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INSIGHT REPORT
Predictive Talent Dynamics - May 2022

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A microscopic view of several cells, likely yeast or similar microorganisms, with prominent blue-stained nuclei. The cells are arranged in a cluster, with some showing budding or division. The background is dark and slightly blurred, emphasizing the cells.

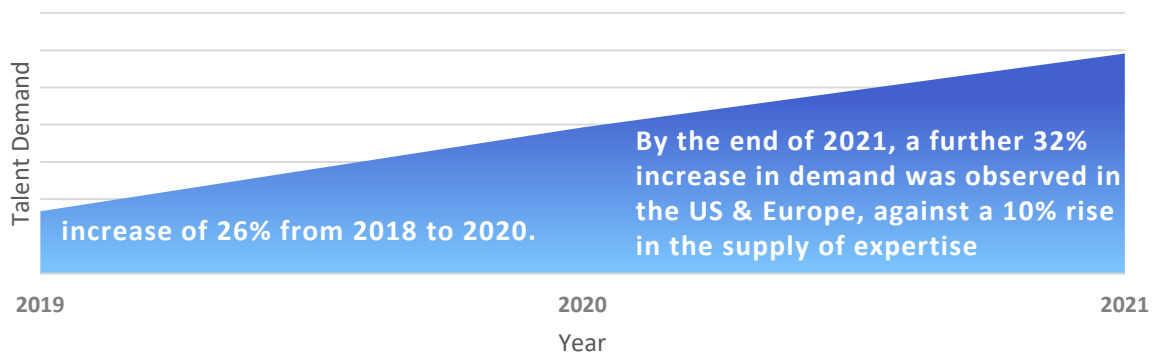
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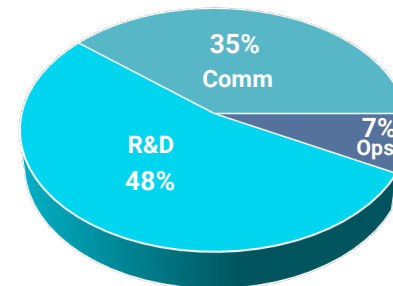
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Executive Summary

Bio manufacturing Hiring:- Yearly Average



**Role Postings:
By Role Type**



Top 3 Companies:

Largest **Annual** Talent Demand Increase
Normalised versus employee no.



2022

Monthly **Hiring Demand** Change

-1.87%

Top 3 Companies:

Largest **Monthly** Talent Demand Increase
Normalised versus employee no.

