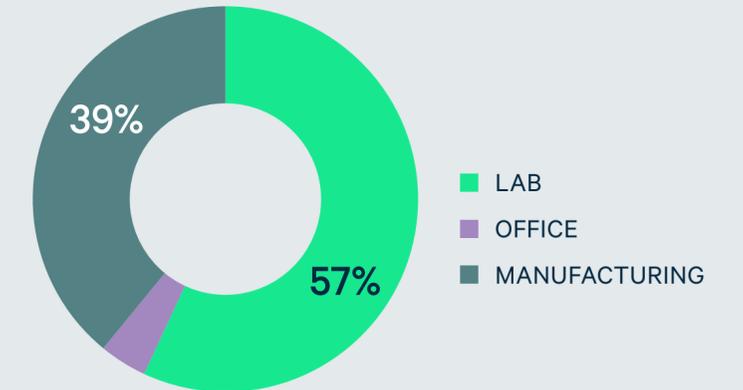
As part of our ongoing work, we've engaged with a wide range of stakeholders (listed within the appendix of this report) across Scottish Enterprise geographical areas, to understand the current landscape of occupier requirements. This intelligence forms the backbone of a strategic, evidence-led approach that can be used to shape the value proposition and attract new investment into the sector.

- There are **140 enquiries** totalling **1.2m sq ft (111,500 sq m)** across Scottish Enterprise geographical areas which have been identified for labs, offices and manufacturing property within the past 2 years.
- The majority of demand by size, was for lab space, totalling **702,545 sq ft (65,269 sq m)** and accounting for **84%** of all enquiries.
- Out of all of the regions, Edinburgh has the highest total sq ft demand **770,000 sq ft (71,535 sq m)** across all property types totalling **80 enquiries**. However, it should be taken into account that **350,000 sq ft (32,516 sq m)** of this is made up of 2 manufacturing enquiries.

Total demand (no. of enquiries) by type



Total demand (sq ft) by type



05 / Demand Analysis

Source

Nearly half of the enquiries are from start up or SMEs who, based on the data, are choosing to remain within Scotland. Previously some occupiers have relocated to the Golden Triangle or outside the UK altogether.

29% of the enquiries are from an undisclosed source, which is a gap in the data collection, which may hinder understanding and monitoring future market dynamics. The 20 enquiries received from outside the Scottish Enterprise geographical area demonstrate growing traction and highlight the attractiveness as a location for company expansion.

Driver

72% of companies suggest that expansion is the main motivation for the enquiry. This demonstrates strong demand for space where companies are actively seeking to scale their operations.

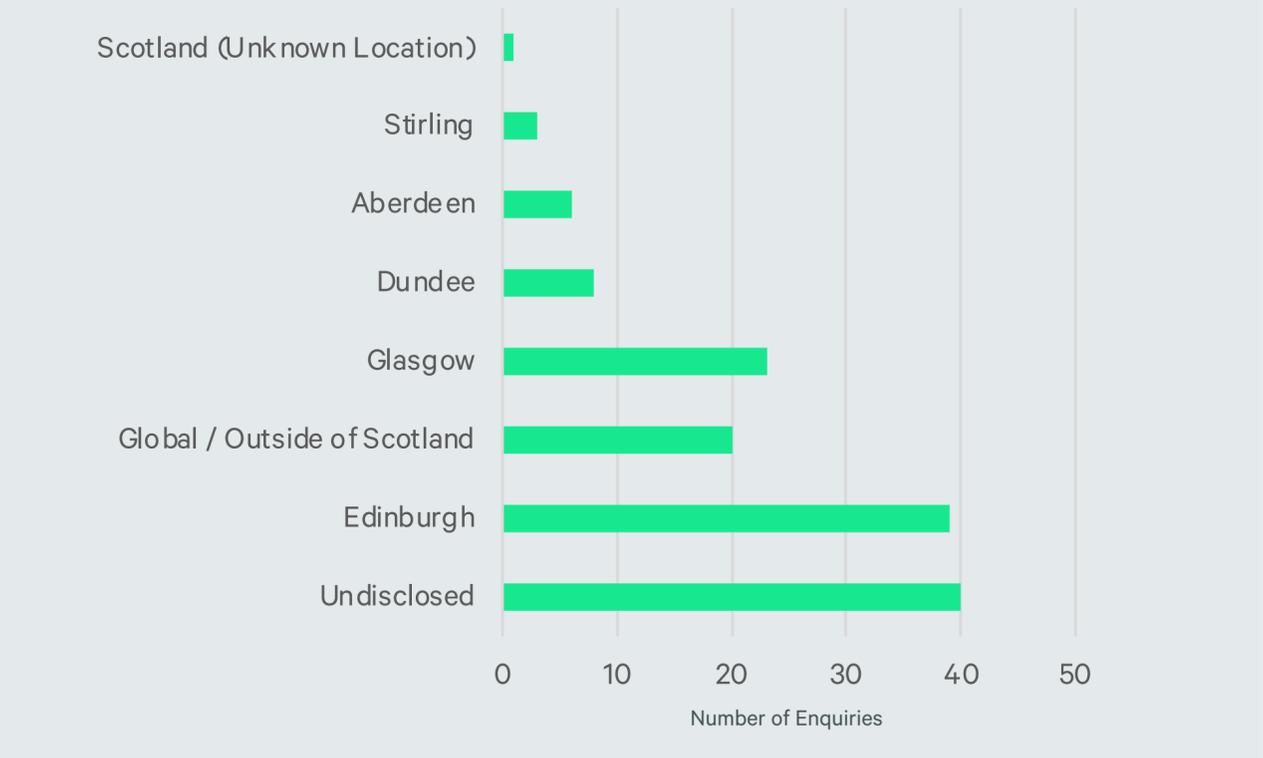
In contrast, the numbers of renewals, consolidations and relocations are relatively low. This suggests that a large proportion of companies (101) seeking space are focused primarily on growth, rather than reducing or maintaining current operations. However, a portion of enquiries (20) remain classified as “Undisclosed”, representing 21% of the total. This gap indicates a continued need for better data collection and understanding of potential companies’ motivations, which could enhance engagement strategies and support future property delivery.

Data quality & consistency: A critical enabler

To ensure that occupier demand is accurately assessed and effectively leveraged, it’s crucial that data is collected consistently across the regions. Disparities in format or quality can undermine analysis and lead to fragmented or misleading conclusions. Establishing standardised data collection practices will be a key objective moving forwards to producing reliable insights and enabling informed decision-making across Scottish Enterprise geographical area’s life sciences ecosystem. Whilst the data currently reflects some gaps from differing stakeholder engagement, we anticipate continued improvement in future updates.

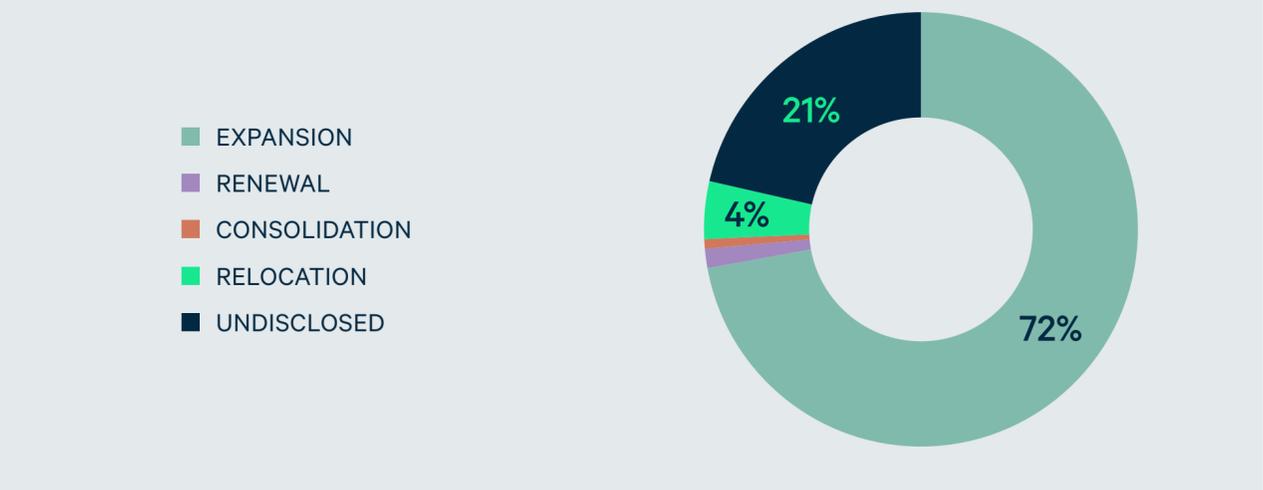


Source: What location are the enquiries from?



27

Driver : What is the reason for the enquiry?

