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Evolution Insight report:
Industry Hiring Data – August 2020.

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Assessment of Hiring Strategy

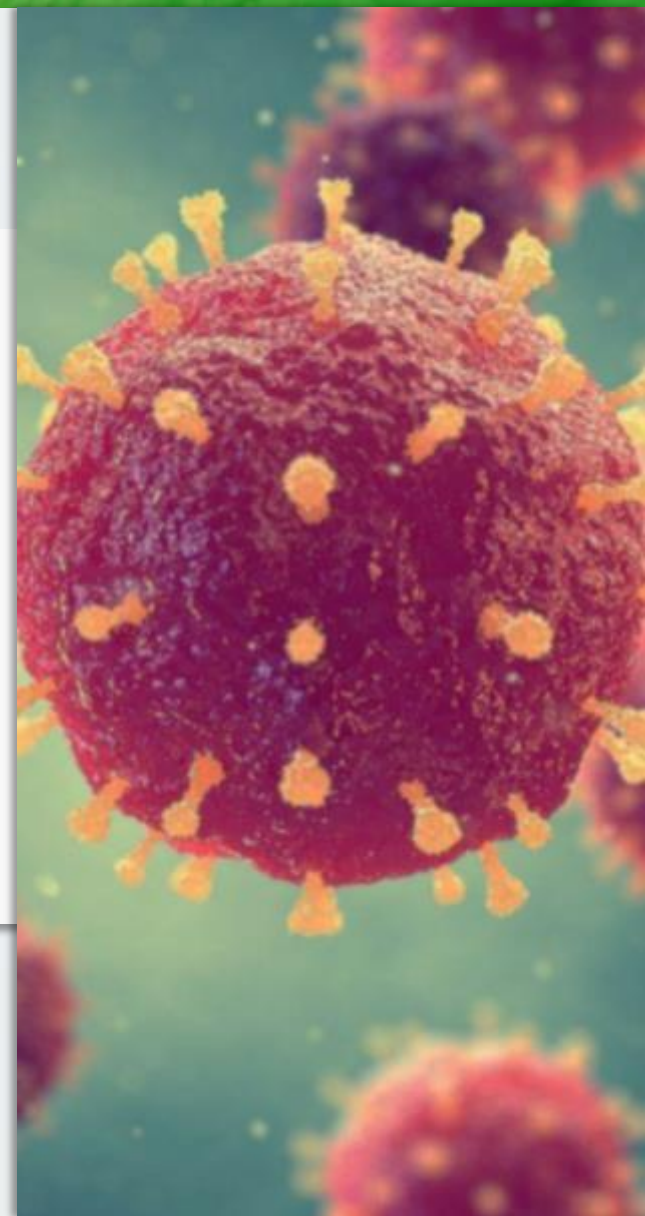
Introduction



Insight into Hiring Trends

The following briefing provides insight to global **Bio hiring trends** and perceived implications on the future-facing competitive talent pool.

- Hiring frequency was assessed for all major industry players across biomanufacturing. Data segmented for CGT, Cell Therapy manufacturing and more general biomanufacturing.





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Assessment of Hiring Strategy

Assignment methodology

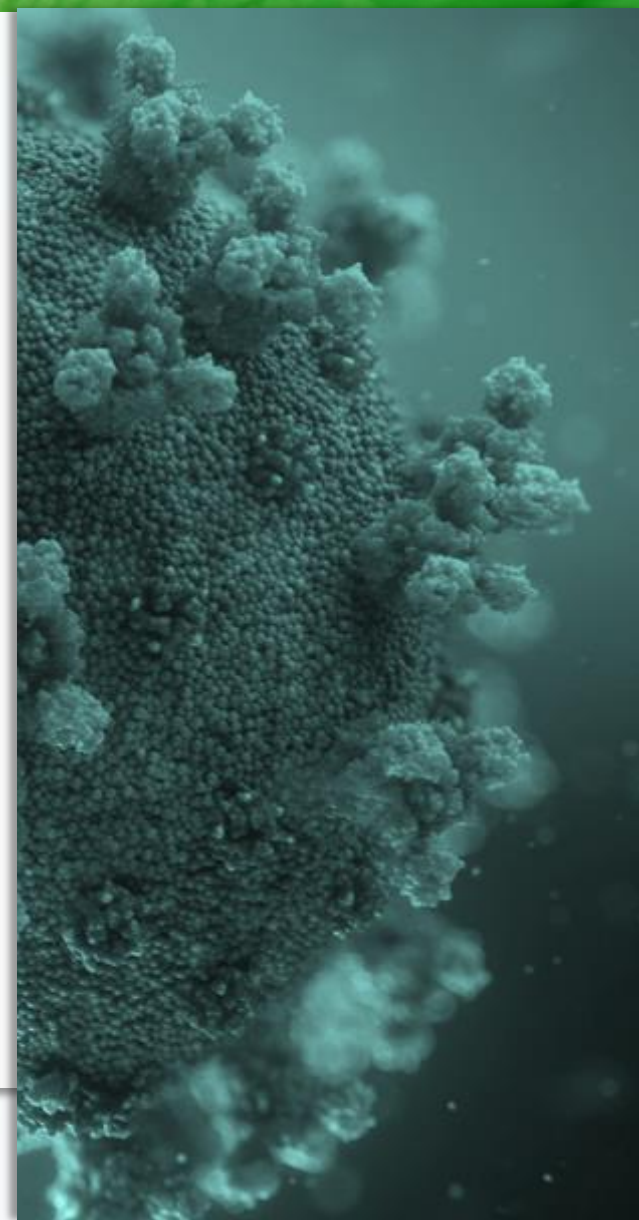


Analysis

Analysis was executed across two stages:-
Phase I and II.

Companies segmented across Cell Therapy Manufacturing, CGT, Biopharma and Manufacturing (CDMO)

- **Phase I :- Open roles Hiring Frequency;** Assessed hiring frequency of over 200 companies from August 2019 to August 2020 by month. This was executed by analysing job postings from their websites and cross matched with additional sources as a trend base line and compared YTD. Companies were segmented to allow comparison of Industry trends.
- **Phase II :- Job type Hiring Frequency;** Assessed hiring frequency by roles of over 200 companies from August 2019 to August 2020 by month. This was executed by analysing job postings from their websites and cross matched with additional sources as a trend base line and compared YTD. Job postings were segmented by R&D, Operations, Commercial & Executive





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Industry Hiring Data – *July/August 2020*

Results

Biopharma

Assessment of Hiring Frequency

By job number



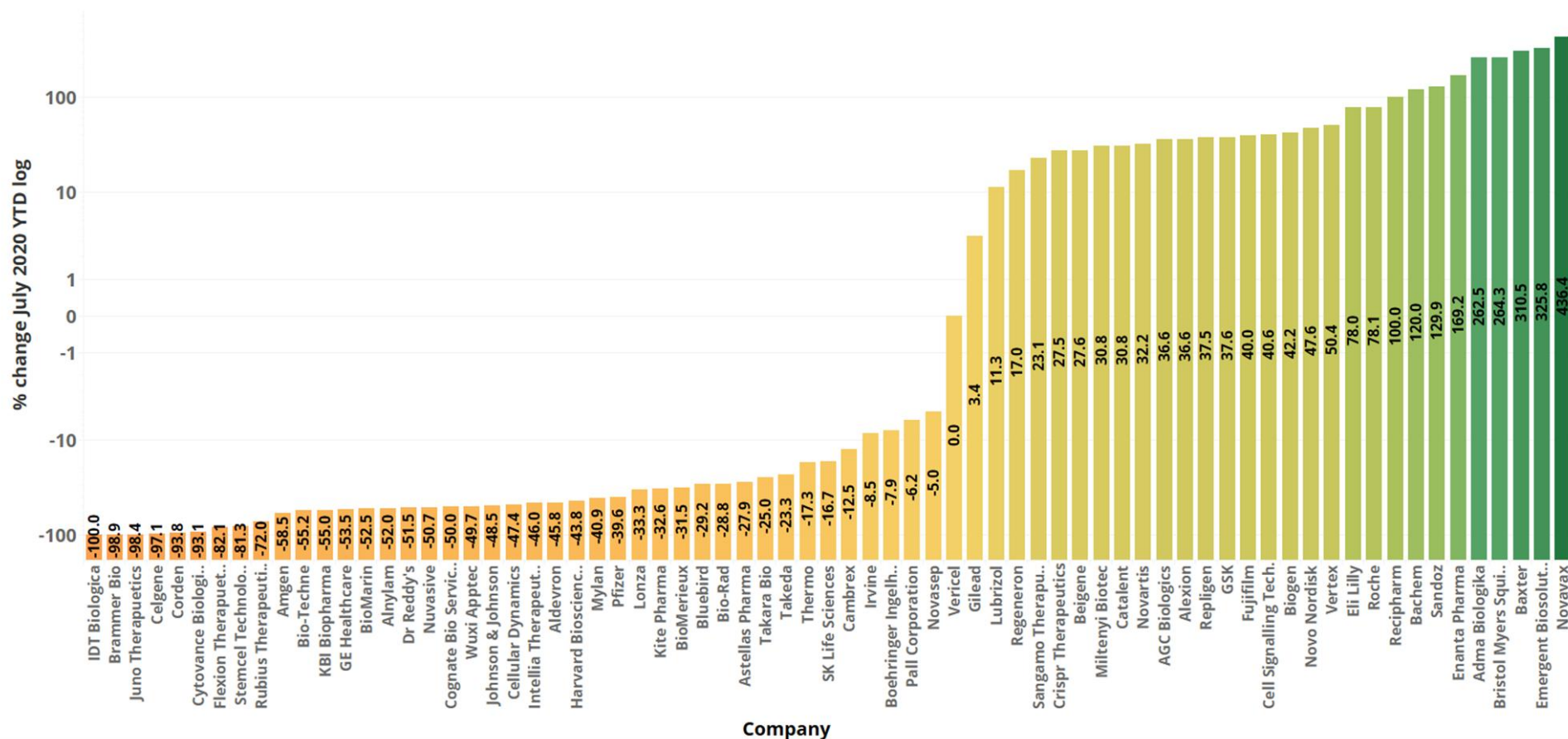
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Hiring Trend July 2020

YTD
BioPharma



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Hiring trend by job posting change:- General BioPharma market

- Novavax, Emergent, Baxter, Adma, Enanta & Recipharm **increasing**
- IDT, Celgene, Corden, Juno & Cytovance **decreasing**

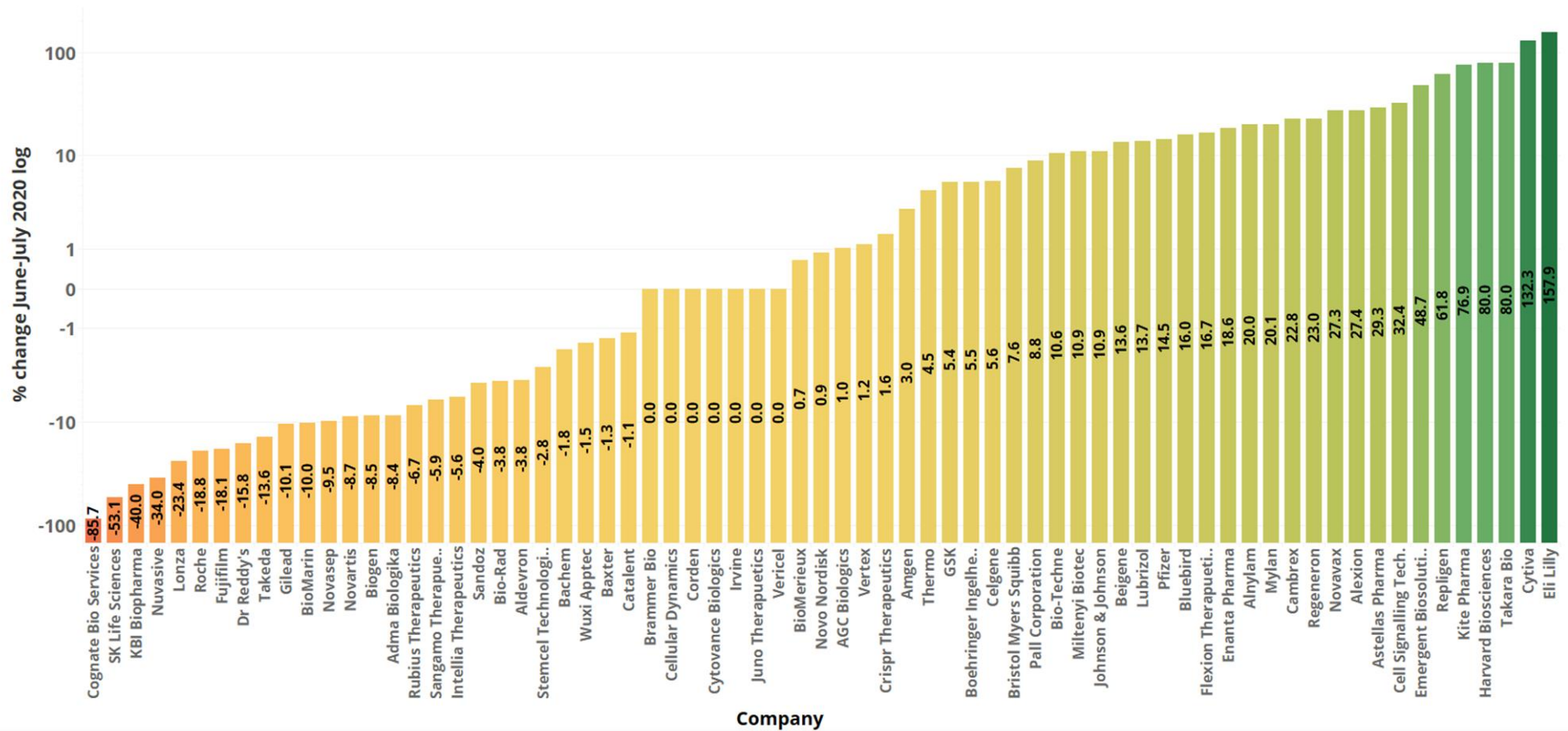


Hiring Trend June – July 2020

MTD
BioPharma



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Hiring trend by job posting change:- General BioPharma market

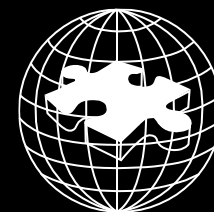
- Eli Lilly, Cytiva, Takara, Harvard Bio, Kite & Emergent **increasing**
- Roche, Fujifilm & KBI **decreasing**



Biopharma

Assessment of Hiring Frequency

By job type



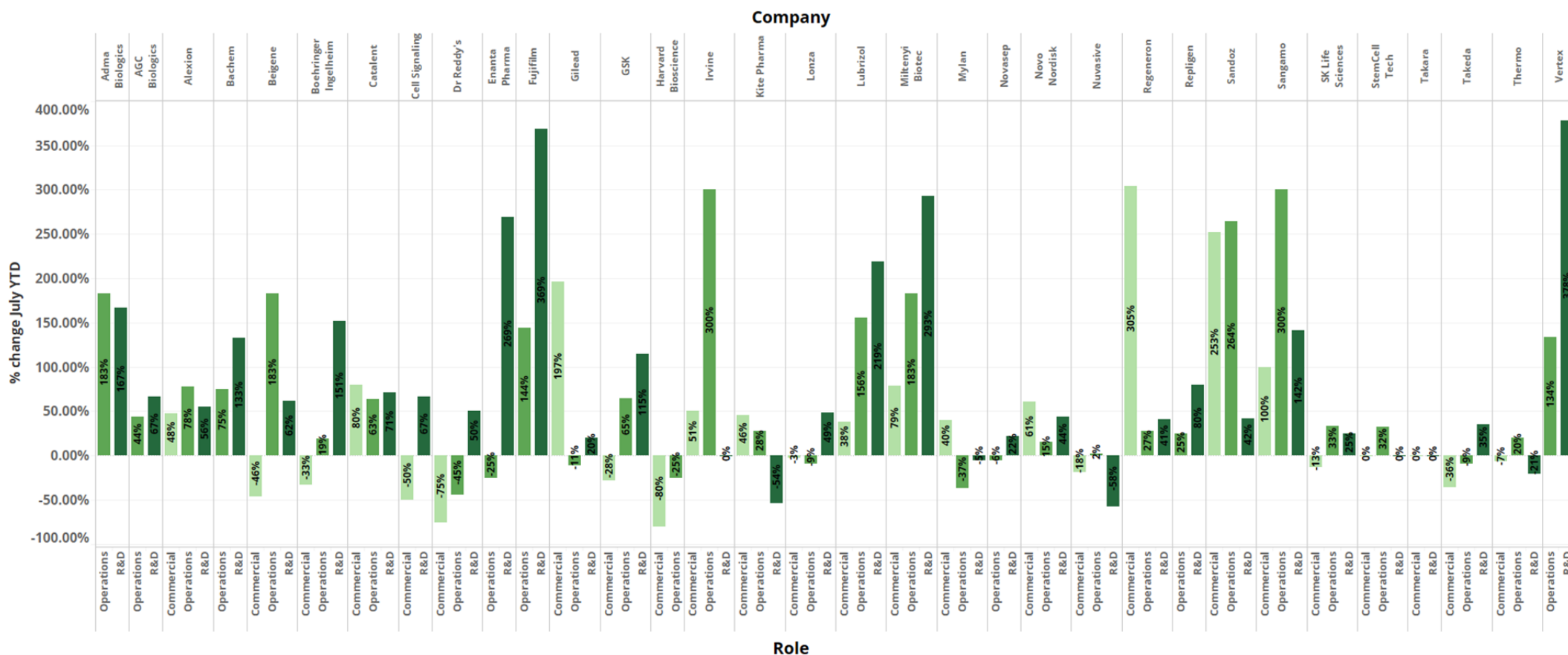
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Hiring Trend July 2020 - *By Role*

YTD
BioPharma



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Hiring trend by job posting change:- General BioPharma market

- **R&D:-** Vertex, Fujifilm, Miltenyi & Enanta **increasing**
- **Operations:-** Sangamo, Sandoz & Irvine, **increasing**
- **Commercial:-** Regeneron, Gilead & Sandoz **increasing**

Role

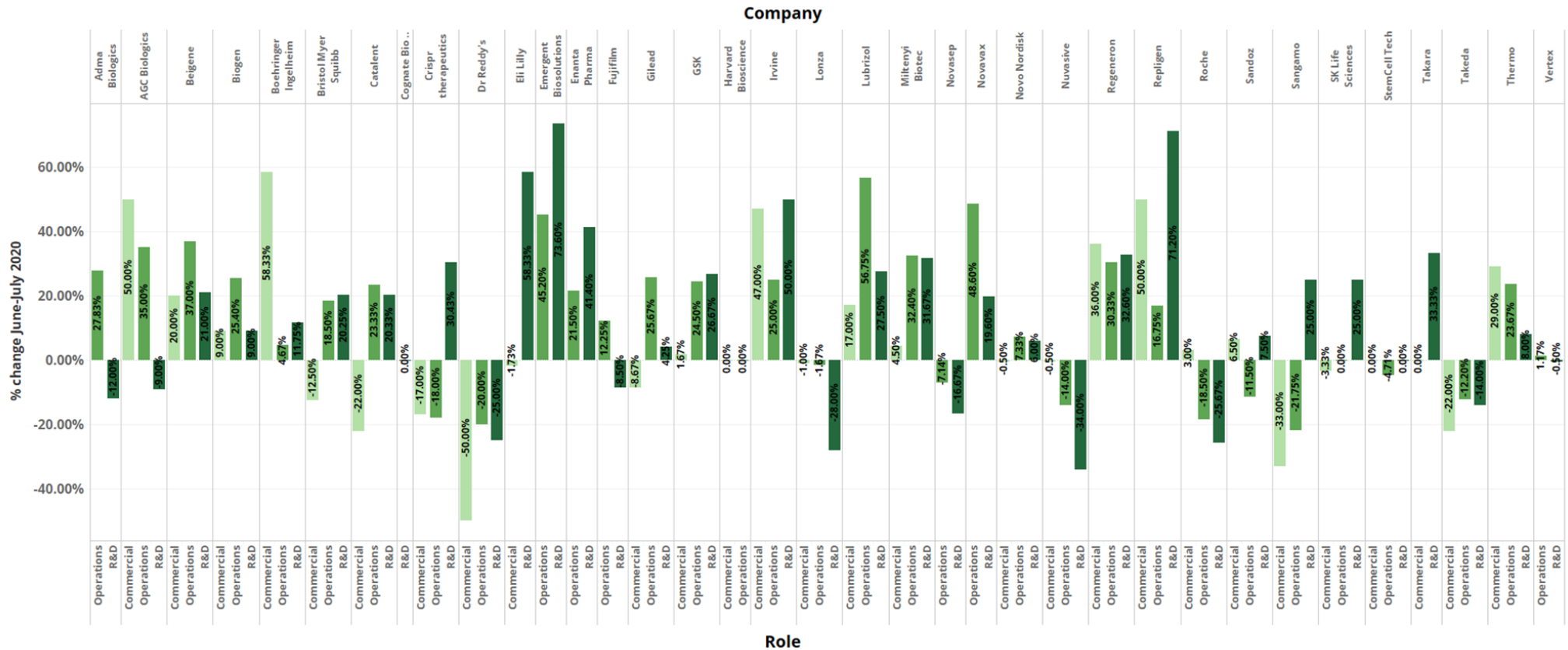
- Commercial
- Operations
- R&D

Hiring Trend June -July 2020 By Role

MTD
BioPharma



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Hiring trend by job posting change:- General BioPharma market

- **R&D:-** Repligen, Emergent, & Eli Lilly **increasing**
- **Operations:-** Lubrizol, Emergent & Novovax, **increasing**
- **Commercial:-** Repligen, Boehringer & AGC Biologics **increasing**