FujiFilm 34.57%

Meissner Filtration 20.43%

Avid Bio 18.53%

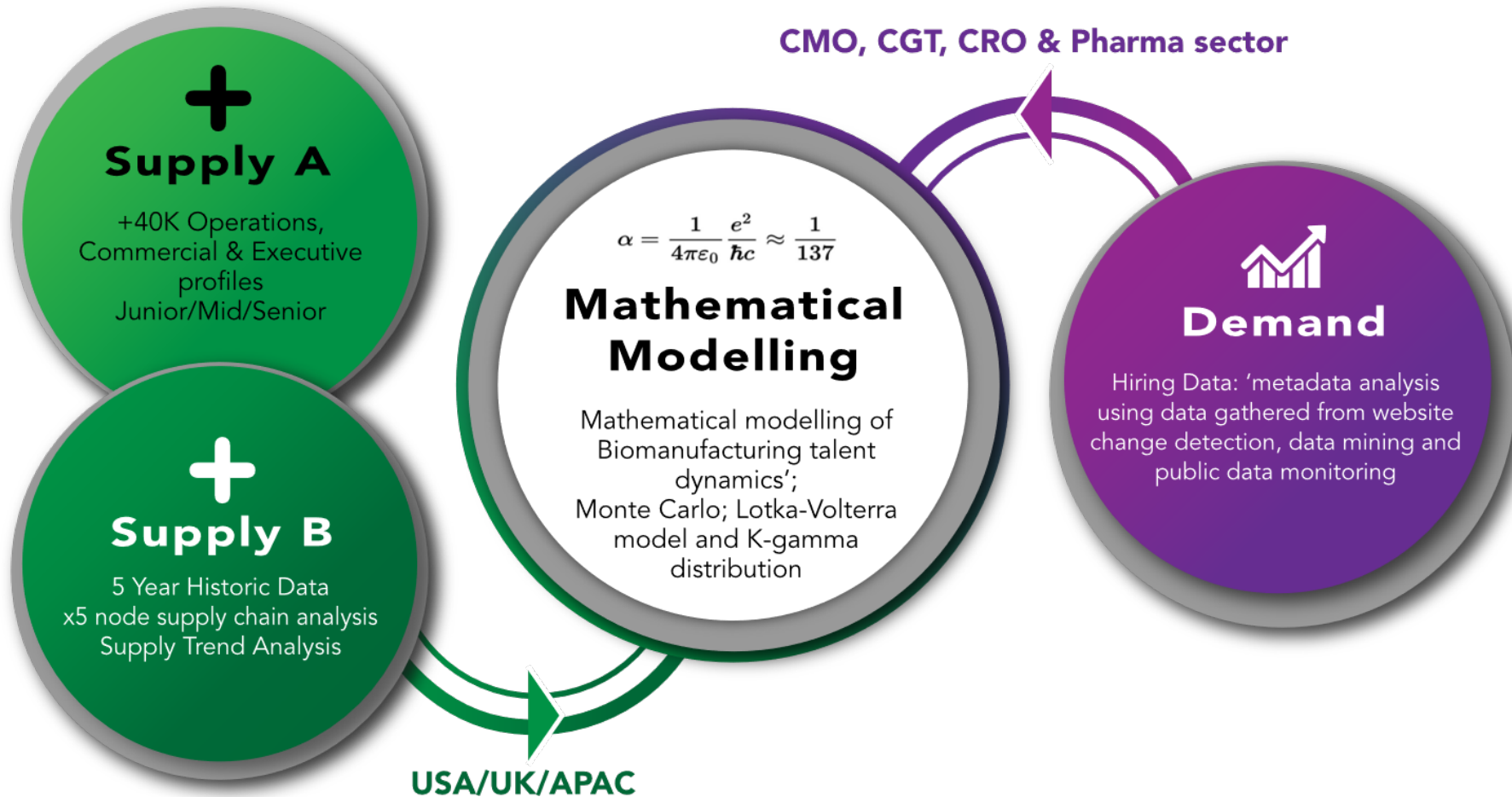


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Assessment of Hiring Frequency by Job Number (*Normalised*)



Insight Report

Aim

To measure, model and predict 'supply versus demand' of Biomanufacturing talent across the global **CMO**, **CGT** and **Pharma** sectors.

Research Partners

Evolution Search Partners; **University of Dundee**; **University College London (UCL)**

Purpose

To provide analytical strategic intelligence to industry leadership to allow future facing workforce planning, aligned to support capital expansion project decisions, recognising the value of human assets in the economic success of the firm.

The outcome data aims to allow specific planning, where required, on creative talent acquisition, specific to segments of biomanufacturing workflows

Short Term

There is evidence that the bioprocessing sector is experiencing operational and staffing problems directly related to an increase in activity and demand. All sectors are experiencing an increase in R&D, manufacturing & production, with a shifting of resources towards responding to the pandemic. Most bioprocessing-related industrial activities are considered 'essential' and continue largely unaffected in terms of operations and output, while many are planning to ramp-up R&D and manufacturing. While there are many near-term changes in onsite staff management, broader business plans are generally not affected in the near-term.

Specific to Biomanufacturing talent, CMO and Pharma companies can no longer wait to develop talent strategies. They already have job openings they cannot fill, and the gap is widening as megatrends disrupt and transform biomanufacturing. Adopting talent management programs and processes will help manufacturers attract and retain workers with the desired skill sets. This is a challenge that requires flexibility and insight. And the stakes are high. Manufacturers with an engaged and skilled workforce will be more likely to enjoy a successful and sustainable future.

Long Term

A microscopic view of several cells, likely yeast or similar microorganisms, with prominent blue-stained nuclei. The cells are arranged in a cluster, with some showing budding or division. The background is dark and slightly blurred, emphasizing the cells.

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CDMO Market Dynamics Data

Industry Sub-Sector

10 | By Job Number – MTD / YTD (Normalised)

12 | Average Total Job Number (MTD, QTD, YTD, 2-YTD)

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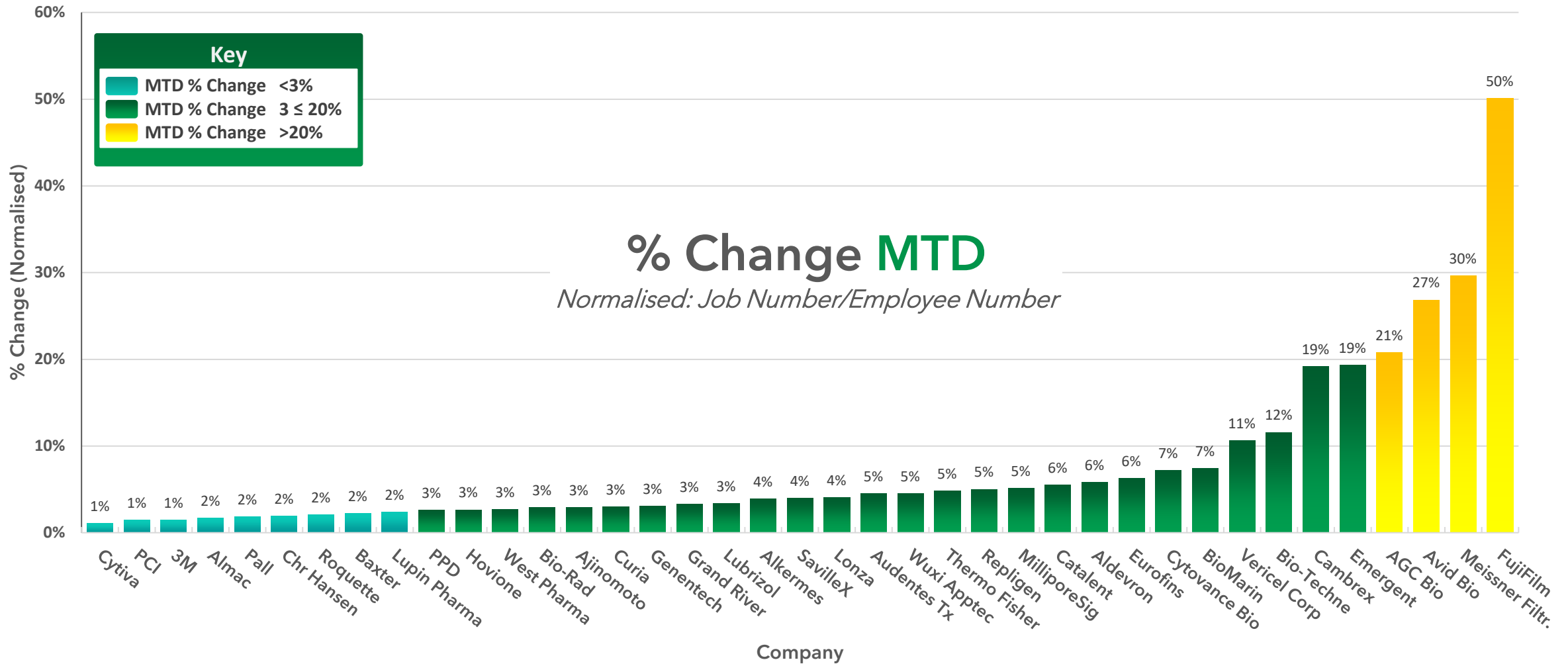