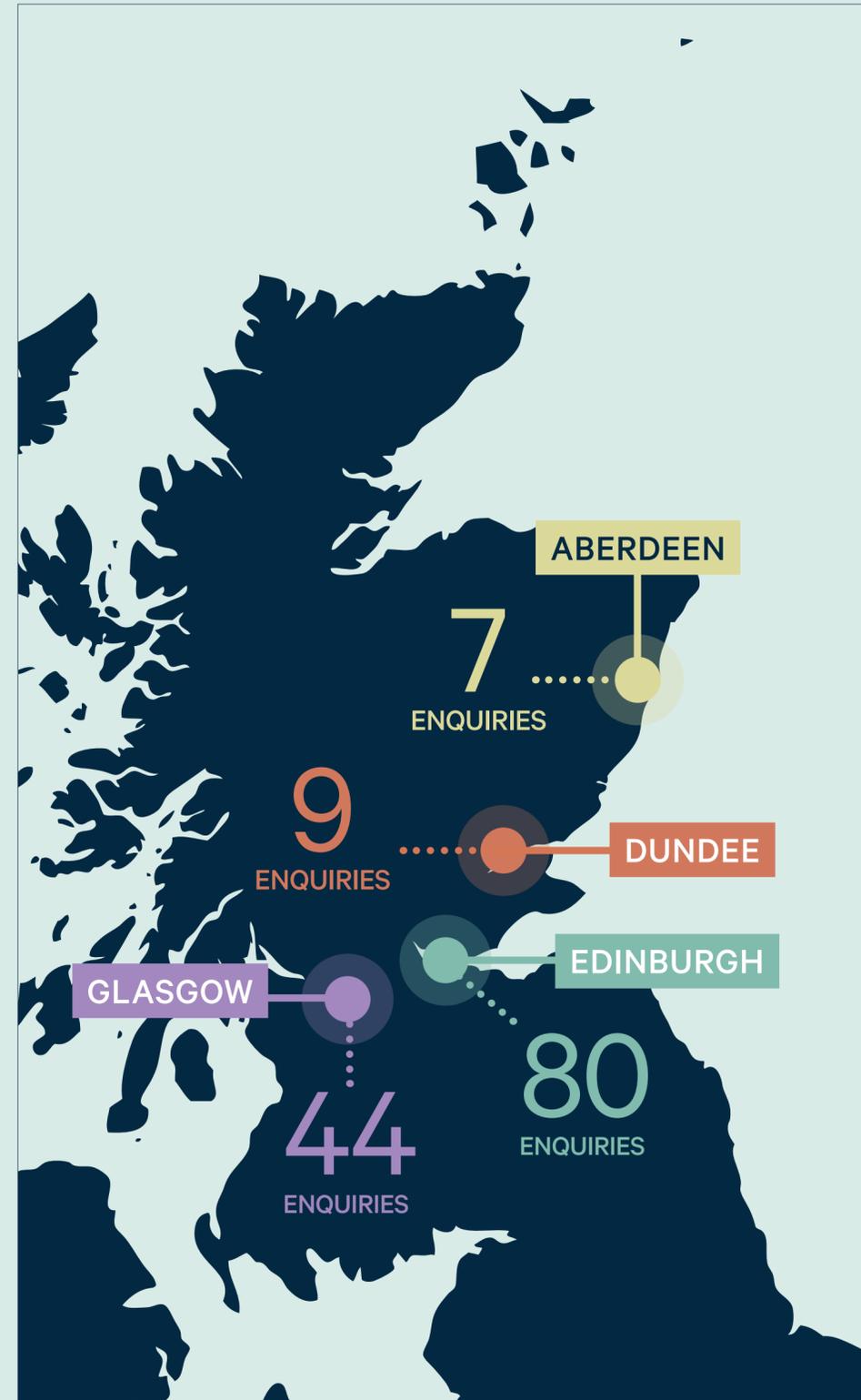


05 / Demand Analysis

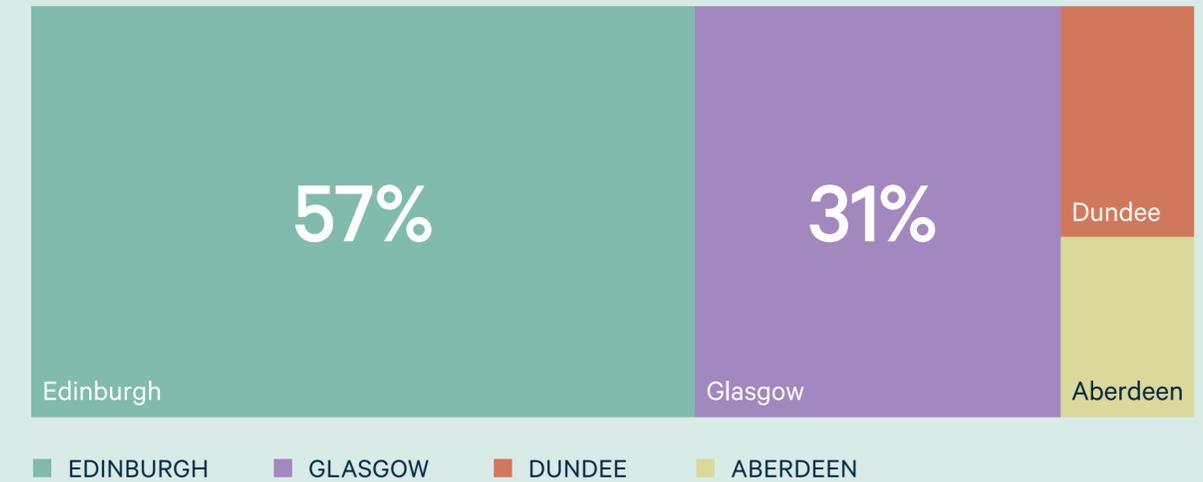
Location

There is a significant concentration of enquiries for Edinburgh (80) and Glasgow (44) which can be attributed to established nature of the clusters with a strong presence of university, research institutions and wider support ecosystems alongside the existing companies based in the regions. Lower enquiry levels in Dundee (9) and Aberdeen (7) likely stem from the historic shortage of good quality space, but this is changing with the recent delivery of the Dundee Innovation Hub and Aberdeen BioHub.

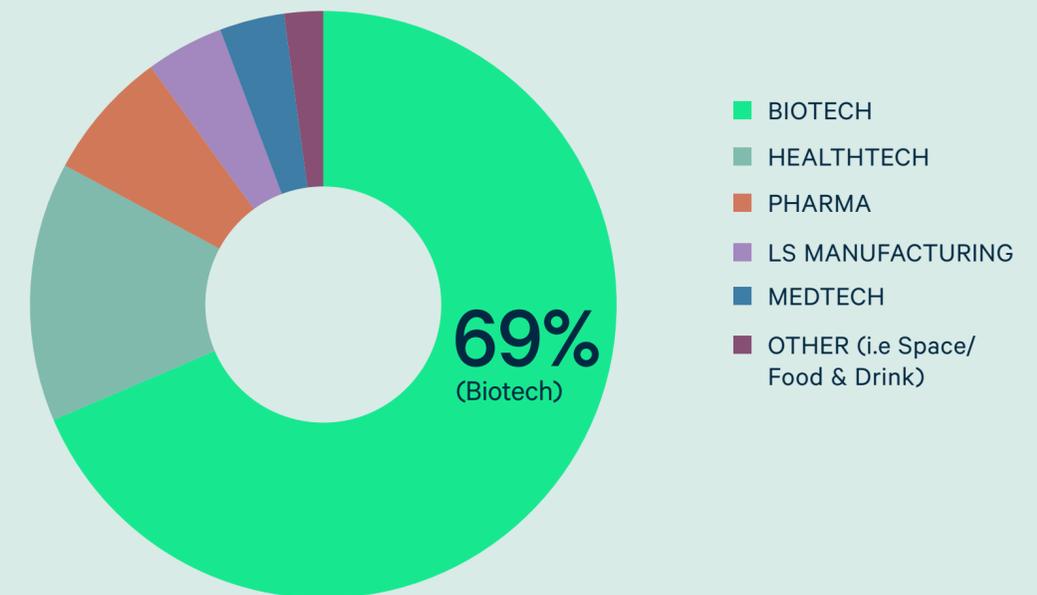
The dominance of the bio tech sector (96) is reflective of current global trends, where biotechnology is at the forefront of medical advancements and innovation. Scotland has made significant investments in this area, attracting talent and companies looking to leverage cutting edge research. The current activity in health tech and pharma in comparison is limited, showing where activity lies and Scotland strengths in bio tech.



Enquiry location



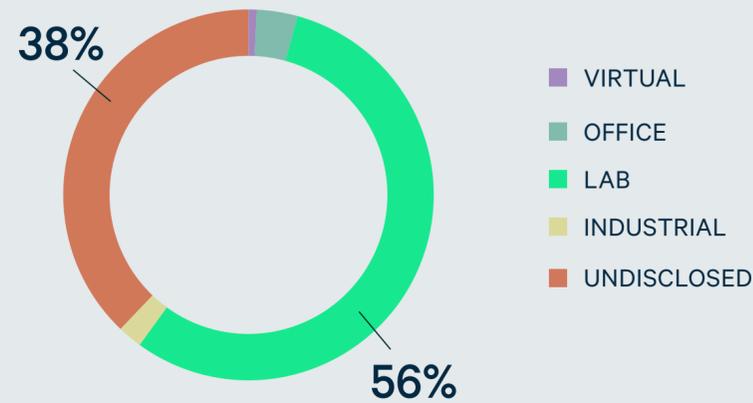
Sector breakdown of enquiry



Sources: CBRE Research (August 2025) Scottish Enterprise geographical area only

05 / Demand Analysis

Current Space Type



Size

The majority of enquiries are from companies seeking spaces between 0-1,000 sq ft (0-92.9 sq m) (56). This indicates a thriving start-up culture, driven in the main from university spin-outs, looking for flexible and affordable options to establish their operations, with access to specialist facilities and equipment with wider ecosystem and support network. This trend indicates a growing ecosystem of entrepreneurial activity, which needs to be supported through incubator spaces. Low occupational costs in incubation spaces can create limited incentives for companies to relocate, leading to 'bed blocking' where companies remain in undersized premises (or occupying a number of suites) despite growth needs. The lower demand for larger spaces indicates that, at least for now, the life sciences sector in Scotland is characterised by a multitude of smaller, agile companies rather than a few large corporate entities, which could shape future property development strategies.

Growth Stage

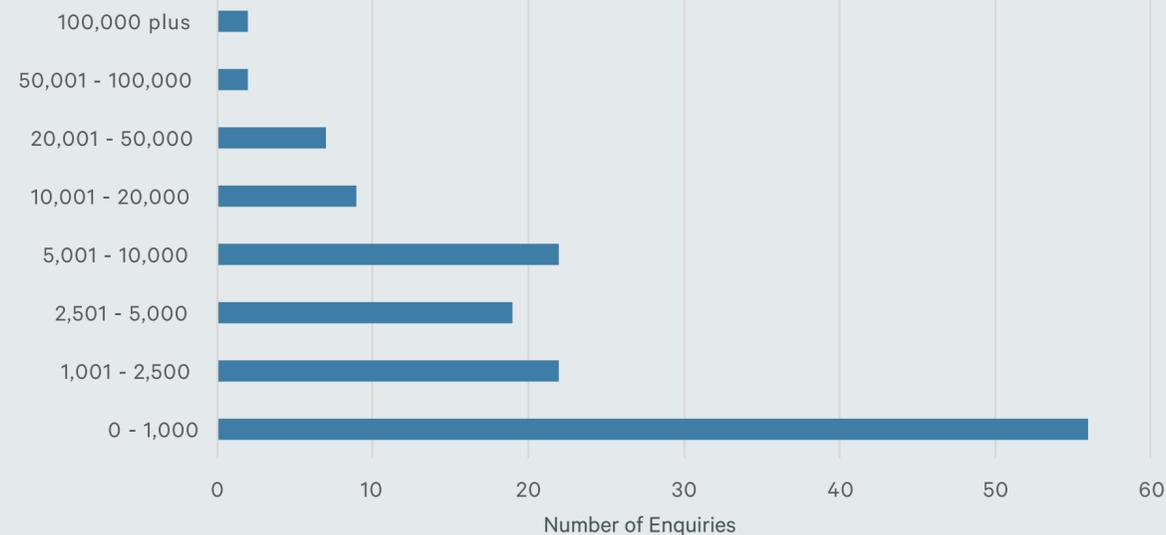
The prominence of start-ups (50 enquiries) reflects the vibrancy and dynamism of the life sciences sector in Scotland. This focus on early-stage companies indicates a healthy innovation pipeline and opportunities for venture capital investment.

Type

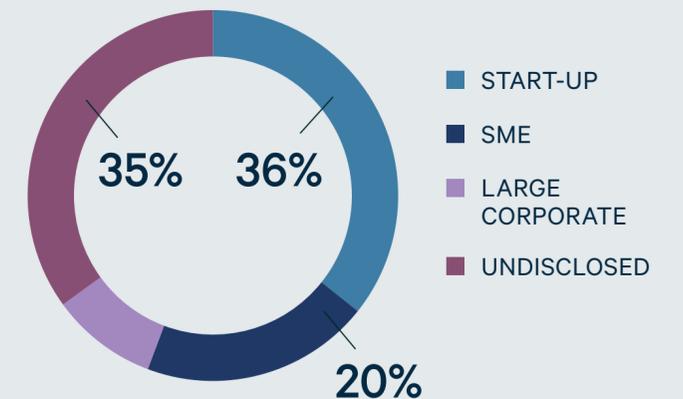
56% of enquiries currently occupy lab space which is indicative of the specialist nature of the life sciences sector, where companies require flexible facilities which can support research and development activities. A large proportion of enquiries have been recorded as "Undisclosed" in terms of their space type which poses a challenge in fully identifying and understanding specific requirements and addressing future needs.

Very few enquiries require solely office space, further demonstrating the need to develop flexible space which can provide lab accommodation. Analysis shows that only a small proportion of enquiries require manufacturing facilities. However, this is not necessarily a full representation of the demand profile, with a number of enquiries being satisfied within more traditional industrial parks (rather than specific TechBox*/Innovation led developments).

Size Ranges of Enquiries



Growth Stage of Enquiry



Sources: CBRE Research (August 2025) Scottish Enterprise geographical area only

*Flexible, hybrid industrial accommodation combining lab, office, and warehouse located within a life sciences cluster location

05 / Demand Analysis

Forecasting Demand

Funding Dynamics

Scotland continues to attract steady VC investment into core life sciences disciplines such as drug discovery, genomics, precision medicine and platforms enabling therapeutic development. Unlike software or general tech, these companies require lab infrastructure from day one, making funding flows a reliable predictor of space demand.

Government support, via for example Scottish Enterprise, Innovate UK, regional growth deals, and specialist programmes around advanced therapies and bio manufacturing is reinforcing this trend. Public funding is increasingly channelled toward translational science and commercialisation.

Policy Environment

Scotland offers a highly supportive policy environment for the life sciences sector.

The Life Sciences Scotland Strategy 2035, aligned with the UK Life Sciences Sector Plan, provides a supportive framework designed to drive sector growth underpinned by a clear national commitment to innovation and health improvement. Collaboration with for example Innovate UK strengthens funding and expertise, creating a robust ecosystem for R&D and commercialisation.

Spin Out Activity

Scotland ranks third behind London and South East in terms of number of spinouts across all sectors, accounting for 243 companies (11.8% of UK total). Edinburgh and Glasgow lead robust life sciences, with Edinburgh hosting 37 spinouts and Glasgow 19 within the past 15 years, forming two strong innovation clusters.

Scottish Enterprise ranks among the UK's top investors across all sectors, participating in 320 spinout equity deals since 2015. Average university stakes fell to 16.1% in 2024, a decade low, and three Scottish universities have adopted best-practice caps ($\leq 25\%$ for life sciences).

Sources: Beauhurst - Spotlight on Spinouts - 2025

Property Implications

Developers will need to offer a mixture of fitted, CAT A and shell condition labs, flexible lease terms and cost-effective options that align with grant-funded and VC-backed growth cycles.

Sites adjacent to clinical infrastructure or academic anchors will see heightened demand for labs with strong M&E, enhanced ventilation, and the ability to support collaboration-driven occupancy.

