

Risk, Readiness & Resilience

A LIFE SCIENCES LOCATION ANALYSIS



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EXECUTIVE SUMMARY

Global life sciences companies are operating in a tighter margin-for-error environment. Validation timelines are compressing, supply chains are being re-evaluated, and site-readiness has become as critical as talent availability. In this environment, location decisions are no longer driven by cost alone; they are driven by confidence. Companies are prioritizing places where innovation can move quickly, operations can scale without disruption, and risk is actively mitigated rather than managed reactively. Middlesex County, New Jersey, operates at that intersection of speed, certainty, and resilience.

In a site selection landscape shaped by supply chain volatility, workforce constraints, and climate exposure, the County offers a combination that is increasingly difficult to replicate: one of the nation's most educated and industry-experienced life sciences workforces, development-ready infrastructure with proven capacity, and an innovation ecosystem anchored by globally recognized research institutions. Middlesex County consistently ranks at or near the top on site selection priorities such as talent availability, R&D intensity, and economic vitality.

This analysis examines Middlesex County through the lens used by life sciences executives and site selectors today: talent readiness, site-readiness, operational risk, innovation capacity, and total value. The findings show a County that is not reacting to change but built for it.

Key Findings Include:

Talent Depth and Experience

Middlesex County has one of the most educated labor pools in the United States, with 45.1% of adults holding a bachelor's degree or higher and 19% holding a graduate degree or higher, placing the County in the top 4% nationally. This concentration rivals or exceeds much larger markets, outperforming Chicago's Cook County and Phoenix's Maricopa County in degree attainment.¹ For life sciences companies, this translates into faster hiring, deeper benches of experienced professionals, and reduced execution risk.

Research and Innovation Density

The County ranks in the top 0.5% of U.S. counties for university-based R&D spending across life

sciences, engineering, computer science, and physical sciences. Anchored by Rutgers University—New Brunswick and supported by proximity to Princeton University,² this level of research intensity signals that innovation is not episodic in Middlesex County; it is structural.

Infrastructure That Reduces Downtime Risk

Middlesex County offers development-ready sites supported by one of the most complete multi-modal logistics networks in the Northeast. The County sits within minutes of the Port of New York & New Jersey—one of the busiest container ports on the East Coast and at the crossroads of major interstate corridors including the New Jersey Turnpike (I-95) and I-287, with direct access to Class-I freight rail and international air cargo through Newark Liberty International Airport. This concentration of port, highway, rail, and air infrastructure enables efficient inbound materials flow and rapid outbound distribution to Northeast and Mid-Atlantic markets.

Climate considerations increasingly influence site selection decisions. Middlesex County's inland location limits direct exposure to ocean storm surge while maintaining immediate access to coastal trade gateways, reducing weather-related disruption risks compared to coastal sites.³ Together, these location and logistics advantages shorten time-to-market, build supply-chain redundancy, and support projects ranging from R&D and advanced manufacturing to large-scale distribution and logistics.

Resilience Built Into the System

With access to roughly 40% of the U.S. population within a day's drive and a logistics network moving over 23.9 million tons of freight annually across 765 facilities, Middlesex County is structured for redundancy.⁴ Utility investments, flood mitigation planning supported by \$1.1 million in federal funding, and low exposure to wildfire and drought risks position the County as a lower-risk alternative to Sunbelt and coastal markets.

Cost-Value Balance

While Middlesex County is not a low-cost market, it delivers productivity and access that offset nominal expenses. Real estate costs are lower

than peer hubs such as Manhattan, Chicago, and San Diego, while median household income stands at approximately \$110,000. State incentive programs, including NJEDA's Emerge program, further improve project economics, as demonstrated by Genmab's decision to locate its U.S. headquarters in Middlesex County.⁵

Site Selection Trends: A New Risk Calculus

Site selection has entered a new phase. Professional site selectors increasingly emphasize locations where operational risks can be identified and addressed early, with greater weight placed on site readiness, infrastructure coordination, and workforce sustainability than on cost alone. This shift reflects growing sensitivity to execution risk, project timelines, and long-term operational continuity across highly regulated and capital-intensive industries.

Middlesex County is responding to this shift with proactive planning. The County works closely with utility providers and developers to align power, water, and site readiness with projected demand, de-risking projects at the earliest stages of development. This coordinated approach is particularly important for life sciences companies, where downtime can cost millions and validation failures can derail timelines—making upfront capacity planning a critical competitive advantage.

Labor dynamics have also shifted. While quit rates have normalized since the pandemic, access to skilled talent has become more critical. In 2024, 91% of industrial-focused site consultants agreed that access to talent significantly shapes location decisions. Middlesex County's depth of experienced scientists, engineers, and GMP-trained manufacturing talent directly addresses this constraint.

Risk considerations now extend beyond operations to include social stability and climate exposure. New Jersey ranks among the safest states nationally,⁶ and Middlesex County's diversity and inclusivity support talent attraction and retention. Geographically, the County avoids the extreme heat, wildfire, and hurricane risks increasingly affecting competing regions, while continuing to invest in flood mitigation and emergency preparedness.³

Life Sciences Cluster: Critical Mass with Continuity *Cluster Strength and Scale*

Middlesex County sits at the center of New Jersey's life sciences ecosystem, long recognized as the "Medicine Chest of the World." Fourteen of the world's 20 largest pharmaceutical companies have a presence in the state. Johnson & Johnson's global headquarters in New Brunswick (Middlesex County) anchors the cluster, supported by nearby campuses of Bristol Myers Squibb and Merck.