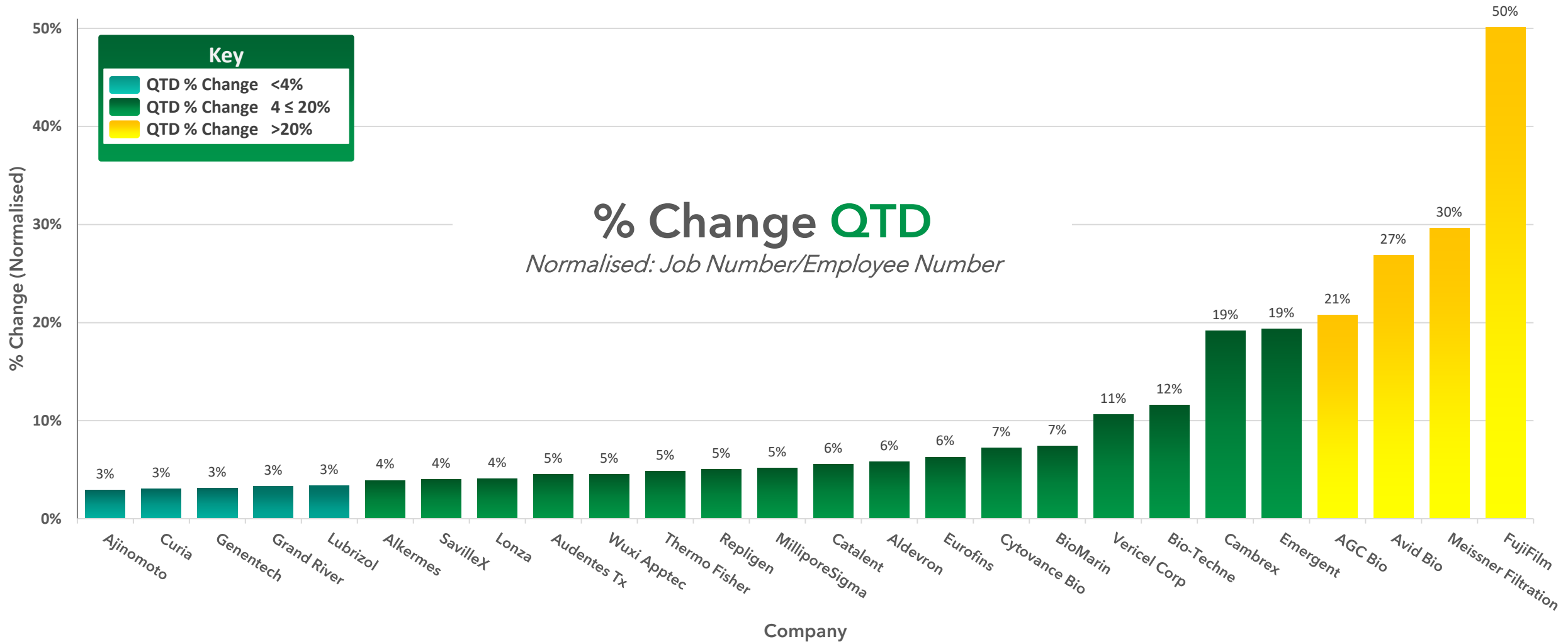
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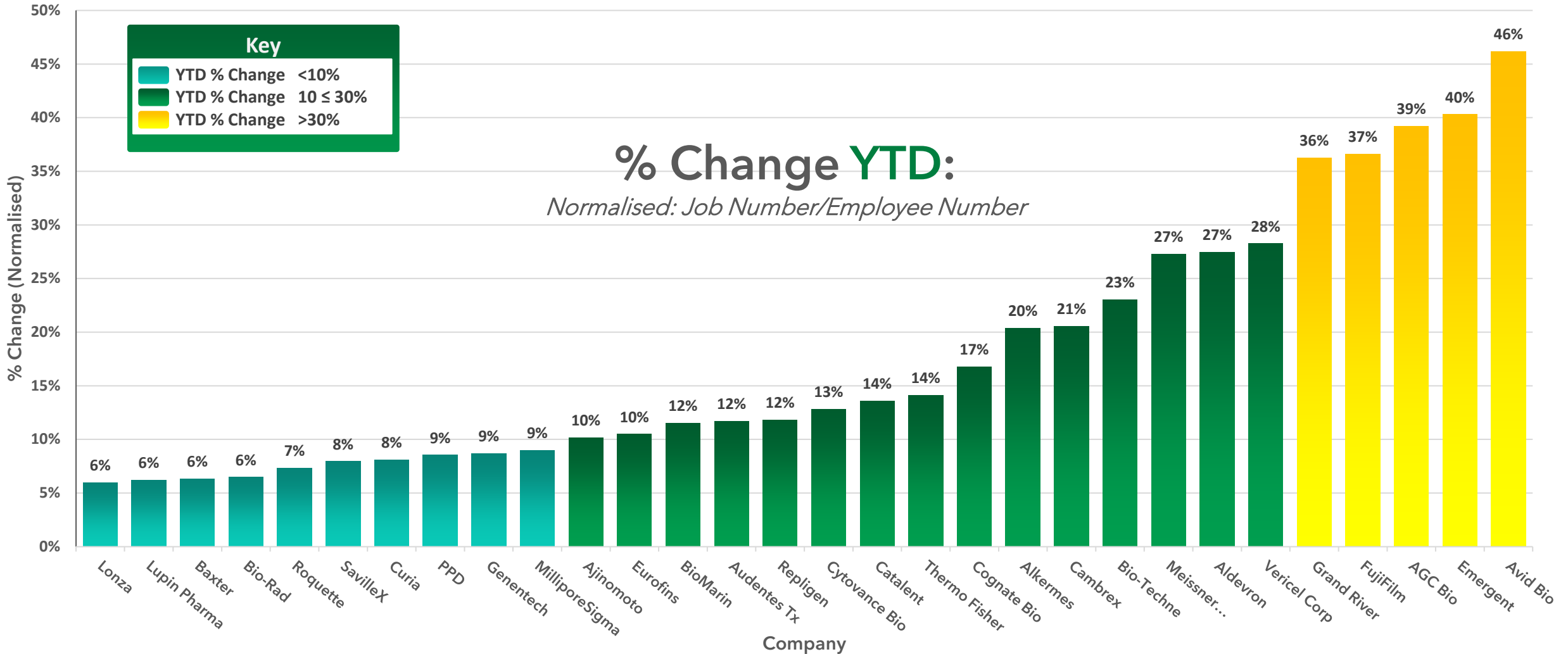
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