Campuses must provide a seamless growth pathway, moving from incubator suites to larger labs within the same ecosystem.



05 /
Demand Analysis

What will future demand look like?

Based on the combined drivers of funding, policy and spin-out growth, demand profile in the Scottish Enterprise geographical area will be dominated by :



- Early-stage and Series A biotech companies
- Platform technology ventures requiring biology & computation
- Diagnostics, imaging and precision medicine companies
- Select advanced therapy and bio manufacturing ventures
- Scale-up companies needing mid-sized R&D footprints

What does this mean for Property?

01



Mid-sized scale-up buildings

Providing suites of 5,000 – 20,000 sq ft is currently the weakest part of the pipeline.

02



Expect demand for flexible leasing structures

Allow for headcount volatility and expansion driven by funding.

03



Invest in shared specialist infrastructure

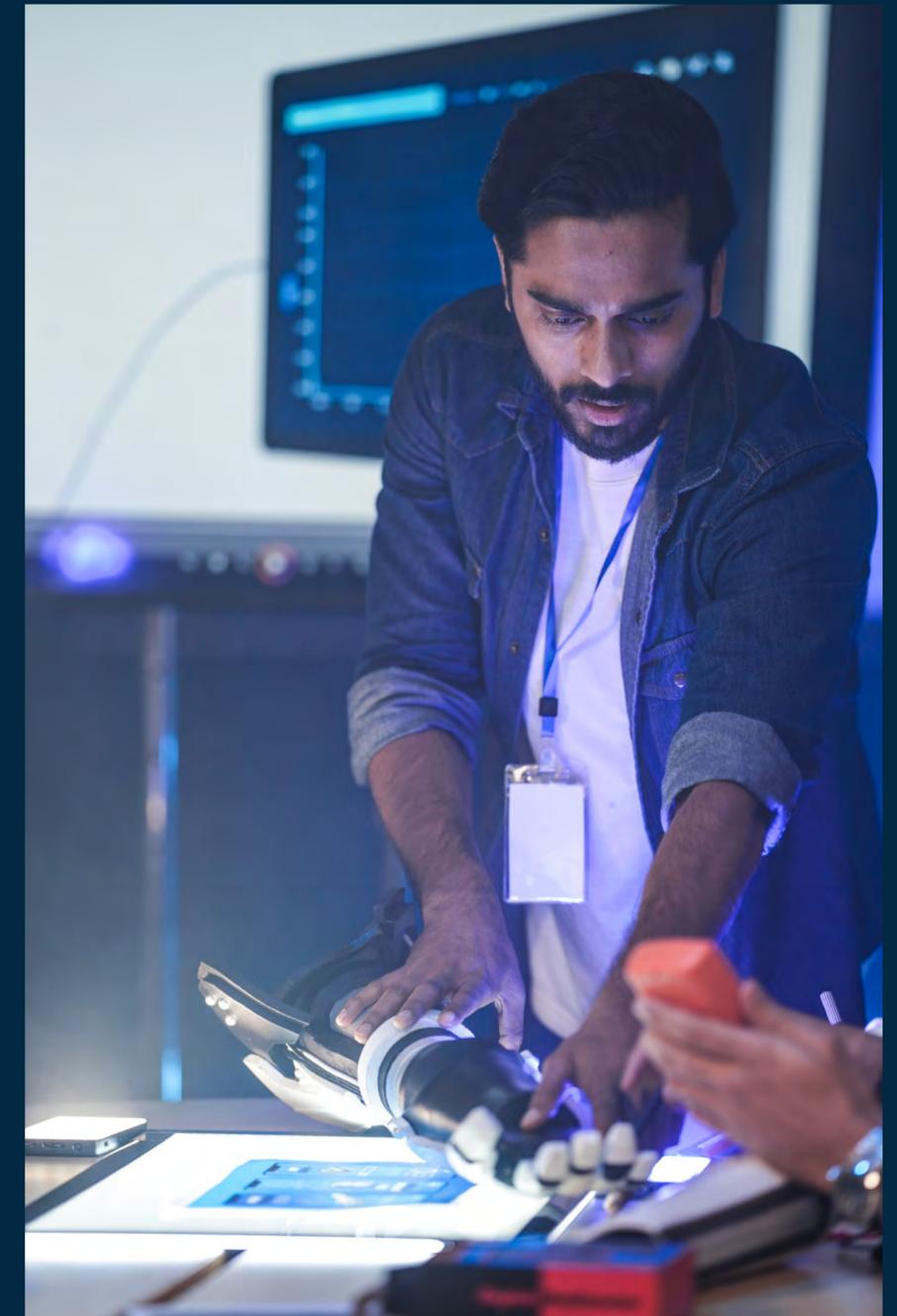
Clinical / pilot scale facilities, imaging suites, enhanced mechanical and engineering (M&E) infrastructure and resilience will differentiate property options.

04



Locations near clinical settings with access to talent will outperform

Proximity to major hospitals and translational centres is a major driver for incoming and expanding R&D companies.



06

SUPPLY ANALYSIS

06 / Supply Analysis

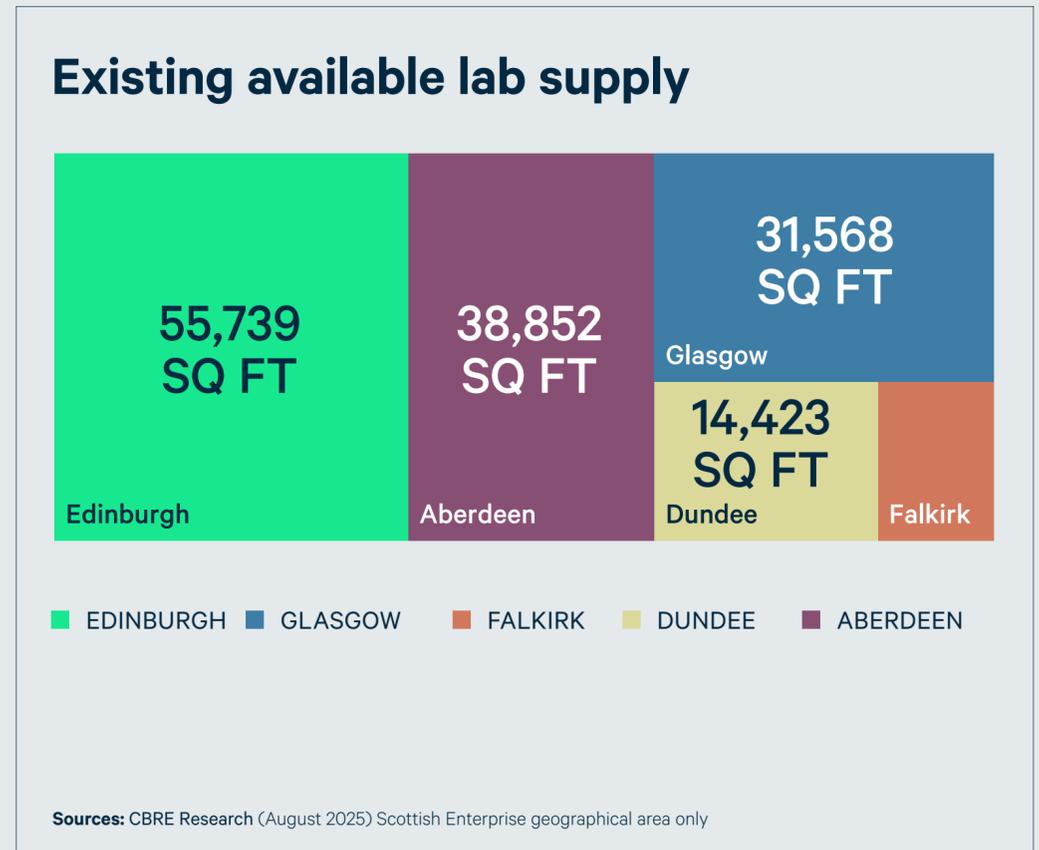
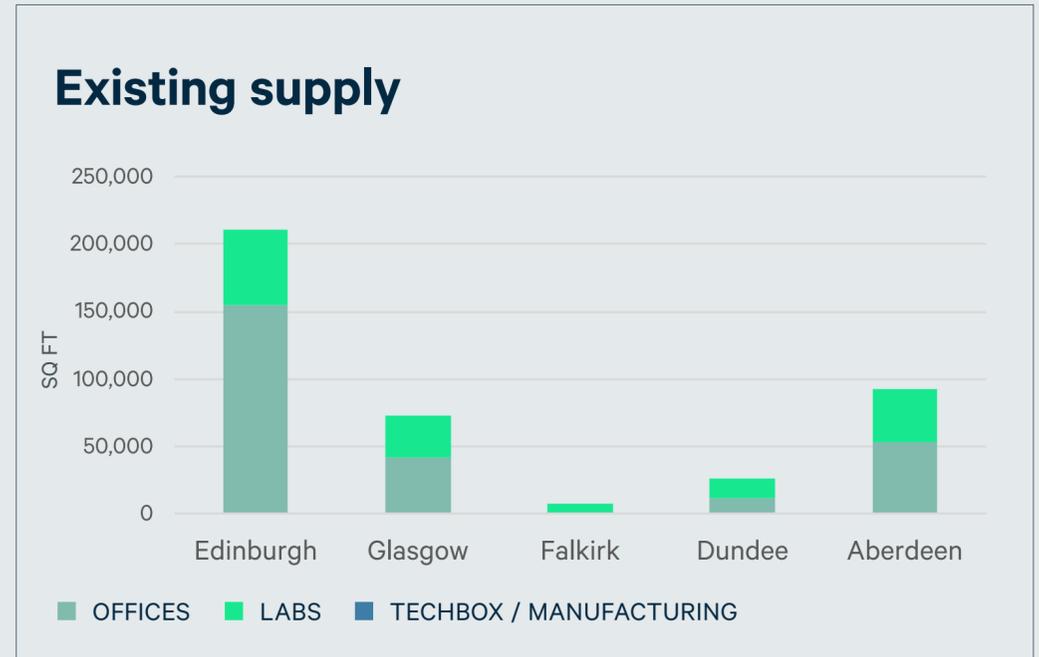
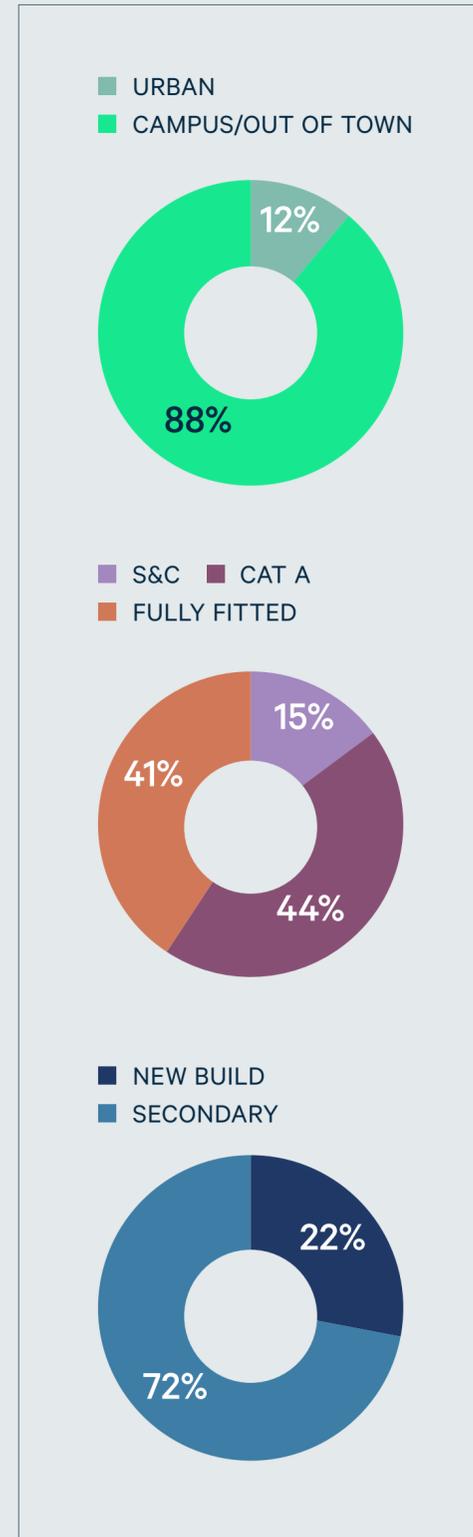
Existing Supply

Existing supply of lab space across Scottish Enterprise geographical areas reflects the highly specialised and diverse requirements of the life sciences sector. Provision is not uniform, instead, it varies significantly in terms of size, type and specification depending on regional strengths, occupier demand and the maturity of local clusters. From fully fitted laboratory suites in established hubs such as Edinburgh, Glasgow and Dundee, to flexible office and innovation spaces in emerging centres like Aberdeen, the landscape illustrates a broad spectrum of accommodation. This includes new build Grade A lab and office facilities alongside secondary purpose-built older stock. Such variation highlights both the opportunities and challenges in ensuring that Scotland's life sciences ecosystem has access to the right types of property in the right locations to support expansion, collaboration and inward investment. The analysis of the supply of offices and labs across various Scottish regions reveals significant imbalances. Edinburgh stands out with a combined total supply of 210,209 sq ft (19,529 sq m) (154,470 sq ft (14,351 sq m) offices and 55,739 sq ft (5,178 sq m) labs). Glasgow follows with a total supply of 73,995 sq ft (6,873 sq m) (41,427 sq ft (3,850 sq m) offices and 31,568 sq ft (2,933 sq m) labs).