Role

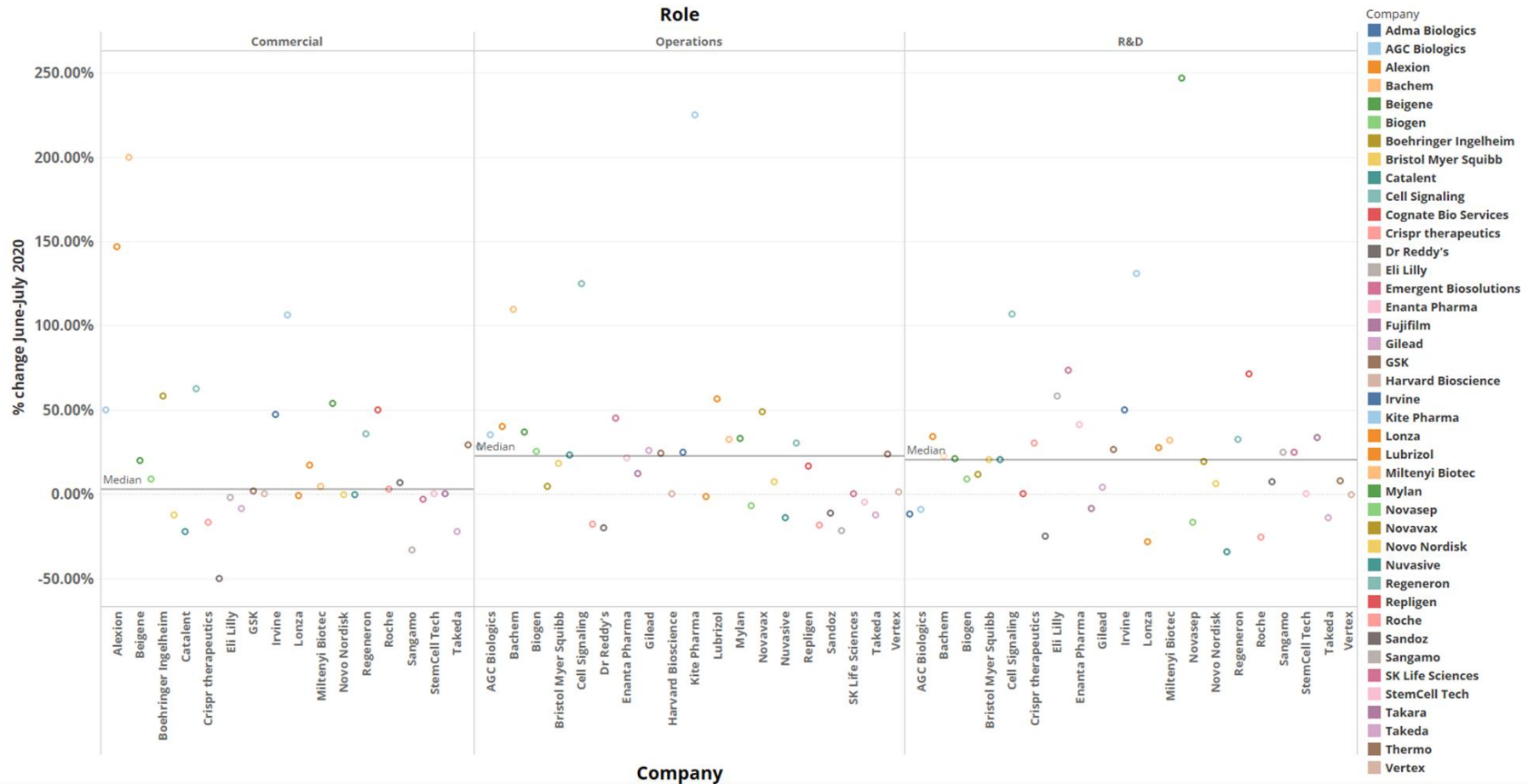
- Commercial (Light Green)
- Operations (Medium Green)
- R&D (Dark Green)

Hiring Trend June -July 2020 *By Role*

MTD
BioPharma



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Hiring trend by job posting change:- General BioPharma market

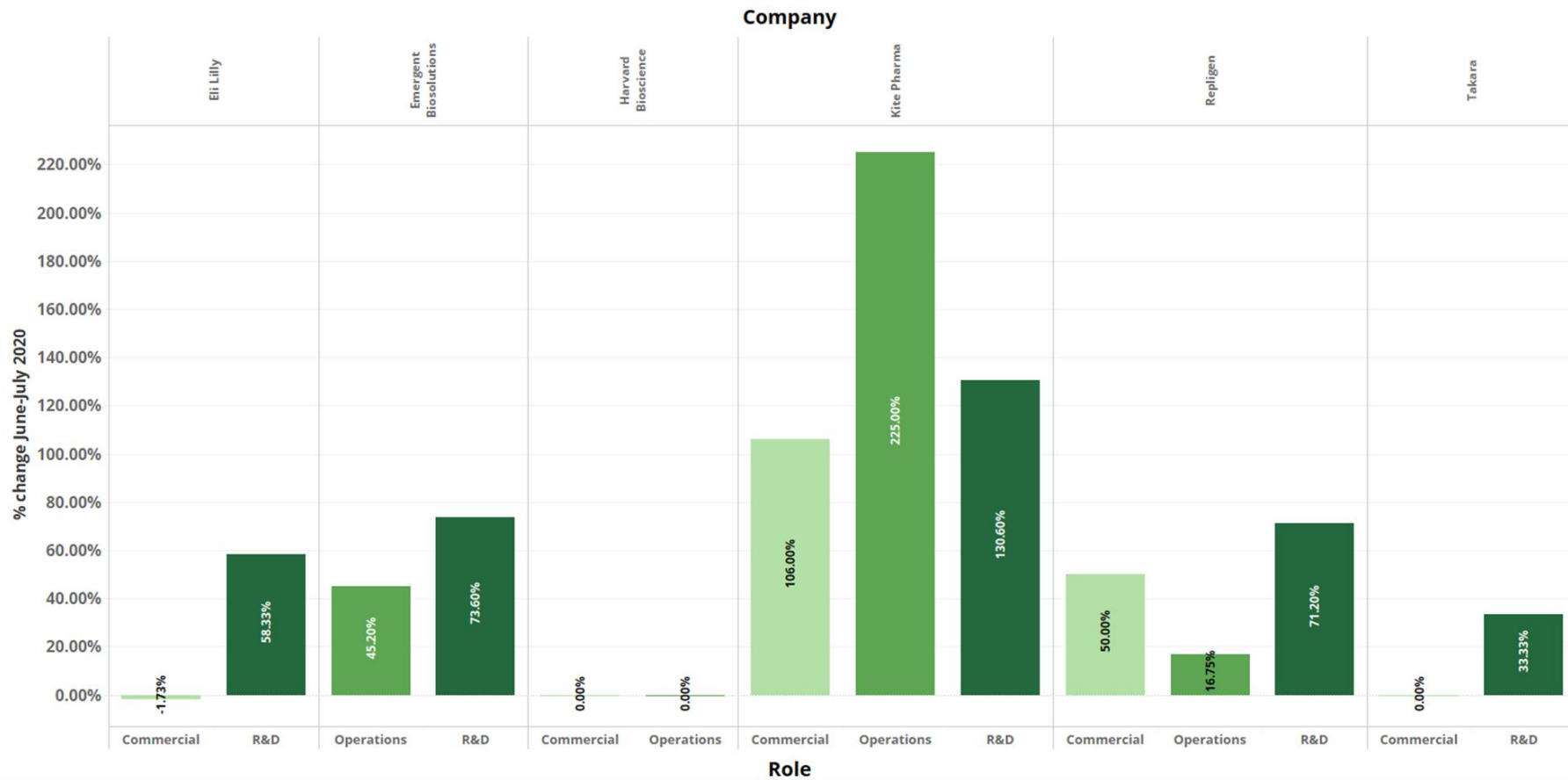
- **R&D:-** Mylan Largest increase
- **Operations:-** Kite Pharma Largest increase
- **Commercial:-** Bachem Largest increase

Hiring Trend June -July 2020 *By Role*

MTD
BioPharma



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Hiring trend by job posting change:- General BioPharma market

Eli Lilly:- Increase in R&D; **Takara:-** Increase in R&D; **Kite:-** Increase across operations, R&D & Commercial;

Emergent:- Increase across operations & R&D; **Repligen:-** Increase across operations, R&D & Commercial;

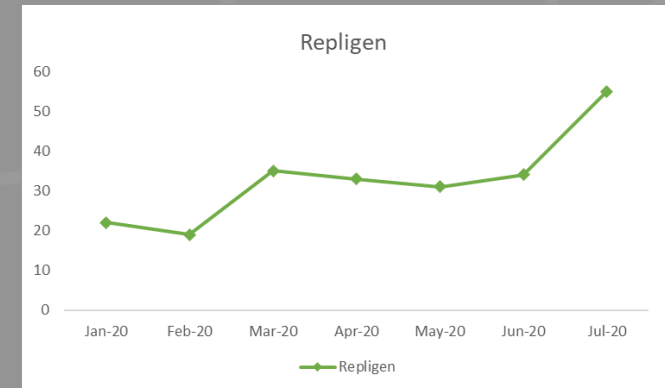
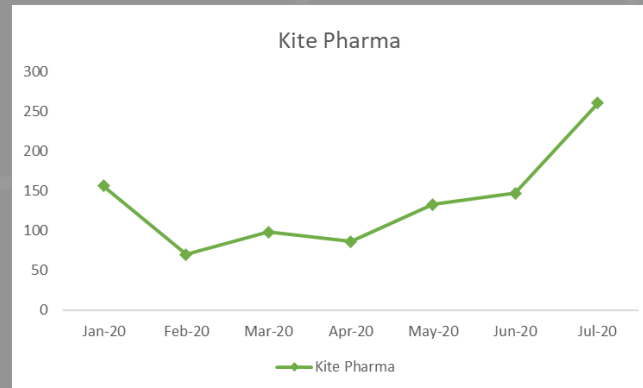
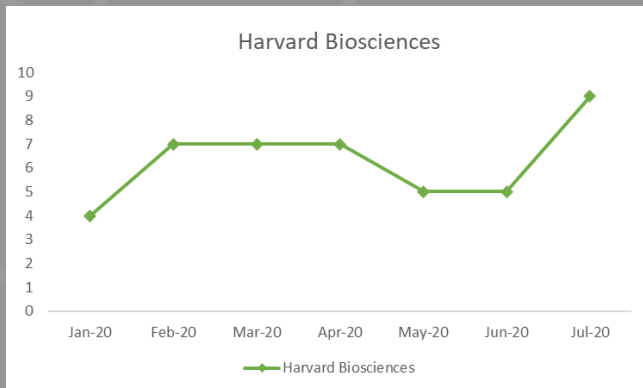
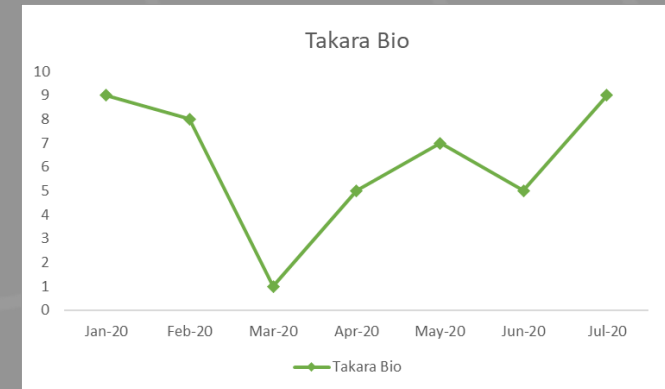
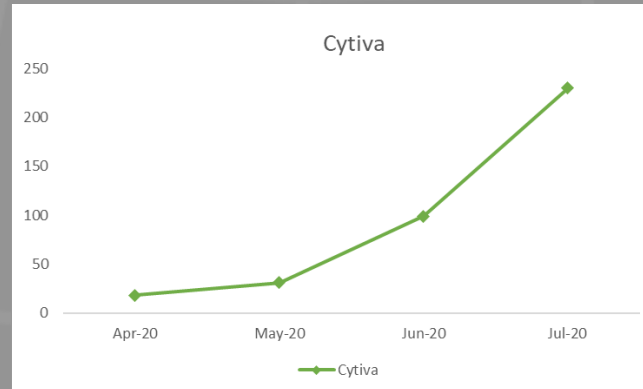
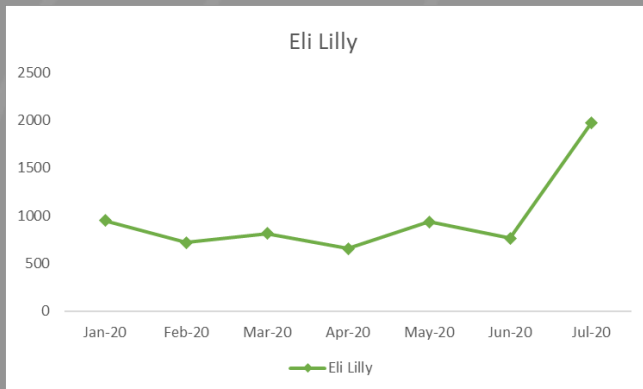
Role

- Commercial
- Operations
- R&D

Hiring Trend 2020 BioPharma



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Increased Hiring:-

Eli Lilly, Cytiva, Takara, Harvard Bio, Kite, & Repligen



- Phase 3 Trial of LY-CoV555 for Prevention of COVID-19
- Jardiance® in phase III trial
- P-tau217 Blood Test Alzheimer's Disease
- Lilly Begins a Phase 3 Clinical Trial with Baricitinib for Hospitalized COVID-19 Patients



- Takara Bio to Support Development of Novel Coronavirus Vaccine Undertaken by Osaka University Group
- Takara Bio Launches a New Facility for the Research and Manufacturing of Regenerative Medicine Products
- Clinical program for NY-ESO-1 • siTCR(TM) gene therapy candidate receives designation in Japan as Orphan Regenerative Medicine
- Takara Bio Launches a New Facility for the Research and Manufacturing of Regenerative Medicine Products
- bioSyntagma Collaboration



- Harvard Bioscience Introduces Next Generation Inhalation System to Aid in the Fight Against COVID-19
- Building Following layoffs & closures, Harvard Bioscience improves financials



- Kite Pharma gets FDA approval for second CAR-T cell therapy
- The agency approved Tecartus, previously developed under the name KTE-X19, as the first CAR-T therapy for mantle cell lymphoma



- Cytiva expands Massachusetts biomanufacturing site
- 40% Quarterly growth. Cytiva is seeing a positive impact from the opportunities arising from industry's efforts to develop COVID 19 vaccines and therapies
- Collaborations with Genedrive , Sona Nanotech, Avacta , Entos Pharma, Takara & Aptamer Grp



- Repligen Announces Agreement to Acquire Engineered Molding Technology
- Repligen Announces Agreement to Acquire Process Analytics Innovator C Technologies
- Sartorius Stedim Biotech and Repligen Corporation Partner

Cell Therapy Manufacturing

Assessment of Hiring Frequency

By job number



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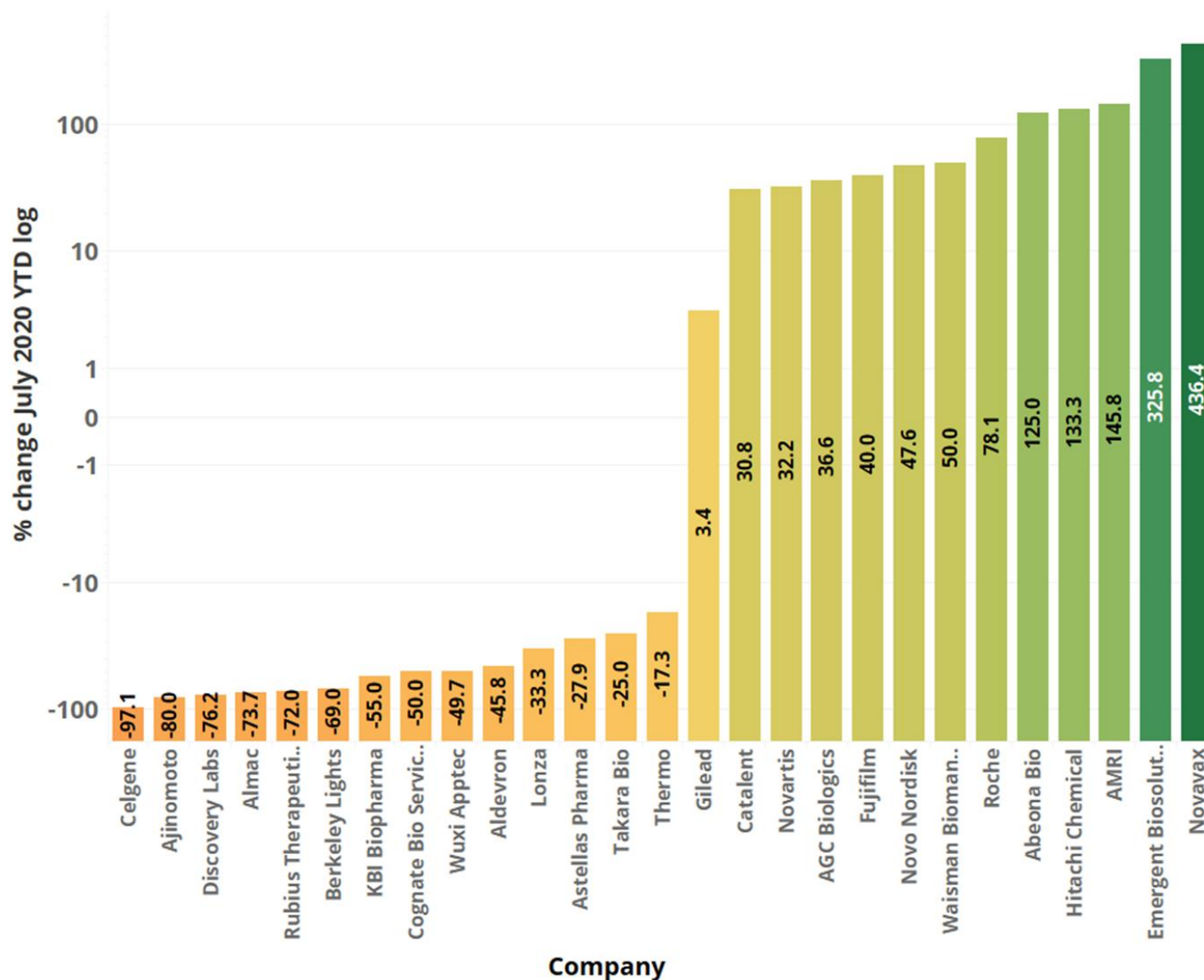
Hiring Trend July 2020

YTD

Cell Therapy Manufacturing



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Cell Therapy Manufacturing Market

Decreasing:-
Celgene, Ajinomoto, Almac, Rubius

Increasing:-
Novavax, Emergent, AMRI, Abeona

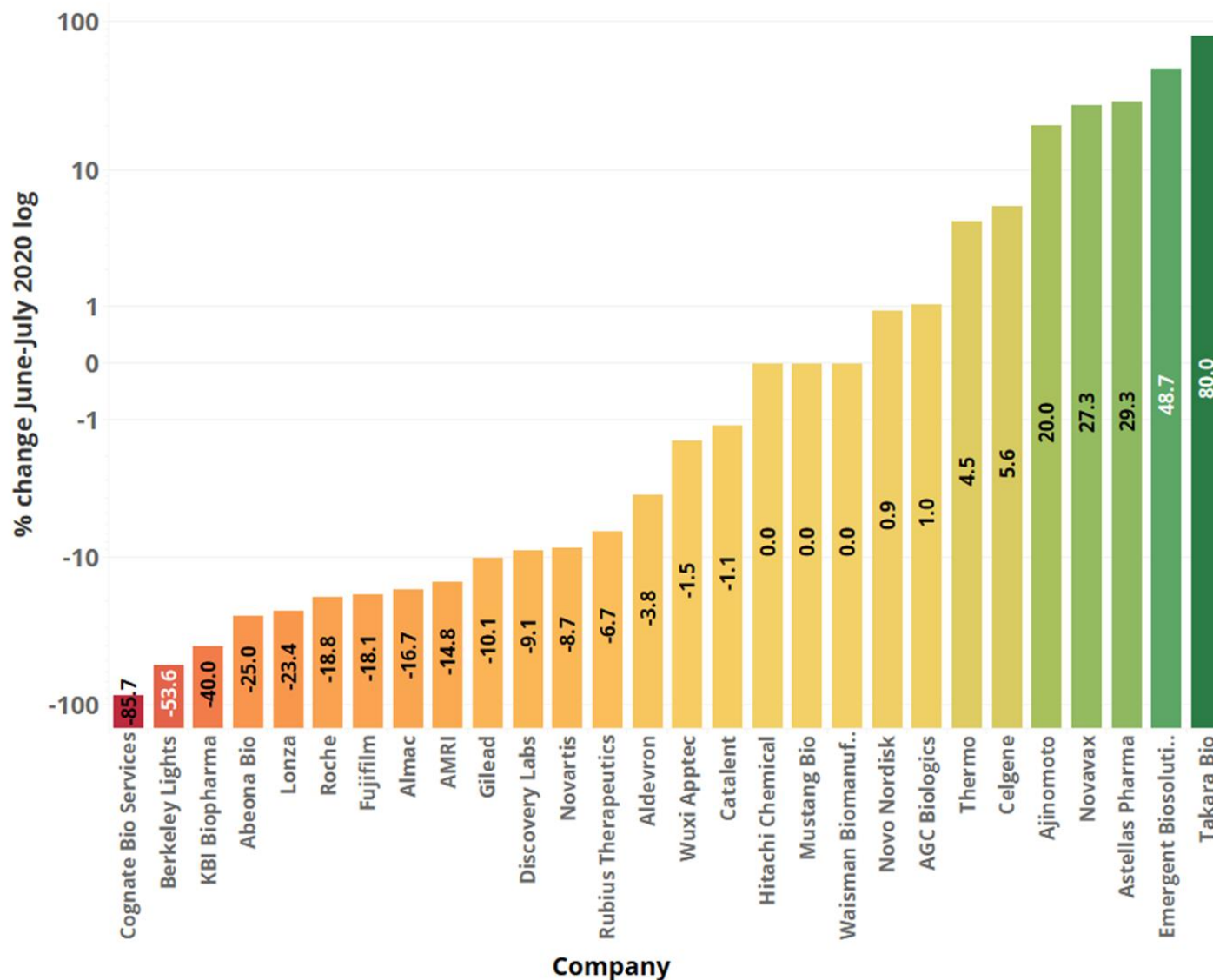
Hiring Trend June-July 2020

MTD

Cell Therapy Manufacturing



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Cell Therapy Manufacturing Market

