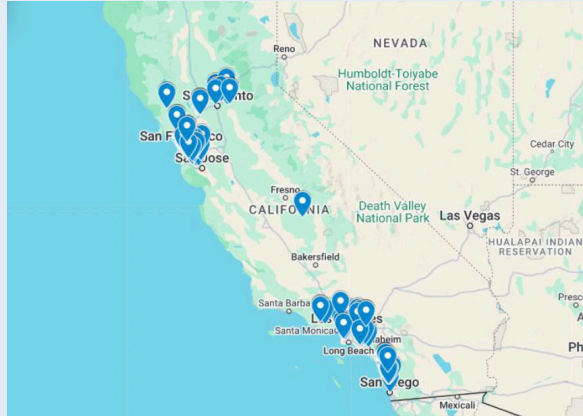


# CALIFORNIA CONSTRUCTION PROJECTS

## Major Projects (\$5M+) 2019-2024



## California Fact Sheet, 2019-2024

Pharmaceutical & Biotech Mfg and R&D

**Number of Major Projects**  
(\$5+ million)

**237**

**Major Project Valuation**  
(Any major project active between 2019 and 2024)

**\$18.78 billion**

**Total Construction Spending**  
(Capital and maintenance expenditure, 2019-2024)

**\$14.71 billion**

## Largest Construction Projects, Pharmaceutical and Biotech Manufacturing and R&D, 2019-2024

| Project Owner  | City                    | State     | Years          | Project Value          |
|--|-------------------------|-----------|----------------|------------------------|
| <b>IQHQ Incorporated</b><br>San Diego Grassroot Research & Development District (Radd) Lab/Mixed-Use Campus                  | <b>San Diego</b>        | <b>CA</b> | <b>2021-24</b> | <b>\$1,650 million</b> |
| <b>Kilroy Realty Corporation</b><br>South San Francisco Kilroy Oyster Point Life Science Campus Phase 2 (KOP 2) Add          | <b>S. San Francisco</b> | <b>CA</b> | <b>2021-25</b> | <b>\$700 million</b>   |
| <b>Bristol-Myers Squibb Company</b><br>San Diego Grassroot Biologics R&D Alexandria Point Plant                              | <b>San Diego</b>        | <b>CA</b> | <b>2024-26</b> | <b>\$500 million</b>   |
| <b>Genetech (Roche USA) Incorporated</b><br>Oceanside Multi-Product API Bulk Biologicals Single-Use Technology (SUT) Bld Add | <b>Oceanside</b>        | <b>CA</b> | <b>2023-25</b> | <b>\$450 million</b>   |
| <b>Alexandria Real Estate Equities Incorporated</b><br>Millbrae Brownfield Alexandria Center For Life Science (ACLS) R&D     | <b>Millbrae</b>         | <b>CA</b> | <b>2022-25</b> | <b>\$400 million</b>   |
| <b>Healthpeak Properties Incorporated</b><br>Brisbane Grassroot The Shore at Sierrapoint Phases II and III                   | <b>Brisbane</b>         | <b>CA</b> | <b>2019-22</b> | <b>\$384 million</b>   |
| <b>IQHQ Incorporated</b><br>Redwood City Brownfield "Elco Yards" Life Science Complex  | <b>Redwood City</b>     | <b>CA</b> | <b>2022-25</b> | <b>\$350 million</b>   |
| <b>Lane Partners LLC</b><br>Berkeley Brownfield Berkeley Commons/600 Addison Street R&D Buildings                            | <b>Berkeley</b>         | <b>CA</b> | <b>2022-24</b> | <b>\$350 million</b>   |
| <b>King Street Properties LLC</b><br>Burlingame Brownfield Nomar Life Science Campus   | <b>Burlingame</b>       | <b>CA</b> | <b>2023-25</b> | <b>\$350 million</b>   |
| <b>Longfellow Real Estate Partners LLC</b><br>Millbrae Brownfield Avia Labs Life Science R&D Building                        | <b>Millbrae</b>         | <b>CA</b> | <b>2023-25</b> | <b>\$310 million</b>   |