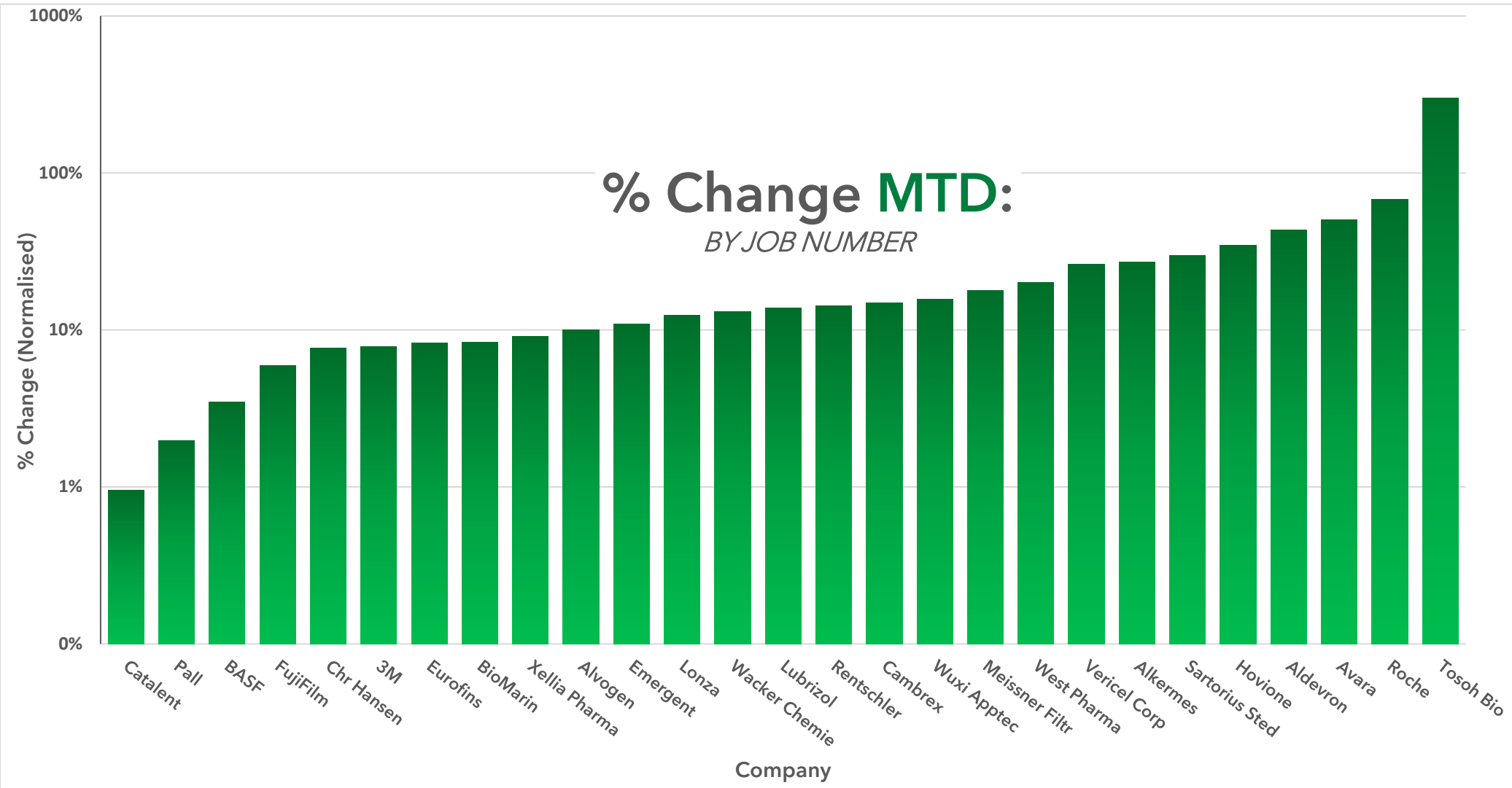
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Assessment of Hiring Frequency by Job Number (*Normalised*)