90% of the existing supply is located within campus or out-of-town settings with the remainder in urban areas. This trend does not align with the growing demand for office and lab space from occupiers for urban locations, where they seek proximity to talent and wider amenities that are accessible by public transport.

Each region has a newly developed building within their supply, with recent developments in Glasgow (Health Innovation Hub), Edinburgh (Edinburgh Innovation Hub), Dundee (Dundee Life Sciences Innovation Hub) and Aberdeen (ONE Biohub). However, there is no existing supply for TechBox* / Manufacturing identified throughout Scottish Enterprise geographical area.

* See Definitions in Appendix for definition of "TechBox" CBRE Research (August 2025) Scottish Enterprise geographical area only.



Sources: CBRE Research (August 2025) Scottish Enterprise geographical area only

06 / Supply Analysis

Pipeline Supply

Pipeline supply provides an indication of the potential development which could be delivered through development sites which either have been allocated planning or are yet to be allocated. Due to the nature of the occupancy of the offices & labs, there is not a clear distinction in terms of the split between offices and labs, therefore, the analysis assumes a combination.

Edinburgh and Glasgow provide the key promoted sites which provide designated pipeline supply. Edinburgh's focus being more focused towards offices & labs when compared to Glasgow which have a number of sites promoted to develop more Manufacturing focused development within Clyde Gateway and Advanced Manufacturing Innovation District Scotland (AMIDS).

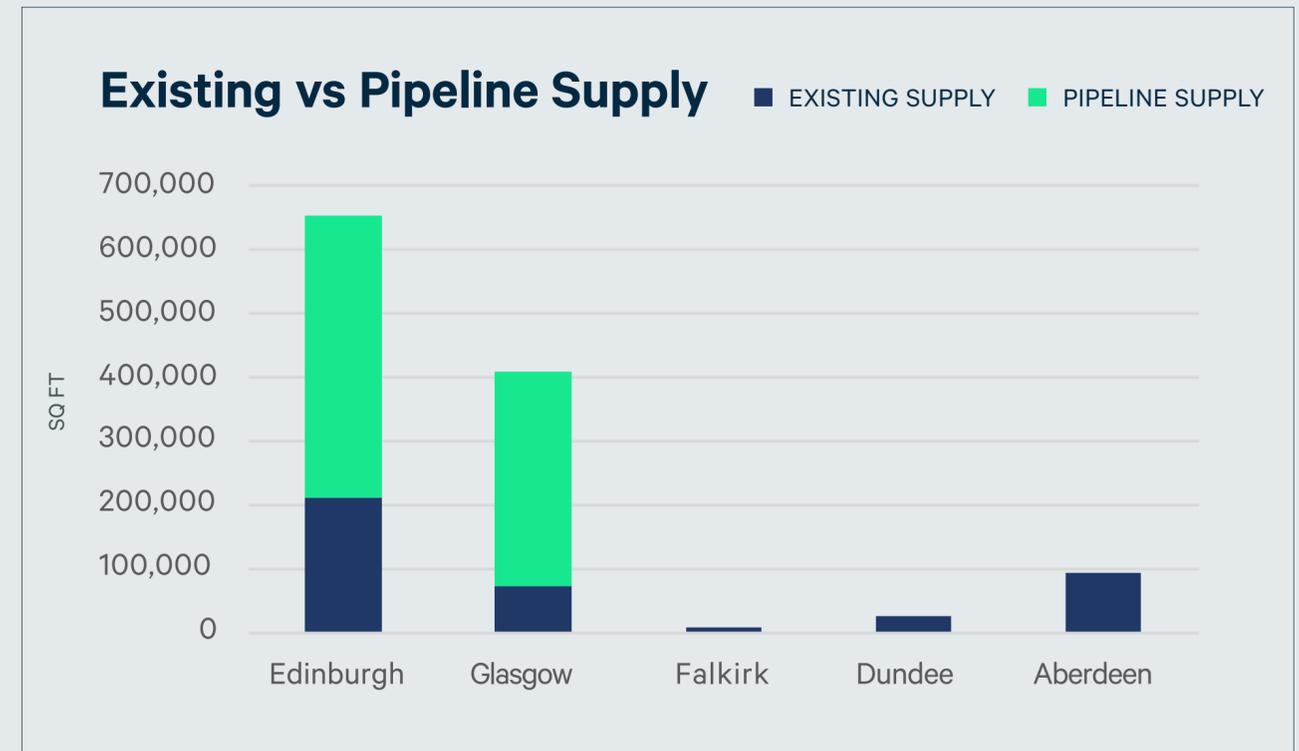
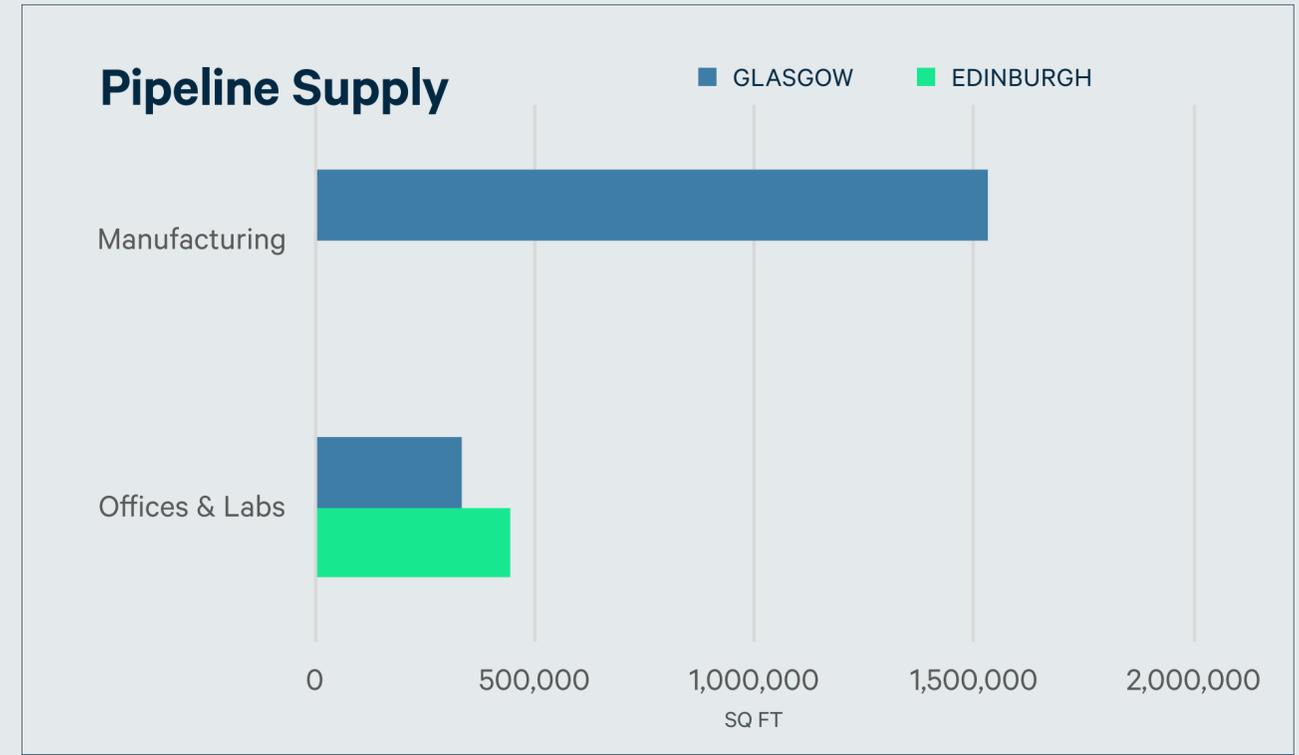
The analysis of existing supply and pipeline for offices and labs reveals a notable trend towards activity within urban centres, particularly in Edinburgh and Glasgow. These cities show a strong commitment to expanding their commercial property offerings, which is reflected within the levels of demand.

The substantial pipeline in both regions requires proactive planning and investment to capture continued growth. A number of schemes which have been delivered to date have benefited from public sector investment. Due to development viability, speculative development continues to be challenging.

The lack of pipeline supply in other regions (Falkirk, Dundee and Aberdeen) highlights a focus towards Edinburgh and Glasgow. The manufacturing sector currently lacks sufficient supply across all regions. This is likely due to the emerging nature and delivery of new manufacturing developments, such as TechBox facilities, which are designed to attract specific sectors like life sciences or advanced manufacturing.

All of the pipeline supply for Scottish Enterprise geographical area is currently uncommitted and without funding, the majority of which is centred around Edinburgh and Glasgow.

Sources: CBRE Research (August 2025) Scottish Enterprise geographical area only



07

REGIONAL OVERVIEWS

07 /
Regional Overviews

EDINBURGH & LOTHIANS



07 / Regional Overviews / Edinburgh & Lothians

Edinburgh boasts a diverse life sciences ecosystem including **Edinburgh BioQuarter, Edinburgh Innovation Hub, Heriot Watt University Research Park, Pentlands Science Park** and **Edinburgh Technopole**. Together with **leading universities, hospitals** and **research institutes**, these hubs drive innovation in regenerative medicine, precision health, and data-driven technologies alongside medical devices and diagnostics creating a globally competitive cluster for research, commercialisation and advanced manufacturing.

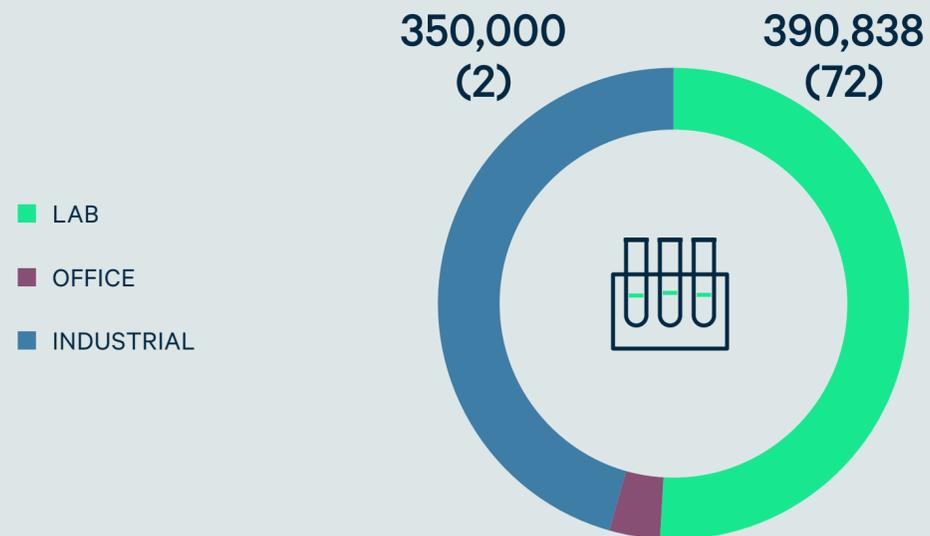


07 / Regional Overviews / Edinburgh & Lothians

Demand

Edinburgh's total sq ft demand (770,000 sq ft, 71,535 sq m) and number of enquiries (80) within the past 2 years.

