



CHARLOTTE
REGIONAL BUSINESS
ALLIANCE®

Charlotte Region Life Sciences Targeted Industry Study

Findings from an independent study identifying the region's competitive assets, priority target sectors, and strategic recommendations for business recruitment in the life sciences sector.

Positioning the Charlotte Region for Life Sciences Investment

The Charlotte Region is positioning itself to claim a meaningful share of the life sciences sector’s global trajectory. The Charlotte Regional Business Alliance commissioned Deloitte to conduct a study to develop an evidence-based growth strategy for the 16-county region, translating existing momentum into a focused path for competitive differentiation.

Deloitte conducted the study using a four-phase approach, engaging more than 50 stakeholders representing local and state economic development, higher education, real estate development, and life sciences industry leaders. The results identified Charlotte’s differentiating assets, key areas of opportunity, and target sectors around which to build a comprehensive business recruitment strategy.

Study Findings

The findings point to a distinct opportunity: the Charlotte Region should leverage its niche identity within the Carolinas around medtech and manufacturing, building on a life sciences foundation that is already stronger than many realize. The region is home to 160 companies employing 12,400 workers in the life sciences industry.

160

LIFE SCIENCES COMPANIES

12,400

LIFE SCIENCES WORKFORCE



Key Assets in the Charlotte Region

Deloitte's analysis points to several foundational assets that give the Charlotte Region a competitive edge in attracting life sciences and advanced manufacturing investment.



Charlotte Douglas International Airport

Global connectivity supporting supply chains, executive travel, and time-sensitive shipping.



Manufacturing Legacy and Workforce

Decades of manufacturing strength developed an experienced production workforce with transferrable skills to life sciences.



UNC Charlotte's R1 Status

A top-tier research designation with burgeoning engineering and bioinformatics programs supporting health and medtech innovation.



Major Health Systems

Large-scale systems provide clinical infrastructure needed for R&D.



The Pearl / Wake Forest University School of Medicine

A new innovation district anchored by an academic medical campus adjacent to Uptown Charlotte.

Areas of Opportunity

The study identifies priority areas of opportunity, pointing to the need for increased specialized workforce training, real estate and site supply, and unified messaging to help better position the region.



Establish Regional Brand

Develop unified, differentiating brand for region's life sciences identity that reinforces its role within the Carolinas' ecosystem.



Core Life Sciences Workforce

Advocate for investments in training programs to develop life sciences-specific talent pipelines throughout the Charlotte Region.



Real Estate & Infrastructure

Align real estate development with industry need for dry and wet lab space, innovation infrastructure, and shovel-ready sites.

Primary Target Sectors

The study identifies four primary sectors the CLT Alliance should target in its business recruitment strategy .

Medical Technologies

Equipment, technology, and devices used to diagnose, treat, and monitor medical conditions.

Contract Manufacturing Services

Outsourced production of goods or equipment on behalf of other companies.

Biologics Manufacturing

Production or packaging of drugs derived from living organisms.

Nutrition & Consumer Health

Production and research focused on supplements, functional food, and consumer-driven health solutions.

SECONDARY OPPORTUNITIES

Small Molecule Drug Manufacturing — chemically synthesized drug production

Digital Health & IT — technology platforms supporting health data, delivery, and monitoring

Strategic Priorities

Deloitte outlines three recommendation pillars to guide the CLT Alliance's next phase of life sciences recruitment:

01

Strengthen the Ecosystem

Explore ways to align industry stakeholders, create connectivity across the region's life sciences community, and advocate for infrastructure that enables continued growth.

02

Build Competitive Capabilities

Invest in economic development capacity, strengthen data and market intelligence, and socialize site readiness standards to compete for target-sector projects.

03

Position the Region

Leverage the region's manufacturing-led health innovation ecosystem as the differentiator and develop regional proof-point library; develop comprehensive recruitment strategy aimed at site selectors and target-sector companies.