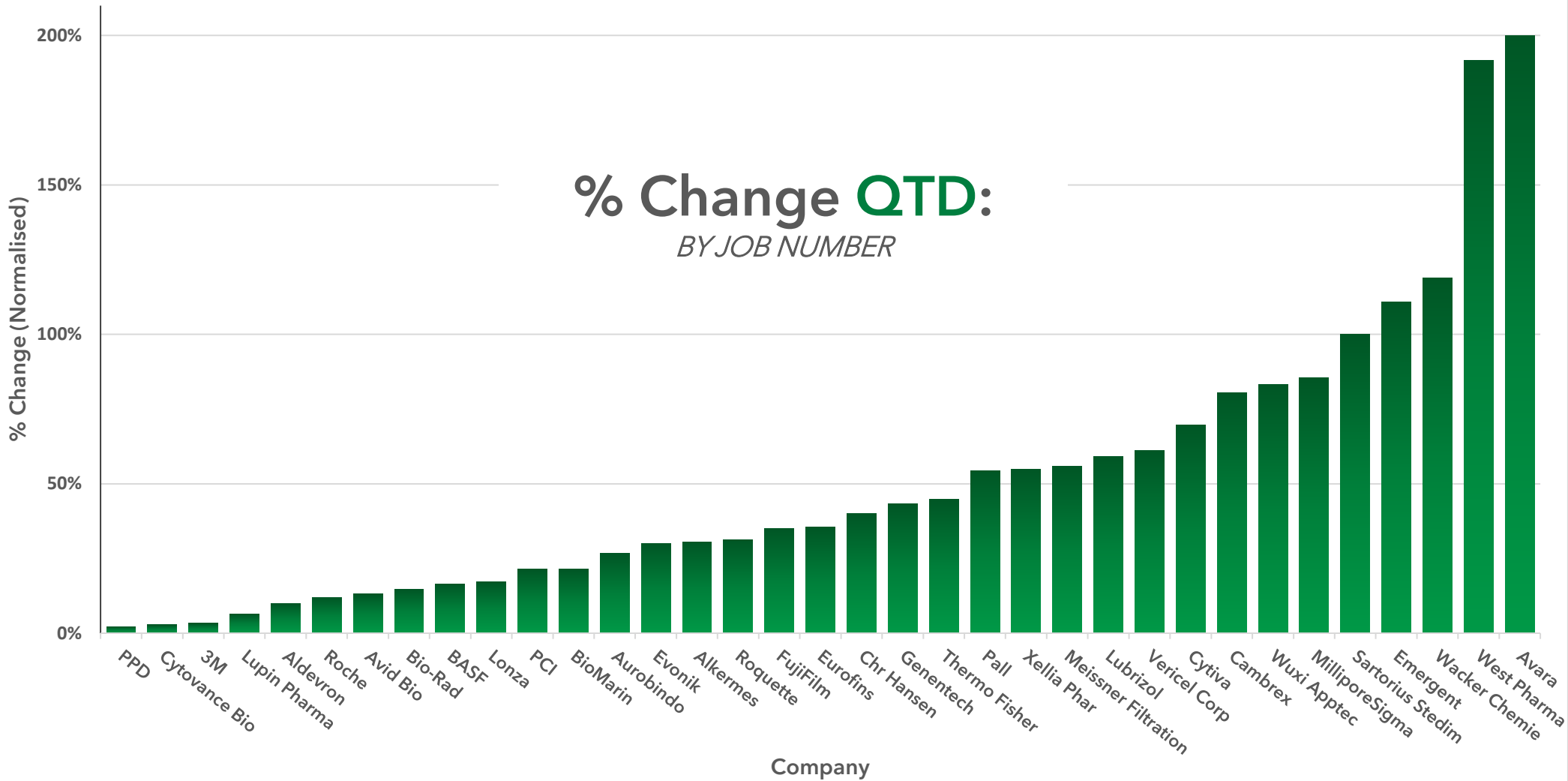




Avara
Roche
Tosoh Bio



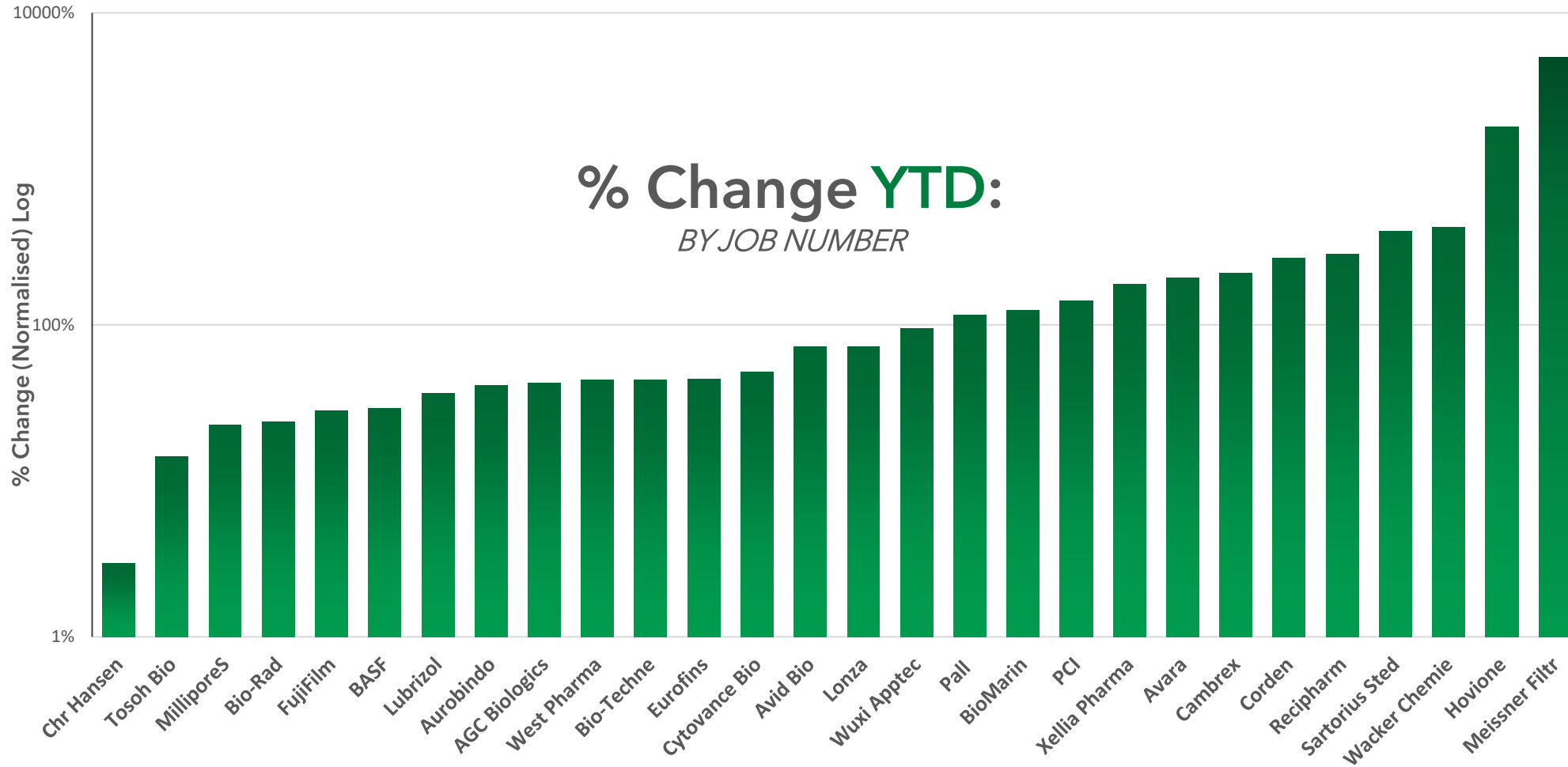
Syngene Intl.
Siegfried
