

Risk, Readiness & Resilience

A SITE SELECTION ANALYSIS



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EXECUTIVE SUMMARY

Site selection has entered a higher-stakes era. What were once primarily cost-driven decisions are now shaped by a broader assessment of risk, workforce sustainability, infrastructure certainty, and long-term operational continuity. Supply chain disruptions, utility constraints, labor shortages, and climate volatility have altered how site selectors evaluate markets, elevating reliability and readiness alongside traditional financial considerations.

Middlesex County, New Jersey, operates at the intersection of these priorities.

In a site selection landscape defined by compressed timelines and heightened exposure to disruption, the County offers a combination that has become increasingly rare: a deeply educated and diverse workforce, development-ready sites with documented utility capacity, multimodal logistics serving major U.S. markets, and a stable operating environment supported by public investment.

This report examines Middlesex County through the lens used by professional site selectors today: access to talent, site and infrastructure readiness, resilience to operational risk, cost-value performance, and quality-of-place considerations that affect long-term success. The findings show a County that reduces uncertainty at every stage of the site selection process.

Key Findings Include:

Talent Availability at Scale

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, placing the County in the top 4% nationally.¹ This depth supports projects across advanced manufacturing, life sciences, logistics, and technology, while reducing recruitment risk.

Infrastructure and Site Readiness

The County offers development-ready industrial and commercial sites positioned within the Northeast Corridor, with direct access to the Port of New York & New Jersey, major interstate highways, freight rail, and international air cargo through Newark Liberty International Airport. This connectivity enables companies to move inputs and finished goods

efficiently while reducing development timelines and accelerating market entry.

Built-In Resilience

Middlesex County's scale and redundancy strengthen operational continuity. A diverse logistics ecosystem spanning 765 facilities supports high-volume freight movement and flexible routing during disruptions.² Coupled with an inland geography and targeted flood mitigation investments supported by \$1.1 million in federal funding, the County offers a lower-risk operating environment than many coastal or climate-exposed markets.³

Cost-Value Performance

While not a low-cost market, Middlesex County delivers productivity, access, and incentives that offset nominal expenses. Median household income is approximately \$110,000, and state incentive programs such as NJEDA's Emerge program materially improve project economics, as demonstrated by recent competitive wins.⁴

2024 Site Selection Trends A New Risk Calculus

Surveys of professional site selectors in 2024 show that infrastructure capacity, utility reliability, and workforce sustainability now outweigh cost in many project types.

Industrial site selection has become more constrained, with companies placing greater weight on locations that can support early risk identification and predictable project execution. 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.

Labor dynamics have also shifted. While national quit rates have normalized since the pandemic, access to skilled workers has become more critical, not less. In 2024, 91% of industrial-focused site consultants agreed that access to talent will significantly shape location decisions, up from just 4% in 2022. This shift reflects shortages in skilled trades, STEM roles, and experienced operations talent that can jeopardize project execution.

Talent Depth and Workforce Sustainability

Access to talent is now the most consistently cited priority among site selectors, and Middlesex County delivers at scale. The County's workforce is among the most educated in the nation, with 45.1% bachelor's degree attainment and 19% graduate degree attainment, exceeding national averages and outperforming larger peer counties such as Cook County, Illinois, and Maricopa County, Arizona.¹

Beyond education levels, Middlesex County benefits from New Jersey's position as the state with the highest concentration of scientists and engineers per square mile in the United States.⁵ This density supports a wide range of industries, including life sciences, advanced manufacturing, logistics, and technology.

Workforce growth further strengthens sustainability. Middlesex County's labor force is projected to grow from 494,925 in 2023 to 541,552 by 2032, the highest projected growth rate of any county in New Jersey.⁶ This growth, combined with strong participation rates, provides a stable labor pipeline for expanding operations.

Development-Ready Sites and Infrastructure Capacity

Middlesex County offers a rare combination of location advantage and site availability. Situated in the heart of the Northeast Corridor, the County provides direct access to I-95 (NJ Turnpike), I-287, the Garden State Parkway, and freight rail lines. The Port of New York & New Jersey is approximately 25 miles away, and Newark Liberty International Airport is within a 30-minute drive, supporting both freight and executive travel.