Decreasing:-

Cognate, Berkeley, KBI, Abeona, Roche & Fujifilm

Increasing:-

Takara, Emergent, Astellas, Novavax & Ajinomoto

Cell Therapy Manufacturing

Assessment of Hiring Frequency

By job type



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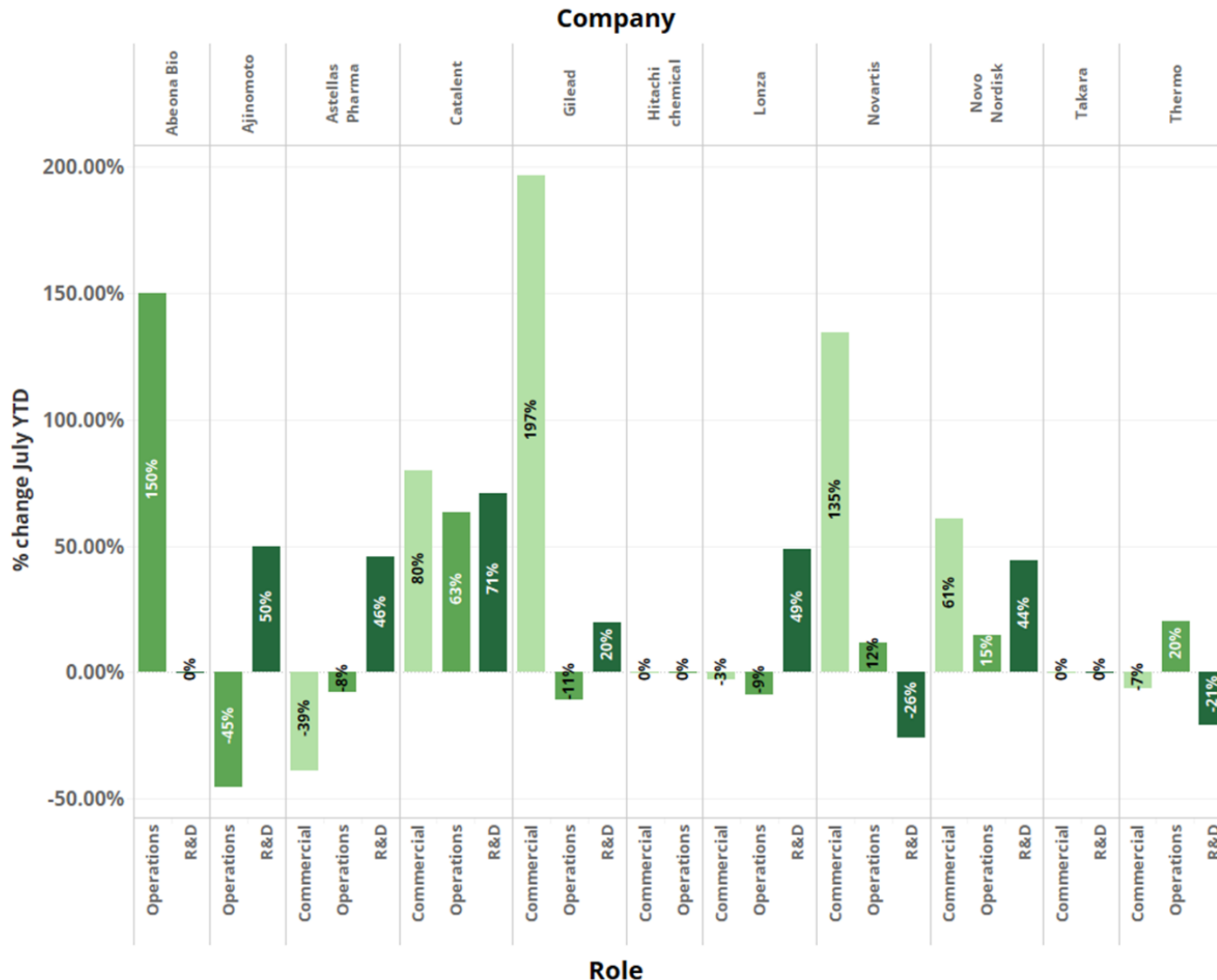
Hiring Trend July 2020 - *By Role*

YTD

Cell Therapy Manufacturing



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Cell Therapy Manufacturing Market

R&D:-

- Ajinomoto, Catalent & Novo - **Increasing**

Operations:-

- Abeona & Catalent - **Increasing**

Commercial:-

- Gilead, Novartis & Novo - **Increasing**

Role

- Commercial
- Operations
- R&D

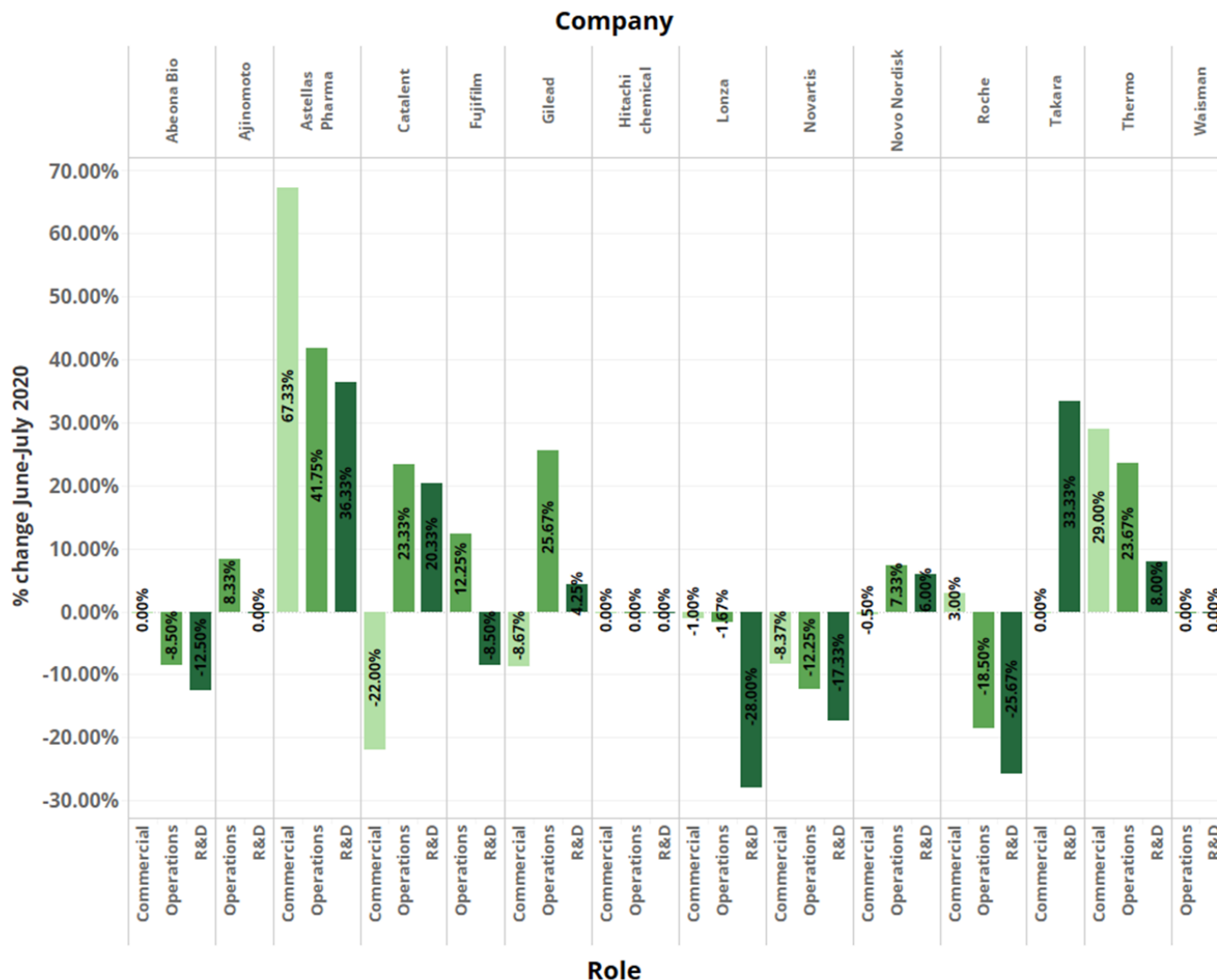
Hiring Trend June-July 2020 *By Role*

MTD

Cell Therapy Manufacturing



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Cell Therapy Manufacturing Market

R&D:-

- Takara, Novo & Astellas **Increasing**

Operations:-

- Thermo, Astellas, & Ajinomoto **Increasing**

Commercial:-

- Thermo & Astellas - **Increasing**

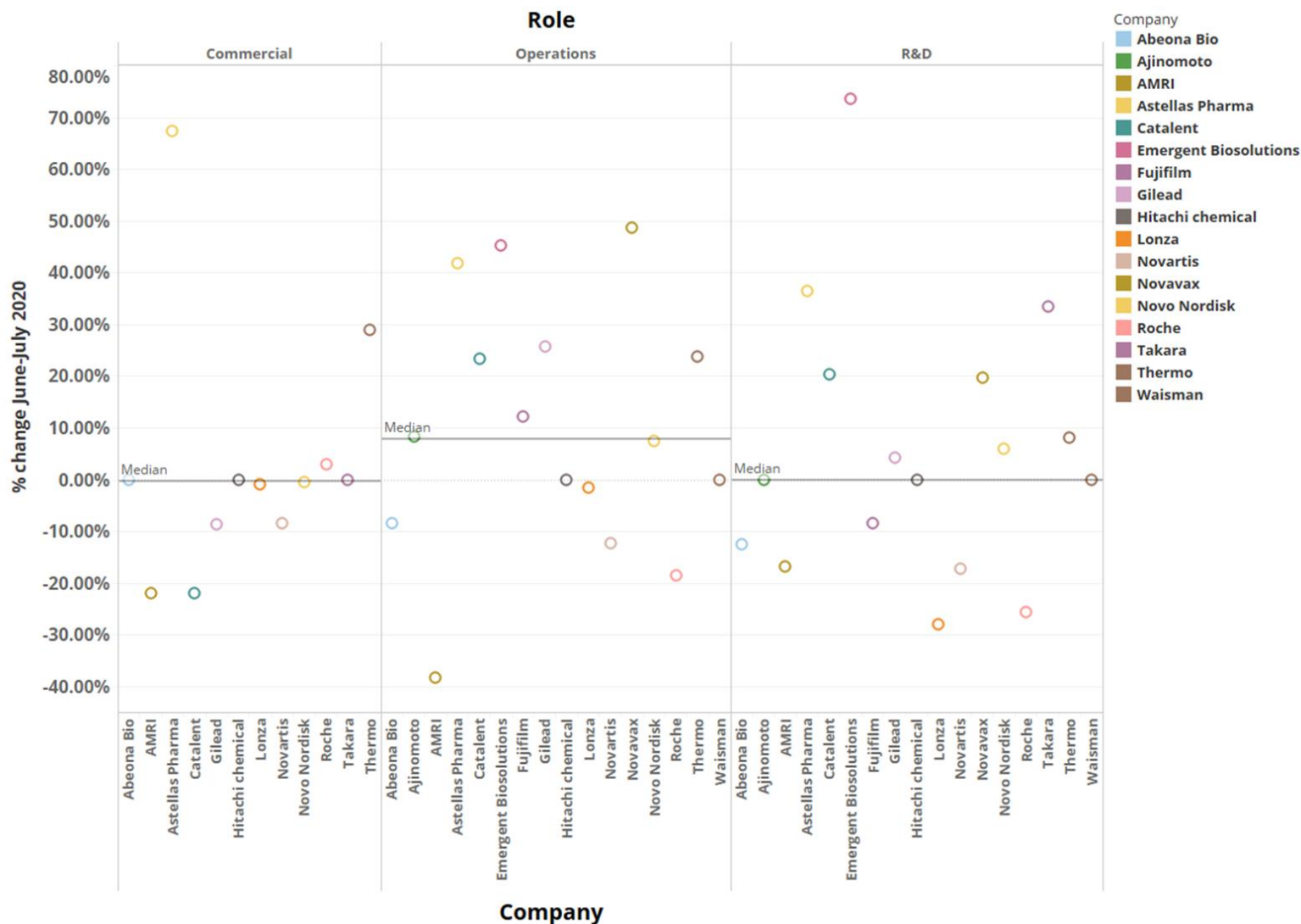
Role

- Commercial
- Operations
- R&D

Hiring Trend June-July 2020 By Role

MTD

Cell Therapy Manufacturing



Cell Therapy Manufacturing Market

R&D:-

- Emergent Biosolutions Largest Increase

Operations:-

- Novavax Largest Increase

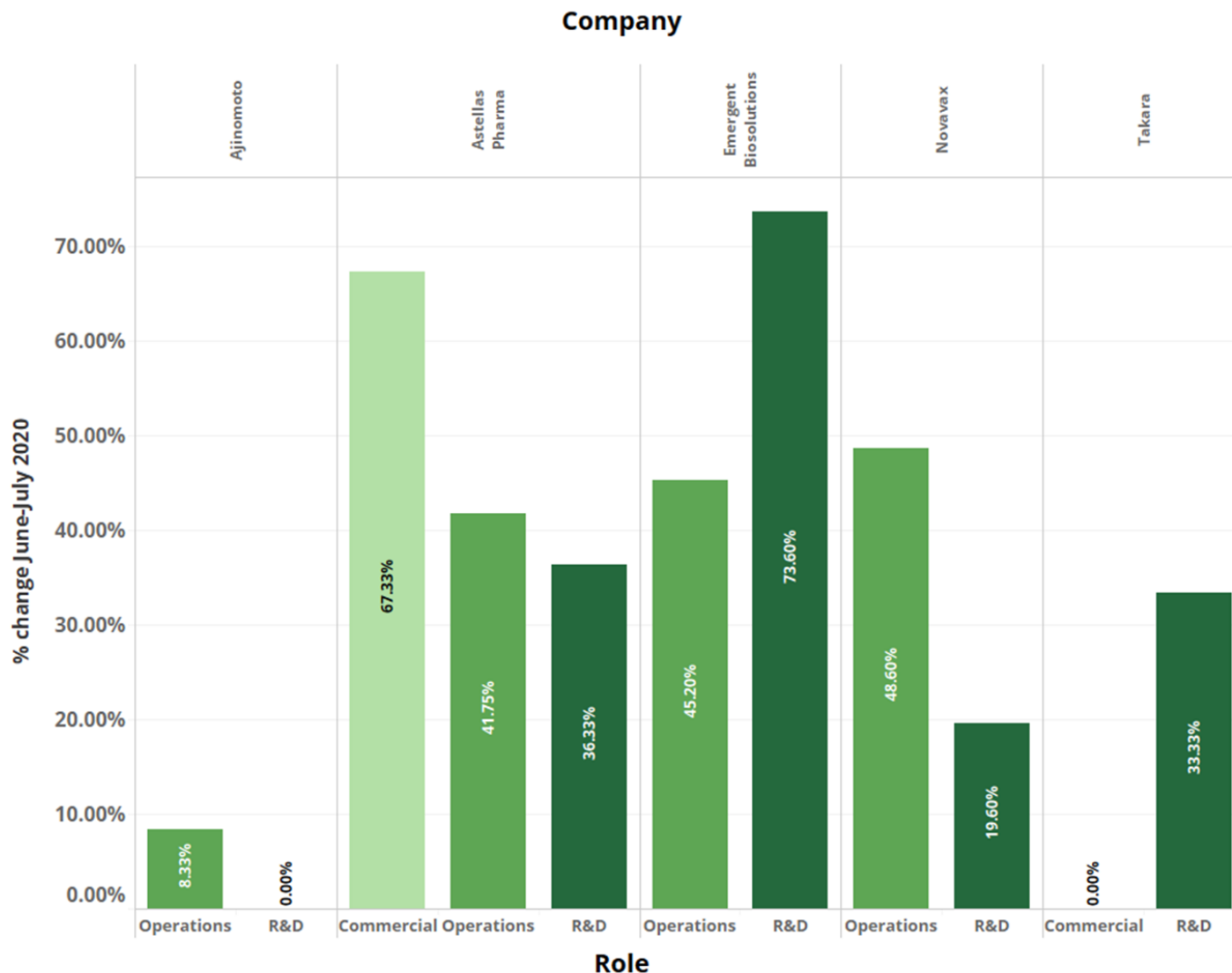
Commercial:-

- Astellas Pharma Largest Increase

Hiring Trend June-July 2020 By Role

MTD

Cell Therapy Manufacturing



Cell Therapy Manufacturing Market

Ajinomoto:- Increase in Operations;

Takara:- Increase in R&D;

Astellas:- Increase across operations, R&D & Commercial;

Emergent:- Increase across operations & R&D;

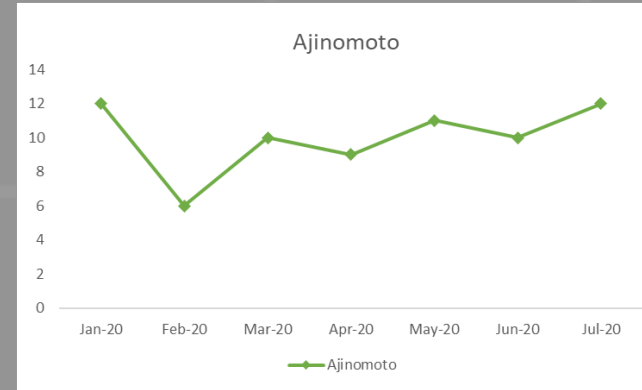
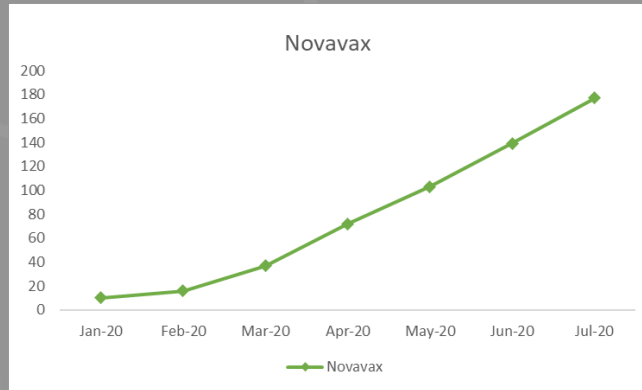
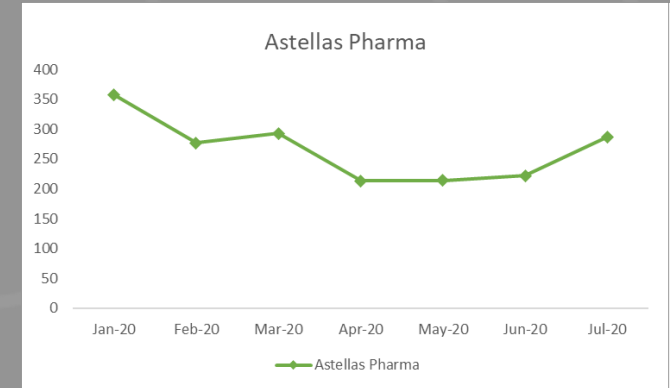
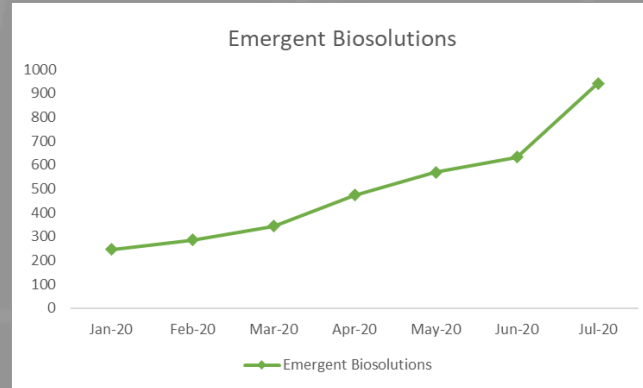
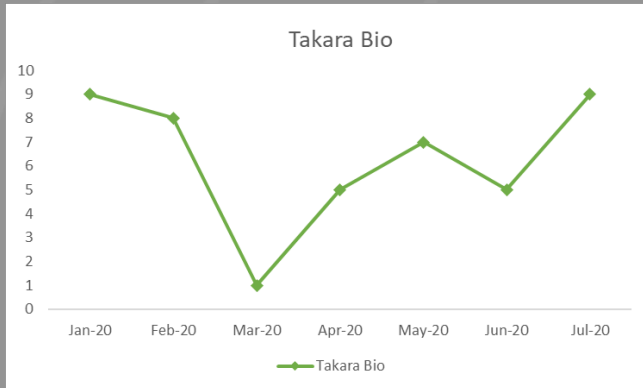
Novavax:- Increase across operations, R&D & Commercial;

Role

- Commercial
- Operations
- R&D



Hiring Trend 2020 Cell Therapy Manufacturing



Increased Hiring:-

Takara, Emergent, Astellas, Novavax & Ajinomoto.