Grand River



Avara
West Pharma
Wacker Chemie



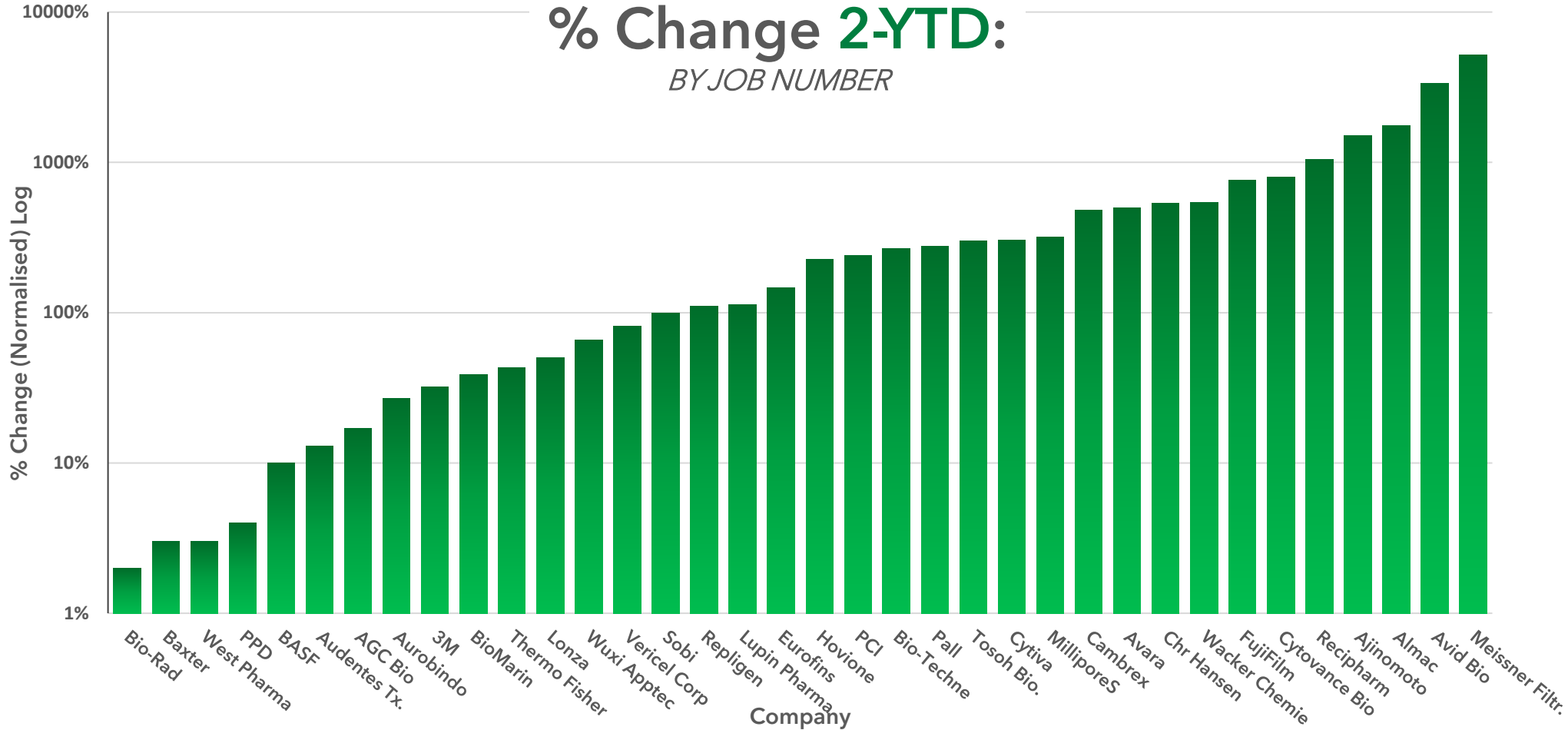
Polypeptide group
Grand River
Syngene Intl.