The County's biotech sector has expanded rapidly. Genmab selected Middlesex County for its U.S. headquarters and is expanding with 300 new R&D jobs, citing talent availability and incentive support as decisive factors. Sampled, one of the world's largest biorepositories, originated at Rutgers and has since grown into a major genomic testing and biobanking operation in Piscataway.⁵ Additional firms across genomics, generics, and flavor modulation reinforce the County's role as a dense, interconnected value chain rather than a collection of isolated assets.

Talent Built for Regulated Industries

The biopharmaceutical industry in Middlesex County has a talent concentration nearly six times the national average.⁶ With 4,556 employees in pharmaceutical preparation manufacturing, the County has a 7.1x greater concentration than the U.S. average.⁷ This matters because life sciences projects fail more often from execution gaps than from lack of ideas. Middlesex County offers experienced professionals who understand FDA processes, GMP requirements, and the realities of scaling regulated production.

Rutgers University plays a central role, supplying PharmD graduates, medicinal chemists, molecular biologists, and clinical researchers. The Rutgers Cancer Institute of New Jersey, the state's only NCI-designated Comprehensive Cancer Center, supports oncology research and clinical trials. The Biopharma Manufacturing Training & Innovation Center, opened in 2022, directly addresses emerging skills needs in cell and gene therapy production.

Infrastructure That Supports Specialized Facilities

Life sciences require more than generic industrial space. Middlesex County has expanded its inventory of wet labs, incubator space, and development-ready industrial sites. The Technology Centre of New Jersey in North Brunswick provides flexible lab environments, while the HELIX Innovation District in New Brunswick is adding large-scale, modern lab and office capacity designed for collaboration between academia and industry.⁸

The County also offers sites suitable for biomanufacturing and distribution, particularly near major Turnpike interchanges. Proximity to East Coast markets, established cold-chain logistics, and access to international gateways support both domestic distribution and global supply chains.

Innovation with Operational Stability

Middlesex County's innovation ecosystem is reinforced by proximity to New York City's venture capital market, state-supported R&D incentives, and collaborative infrastructure. Rutgers University reported over \$930 million in R&D spending in 2024, underscoring the scale of research activity feeding the private sector.² Initiatives such as the HELIX are designed to shorten the path from discovery to deployment.

State programs, including the NJ Angel Investor Tax Credit and the Biotech Net Operating Loss transfer mechanism, have provided non-dilutive capital to early-stage companies, strengthening the pipeline without increasing financial risk. These tools, combined with predictable permitting and regulatory familiarity, make Middlesex County a place where innovation can move without friction.

Competitive Position and Outlook

Middlesex County competes directly with top-tier life sciences hubs such as Boston, the San Francisco Bay Area, San Diego, and Research Triangle Park. Its advantage lies in balance. Compared to Boston and San Francisco,

Middlesex County offers lower real estate costs and less congestion while maintaining access to elite talent. Compared to emerging markets, it provides a deeper bench of experienced professionals and immediate market access.

Looking ahead, the completion of the HELIX Innovation District,⁸ continued investment in workforce development, and growing emphasis on domestic pharmaceutical manufacturing position Middlesex County for sustained relevance. As life sciences, technology, and healthcare continue to converge, the County's combination of research, clinical assets, and infrastructure creates optionality for companies navigating an uncertain future.

A Case for Confidence and Partnership

In an era where life sciences companies must validate faster, scale more reliably, and operate under increasing scrutiny, location is a strategic risk decision. Middlesex County reduces that risk by offering built-in advantages across talent, infrastructure, innovation, and resilience.

Through the Office of Business Engagement, Middlesex County acts as a partner, not just a host. One conversation connects companies to workforce data, utility coordination, and incentive pathways aligned to real project timelines. For organizations seeking confidence in their next investment decision, Middlesex County offers a location designed to perform under pressure and adapt over time.

Formulated for innovators, Middlesex County, NJ, is where research institutions power discovery, talent pipelines keep the momentum strong, and world-class infrastructure gets results to market faster.

For more information, visit:

biz.DiscoverMiddlesex.com

Notes

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3. Rutgers Climate Resource Center, "New Jersey Climate Change and Flood Risk," *Rutgers University*, retrieved from https://njclimateresourcecenter.rutgers.edu/wp-content/uploads/2020/03/CHPR_Final_12.6_2017.pdf

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5. Adam Bruns, "Innovation Destination," *Site Selection Magazine*, retrieved from <https://siteselection.com/innovation-destination-2/>

6. StatsAmerica, "Regional Data and Economic Indicators," *StatsAmerica*, retrieved from <https://www.statsamerica.org/regions/>

7. Lightcast, "Labor Market Analytics for Middlesex County," Lightcast proprietary database, Q3 2024.

8. Joshua Burd, "EDA, Nokia Bell Labs to Open New Hub for Commercializing Research at New Brunswick's HELIX Campus," *Real Estate—NJ*, retrieved from <https://re-nj.com/eda-nokia-bell-labs-to-open-new-hub-for-commercializing-research-at-new-brunswicks-helix-campus/>