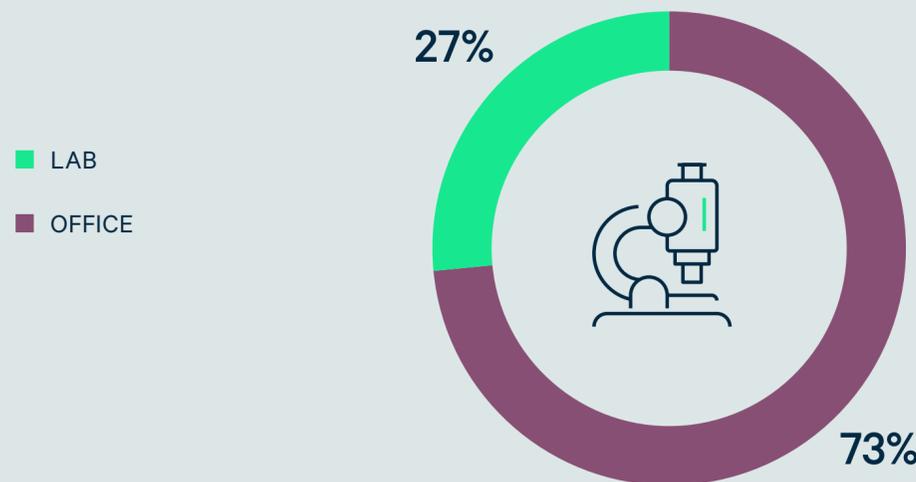
Edinburgh Demand



Supply

Edinburgh's office and lab supply is diverse, with a mix of conversions and new builds. Out-of-town campus locations dominate, featuring significant office space and a substantial, though varied, lab provision. Recent activity has seen the Edinburgh Innovation Hub being delivered by Queen Margaret University providing flexible lab and office space totalling 77,500 sq ft (7,200 sq m). The existing supply is dominated by a mixture of purpose built and converted properties, with a large proportion (73%) of offices space, with 27% provided as lab space, of which 29,906 sq ft (2,778 sq m) are secondary and 25,833 sq ft (2,400 sq m) new build.

Existing supply - offices & labs - Edinburgh



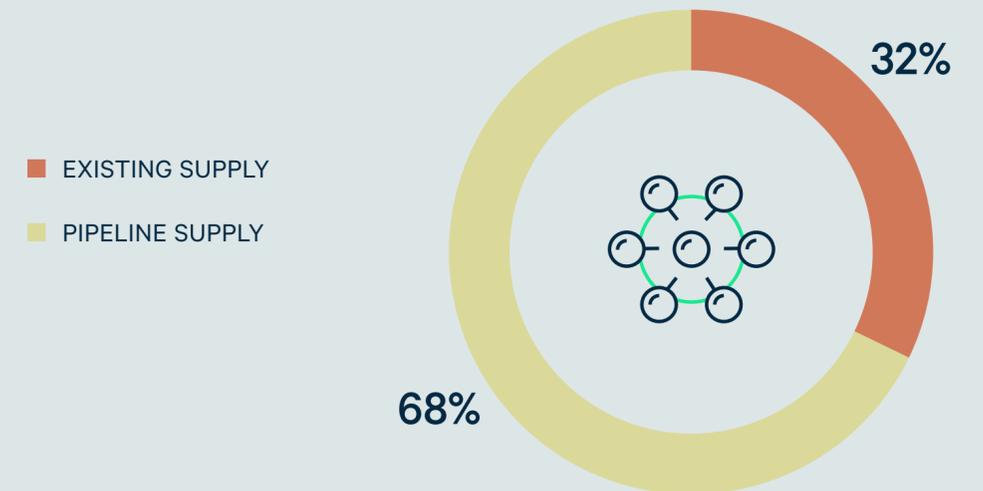
Pipeline

Significant developments are underway to expand Edinburgh's life sciences infrastructure. The Usher Institute building (in the BioQuarter's Health Innovation District) was completed in 2024 to drive data-enabled healthcare innovation. Looking ahead, BioQuarter is developing a masterplan of 81 acres of additional mixed-use lab, clinical and innovation space which can be brought forward to accommodate spin-outs and company growth and inward investment.

Edinburgh Technopole and Heriot-Watt Research Park all have designated development plots. This future pipeline is likely to be centred around delivering office and lab developments, rather than manufacturing development due to the nature of the market and activity to date.

BioCampus is a strategic bio manufacturing location. It has an existing bio manufacturing centre and offers plots (totalling 4.95 acres) for bespoke build to suit requirements, benefiting from strong research links from nearby research institutes.

Existing vs pipeline supply - Edinburgh



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Key Activity

Edinburgh's cluster is thriving with new ventures and investments. For example, an Edinburgh-based firm BioXcelerate recently launched an AI platform that can accelerate drug discovery and cut genetic disease detection times by >98%. The city's universities and hospitals are partnering on data-driven healthcare (e.g. through Health Innovation South East Scotland – one of three regional test beds facilitating collaboration between NHS, academia and industry) and high-profile AI & supercomputing projects. Edinburgh will host the UK's most powerful supercomputer to fuel breakthroughs in personalised medicine and health analytics.

Edinburgh has produced 86 spinouts in the last 15 years (71 of which are from University of Edinburgh, which is the 8th highest within the UK).

Notable Life Sciences spin-outs like Synpromics (gene therapy tech acquired by Bayer) and others have attracted major funding. Ongoing collaborations and industry partnerships ensure a steady stream of new startups (driven from the universities), clinical trials and biotech innovations in the region.

EDINBURGH HAS PRODUCED

37 life sciences spinouts

IN THE LAST 15 YEARS

86 spinouts

ACROSS ALL SECTORS

Key Property Transaction



Moubray Building,
Edinburgh Technopole

£45.00

PER SQ FT

HEADLINE
LAB RENT



Ingenza, a biotech CRDMO, signed a **10-year lease** for **18,000 sq ft** at the Moubray Building at Edinburgh Technopole, with a headline rent of **£45.00 psf**, representing one of the key transactions for the Life Sciences market in the Scottish Enterprise geographical area, setting a new headline rent.

07 / Regional Overviews / Edinburgh & Lothians

Occupiers

- Roslin CT
- Ingenza
- LifeArc
- Charles River
- Trogenix
- GenQA
- Fugro
- Roslin Technologies
- Fios Genomics
- Valneva
- Resolution Therapeutics
- Canon Medical
- Ossur
- IQVIA
- AskBio
- Macomics
- NuCana
- Beta Bugs
- BioCaptiva
- Cambrex
- Cytomos
- MiAlgae
- Piramal Pharma Solutions

Stakeholders & Partners

- Scottish Enterprise
- NHS Lothian
- City of Edinburgh Council
- University of Edinburgh
- Heriot Watt University
- Institute of Occupational Medicine
- Institute for Regeneration and Repair
- Roslin Innovation Centre
- Moredun Research Institute
- Cell and Gene Therapy Catapult
- National Robotarium
- Data Lab
- Medical Device Manufacturing Centre

The list of Occupiers and Stakeholders/Partners is illustrative and not exhaustive.



07 / Regional Overviews / Edinburgh & Lothians



BioQuarter

OWNER / OPERATOR Scottish Enterprise/ University of Edinburgh

URBAN OR CAMPUS Campus

TOTAL AVAILABLE OFFICES & LABS 24,809 sq ft (2,305 sq m)



Edinburgh Technopole

OWNER / OPERATOR Pioneer Group

URBAN OR CAMPUS Campus

TOTAL AVAILABLE OFFICES & LABS 29,472 sq ft (2,738 sq m)



Edinburgh Innovation Hub

OWNER / OPERATOR Queen Margaret University/East Lothian Council

URBAN OR CAMPUS Campus

TOTAL AVAILABLE OFFICES & LABS 77,500 sq ft (7,200 sq m)



Pentlands Science Park

OWNER / OPERATOR Moredun Group

URBAN OR CAMPUS Campus

TOTAL AVAILABLE OFFICES & LABS 48,675 sq ft (4,522 sq m)



Heriot Watt University Research Park

OWNER / OPERATOR Heriot Watt University

URBAN OR CAMPUS Campus

TOTAL AVAILABLE OFFICES & LABS 29,703 sq ft (2,759 sq m)



Roslin Innovation Centre, Easter Bush Campus

OWNER / OPERATOR University of Edinburgh

URBAN OR CAMPUS Campus

TOTAL AVAILABLE OFFICES & LABS 41,000 sq ft (3,809 sq m)

07 /
Regional Overviews

GLASGOW &
LANARKSHIRE



07 / Regional Overviews / Glasgow & Lanarkshire

The Glasgow region constitutes **one of the largest life sciences hubs in the UK**, with more than **380 life sciences companies**. Centred on Scotland's biggest city, the cluster benefits from four universities. Glasgow's strengths lie in precision medicine, clinical imaging and pharmaceutical services. These strengths are underpinned by assets such as the **Imaging Centre of Excellence** at **Queen Elizabeth University Hospital**, home to the **UK's first 7-Tesla MRI scanner**, and **The Living Laboratory** (a precision medicine testbed uniting industry, NHS and academia to accelerate clinical innovation adoption and improve patient outcomes).



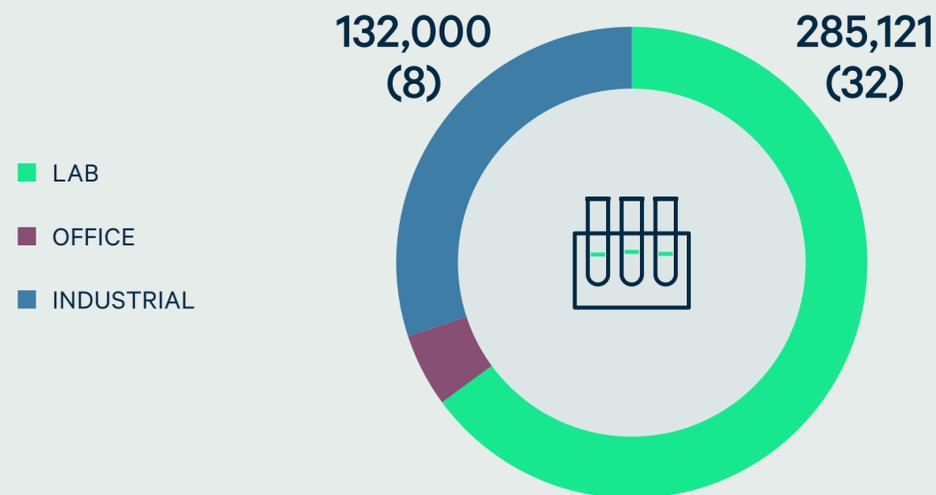
 Health Innovation Hub

07 / Regional Overviews / Glasgow & Lanarkshire

Demand

Glasgow's total sq ft demand **(440,000 sq ft, 40,877 sq m)** and number of enquiries **(44)** within the past 2 years.

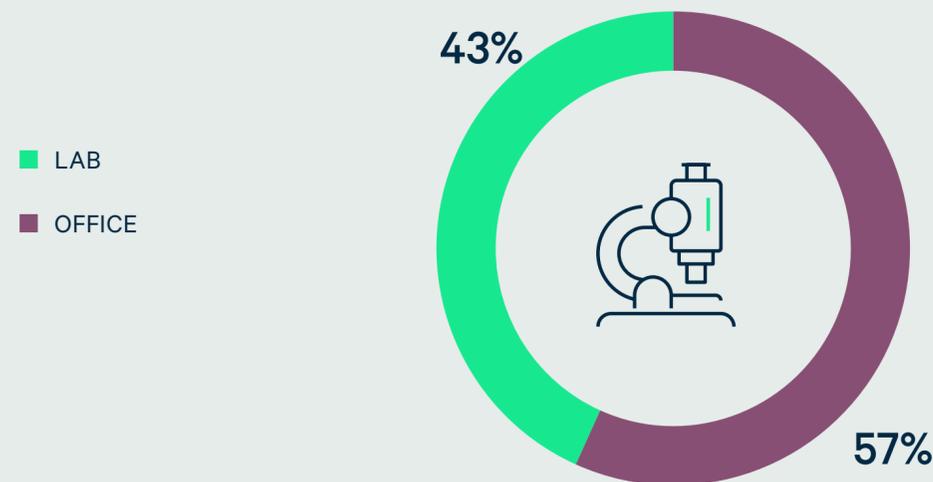
Glasgow Demand



Supply

The principal activity is centred around Glasgow City Innovation District and emerging Glasgow Riverside Innovation District (GRID) in Govan. The region's lab space includes both hospital-adjacent research facilities and standalone science parks. There is a growing supply of scale-up space including the purpose-built lab/office (87,000 sq ft, 8,083 sq m) Health Innovation Hub (HIH) which has been developed by Kadans Science Partners and University of Glasgow. West of Scotland Science Park has a mixture of new and older existing supply. A recent addition being Speyroc's development of Viridis, which provides offices & labs totalling c20,000 sq ft (1,858 sq m). Outside of these two developments, only office space of 31,427 sq ft (2,920 sq m) remains available.