Cell Therapy Manufacturing



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- Takara Bio to Support Development of Novel Coronavirus Vaccine Undertaken by Osaka University Group
- Takara Bio Launches a New Facility for the Research and Manufacturing of Regenerative Medicine Products
- Clinical program for NY-ESO-1 • siTCR(TM) gene therapy candidate receives designation in Japan as Orphan Regenerative Medicine
- Takara Bio Launches a New Facility for the Research and Manufacturing of Regenerative Medicine Products



- Emergent BioSolutions Signs Agreement with AstraZeneca to Expand Manufacturing for COVID-19 Vaccine Candidate
- Emergent BioSolutions Signs Agreement with AstraZeneca to Expand Manufacturing for COVID-19 Vaccine Candidate
- Emergent BioSolutions Signs Agreement for Large-Scale Drug Substance Manufacturing for J & J's Lead COVID-19 Vaccine Candidate
- Emergent BioSolutions to Invest \$75 Million in Canton Site and Expand Viral Vector and Gene Therapy Capability



- Early Clinical Studies of ASP8062 to Investigate Potential Novel Therapeutic Approach to Address the Opioid Crisis
- Phase 3 DOLOMITES Study of Anemia in CKD
- XTANDI® enzalutamide approval Treatment of Prostate Cancer



- Novavax and Takeda Announce Collaboration for Novavax' COVID-19 Vaccine Candidate in Japan
- Novavax and Serum Institute of India Announce Development and Commercial Collaboration
- Novavax Announces Positive Phase 1 Data for its COVID-19 Vaccine Candidate
- Novavax and FUJIFILM Diosynth Biotechnologies Initiate Large Scale Manufacturing of COVID-19 Vaccine Candidate



- Ajinomoto Co., Inc. Announces Changes in Its Organization and Personnel
- Ajinomoto India to triple in four years
- Ajinomoto Bio-Pharma Services Introduces AJILITY Fast Track Platform for Drug Product Manufacturing
- Ajinomoto Bio-Pharma Services Completes Acquisition of Granules OmniChem Joint Venture in India

Cell & Gene Therapy

Assessment of Hiring Frequency

By job number



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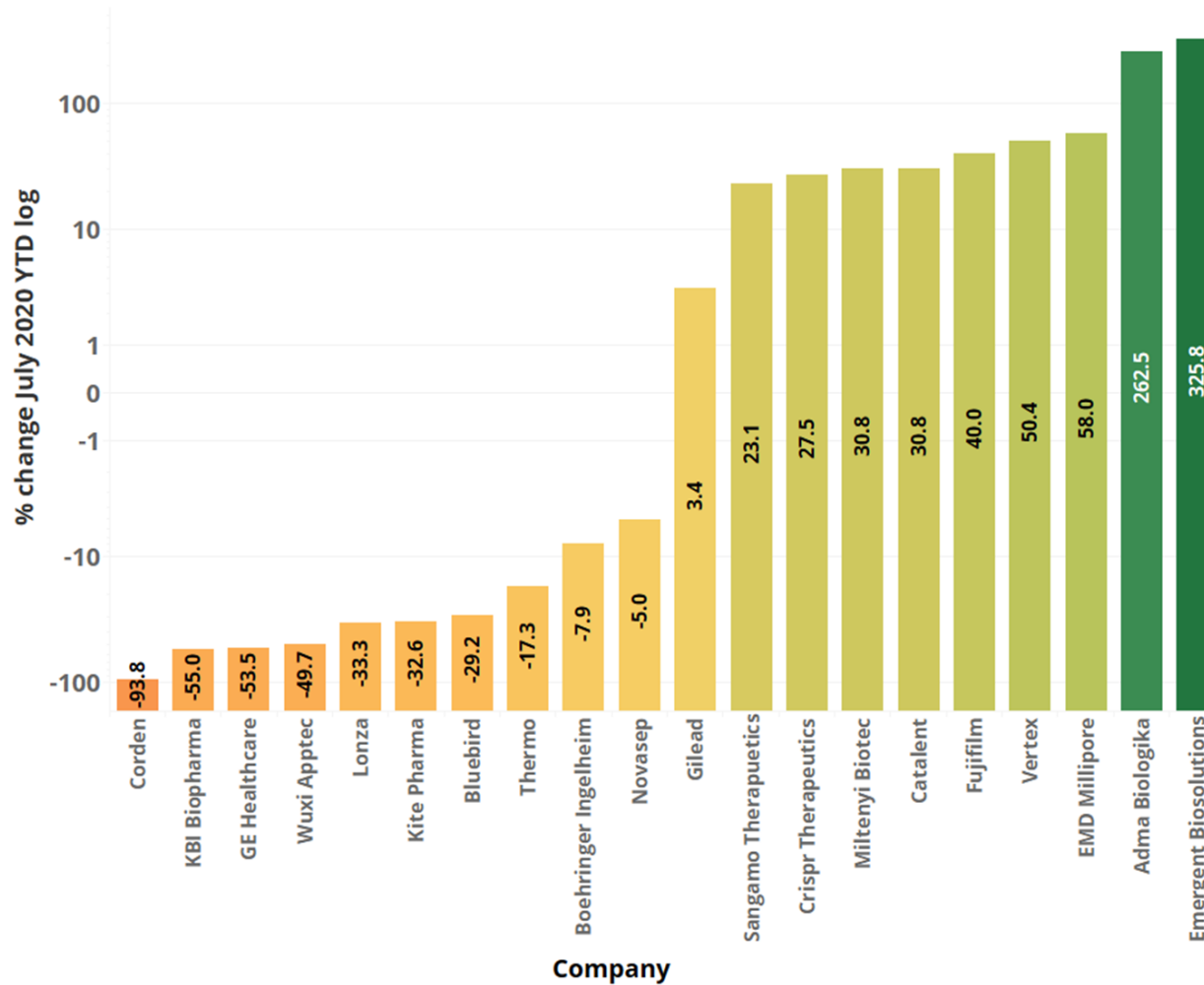
Hiring Trend July 2020

YTD

Cell Gene Therapy



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General CGT Market

Decreasing

- Corden, KBI, GE, Lonza and Wuxi

Increasing

- Emergent, ADMA, MilliporeSigma and Fujifilm

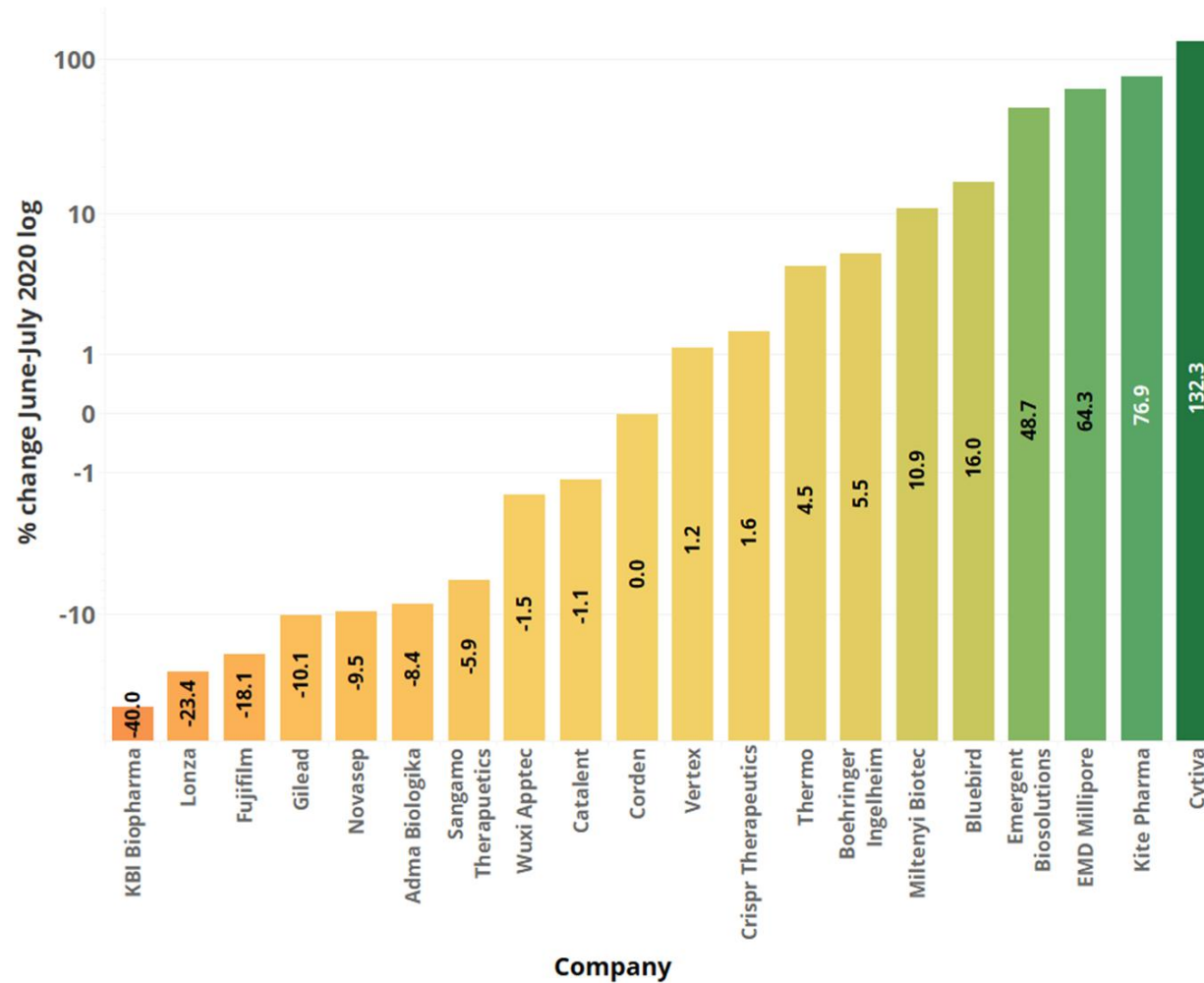
Hiring Trend June -July 2020

MTD

Cell Gene Therapy



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General CGT Market

Decreasing:-

- KBI, Fujifilm, GE Healthcare, Lonza & Novasep

Increasing:-

- Cytiva, Kite, MilliporeSigma, Emergent, Bluebird & Miltenyi

Cell & Gene Therapy

Assessment of Hiring Frequency

By job type



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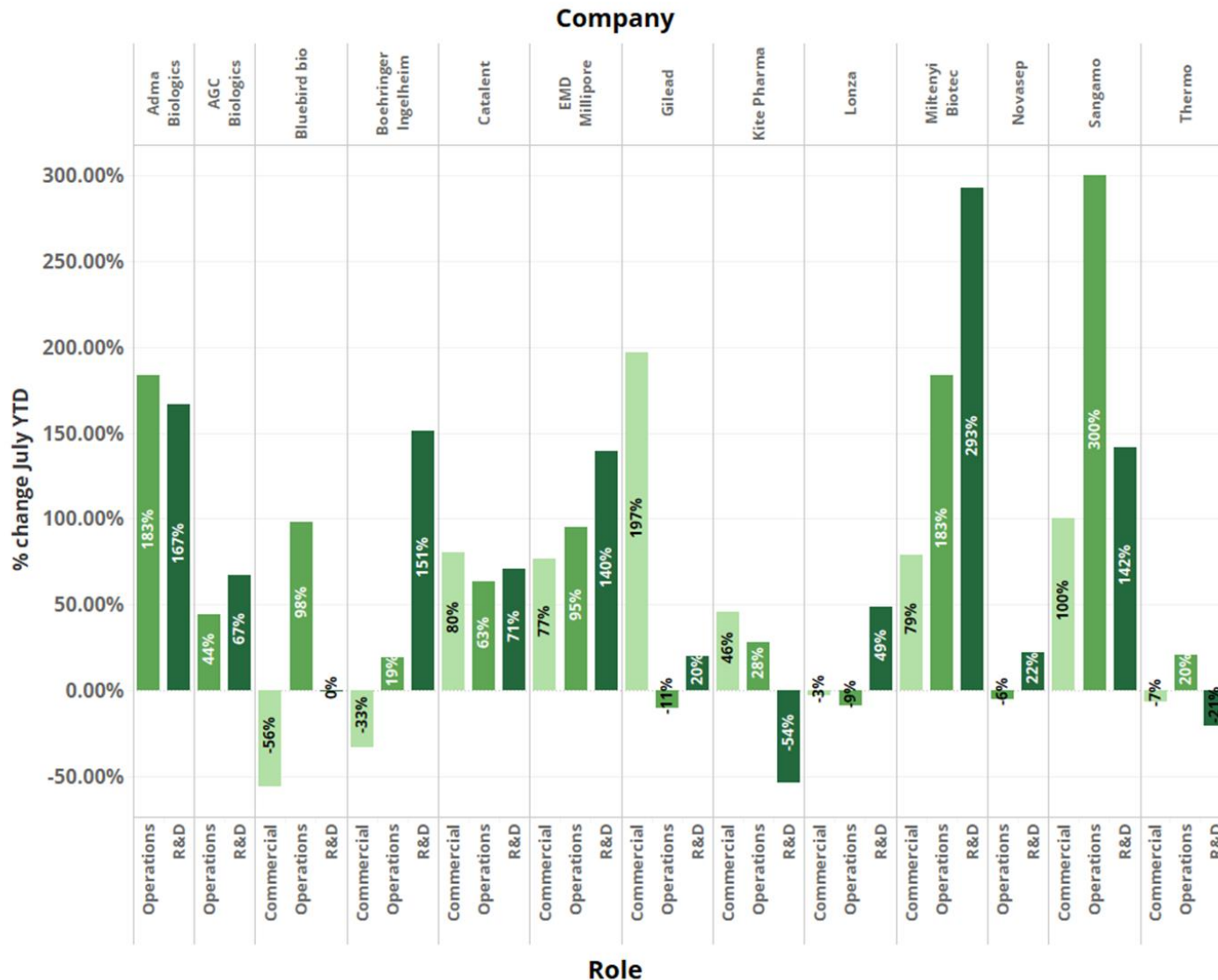
Hiring Trend July 2020 - *By Role*

YTD

Cell Gene Therapy



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General CGT Market

R&D:-

- Miltényi, Adma, Boehringer **increasing**

Operations:-

- Sangamo, Miltényi, Adma & Boehringer **increasing**

Commercial:-

- Gilead, Sangamo & Catalent **increasing**

Role

- Commercial
- Operations
- R&D

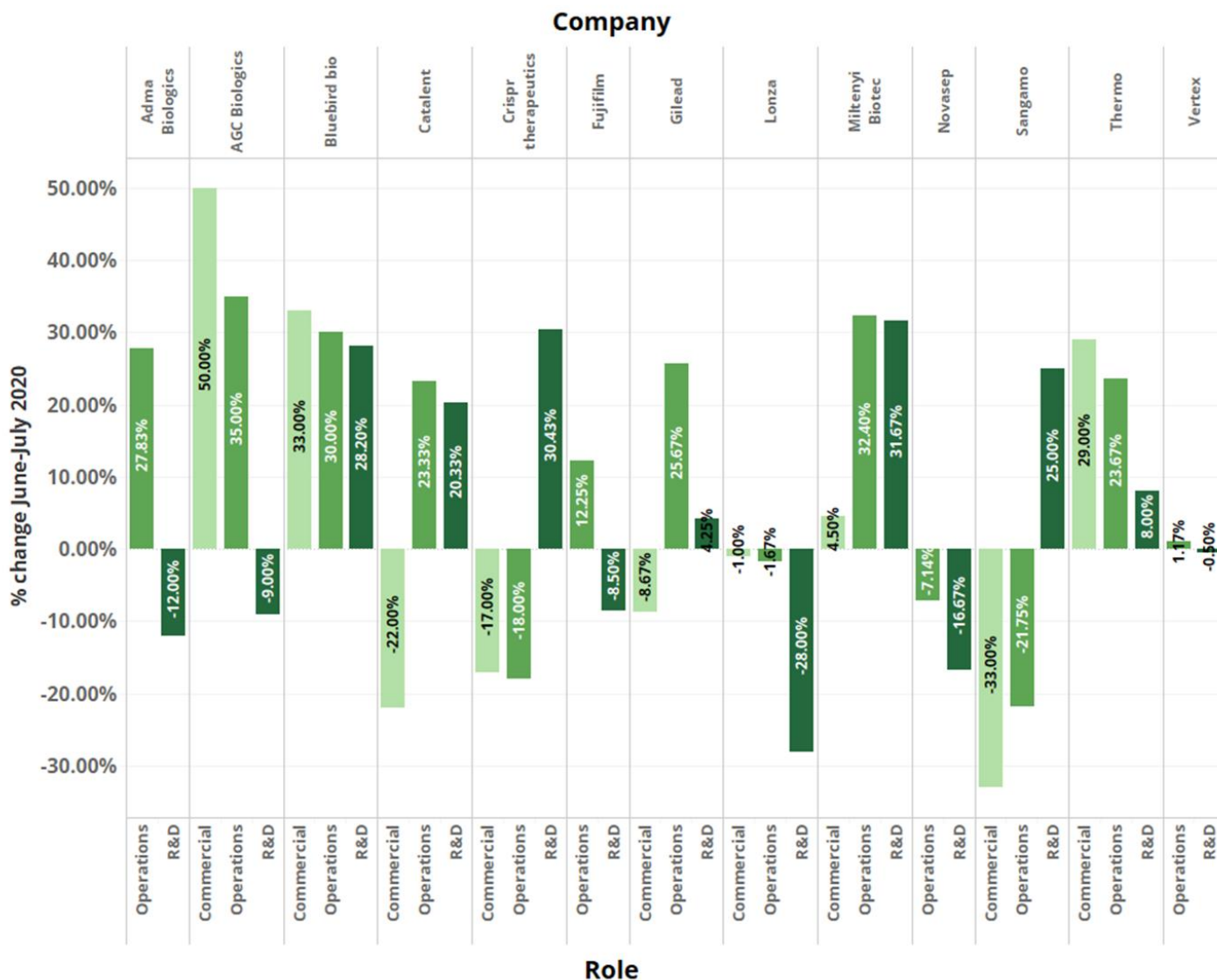
Hiring Trend June -July 2020 *By Role*

MTD

Cell Gene Therapy



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SEARCH PARTNERS



General CGT Market

R&D:-

- Sangamo, Miltenyi, Crispr Ther & Bluebird **Increasing**

Operations:-

- Thermo, Bluebirds & AGC **Increasing**

Commercial:-

- Thermo, Bluebird & AGC **Increasing**

Role

- Commercial
- Operations
- R&D

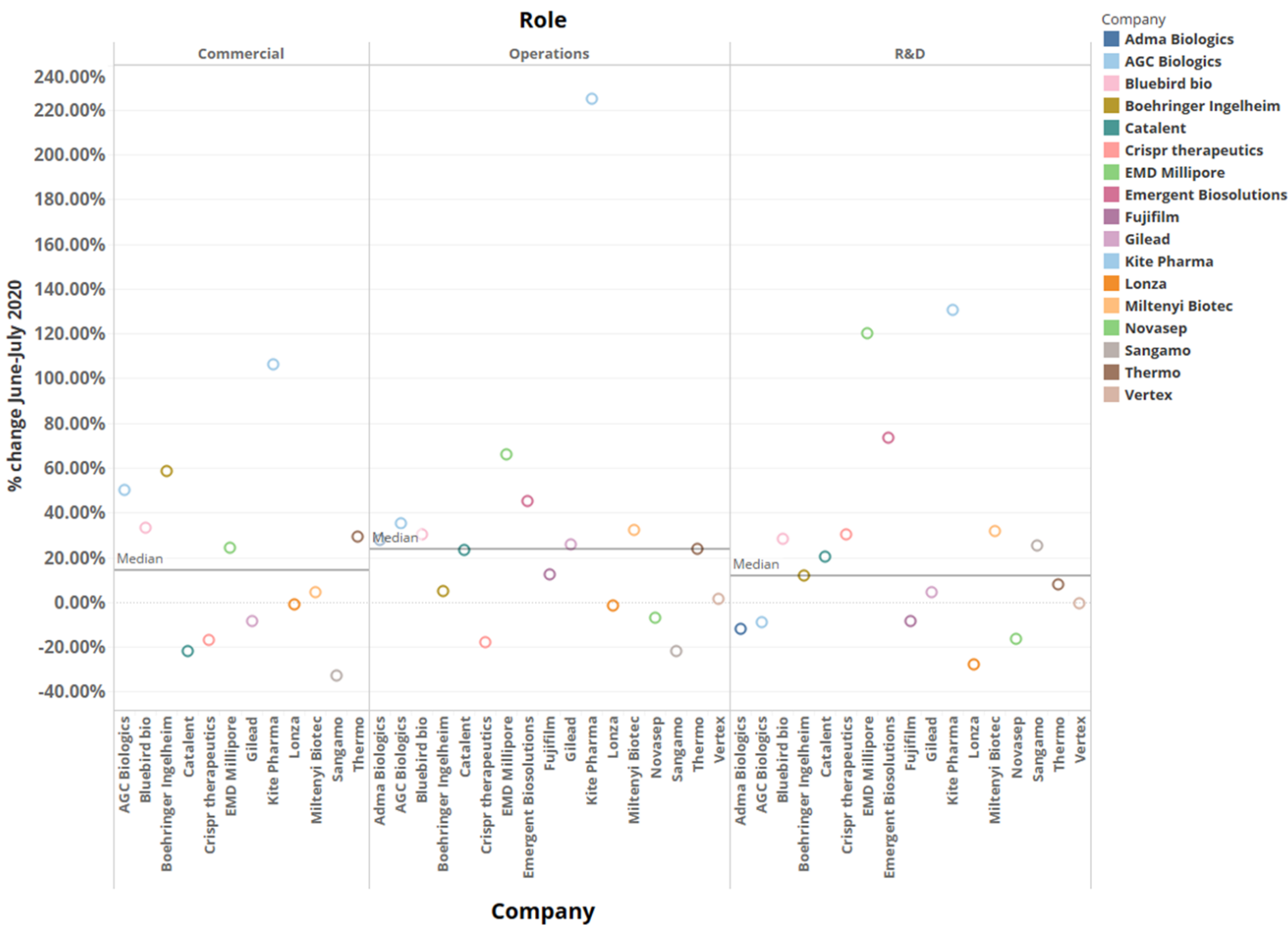
Hiring Trend June -July 2020 *By Role*

MTD

Cell Gene Therapy



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General CGT Market

- R&D:-**
 - Kite Pharma Largest increase
- Operations:-**
 - Kite Pharma Largest increase
- Commercial:-**
 - Kite Pharma Largest increase

