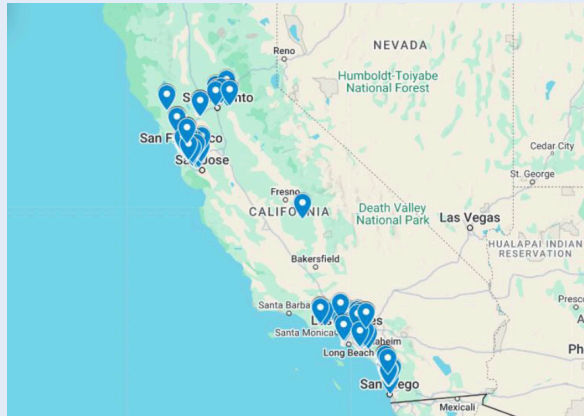


CALIFORNIA CONSTRUCTION PROJECTS

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

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

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").

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**

California Construction Labor Hours by Trade,

Pharmaceutical & Biotech Mfg and R&D, 2019-2024

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