Wacker
Meissner Filtration
Hovione



Cognate Bio
Unither Pharma
Vetter Health



Meissner Filtration
Avid Bio
Almac



Syngene Intl.
Unither Pharma
Vetter Health

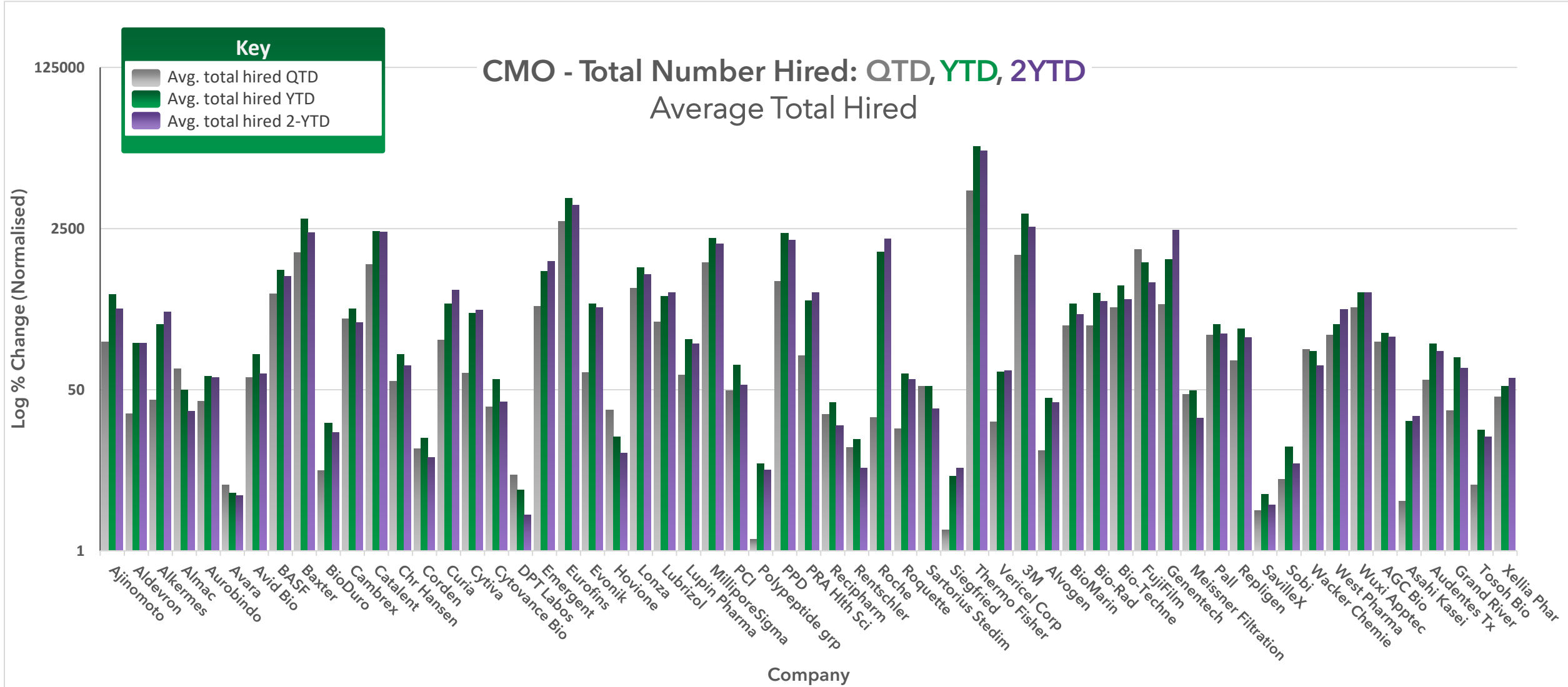


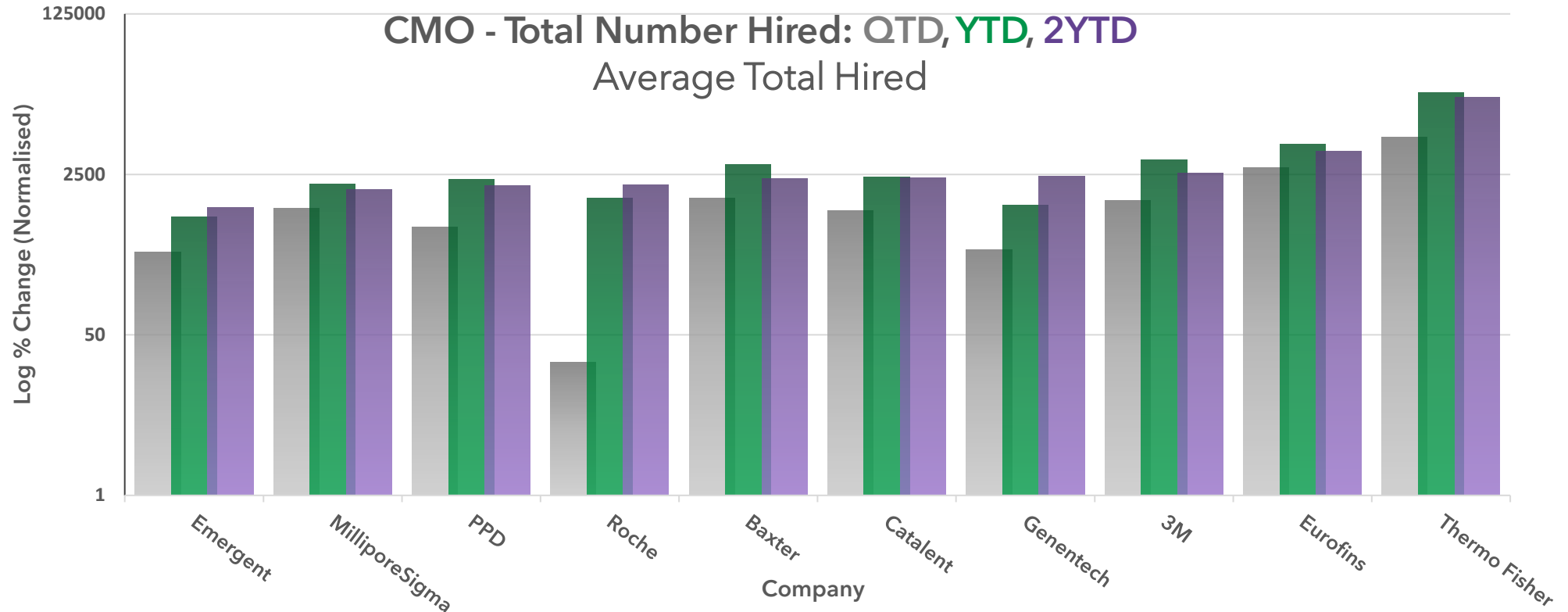
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Assessment of Hiring Frequency by Job Number *(Average)*





Key

- Avg. total hired QTD
- Avg. total hired YTD
- Avg. total hired 2-YTD

Thermo Fisher Scientific, Eurofins and 3M