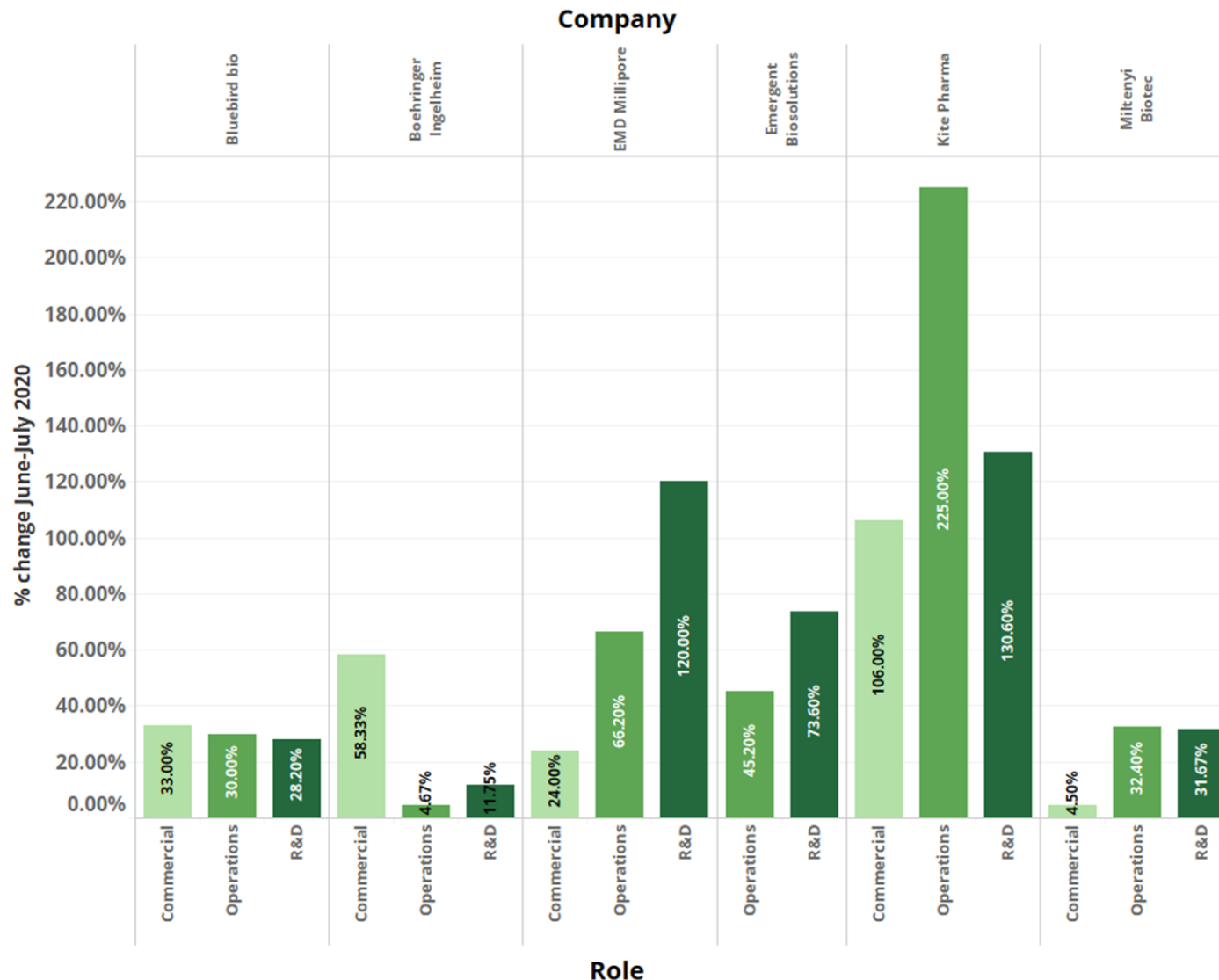
Hiring Trend June-July 2020 *By Role*

MTD

Cell Gene Therapy



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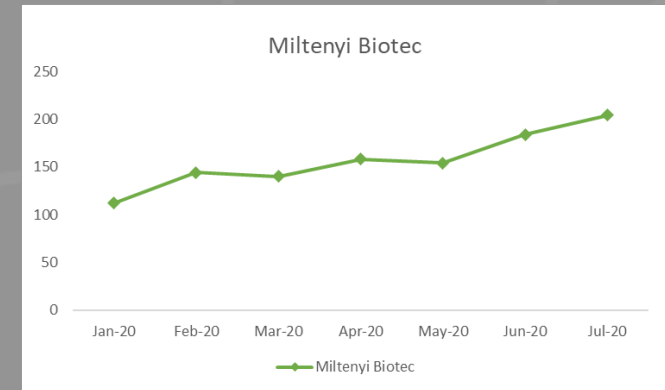
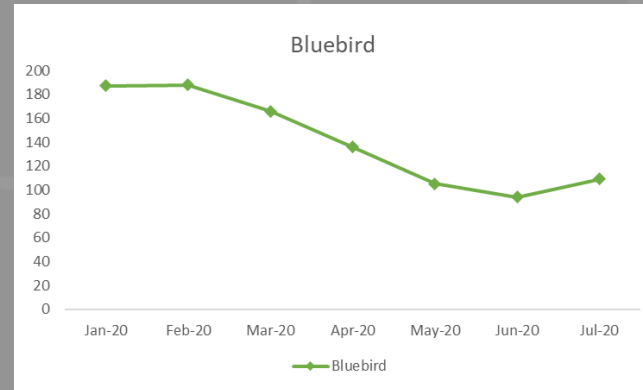
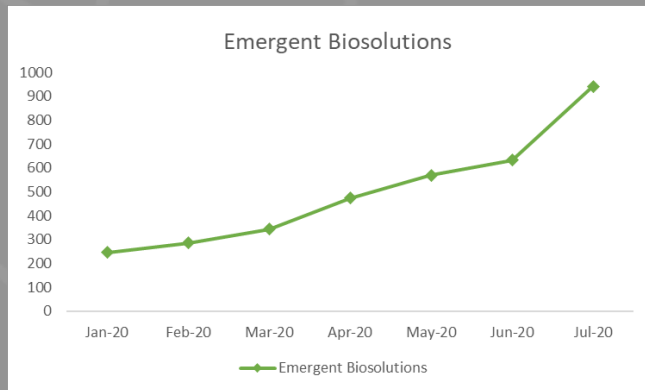
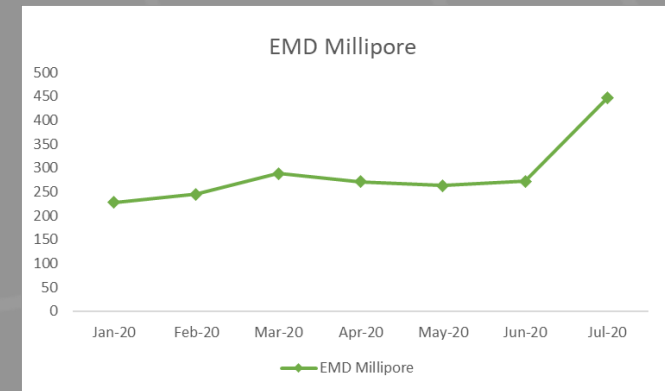
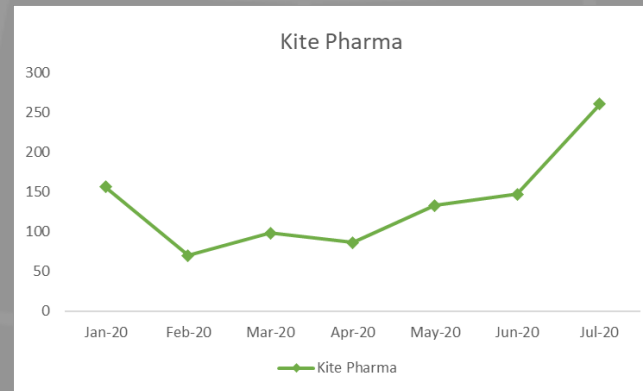
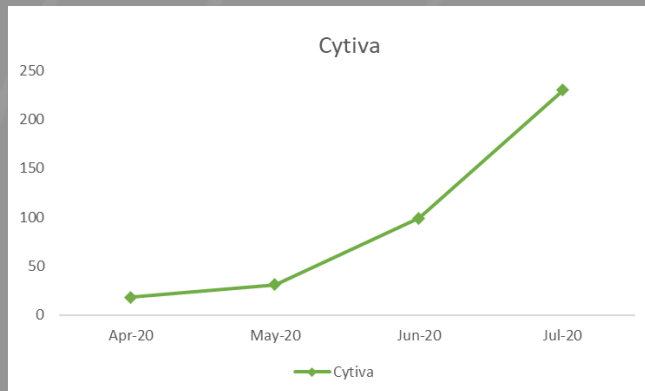
General CGT market

- Bluebird:-** Increase in Operations, R&D & Commercial
- Boehringer:-** Increase in Operations, R&D & Commercial
- MilliporeSigma:-** Increase across operations, R&D & Commercial;
- Emergent:-** Increase across operations & R&D;
- Kite:-** Increase across operations, R&D & Commercial;
- Miltenyi:-** Increase in Operations, R&D & Commercial

Role

- Commercial
- Operations
- R&D

Hiring Trend 2020 Cell Gene Therapy



Increased Hiring:-
Cytiva, Kite, MilliporeSigma, Emergent, Bluebird & Miltenyi

Cell Gene Therapy



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- Kite Pharma gets FDA approval for second CAR-T cell therapy
- The agency approved Tecartus, previously developed under the name KTE-X19, as the first CAR-T therapy for mantle cell lymphoma.



- MilliporeSigma Invests \$20 Million in New Switzerland Laboratory based Buchs to support its rapidly growing reference materials business
- Merck Opens its Largest M Lab™ Collaboration Center in Shanghai
- Merck Advances Bioprocessing Capabilities with Raman Technology Sensor Acquisition



- Emergent BioSolutions Signs Agreement with AstraZeneca to Expand Manufacturing for COVID-19 Vaccine Candidate
- Emergent BioSolutions Signs Agreement with AstraZeneca to Expand Manufacturing for COVID-19 Vaccine Candidate
- Emergent BioSolutions Signs Agreement for Large-Scale Drug Substance Manufacturing for J & J's Lead COVID-19 Vaccine Candidate
- Emergent BioSolutions to Invest \$75 Million in Canton Site and Expand Viral Vector and Gene Therapy Capability



- Bristol Myers Squibb and Bluebird T cell immunotherapy collaboration



- Miltenyi Biotec offers automated and closed adherent cell culture solutions on CliniMACS Prodigy®
- Miltenyi Biotec launches world's first fully automated light sheet microscope
- Miltenyi Biotec launches new tool for coronavirus-specific T cell research



- Cytiva expands Massachusetts biomanufacturing site
- 40% Quarterly growth. Cytiva is seeing a positive impact from the opportunities arising from industry's efforts to develop COVID 19 vaccines and therapies
- Collaborations with Genedrive , Sona Nanotech, Avacta , Entos Pharma, Takara & Aptamer Grp

CDMO

Assessment of Hiring Frequency

By job number



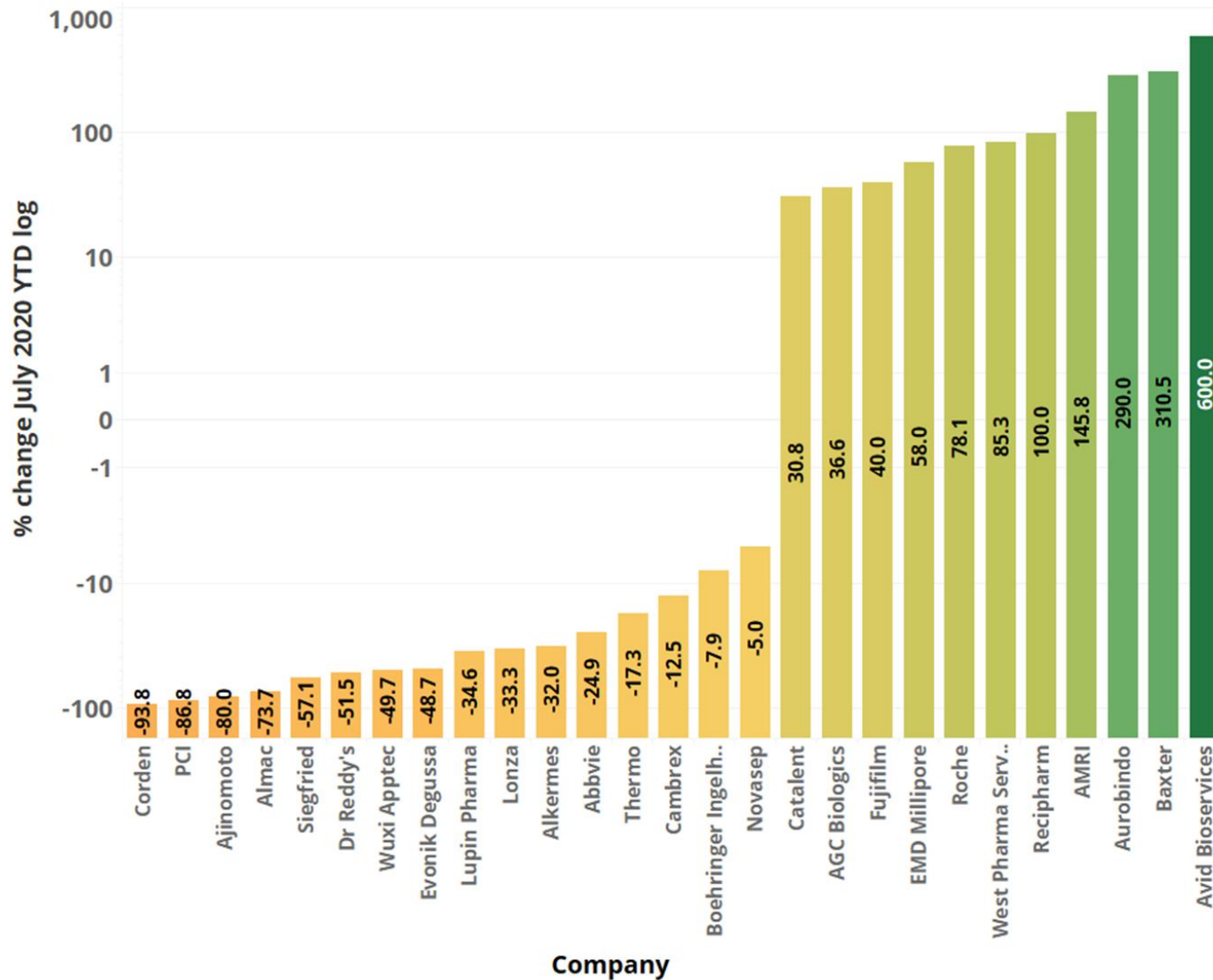
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Hiring Trend July 2020

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CDMO



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General CDMO market

Decreasing

- Corden, PIC, Ajinomoto, Almac, Siegfried and Wuxi

Increasing

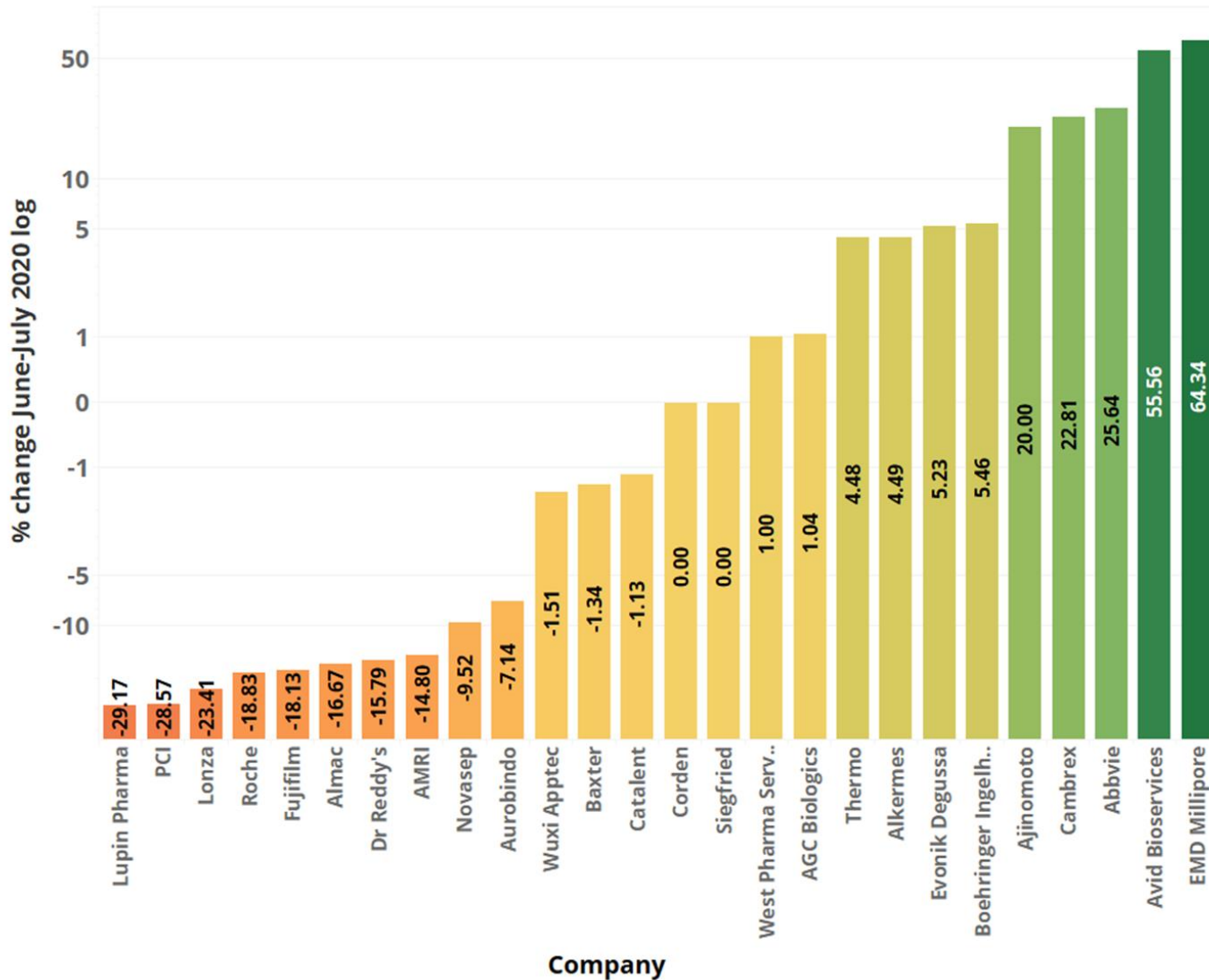
- Avid, Baxter, Aurobindo, AMRI and Recipharm

Hiring Trend June - July 2020

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CDMO



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General CDMO market

Decreasing:-

- Lupin, PCI, Roche, fujifilm & Almac

Increasing:

- MilliporeSigma, Avid, Abbvie, Cambrex, Ajinomoto & Boehringer

CDMO

Assessment of Hiring Frequency

By job type



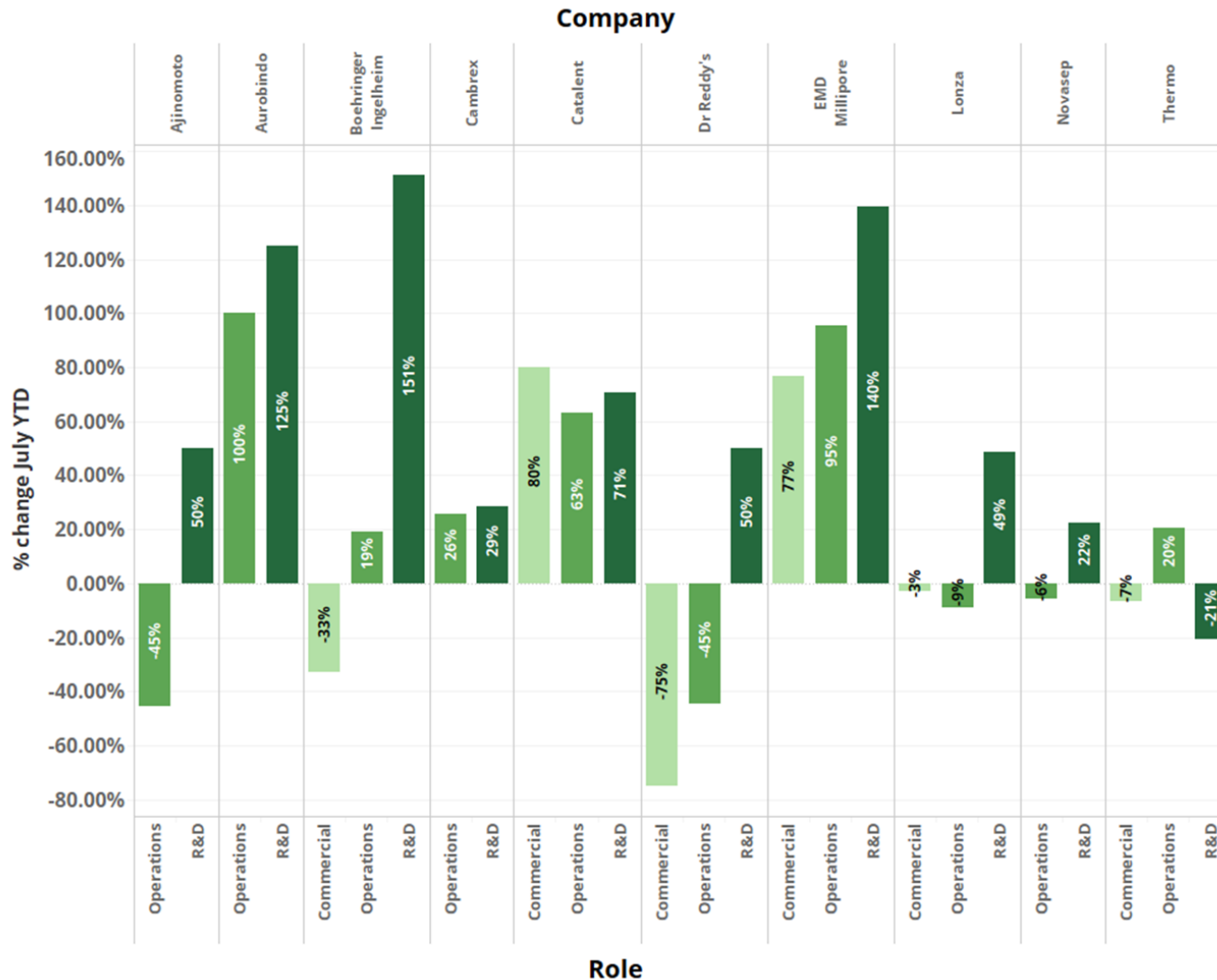
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Hiring Trend July 2020 - By Role