Existing supply - offices & labs - Glasgow

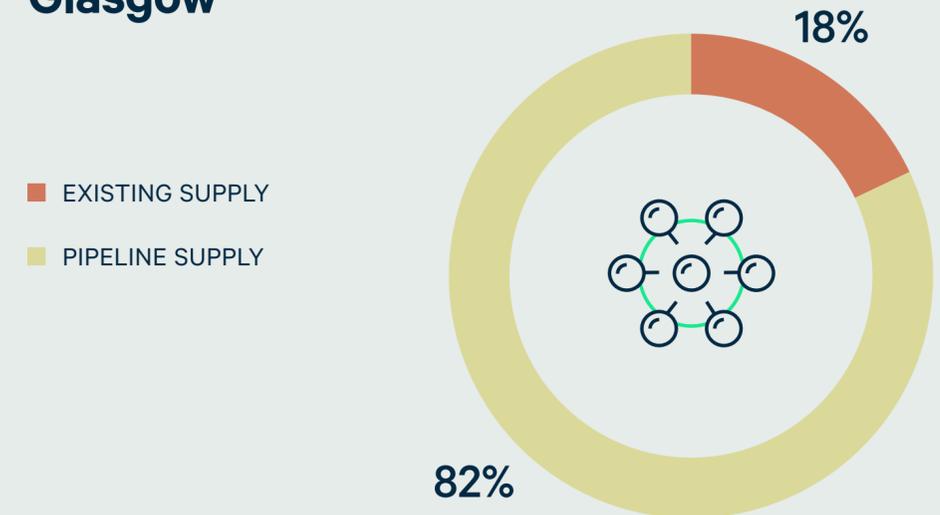


Pipeline

The main pipeline of supply for Glasgow is focused towards TechBox / Advanced Manufacturing, with a number of developments outlined within Clyde Gateway (Innovation Shawfield) which draws upon the wider strengths within the industrial market. There are also plans to include office & lab accommodation within Innovation Dalmarnock and Red Tree Labs (c216,000 sq ft, 20,067 sq m).

University of Glasgow are preparing the delivery of Plot J & Plot H within their existing Church Street Campus Masterplan with a view to deliver two innovation led buildings totalling c118,000 sq ft (10,963 sq m) providing a mixture of offices and labs provision.

Existing vs Pipeline Supply - Glasgow



07 / Regional Overviews / Glasgow & Lanarkshire

Key Activity

The Medicines Manufacturing Innovation Centre (MMIC) in Renfrewshire, a £56 million industry-led centre opened in 2023 to accelerate novel pharma manufacturing technologies. Glasgow’s Precision Medicine Living Laboratory (part of a UKRI “Strength in Places” project) integrates the HIH and existing QEUH facilities to translate cutting-edge research into clinical practice.

Glasgow has produced 84 spinouts in the last 15 years, split between University of Strathclyde and University of Glasgow. One of the most notable spin out from University of Glasgow for Life Sciences being Chemify, AI-driven digital chemistry platform for molecule design and robotic synthesis, who were funded by Scottish Enterprise and Innovate UK.

Dxcover, backed by investors including Eos Advisory and Scottish Enterprise, is one of the University of Strathclyde’s most prominent life sciences spin-outs, pioneering AI-driven infrared spectroscopy for early cancer detection, enabling same-day diagnosis for hard-to-detect cancers like brain and pancreatic.

GLASGOW HAS PRODUCED
19 life sciences spinouts
 IN THE LAST 15 YEARS
84 spinouts
 ACROSS ALL SECTORS

Key Property Transaction



Health
 Innovation
 Hub

£35.00

PER SQ FT

HEADLINE
 LAB RENT



Chemify have taken space within the **Health Innovation Hub (40,000 sq ft, 3,716 sq m)** alongside the **Digital Health Validation Lab.**

07 / Regional Overviews / Glasgow & Lanarkshire

Occupiers

- Aurum Biosciences
- SGS
- Lamond Laboratories
- Roche Diagnostics
- Dxcover
- Philips
- Thermo Fisher
- Johnson & Johnson
- Bayer
- GSK
- BioClavis
- EnteroBiotix
- Sartorius Stedim BioOutsource
- Causeway Therapeutics
- Curia Global
- Oracle Bio
- Screenin3D
- Mironid

Stakeholders & Partners

- Scottish Enterprise
- University of Glasgow
- Queen Elizabeth University Hospital
- Glasgow City Council
- Clinical Innovation Zone
- BioCity Scotland
- Industrial Biotechnology Innovation Centre (IBiolC)
- NHS Greater Glasgow & Clyde
- Beatson Institute for Cancer Research
- Strathclyde Institute of Pharmacy & Biomedical Sciences
- Medicines Manufacturing Innovation Centre (MMIC)
- Digital Health & Care Innovation Centre
- Advanced Manufacturing Innovation District Scotland (AMIDS)
- CPI
- Digital Process Manufacturing Centre

The list of Occupiers and Stakeholders/Partners is illustrative and not exhaustive.



University of Glasgow

07 / Regional Overviews / Glasgow & Lanarkshire



Health Innovation Hub (HIH) at Glasgow Riverside Innovation District (GRID)

OWNER / OPERATOR Kadans / University of Glasgow

URBAN OR CAMPUS Urban

TOTAL AVAILABLE OFFICES & LABS 21,118 sq ft (1,962 sq m)



West of Scotland Science Park

OWNER / OPERATOR Specroc / Kadans

URBAN OR CAMPUS Campus

TOTAL AVAILABLE OFFICES & LABS 42,391 sq ft (3,938 sq m)



BioCity

OWNER / OPERATOR Pioneer

URBAN OR CAMPUS Campus

TOTAL AVAILABLE OFFICES & LABS 8,324 sq ft (773 sq m)



University of Glasgow

OWNER / OPERATOR University of Glasgow

URBAN OR CAMPUS Urban

TOTAL AVAILABLE OFFICES & LABS 117,909 sq ft (10,954 sq m)



Advanced Manufacturing Innovation District (AMIDS)

OWNER / OPERATOR Buccleuch/Renfrewshire Council

URBAN OR CAMPUS Campus

TOTAL AVAILABLE OFFICES & LABS 0 sq ft

07 /
Regional Overviews

DUNDÉE



Regional Overviews / Dundee

Dundee hosts one of the UK's most concentrated life sciences clusters, centred on the **University of Dundee** and **Ninewells Hospital**, with global strengths in drug discovery and proteomics. The Dundee Life Sciences Innovation District, is anchored by the new Life Sciences Innovation Hub. This forms part of the Tay Cities Biomedical Cluster (backed by £25m Tay Cities Deal funding), and alongside GSK's API manufacturing site in Montrose, is driving medtech, biopharma and translational research.

The University of Dundee's new Centre for Targeted Protein Degradation (CeTPD) is a world-leading research facility dedicated to developing innovative treatments. This centre focuses on destroying harmful proteins and tackling previously "undruggable" diseases, utilizing cutting-edge AI imaging technology to achieve its goals.

Other projects include potential for new manufacturing labs at the Michelin Scotland Innovation Parc (MSIP) in Dundee, which is diversifying into life sciences and biotech manufacturing alongside the establish focus of Energy & Sustainability.



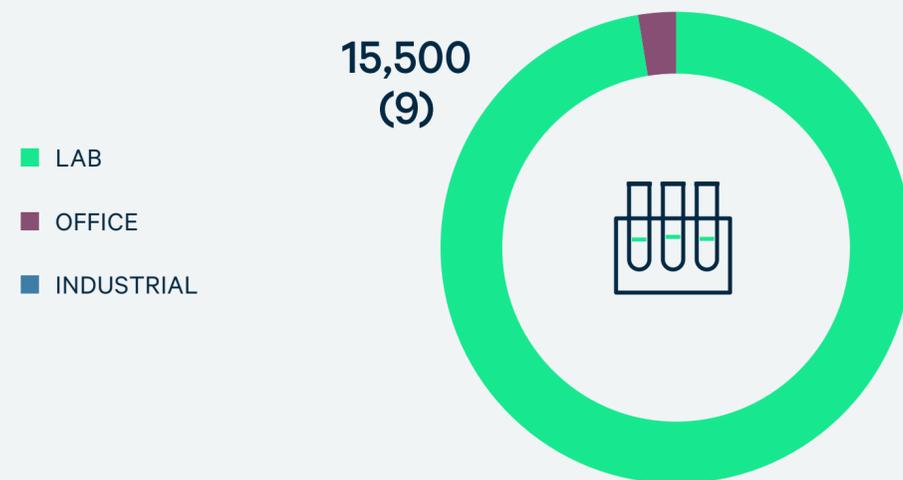
Life Sciences Innovation Hub

07 / Regional Overviews / Dundee

Demand

Dundee's total sq ft demand **(15,500 sq ft, 511 sq m)** and number of enquiries **(9)** within the past 2 years.

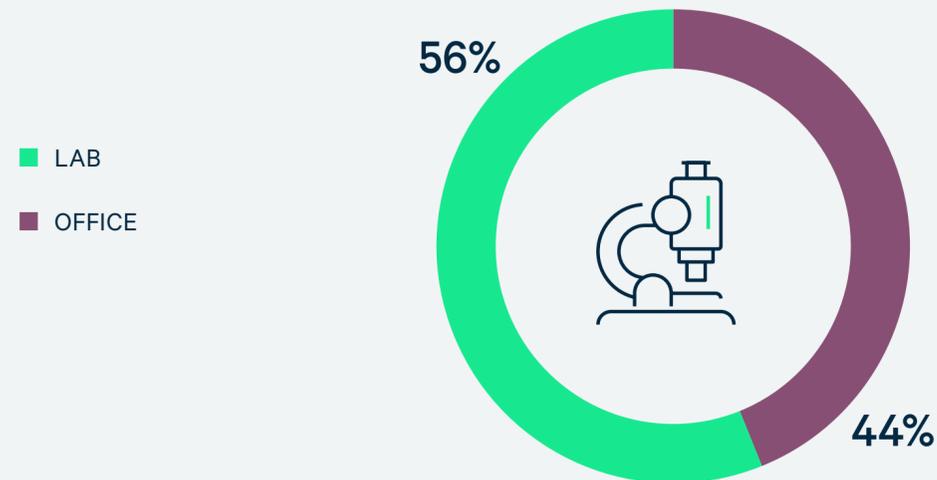
Dundee Demand



Supply

The centrepiece of Dundee's supply is the newly developed Life Sciences Innovation Hub (22,500 sq ft, 2,090 sq m) within Dundee Technopole, which provides fully fitted labs (chemistry & biology) ranging from 258 sq ft (24 sq m) to 10,764 sq ft (1,000 sq m) with associated office/write space. This builds upon the space provided within the Dundee University Incubator, which provides flexible lab and offices for spin outs and start ups. There is currently 25,704 sq ft (2,388 sq m) of existing supply, of which 56% is lab space.

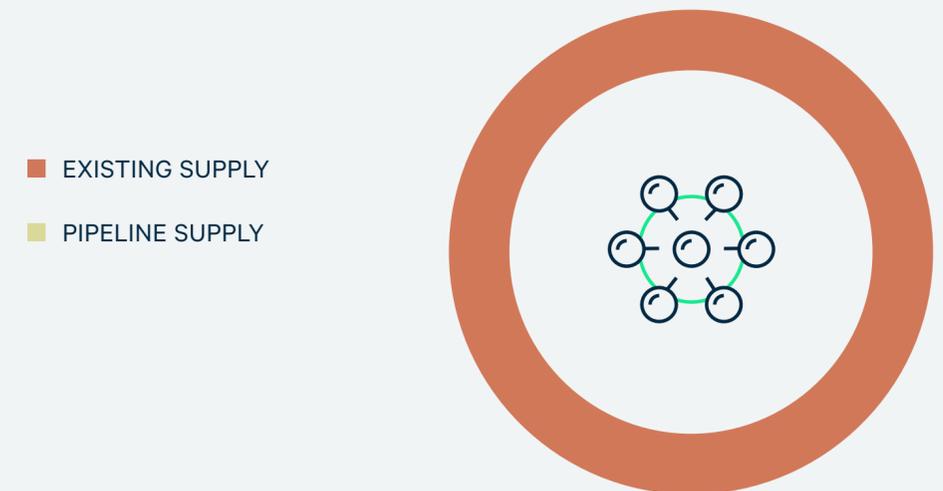
Existing supply - offices & labs - Dundee



Pipeline

There is no dedicated pipeline supply development for Life Sciences which is identified within Dundee at present.