The County maintains a diverse inventory of industrial and commercial sites, including large-scale business parks such as Raritan Center in Edison and redevelopment-ready parcels with existing utility infrastructure. Unlike many dense metropolitan regions, Middlesex County retains "plug-and-play" sites that reduce time-to-market for new facilities.

Utilities represent a critical differentiator. Water infrastructure investments include approximately \$93 million in upgrades by Middlesex Water Company in 2025 alone, supporting both capacity and resilience for industrial users.⁷

Logistics Reach and Supply Chain Resilience

Supply chain resilience has become a defining consideration in site selection. Middlesex County's logistics network supports 23.9 million tons of freight annually across 765 facilities, providing redundancy across highway, rail, port, and air cargo modes.²

This multimodal system allows companies to reroute shipments when disruptions occur, reducing dependence on single-threaded supply chains. The County's location enables same-day or next-day access to major Northeast markets, serving approximately 40% of the U.S. population within a one-day drive.

During periods of disruption, including the COVID-19 pandemic, East Coast ports such as Port Newark/Elizabeth maintained higher throughput than West Coast counterparts, reinforcing the value of Middlesex County's geographic position. For site selectors, this redundancy translates into reduced downtime risk and greater operational continuity.

Climate Risk and Operational Stability

Climate exposure is now a standard component of site selection analysis. Middlesex County offers a comparatively moderate risk profile. Its inland location reduces exposure to coastal storm surge and direct hurricane impacts, while ongoing flood mitigation efforts address precipitation-related risks.

The County has secured \$1.1 million in federal funding for flood mitigation projects in southern municipalities, strengthening drainage systems and critical infrastructure. Unlike Sunbelt markets facing increasing wildfire, drought, and extreme heat risks, Middlesex County maintains stable water availability and minimal wildfire exposure.³

Social and political stability further reinforce resilience. New Jersey ranks among the safest

states nationally, and Middlesex County is known for its diversity, inclusivity, and predictable governance, factors that increasingly influence corporate location decisions.⁸

Cost Structure and Incentive Environment

Middlesex County is not positioned as a low-cost market, but site selectors increasingly evaluate total value rather than nominal expense. Median household income in the County is approximately \$110,000, compared with \$104,453 in New York County, NY, and \$80,579 in Cook County, Illinois.

Real estate costs remain lower than peer hubs such as Manhattan, Boston, and San Diego, while New Jersey's incentive programs materially offset operating costs. The NJEDA Emerge program provides tax credits tied to job creation and capital investment, with recent projects securing multi-million-dollar packages.⁴

Incentives can be further supplemented through PILOT agreements, workforce training grants, and sales tax exemptions on manufacturing and R&D equipment, improving project feasibility.⁹

Quality of Place and Talent Retention

Quality of place has become a strategic factor in site selection, particularly for projects reliant on skilled labor. Middlesex County consistently ranks among the top places to live for families and professionals, supported by high-performing schools, cultural amenities, and access to healthcare.

New Jersey's public education system ranks among the best in the nation,¹⁰ and Middlesex County is home to nationally recognized Magnet Schools and higher education institutions. Safety, diversity, and access to recreation contribute to strong talent retention, reducing long-term turnover risk.

Business Support and Execution Certainty

Middlesex County's Office of Business Engagement provides site selectors with a single point of coordination and partnership, supporting site evaluation, utility verification, incentive navigation, and workforce connections. This high-touch approach reduces friction during the site selection and development process.

The County's long-standing AAA bond rating¹¹ reflects fiscal stability and the capacity to sustain infrastructure investment and capital improvements over time. For site selectors, this stability translates into confidence that commitments made today will be supported throughout the life of a project.

A Location Designed to Reduce Risk

For site selectors operating in an increasingly constrained environment, Middlesex County, New Jersey, offers a compelling case. The County combines infrastructure capacity, deep labor pools, resilient logistics, and a stable operating environment in a way that reduces uncertainty across every phase of site selection.

Rather than competing solely on cost, Middlesex County competes on confidence. It is a location where projects can move from evaluation to execution with fewer surprises, supported by data, coordination, and long-term public investment.

The right talent. The right location. The right customers. Middlesex County, NJ, has everything businesses need to thrive.

For more information, visit:

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Notes

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