YTD
CDMO



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General CDMO Market

R&D:-

- MilliporeSigma, Aurobindo, Boehringer **increasing**

Operations:-

- MilliporeSigma, Aurobindo & Catalent **increasing**

Commercial:-

- MilliporeSigma & Catalent **increasing**

Role

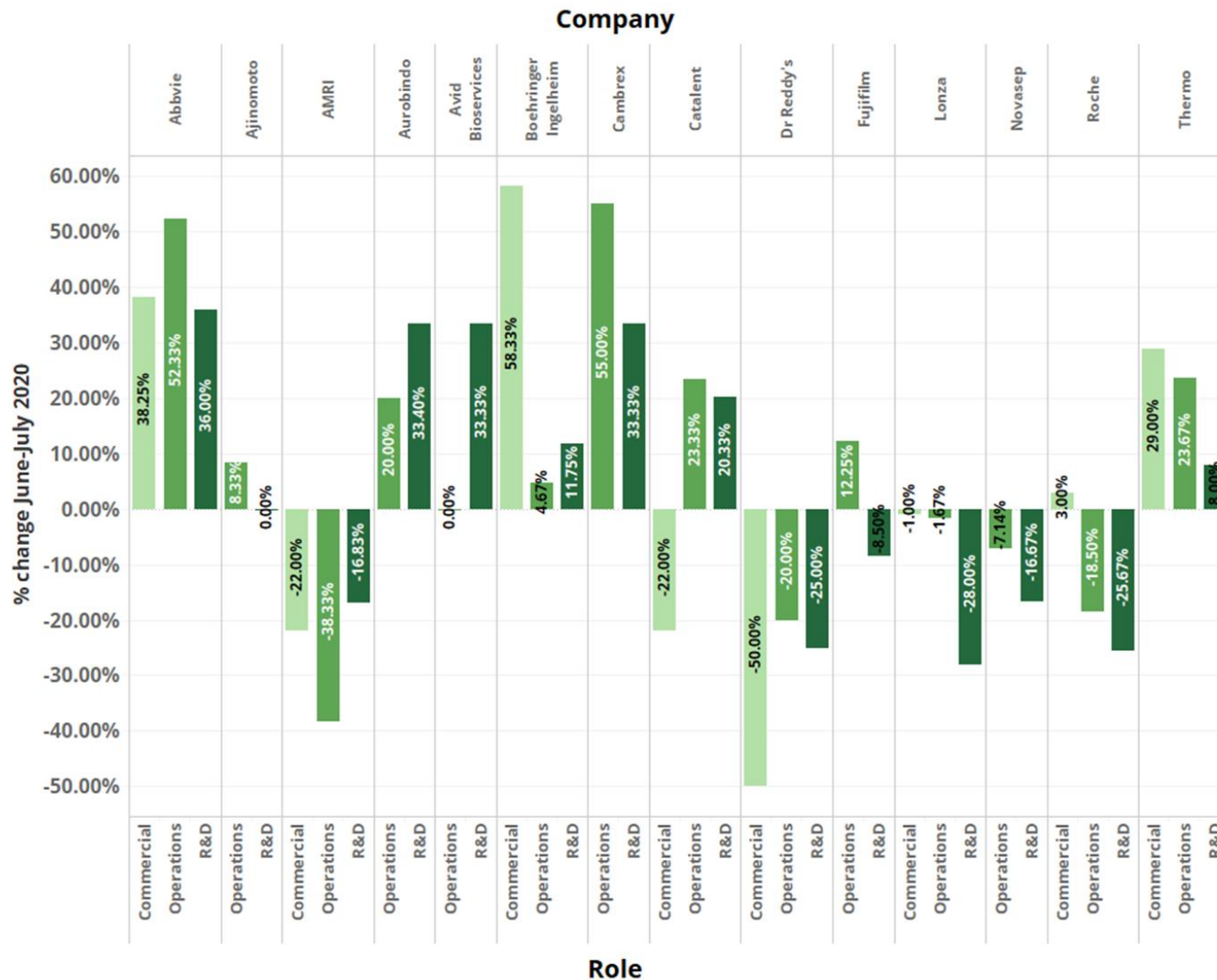
- Commercial
- Operations
- R&D

Hiring Trend June - July 2020 *By Role*

MTD
CDMO



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General CDMO Market

R&D:-

- Abbvie, Aurobindo, Avid, Cambrex & Catalent **increasing**

Operations:-

- Abbvie, Cambrex, Catalent & Thermo **increasing**

Commercial:-

- Thermo, Abbvie & Boehringer **increasing**

Role

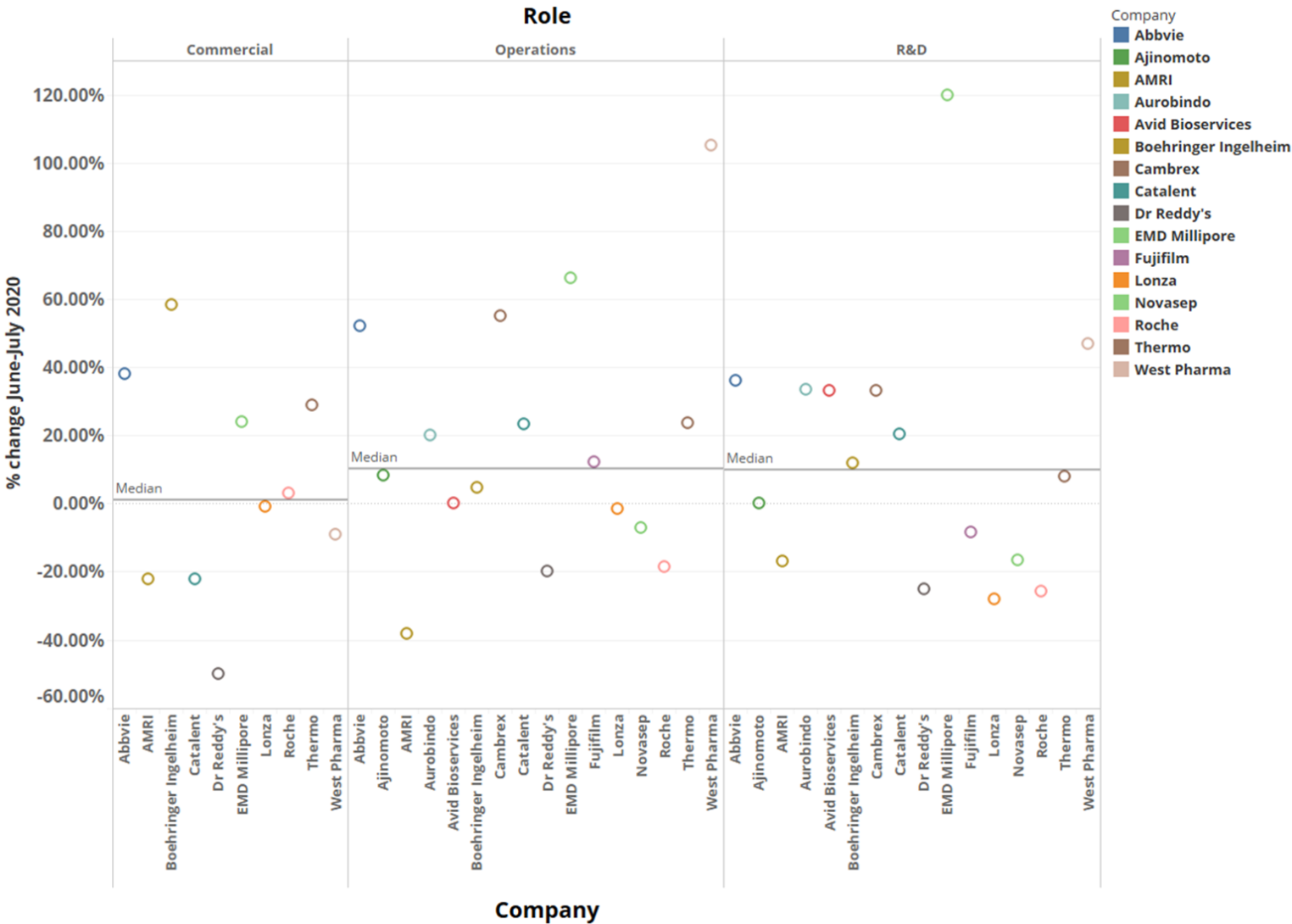
- Commercial
- Operations
- R&D

Hiring Trend June - July 2020 *By Role*

MTD
CDMO



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General CDMO Market

- R&D:-**
 - Millipore Largest Increase
- Operations:-**
 - West Pharma Largest Increase
- Commercial:-**
 - Boehringer Ingelheim Largest Increase

Hiring Trend June - July 2020 *By Role*

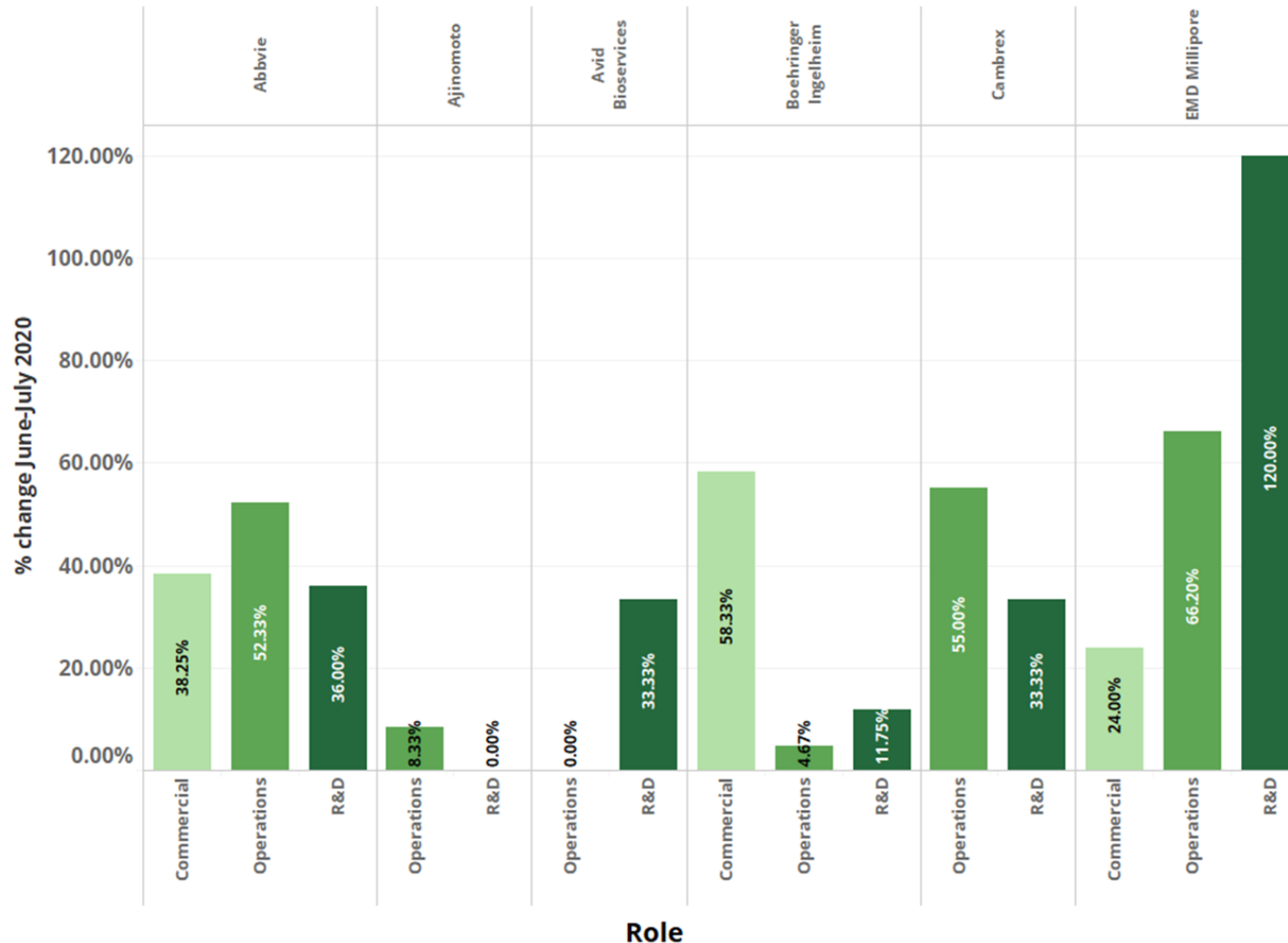
MTD
CDMO



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Company

CDMO:- Hiring Trend by Role %change June-July 2020



General CDMO market

Abbvie:- Increase in Operations, R&D & Commercial

Ajinomoto:- Increase in Operations

Avid:- Increase across Operations & R&D

Boehringer:- Increase across operations, R&D & Commercial

Cambrex:- Increase across Operations & R&D

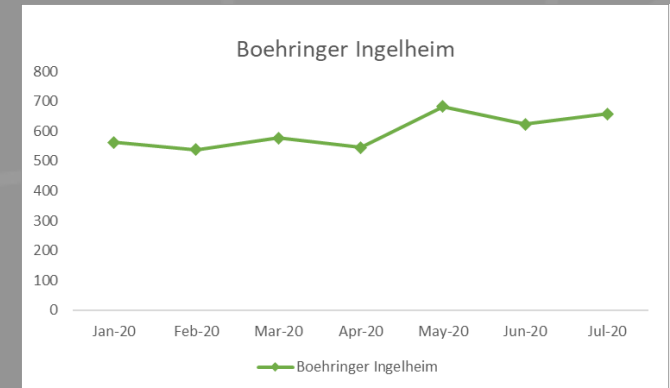
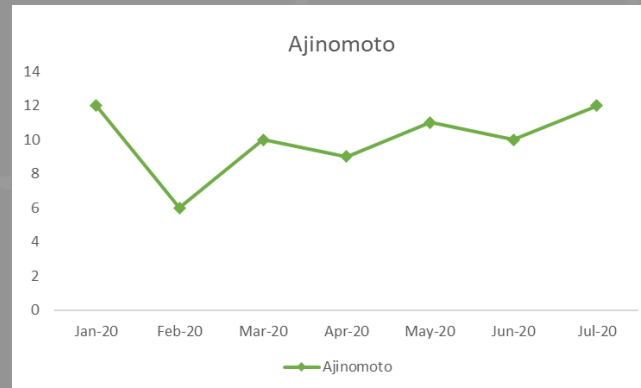
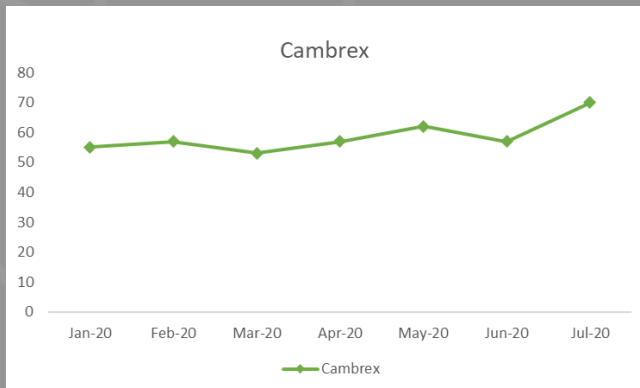
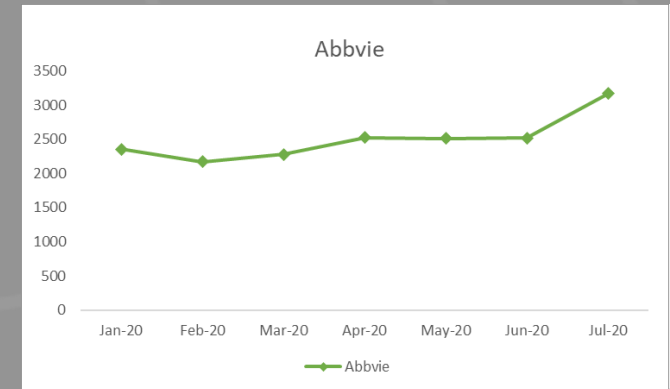
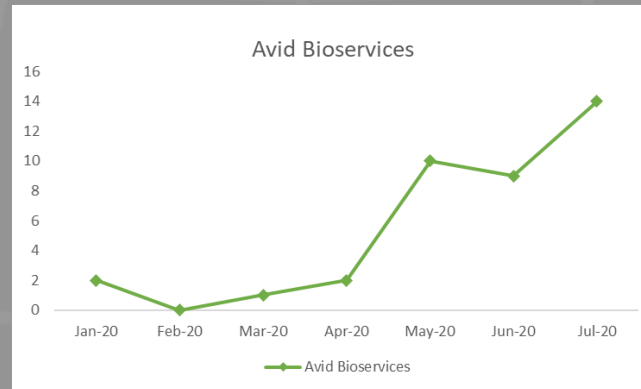
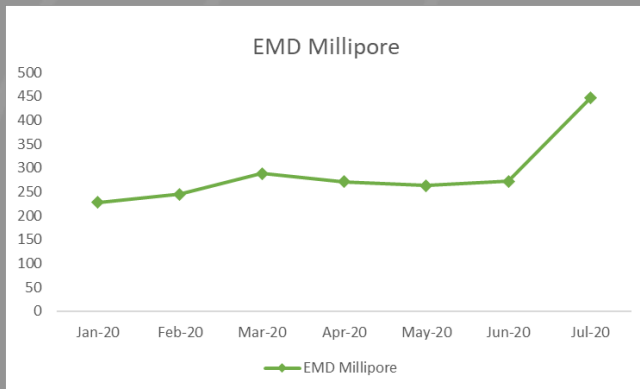
MilliporeSigma:- Increase in Operations, R&D & Commercial



Hiring Trend 2020 CDMO



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Increased Hiring:-
MilliporeSigma, Avid, Abbvie, Cambrex, Ajinomoto & Boehringer



- MilliporeSigma Invests \$20 Million in New Switzerland Laboratory based Buchs to support its rapidly growing reference materials business
- Merck Opens its Largest M Lab™ Collaboration Center in Shanghai
- Merck Advances Bioprocessing Capabilities with Raman Technology Sensor Acquisition



- Avid Bioservices Selected By Iovance Biotherapeutics to Lead Process Development Through CGMP Manufacturing of novel IL-2 Analog
- Avid Bioservices and Argonaut Manufacturing Services Enter Agreement to Offer Integrated Process Development, Drug Substance Manufacturing and Drug Product Parenteral Manufacturing
- Avid Bioservices and Aragen Bioscience Enter Agreement to Offer Integrated Solution for Cell Line and Process Development through Commercial Manufacturing



- I-SPY COVID Trial
- Abbvie & Jacobio collaboration SHP2 Inhibitors
- Positive Phase 3 Data for Atogepant in Migraine Prevention
- Phase 3 Study RINVOQ™



- Cambrex Increases Flexible Manufacturing Capacity at Karlskoga, Sweden Facility
- Cambrex Completes Biopharmaceutical Expansion at its Durham, NC Facility



- Ajinomoto Co., Inc. Announces Changes in Its Organization and Personnel
- Ajinomoto India to triple in four years



- Boehringer Ingelheim Launches External Innovation Hub in China
- Boehringer Ingelheim acquires GST to strengthen its stem cell capabilities in Animal Health
- Boehringer Ingelheim's China-developed Classical Swine Fever live vaccine approved
- Boehringer Ingelheim Acquires Northern Biologics' Preclinical Cancer Antibody Pipeline, Expanding Immuno-oncology Portfolio

Pharma

Assessment of Hiring Frequency

By job number



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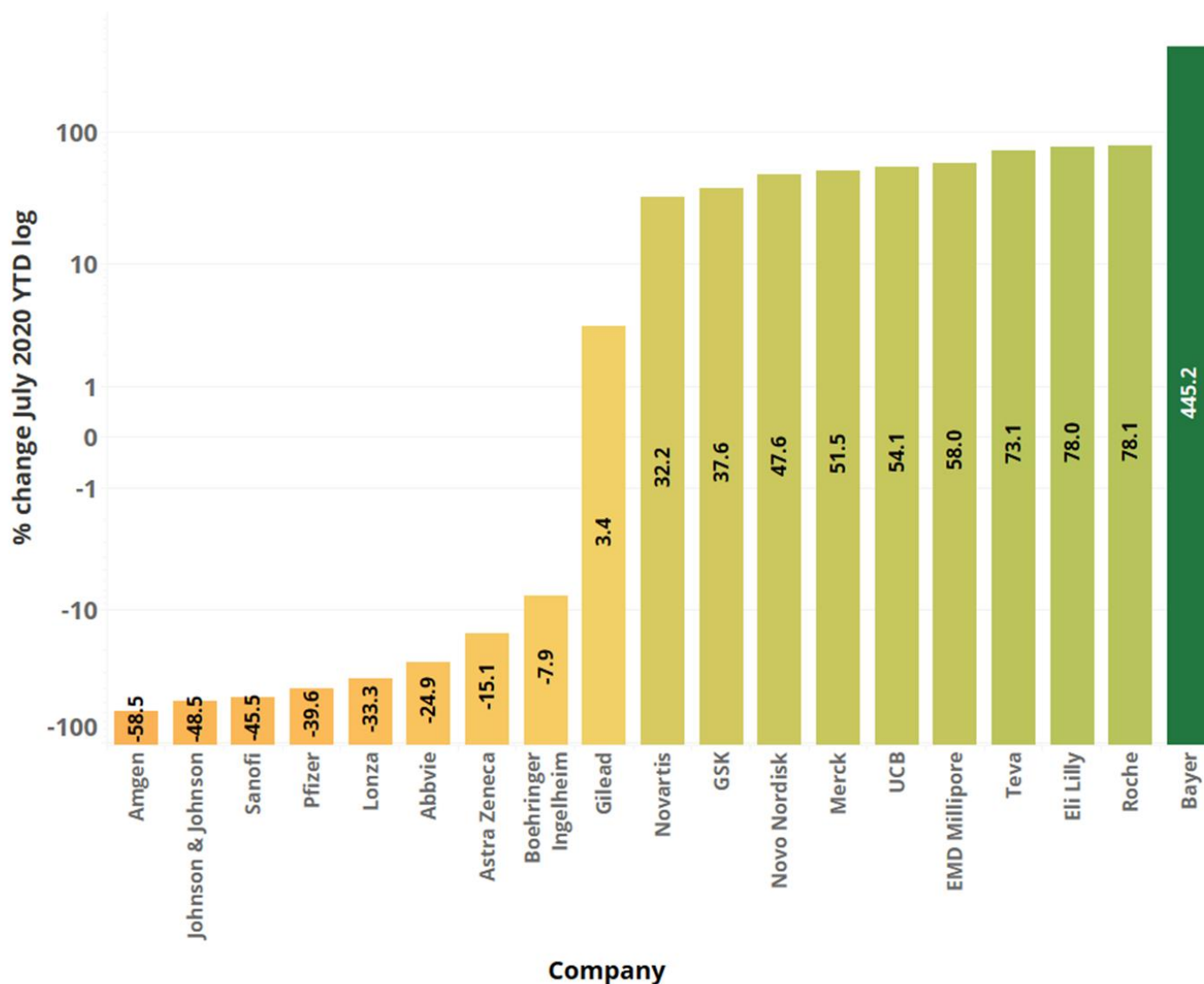
Hiring Trend July 2020

YTD

Pharma



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General Pharma market

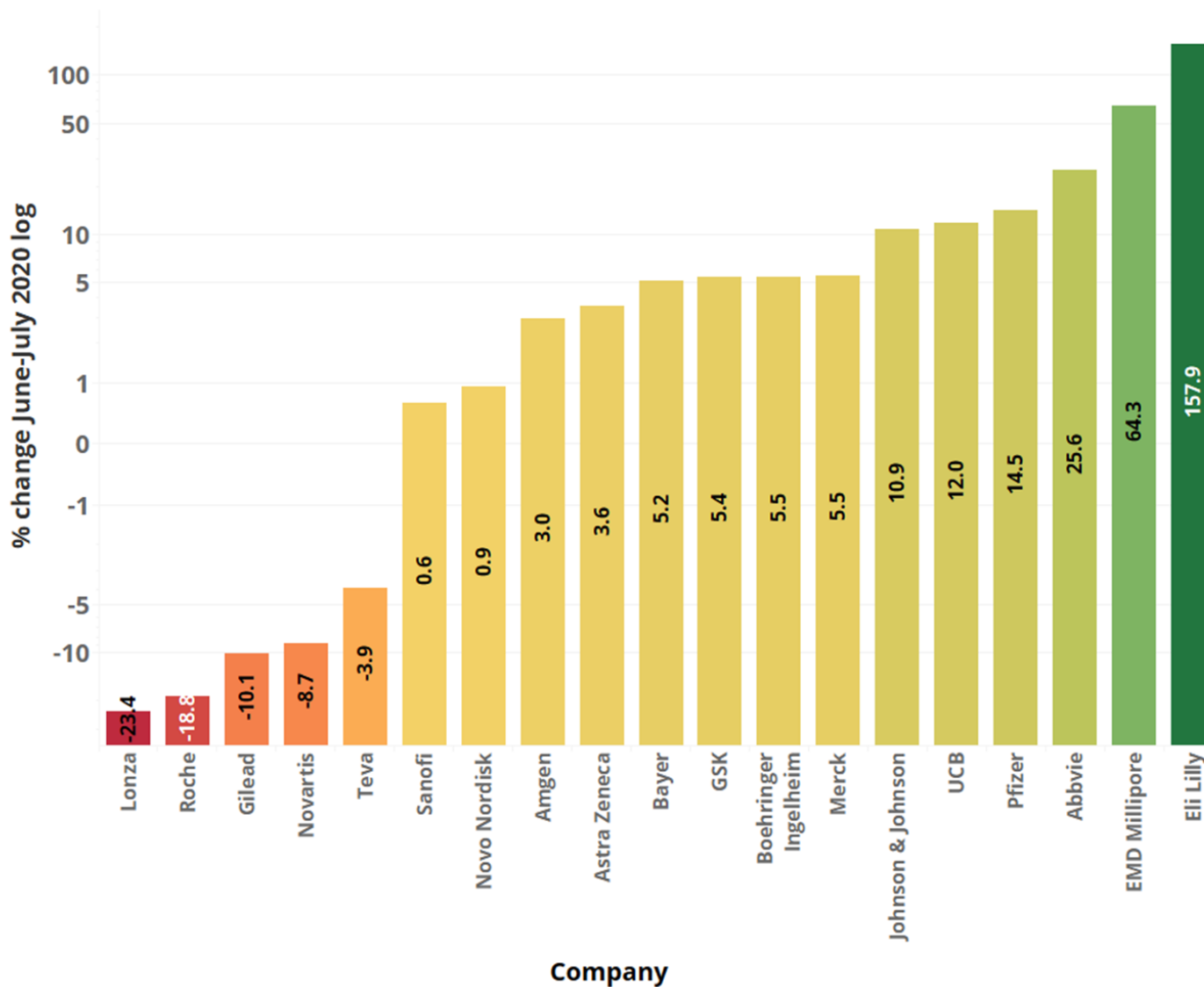
- Decreasing:-** Amgen, J&J, Sanofi & Pfizer
- Increasing:-** Bayer, Roche, Eli Lilly Teva & EMD Millipore