Pipeline - offices & labs - Dundee



07 / Regional Overviews / Dundee

Key Activity

Dundee University has produced 16 spinouts in the last 15 years, with one of the most significant being Exscientia, the AI-driven drug discovery unicorn that grew as a spin-out before achieving global recognition. The region is seeing other spin-outs such as Amphista (drug discovery) and Tay Therapeutics (cancer therapeutics) and others emerging from its pipeline of research.

The Tay Cities Deal injection is spurring partnerships – e.g. recent expansions in biomedical companies and collaborations with NHS Tayside on clinical research.

Investments include major grants to the university’s drug discovery programs and ongoing support from global pharma (Dundee’s research groups often partner with the likes of GSK, Boehringer Ingelheim, etc.).

DUNDEE HAS PRODUCED
16 life sciences spinouts
IN THE LAST 15 YEARS

23 spinouts
ACROSS ALL SECTORS

Sources: Beauhurst 2025



(Merged with Recursion Pharmaceuticals in 2024)

Before its October 2021 Nasdaq IPO, Exscientia, founded in Dundee as a University of Dundee spin-out, had secured substantial private funding from global life sciences and venture investors, including equity fundraising of £161m led by SoftBank Vision Fund 2 following earlier Series A and B financings, together totalling £220m investment into the company’s AI-driven drug discovery platform prior to becoming a public company.

Exscientia’s October 2021 IPO raised approximately \$510 million. This was one of the largest public offerings by a European biotech at the time. The offering highlights the ability of a spin-out within the Scottish Enterprise geographical area to attract substantial global capital. It also validates the strength of the life sciences ecosystem and reinforcing the potential to build world-leading companies.

£35.00
PER SQ FT
HEADLINE LAB RENT



07 / Regional Overviews / Dundee

Occupiers

- Exscientia (now Recursion Pharmaceuticals)
- Amphista
- Eurofins
- GSK
- Cyclacel Pharmaceuticals
- In4Derm
- Kyowa Kirin
- MediComm Innovations
- Vascular Flow Technologies
- Axis-Shield Diagnostics (Abbott)
- Ten Bio
- Ubiquigent
- Cellexus
- DC Biosciences
- APS Biocontrol
- Myconourish
- Cypex
- Glycobiotech
- Kinasource

Stakeholders & Partners

- Scottish Enterprise
- University of Dundee
- NHS Tayside
- Dundee City Council
- The James Hutton Institute
- Advanced Plant Growth Centre
- SRUC
- Tay Cities Biomedical Cluster

The list of Occupiers and Stakeholders/Partners is illustrative and not exhaustive.



07 / Regional Overviews / Dundee



Life Sciences Innovation Hub

Dundee University Incubator

OWNER / OPERATOR

University of Dundee

OWNER / OPERATOR

University of Dundee

URBAN OR CAMPUS

Campus

URBAN OR CAMPUS

Campus

TOTAL AVAILABLE OFFICES & LABS

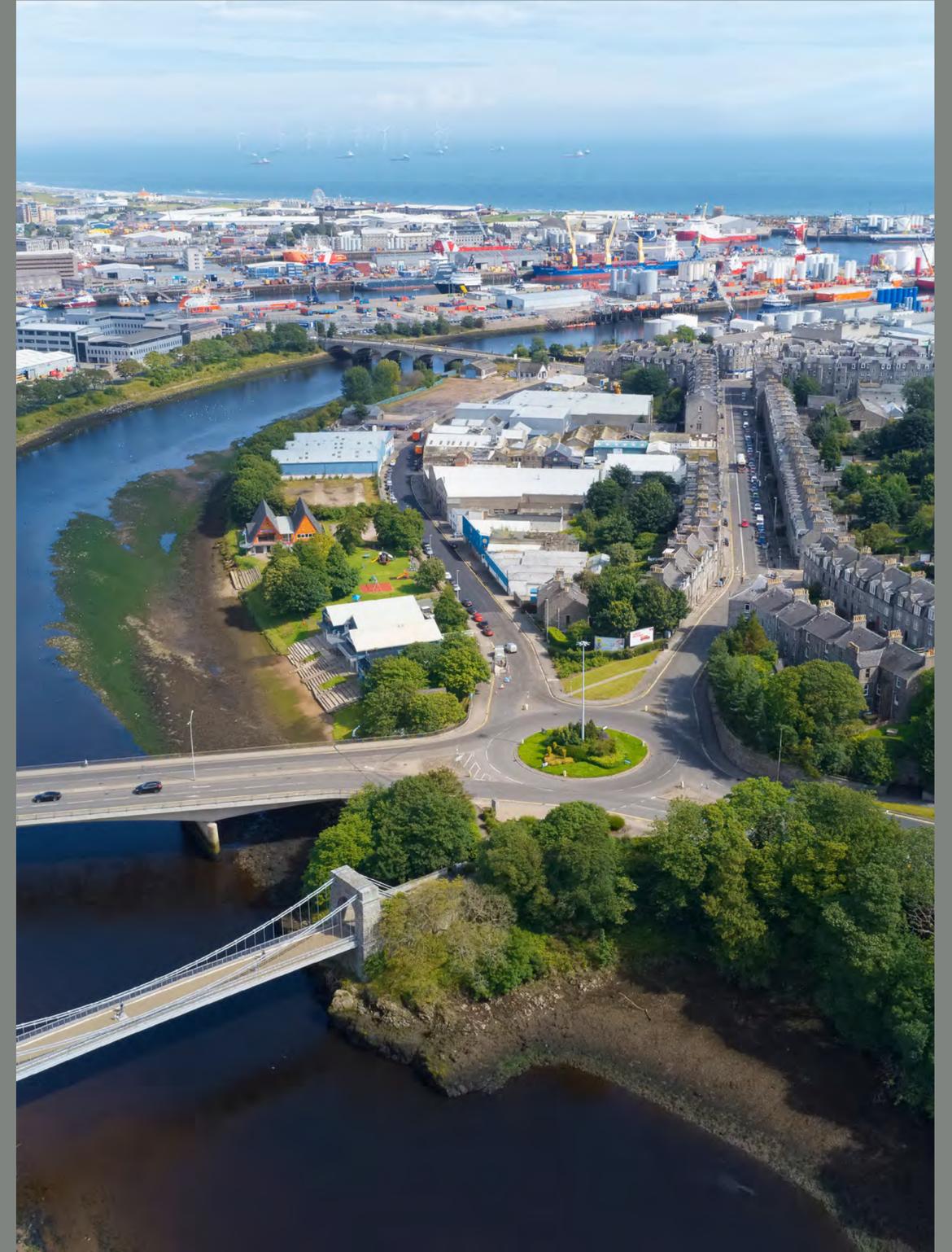
3,175 sq ft (295 sq m)

TOTAL AVAILABLE OFFICES & LABS

22,529 sq ft (2,093 sq m)

07 /
Regional Overviews

A B E R D E E N



07 / Regional Overviews / Aberdeen

The Aberdeen City Region has life sciences cluster known for tackling global health challenges, from neurodegenerative disease to diabetes and oncology. Long recognised for its energy sector, Aberdeen has diversified by leveraging strengths in biologics, drug discovery and clinical research.

The region's universities and institutes (University of Aberdeen's Institute of Medical Sciences, Rowett Institute) provide expertise in large-molecule biologics and nutrition science. Aberdeen has a

strong history of spin-outs and start-ups such as TauRx (leading Alzheimer's therapy developer), NovaBiotics (antifungal & antibacterial biotech), Elasmogen (innovative "shark antibody" therapeutics) and EnteroBiotix (microbiome-based therapeutics). Aberdeen's life sciences cluster is highly specialised and the cluster contributes strongly to regional economic diversification beyond oil & gas.

With the energy industry transition, there's also cross-sector innovation e.g. companies exploring bio-based solutions for environmental challenges. Overall, Aberdeen's life sciences sector is on an upward trajectory, with the new infrastructure and steady stream of innovation positioning it for continued growth.



One BioHub, Aberdeen

07 / Regional Overviews / Aberdeen

Demand

Aberdeen’s total sq ft demand **(11,546 sq ft, 1,073 sq m)** and number of enquiries **(7)** within the past 2 years.

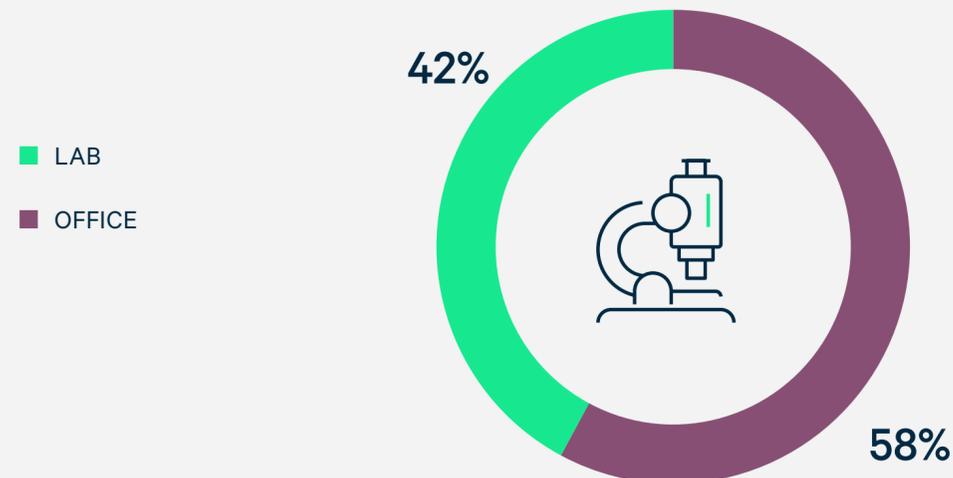
Aberdeen Demand



Supply

Aberdeen’s life sciences activities are centred on the Foresterhill Health Campus, one of Europe’s largest integrated clinical and research campuses. Foresterhill hosts Aberdeen Royal Infirmary, University of Aberdeen’s medical school and now the ONE BioHub, creating a co-located “triple helix” of healthcare, academia and industry. Prior to BioHub, Aberdeen had limited dedicated biotech space. ONE BioHub (opened August 2023) provides 69,000 sq ft (6,410 sq m) of office and lab space for start-ups and scale-ups. There is currently 38,852 sq ft (3,609 sq m) of lab space available in Aberdeen.

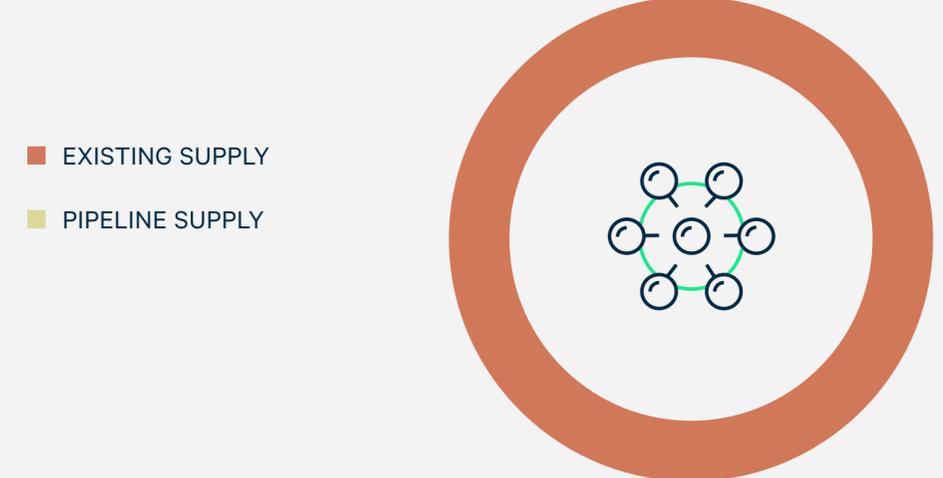
Existing supply - offices & labs - Aberdeen



Pipeline

There is no dedicated pipeline supply for Life Sciences which is identified within Aberdeen at present.

Pipeline - offices & labs - Aberdeen



07 / Regional Overviews / Aberdeen

Key Activity

Scottish Brain Sciences has opened a state-of-the-art clinical research centre at ONE BioHub in Aberdeen, marking its third research site alongside Edinburgh and St Andrews. The centre focuses on early detection and treatment of Alzheimer’s disease and other neurodegenerative conditions, enabling local participation in clinical trials, advanced assessments, and precision studies. It aims to accelerate breakthroughs in brain health, strengthen Scotland’s position as an international hub for brain health innovation, and connect research with clinical and commercial pathways.