# CALIFORNIA CONSTRUCTION EMPLOYMENT

## Industry Analysis: CALIFORNIA

**Pharmaceutical  
Manufacturing (2023)**  
(NAICS = 325400)

**Firms:**  
875

**Employees:**  
44,507

**Annual Wages:**  
\$6.98 billion

**Wages per Employee:**  
\$156,887

## Construction Labor Overview, 2019-2024 Pharmaceutical & Biotech Mfg and R&D

**Total Labor Hours**  
(14 trades; installation and maintenance) **29,557,642**

**Union Labor Hours (est.)**  
(Estimated state union% in non-residential  
blue-collar construction trades = 50.7% ) **14,978,257**

**Union Earnings (est.)** **\$588,210,680**

### Data Sources

Pharmaceutical and biotech industry data (projects, spending, labor hours demanded) from Industrial Information Resources (IIR). State industry employment data from the Bureau of Labor Statistics (QCEW) using the North American Industry Classification System (NAICS). State union percent in non-residential construction calculated by dividing union members in construction (unionstats.com) by blue-collar QCEW employment in nonresidential construction firms in 2019 (assumes union density equals zero in residential construction; blue-collar percentage from NAICS=23 using the BLS Occupational Employment Statistics series). Note: Pharmaceutical manufacturing industry statistics (above) do not represent the entirety of the pharmaceutical and biotech industry featured in this study. Most significantly, in addition to NAICS 325400 ("Pharmaceutical Manufacturing"), other industry jobs comprise a subset of NAICS 541700 ("Scientific R&D Services").

## California Construction Labor Hours by Trade, Pharmaceutical & Biotech Mfg and R&D, 2019-2024

|                             | Installation      | Maintenance      | Total             |
|-----------------------------|-------------------|------------------|-------------------|
| <b>Boilermaker</b>          | <b>325,342</b>    | <b>40,734</b>    | <b>366,076</b>    |
| <b>Carpenter</b>            | <b>1,384,992</b>  | <b>331,783</b>   | <b>1,716,775</b>  |
| <b>Electrician</b>          | <b>8,113,962</b>  | <b>1,113,610</b> | <b>9,227,572</b>  |
| <b>HVAC Installers</b>      | <b>826,404</b>    | <b>19,632</b>    | <b>846,036</b>    |
| <b>Instrumentation Tech</b> | <b>4,901,042</b>  | <b>404,217</b>   | <b>5,305,260</b>  |
| <b>Insulator</b>            | <b>722,548</b>    | <b>97,728</b>    | <b>820,276</b>    |
| <b>Ironworker</b>           | <b>705,562</b>    | <b>320,286</b>   | <b>1,025,848</b>  |
| <b>Laborer</b>              | <b>1,539,301</b>  | <b>124,665</b>   | <b>1,663,966</b>  |
| <b>Millwright</b>           | <b>1,123,673</b>  | <b>367,918</b>   | <b>1,491,591</b>  |
| <b>Operator</b>             | <b>1,773,051</b>  | <b>93,786</b>    | <b>1,866,837</b>  |
| <b>Painting</b>             | <b>256,093</b>    | <b>92,472</b>    | <b>348,565</b>    |
| <b>Plumber + Pipefitter</b> | <b>3,384,084</b>  | <b>118,259</b>   | <b>3,502,344</b>  |
| <b>Scaffolding</b>          | <b>586,662</b>    | <b>64,386</b>    | <b>651,047</b>    |
| <b>Welder</b>               | <b>500,426</b>    | <b>225,021</b>   | <b>725,448</b>    |
| <b>Total</b>                | <b>26,143,143</b> | <b>3,414,500</b> | <b>29,557,642</b> |