Hiring Trend June - July 2020

MTD
Pharma



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General Pharma market

- **Decreasing:-** Roche, Gilead, Novartis & Teva
- **Increasing:-** Eli Lilly, EMD Millipore, Abbvie, UCB & Pfizer

Pharma

Assessment of Hiring Frequency

By job type



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Hiring Trend July 2020 *By Role*

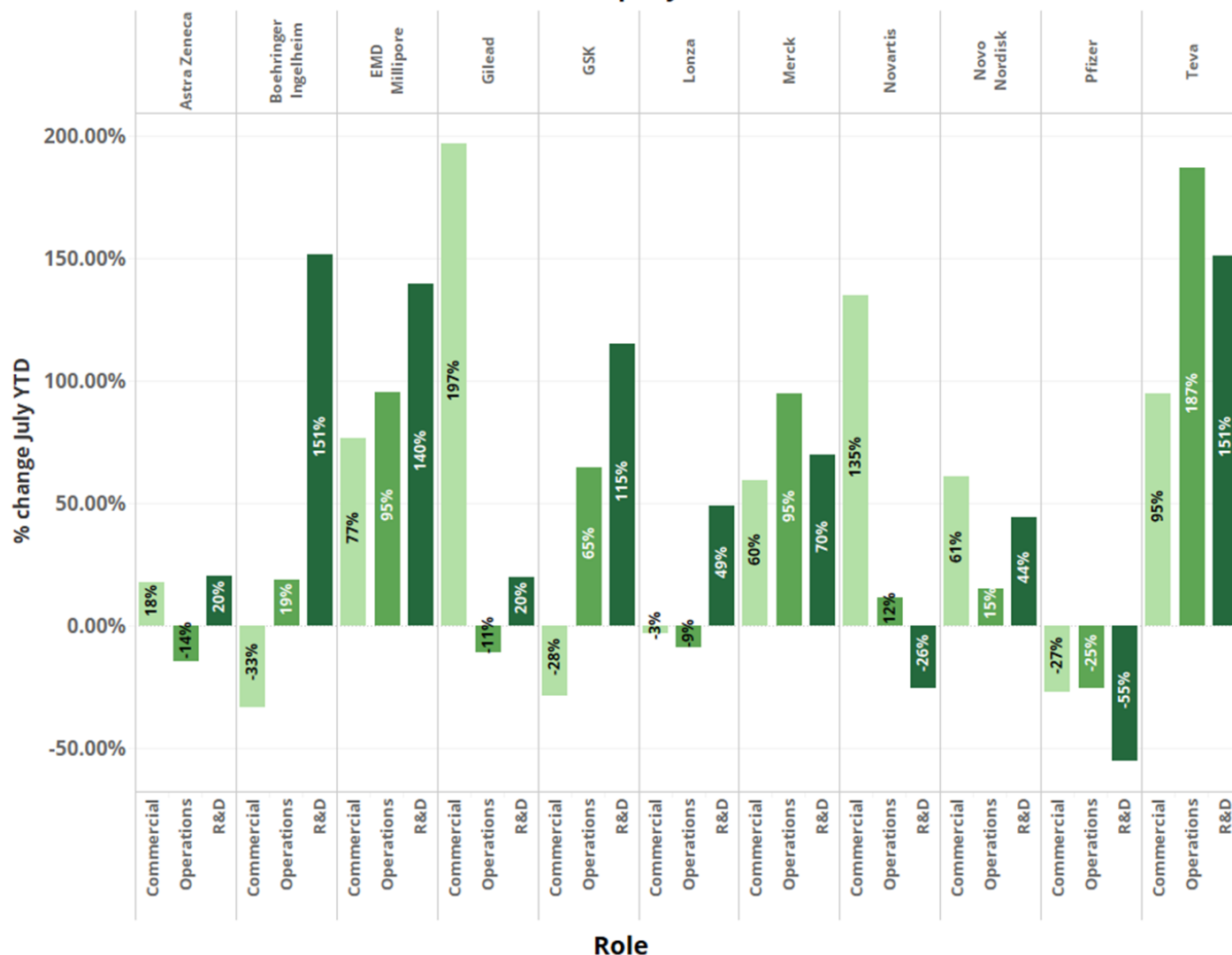
YTD

Pharma



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Company



General Pharma market

R&D:- Teva, Boehringer, MilliporeSigma & GSK **increasing**

Operations:- Teva, Merck, & MilliporeSigma **increasing**

Commercial:- Gilead, Novartis & MilliporeSigma **increasing**

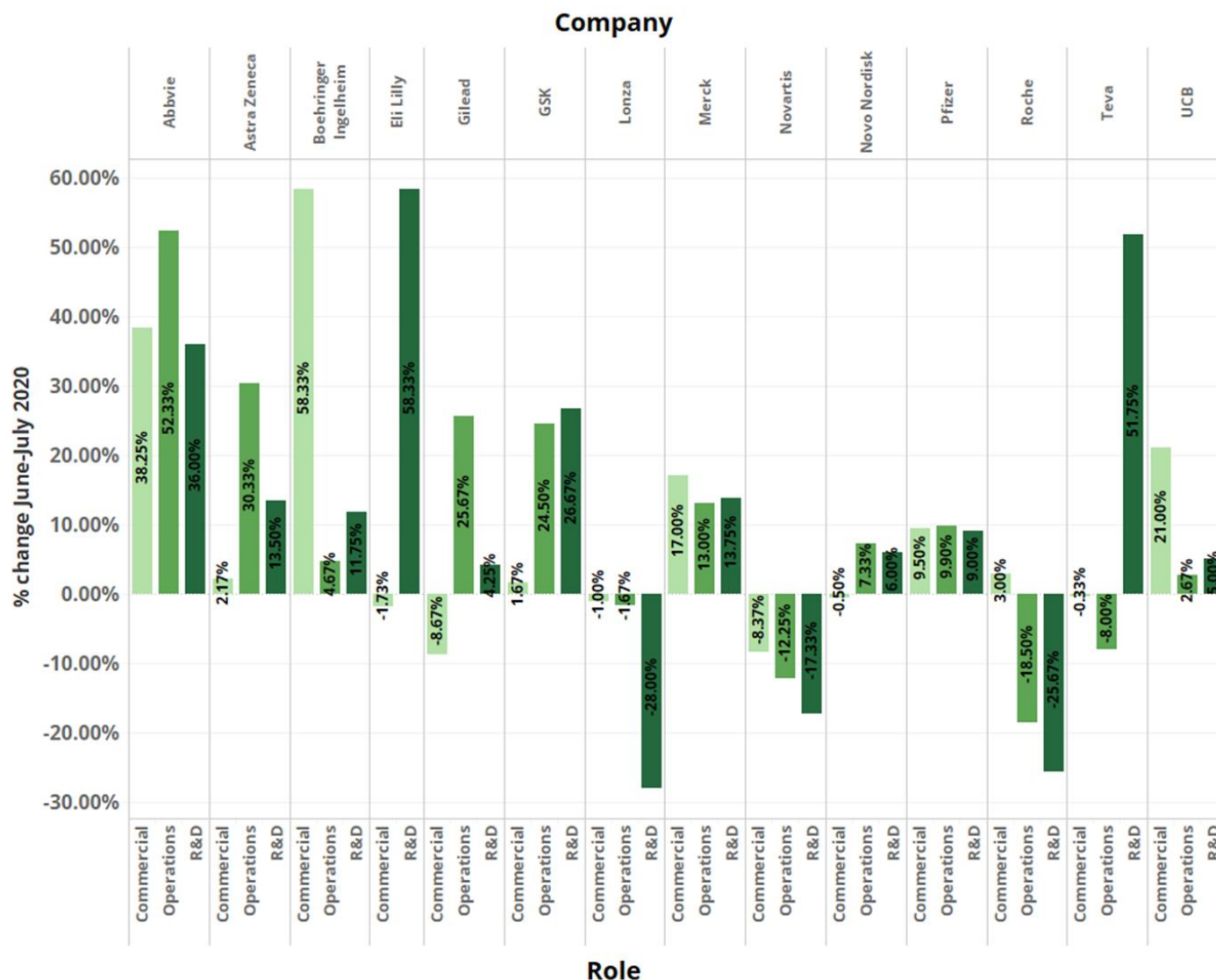
Role

- Commercial
- Operations
- R&D

Hiring Trend June - July 2020 *By Role* MTD Pharma



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General Pharma market

R&D:-

Teva, Eli Lilly & Abbvie **increasing**

Operations:-

Abbvie, Gilead, GSK **increasing**

Commercial:-

Abbvie, Gilead, Merck & UCB **increasing**

Role

- Commercial
- Operations
- R&D

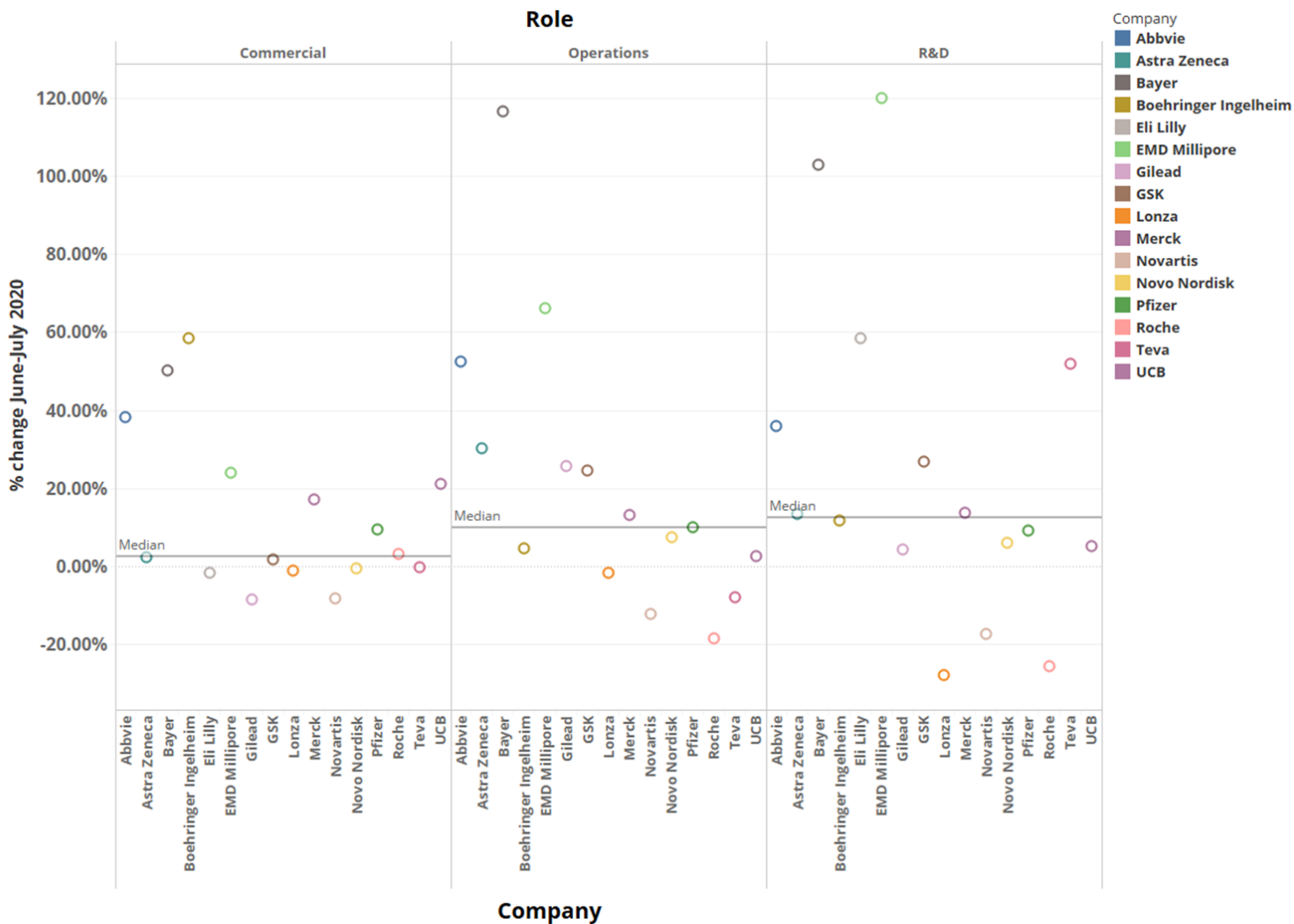
Hiring Trend June - July 2020 *By Role*

MTD

Pharma



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General Pharma market

R&D:-
Millipore Largest increase

Operations:-
Bayer Largest increase

Commercial:-
Boehringer Ingelheim Largest increase

Hiring Trend June - July 2020 *By Role*

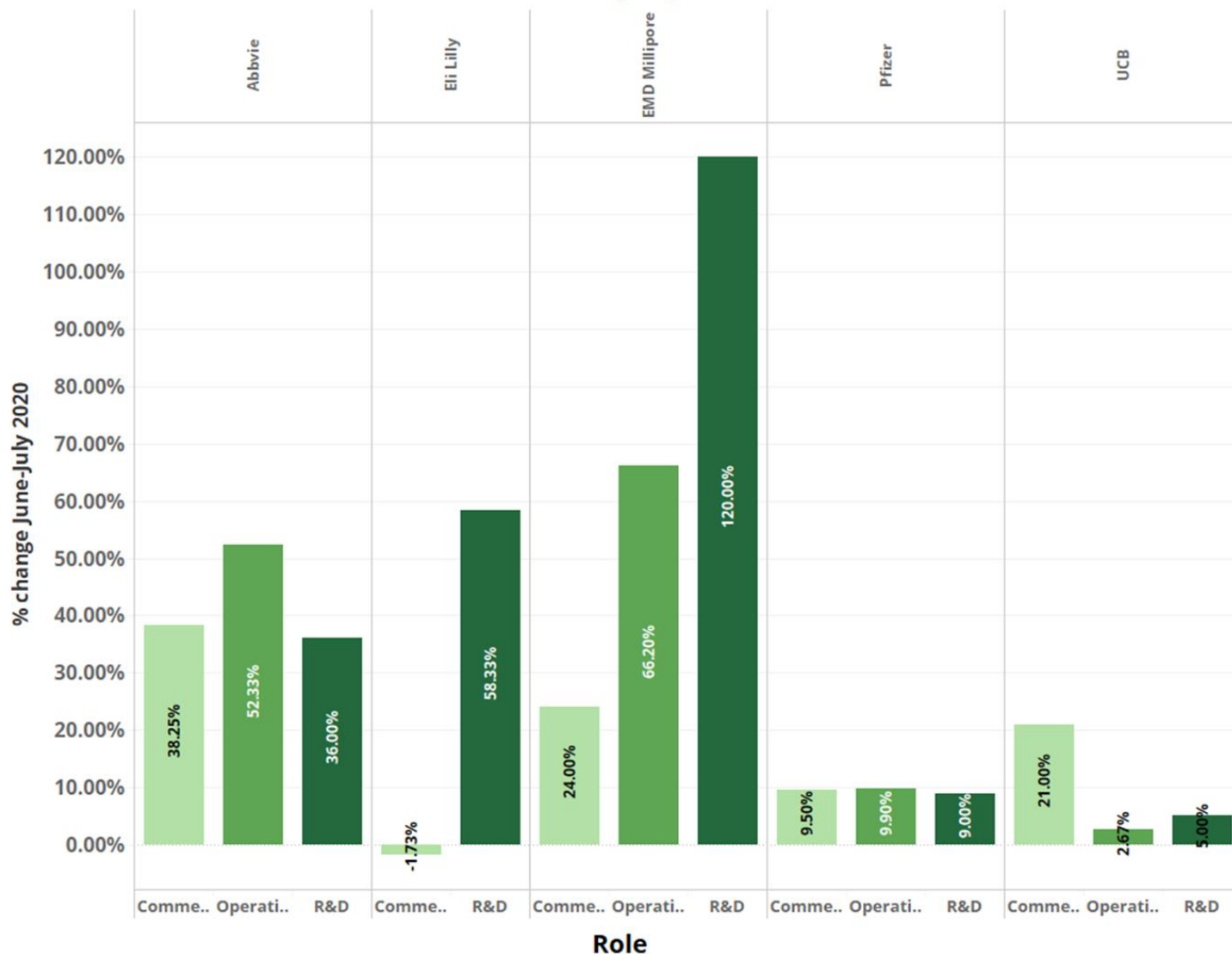
MTD

Pharma



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Company



General Pharma market

Abbvie:- Increase in Operations, R&D & Commercial

Eli Lilly:- Increase in R&D

Pfizer:- Increase across operations, R&D & Commercial

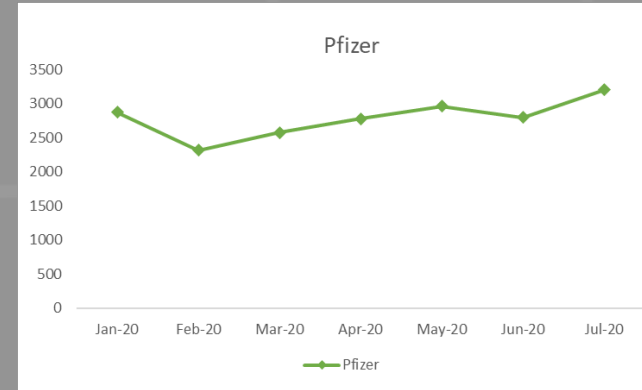
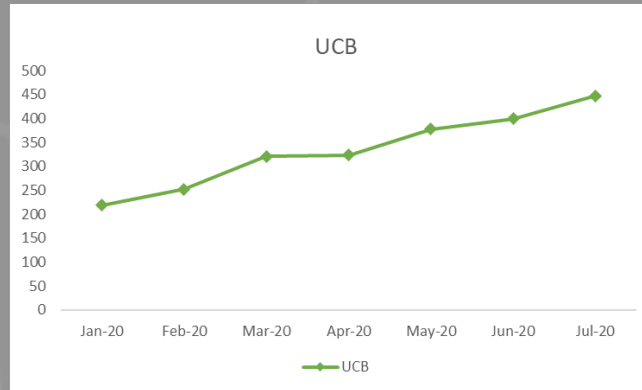
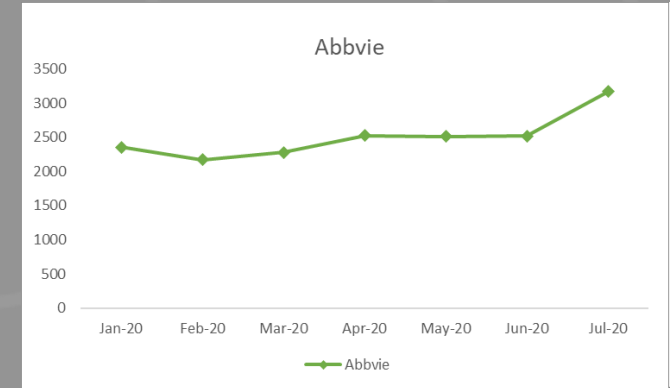
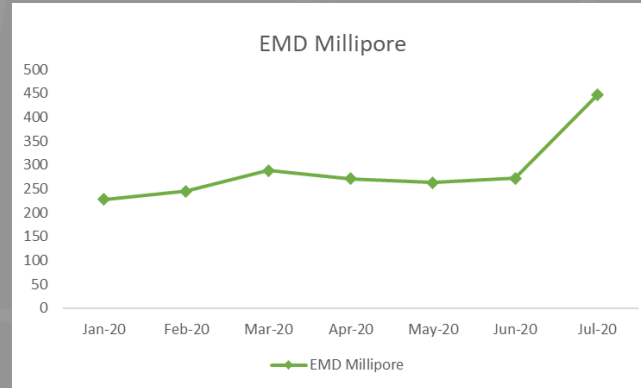
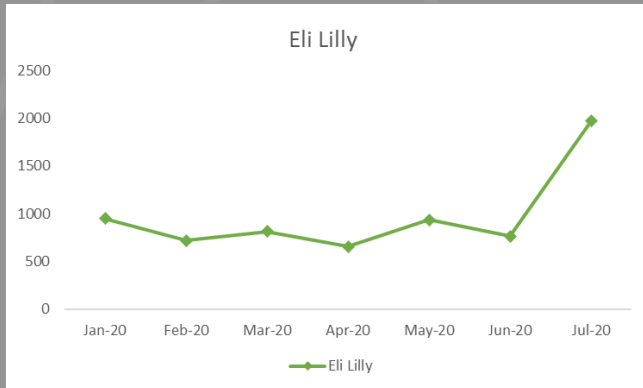
UCB:- Increase across operations, R&D & Commercial

MilliporeSigma:- Increase in Operations, R&D & Commercial

Role

- Commercial
- Operations
- R&D

Hiring Trend 2020 Pharma



Increased Hiring:-

Eli Lilly, EMD Millipore, Abbvie, UCB & Pfizer



- Phase 3 Trial of LY-CoV555 for Prevention of COVID-19
- Jardiance® in phase III trial
- P-tau217 Blood Test Alzheimer's Disease
- Phase 3 Clinical Trial with Baricitinib for Hospitalized COVID-19 Patients



- MilliporeSigma Invests \$20 Million in New Switzerland Laboratory based Buchs to support its rapidly growing reference materials business
- Merck Opens its Largest M Lab™ Collaboration Center in Shanghai
- Merck Advances Bioprocessing Capabilities with Raman Technology Sensor Acquisition



- I-SPY COVID Trial
- Abbvie & Jacobio collaboration SHP2 Inhibitors
- Positive Phase 3 Data for Atogepant in Migraine Prevention
- Phase 3 Study RINVOQ™



- CIMZIA[®] Biologic Approved in Europe for Full Axial Spondyloarthritis Spectrum
- UCB enters into collaboration with Roche to develop antibody treatment for people living with Alzheimer's Disease
- UCB acquires Engage Therapeutics: Staccato
- UCB completes the acquisition of Ra Pharmaceuticals



- Pfizer announces agreement with Gilead to manufacture remdesivir for treatment of COVID-19
- Pfizer and BioNTech to supply Canada with their BNT162 mRNA-based vaccine candidate
- Pfizer and BioNTech to supply Japan with 120 million doses of their BNT162 mRNA-based vaccine candidate
- Pfizer and BioNTech announce an agreement with U.S. government for up to 600 million doses of mRNA-based vaccine



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Assessment of Hiring Strategy

Summary

Summary



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BioPharma:-

MTD:- Eli Lilly, Cytiva, Takara, Harvard Bio, Kite & Repligen have the largest increase in hiring

YTD:- Novavax, Emergent, Baxter, Adma, Enanta & Recipharm

Cell Therapy Manufacturing:-

MTD:- Takara, Emergent, Astellas, Novavax & Ajinomoto have the largest increase in hiring

YTD:- Novavax, Emergent, AMRI and Abeona

Cell Gene Therapy:-

MTD:- Cytiva, Kite, MilliporeSigma, Emergent, Bluebird & Miltenyi have the largest increase in hiring

YTD:- Emergent, ADMA, MilliporeSigma and Fujifilm

CDMO:-

MTD:- MilliporeSigma, Avid, Abbvie, Cambrex, Ajinomoto & Boehringer have the largest increase in hiring

YTD:- Avid, Baxter, Aurobindo, AMRI and Recipharm

Pharma:-

MTD:- Eli Lilly, EMD Millipore, Abbvie, UCB & Pfizer have the largest increase in hiring

YTD:- Bayer, Roche, Eli Lilly Teva & EMD Millipore



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Assessment of hiring strategy

Commentary



The changes in the bio/pharmaceutical industry are being accelerated and catalysed by the current Covid-19 crisis and appears to be a catalyst for acceleration of existing and emerging trends in the industry.