Aberdeen has produced 24 spinouts in the past 15 years. The most notable for Life Sciences being TauRx Therapeutics, neurodegenerative disease specialist developed from University of Aberdeen research. Since its spin-out in 2002, TauRx has grown substantially advancing treatments for Alzheimer’s and related conditions.

ABERDEEN HAS PRODUCED
19 life sciences spinouts
IN THE LAST 15 YEARS

24 spinouts
ACROSS ALL SECTORS

Key Property Transaction

Scottish Brain Sciences
ONE BioHub

**£35.00 –
£45.00**

PER SQ FT

HEADLINE
LAB RENT



Scottish Brain Sciences launching **4,300 sq ft (399 sq m)** within ONE BioHub.

07 / Regional Overviews / Aberdeen

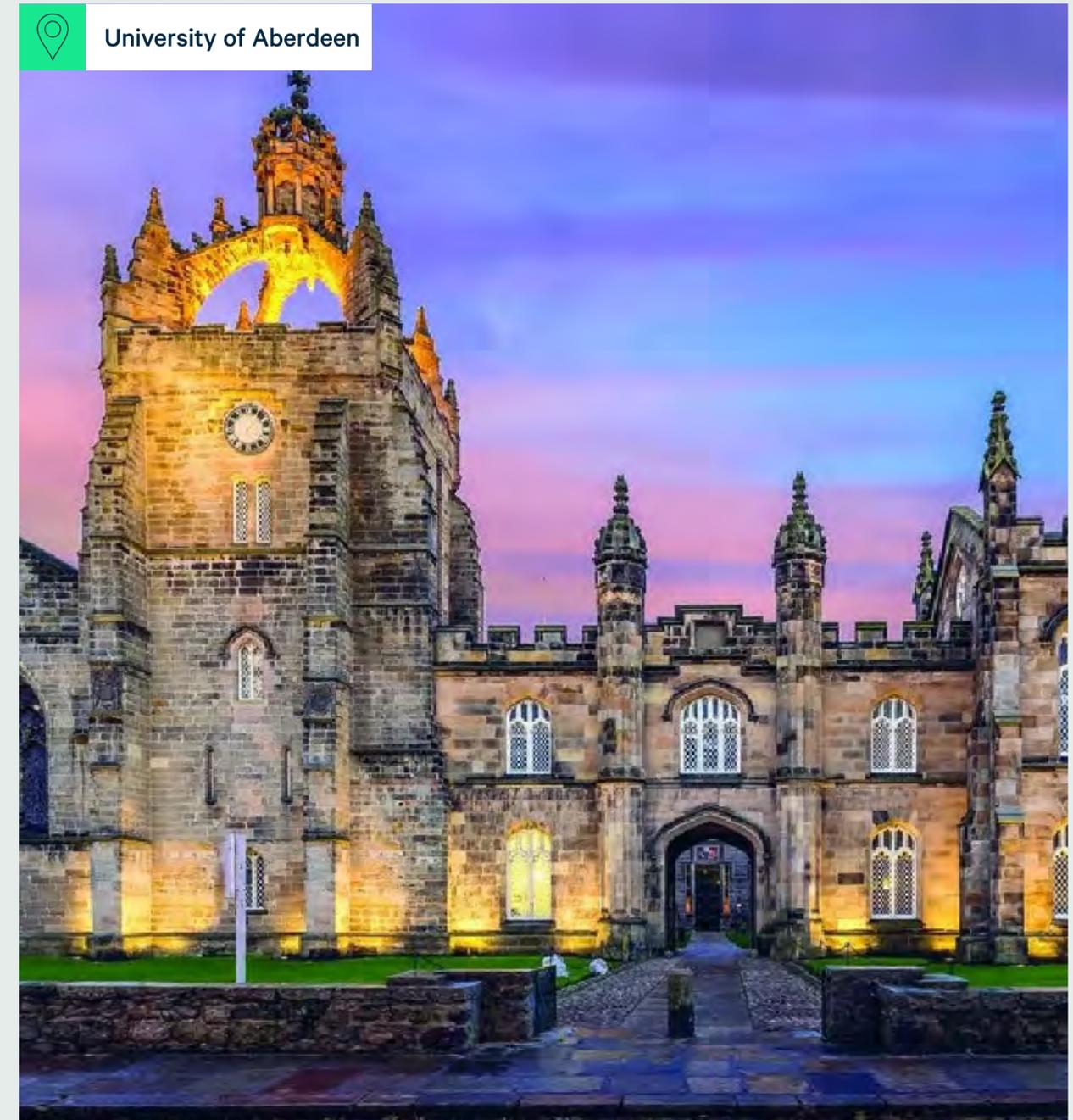
Occupiers

- Scottish Brain Sciences
- Novabiotics
- Elasmogen
- NCIMB
- TauRx Therapeutics
- Sirakoss
- Vertebrate Antibodies
- Haptogen
- EnteroBiotix
- Sx Software

Stakeholders & Partners

- Scottish Enterprise
- Opportunity North East (ONE)
- ONE BioHub
- University of Aberdeen
- Aberdeen City Council
- NHS Grampian
- Rowett Research Institute
- Scotland's Rural College (SRUC)
- Seedpod

The list of Occupiers and Stakeholders/Partners is illustrative and not exhaustive.



07 / Regional Overviews / Aberdeen



ONE BioHub

Aberdeen Energy & Innovation Park

OWNER / OPERATOR

Opportunity North East

OWNER / OPERATOR

AM Sci Tech

URBAN OR CAMPUS

Campus

URBAN OR CAMPUS

Campus

TOTAL AVAILABLE OFFICES & LABS

28,653 sq ft (2,662 sq m)

TOTAL AVAILABLE OFFICES & LABS

63,555 sq ft (5,904 sq m)

09

SOURCES

09 / Sources

Edinburgh BioQuarter	https://edinburghbioquarter.com/
Midlothian Science Zone	https://www.midlothiansciencezone.com/
UKSPA	www.ukspa.org.uk
Life Sciences Scotland Industry Overview	(Glasgow CIZ, Aberdeen BioHub, Dundee MediPark)
Scottish Development International Materials	(Enterprise Areas like Prestwick and Irvine)
Kadans – Health Innovation Hub	www.kadans.com/properties/health-innovation-hub
Viridis	https://www.wossp.co.uk/why-wossp/viridis/
Helix	https://www.wossp.co.uk/media/pncl4zki/helix-building-west-of-scotland-science-park-brochure.pdf
Kelvin Campus	https://www.kadans.com/science-clusters/west-of-scotland-science-park-glasgow/
BioCity	https://thepioneergroup.com/locations/biocity-glasgow/
Life Sciences Innovation Hub	https://www.dundee.ac.uk/innovation-hub
Dundee University Incubator	https://www.biodundee.co.uk/why-dundee/property/dundee-university-incubator
Aberdeen Energy Innovation Park	Aberdeen Office Rental, Office Space, Serviced Offices
Heriot Watt Research Park	https://heriot-watt-researchpark.co.uk/
Edinburgh Technopole	https://thepioneergroup.com/locations/edinburgh-technopole/
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Life Sciences Vision for 2025	www.lifesciencesscotland.com/vision-for-2025
Scottish Enterprise	www.scottish-enterprise.com
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Scotland Trade & Investment Agency	https://www.sdi.co.uk/
Scottish Government - Science & Research	https://www.gov.scot/policies/science-and-research/life-sciences/
ABPI Scotland – <i>A manifesto for health and growth</i>	https://www.abpi.org.uk/publications/abpi-scotland-a-manifesto-for-health-and-growth/
Healthandcare.scot	https://healthandcare.scot/stories/3761/life-sciences-scotland-growth-economy
GOV.UK – <i>Life Sciences Sector Plan</i>	https://www.gov.uk/government/publications/life-sciences-sector-plan/life-sciences-sector-plan
UK Government – <i>UK's Modern Industrial Strategy</i>	– <i>UK's Modern Industrial Strategy</i>
Scottish Government – <i>Sector Briefing - Life Sciences – Dec 2025</i>	
BioXcelerate	https://healthandpharma.net/ai-biox-genetics-variant-detection-drug-discovery
Pitchbook	https://try.pitchbook.com
Beauhurst	https://www.beauhurst.com/

09 /
Sources

Stakeholders

We extend our sincere gratitude to all stakeholders who contributed their time, expertise, and insights to the development of the Scottish Enterprise: Life Sciences Property Supply & Demand Analysis (2025).

Your collaborative spirit and commitment to provide data have been instrumental in shaping forward-looking analysis. This report is a testament to the power of partnership across industry, academia, healthcare, and government, and we thank you for your invaluable input.



09 / Sources

DATA CRITERIA	DEFINITION / COMMENT
Data collection period	All data presented in this report was compiled and analysed up to August 2025 , reflecting the most current market information available at the time of analysis. While every effort has been made to ensure the accuracy of the data, it is important to note that market conditions are dynamic and future developments may impact the findings presented. Additionally, where data has been provided by third parties, we have relied on the accuracy of their submissions.
Lab	For the purpose of this report, reference to “lab” refers to any lab space which is being actively marketed for lease to an occupier. This covers all types and specifications of lab space including CL1 – CL4. Within the supply data, only existing and pipeline properties specifically marketed for life sciences, including labs with associated office space, have been included; traditional office spaces with potential for conversion but not currently marketed as labs are excluded.
Offices	The scope of this analysis is specifically focused on dedicated laboratory facilities and associated or directly linked office spaces, to provide a precise and representative view of the supply landscape, therefore excluding traditional office accommodation not explicitly marketed for life sciences occupiers. The report’s definition of “Office” encompasses all leasable office spaces within buildings tailored for and to attract life sciences occupiers, recognising the integrated nature of these environments.
TechBox	A “Techbox” is a flexible, hybrid industrial accommodation solution designed for modern occupiers, particularly in science and tech sectors. Situated in established or emerging science and technology clusters, the design blends office, laboratory and warehouse/manufacturing space within a self-contained unit. Key features include a high-quality setting/ landscaping, excellent amenities and a design-led aesthetic. They offer a high proportion of office space with flexibility for lab or office fit-out, often incorporating Grade A features. TechBoxes can also provide substantial power supply (where available) alongside external plant provisions and design adaptability for future needs.
Manufacturing	The manufacturing supply data includes only properties specifically marketed for life sciences, such as ex-tenanted bio-manufacturing facilities and purpose-built manufacturing or TechBox spaces designed for life sciences occupiers. In this report, “manufacturing” refers to accommodation intended for bio-manufacturing or for companies seeking to locate within a cluster of synergistic or related life sciences businesses, fostering collaboration and innovation. It excludes traditional industrial accommodation.
Headline office & lab rent	Headline office and lab rent is the highest rent achieved for leasing laboratory with associated office space within each geographical areas within Scottish Enterprise, to a CAT A specification.
Geographical area of analysis	Throughout this report, the analysis of the supply and demand is within the geographical areas covered by the Scottish Enterprise only. This definition is adopted to ensure consistency and clarity in the analysis presented.
Enquiries	This analysis defines “enquiries” as active requirements from companies seeking lab, office or manufacturing space within Scottish Enterprise geographical area. Data is sourced from stakeholder engagement, providing a granular view of current and potential occupier demand. While not all enquirers will lease space, this granular data offers valuable insights into future demand trends.
Life sciences	As outlined within the Life Sciences Strategy for Scotland 2035 Vision – the <i>“definition of the life sciences sector therefore encompasses human, animal, microbial and plant sciences. It includes pharmaceuticals, health tech, agritech and animal health, aquaculture, industrial biotechnology and bio based manufacturing.”</i>
Life sciences cluster	As defined within the Scotland Life Sciences Sector briefing – Dec 2025, the data in relation to turnover refers to the wider Life Sciences “cluster” definition.
VC funding analysis	VC funding analysis involves using platforms including PitchBook and Beauhurst to identify companies that have raised venture capital across different years, based on verified data from filings, press releases, and proprietary research. Each funding round is linked to the company’s current registered headquarters address at the time of analysis. Therefore, if a business originally spun out from one city but later relocated/ changed its HQ registered address, the funding is attributed to the city where it is currently registered. This approach does not retrospectively reallocate funding to the company’s original location, resulting in the analysis reflecting the present geographic distribution of VC-backed firms rather than their historical origins.
Undisclosed enquiries	Information requested from a stakeholder for inclusion in the analysis but not received. This lack of information can introduce bias, incomplete findings, and uncertainty in the interpretation of results. The reasons for non-disclosure may vary and could include, but are not limited to, data unavailability, privacy concerns, or the stakeholder’s inability to provide the data within the project timeline.



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