Essentially all bioprocessing-related industrial activities are continuing largely unaffected in terms of operations and output. While there are many changes in onsite staff management, broader business plans are not affected in the near-term. There will be a number of fundamental changes resulting from the pandemic. Many of these, such as the increase in the number of global facilities, were commencing prior to the crisis due to regional growth, the need for redundant production, and requirements for smaller, dedicated facilities. But the added pressures will move up the timelines and magnitude of change.

The general expectation is that there will be relatively minimal adverse near-term economic impact from the pandemic and its aftermath on the bioprocessing sector. Most companies are continuing with their long-term capital-intensive expansions and mergers/acquisitions.

Biopharmaceutical-related equipment suppliers, CDMOs, CROs and developer companies are considered “essential,” and have continued operations with only minimal initial disruptions, most associated with staff management. Many are now planning on how to ramp-up their activities.

Summary

Overall, industry suppliers of goods and services are experiencing or expect increases in sales with an increasing number of pandemic and other infectious disease orders and projects beginning to come in.





Change in Process

- More facilities/modular
- More Bioprocessing
- More pandemic R&D & Manufacturing
- More supply chain control
- More Single use vs Stainless Steel
- More Regionalisation
- Faster R&D & speed to market
- Staffing difficulties





Staffing Difficulties

Prolonged employment challenges have beset the industry for over 10 years. These will now be intensified by the expected increase in bioprocessing for pandemic-related products. Hiring challenges and shortages of staff with expertise and experience will accelerate. Pandemic R&D and manufacturing will compete for limited staff with the cellular and gene therapies sectors, as new facilities come online. Bioprocessing expertise may be in short supply within a few months, with recruiting more difficult and salaries increasing.

This report illustrates evidence of companies increasing hiring now to mitigate the threats



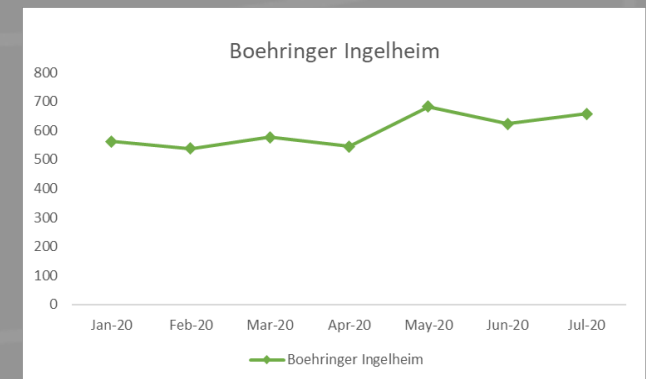
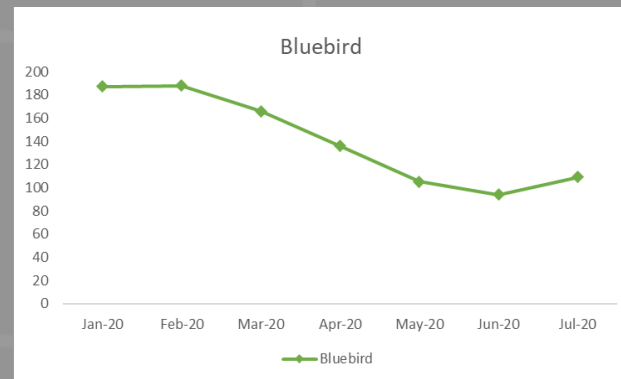
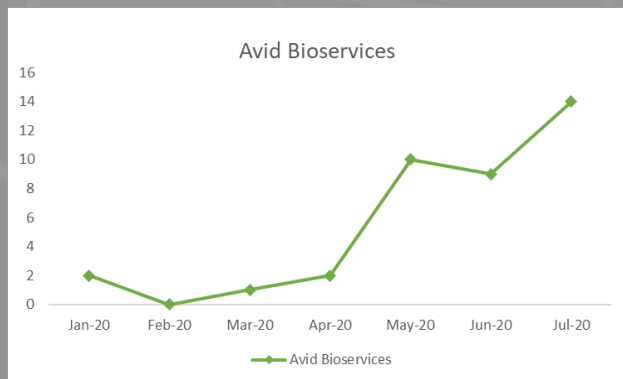
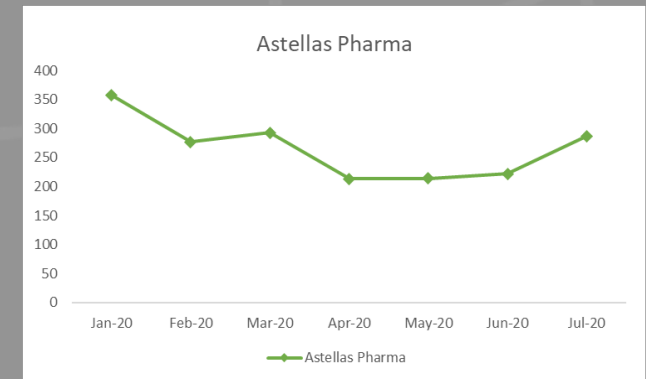
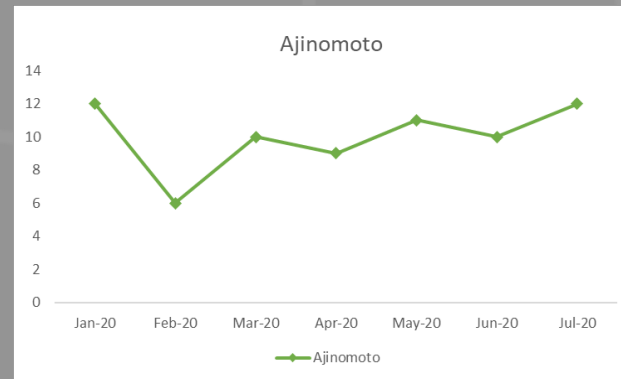
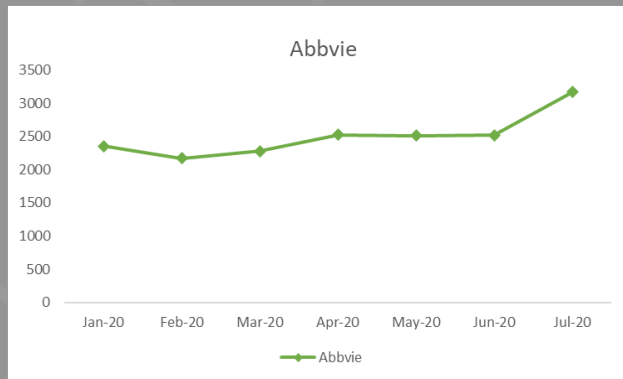


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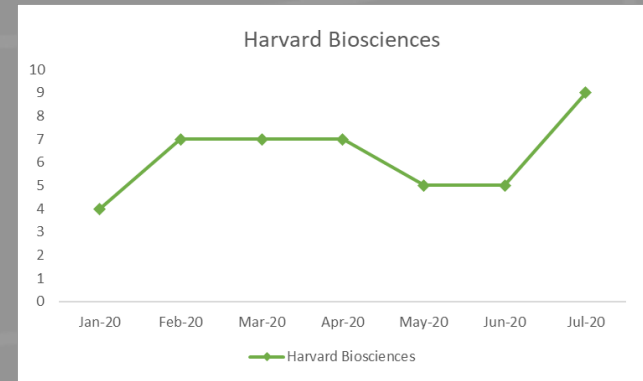
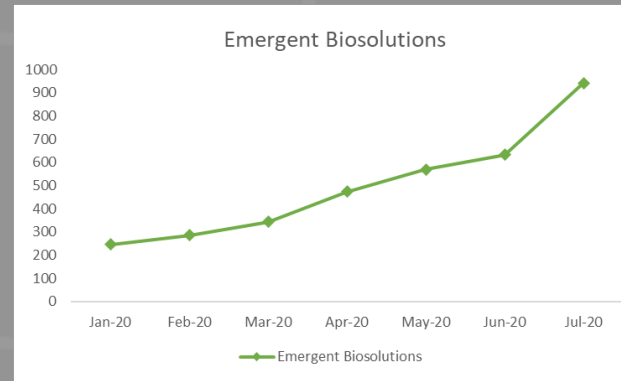
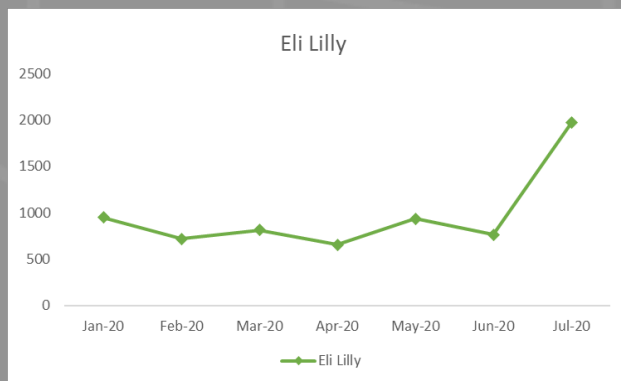
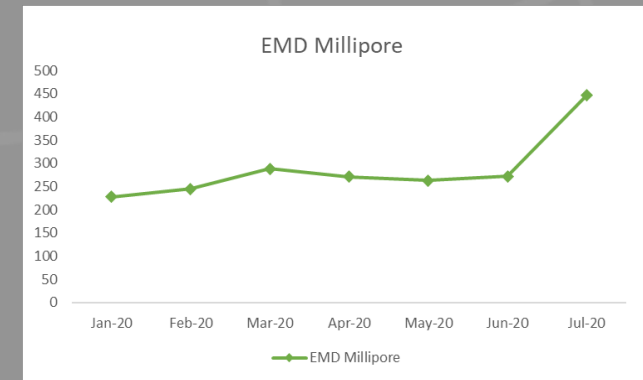
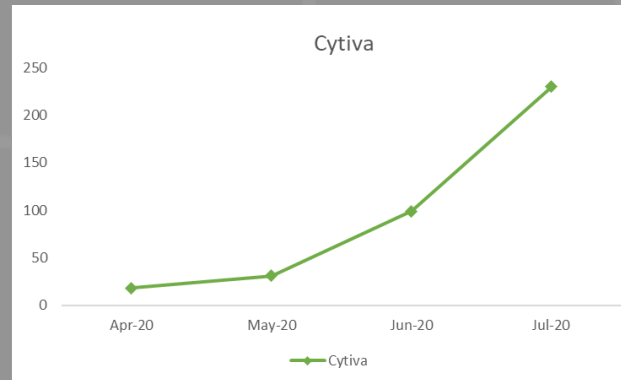
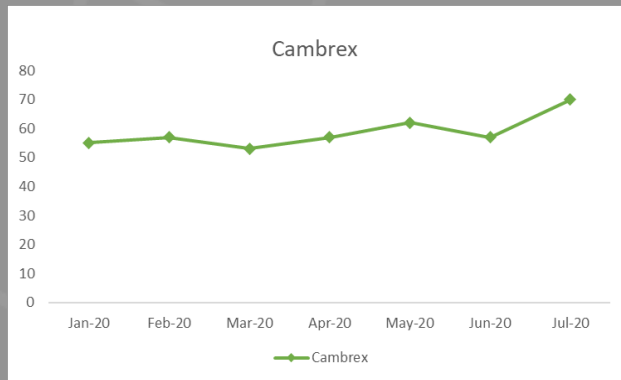
Assessment of hiring strategy

Appendices

Appendix One Hiring Trend



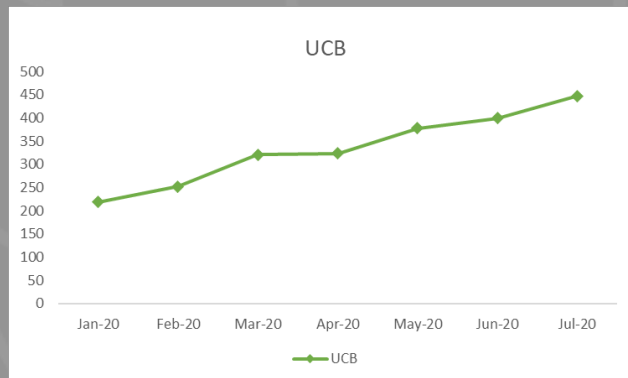
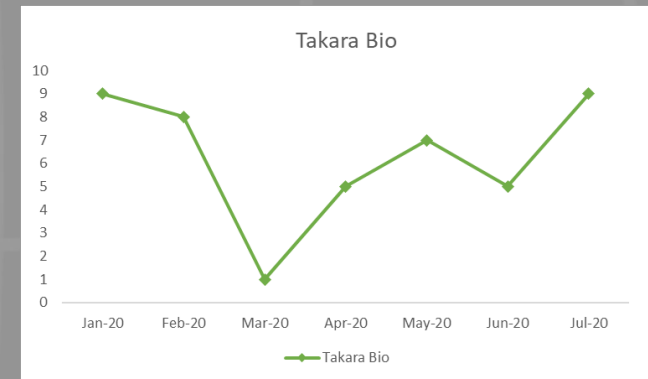
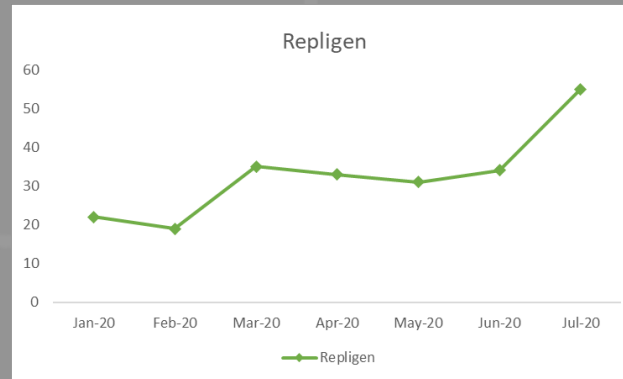
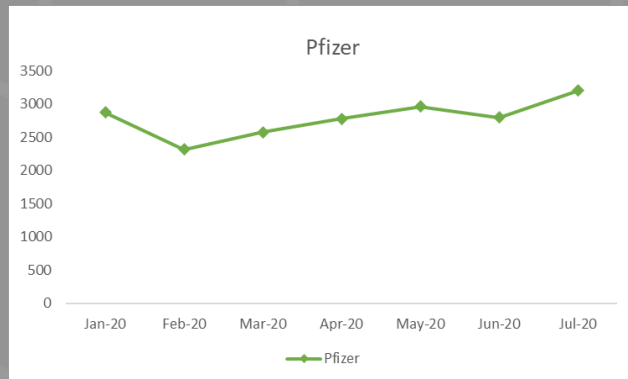
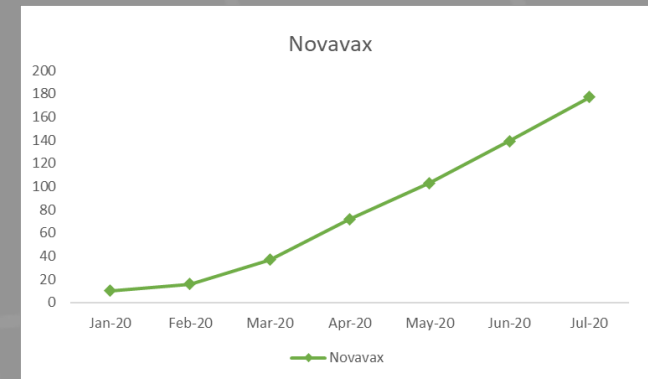
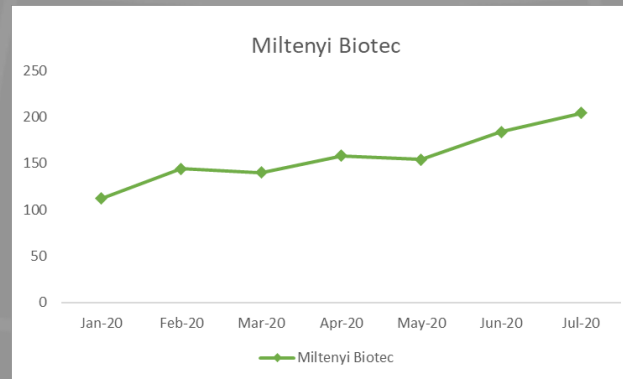
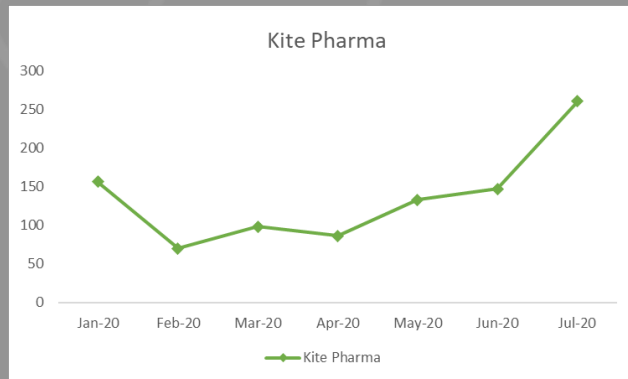
Appendix One Hiring Trend



Appendix One Hiring Trend



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Appendix Two Featured Companies



Biopharma Companies

Adma Biologika	AGC Biologics	Aldevron	Alexion	Alnylam	Amgen	Astellas Pharma	Bachem
Baxter	Beigene	Bio-Rad	Bio-Techne	Biogen	BioMarin	BioMerieux	Bluebird
Boehringer Ingelheim	Brammer Bio	Bristol Myers Squibb	Cambrex	Catalent	Celgene	Cell Signalling Tech.	Cellular Dynamics
Cognate Bio Services	Corden	Crispr Therapeutics	Cytovance Biologics	Dr Reddy's	Eli Lilly	Emergent Biosolutions	Enanta Pharma
Flexion Therapeutics	Fujifilm	GE Healthcare	GE/Cytiva	Gilead	GSK	Harvard Biosciences	IDT Biologica
Intellia Therapeutics	Irvine	Johnson & Johnson	Juno Therapeutics	KBI Biopharma	Kite Pharma	Lonza	Lubrizol
Miltenyi Biotec	Mylan	Novartis	Novasep	Novavax	Novo Nordisk	Nuvasive	Pall Corporation
Pfizer	Recipharm	Regeneron	Repligen	Roche	Rubius Therapeutics	Sandoz	Sangamo Therapeutics
SK Life Sciences	Stemcel Technologies	Takara Bio	Takeda	Thermo	Vericel	Vertex	Wuxi Apptec

Appendix Two Featured Companies



Cell Therapy Manufacturing Companies				
Abeona Bio	AGC Biologics	Ajinomoto	Aldevron	Almac
AMRI	Astellas Pharma	Berkeley Lights	Catalent	Celgene
Cognate Bio Services	Discovery Labs	Emergent Biosolutions	Fujifilm	Gilead
Hitachi Chemical	KBI Biopharma	Lonza	Mustang Bio	Novartis
Novavax	Novo Nordisk	Oxford Biomedica	Roche	Rubius Therapeutics
Takara Bio	Thermo	Waisman Biomufacturing	Wuxi Apptec	

Appendix Two Featured Companies



Cell Gene Therapy Companies					
Adma Biologika	Bluebird	Boehringer Ingelheim	Catalent	Corden	Crispr Therapeutics
EMD Millipore	Emergent Biosolutions	Fujifilm	GE Healthcare	Cytiva	Gilead
KBI Biopharma	Kite Pharma	Lonza	Miltenyi Biotec	Novasep	Sangamo Therapeutics
Thermo	Vertex	Wuxi Aptec			

Appendix Two Featured Companies



CDMO Companies				
Abbvie	AGC Biologics	Ajinomoto	Alkermes	Almac
Aurobindo	Avid Bioservices	Baxter	Boehringer Ingelheim	Cambrex
Corden	Dr Reddy's	EMD Millipore	Evonik Degussa	Fujifilm
Lupin Pharma	Novasep	PCI	Recipharm	Roche
Thermo	West Pharma Services	Wuxi Apptec		

Appendix Two Featured Companies



Pharma Companies				
Abbvie	Amgen	Astra Zeneca	Bayer	Boehringer Ingelheim
Eli Lilly	EMD Millipore	Gilead	GSK	Johnson & Johnson
Lonza	Merck	Novartis	Novo Nordisk	Pfizer
Roche	Sanofi	Teva	UCB	