Largest increase across QTD, YTD, 2YTD.

The background features several glass vessels, resembling petri dishes or beakers, containing blue, textured spheres. The vessels are arranged in a way that suggests a process of evolution or growth, with some vessels containing larger spheres and others containing smaller ones. The lighting is soft and focused on the central vessels, creating a sense of depth and scientific inquiry.

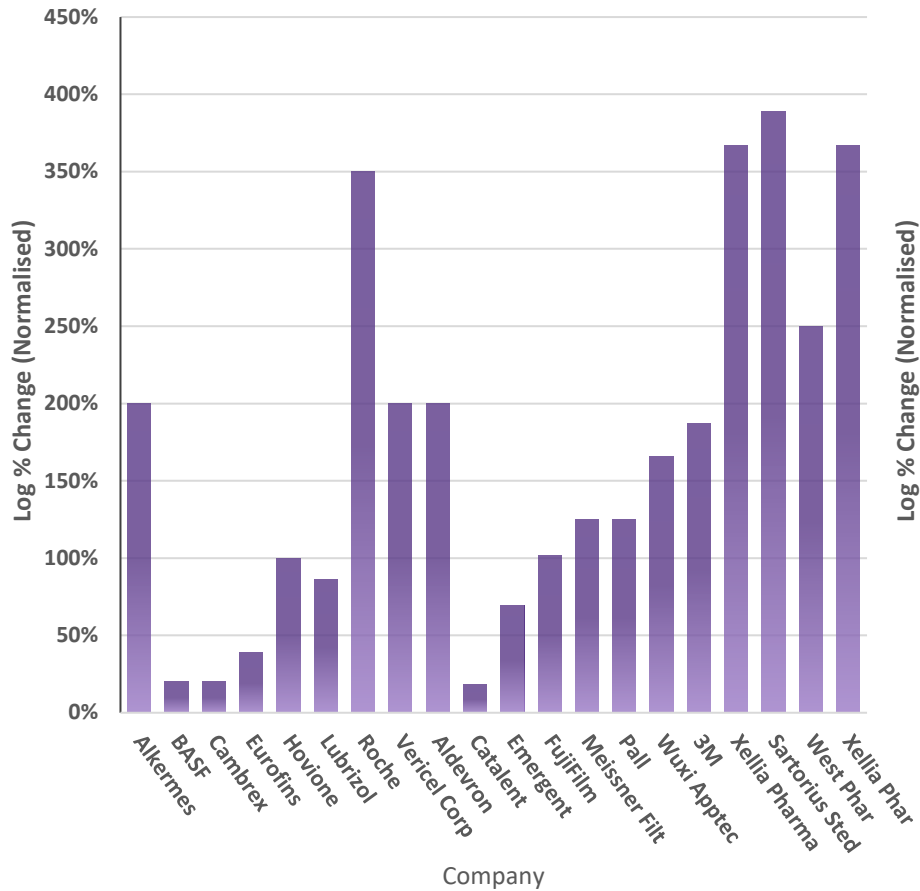
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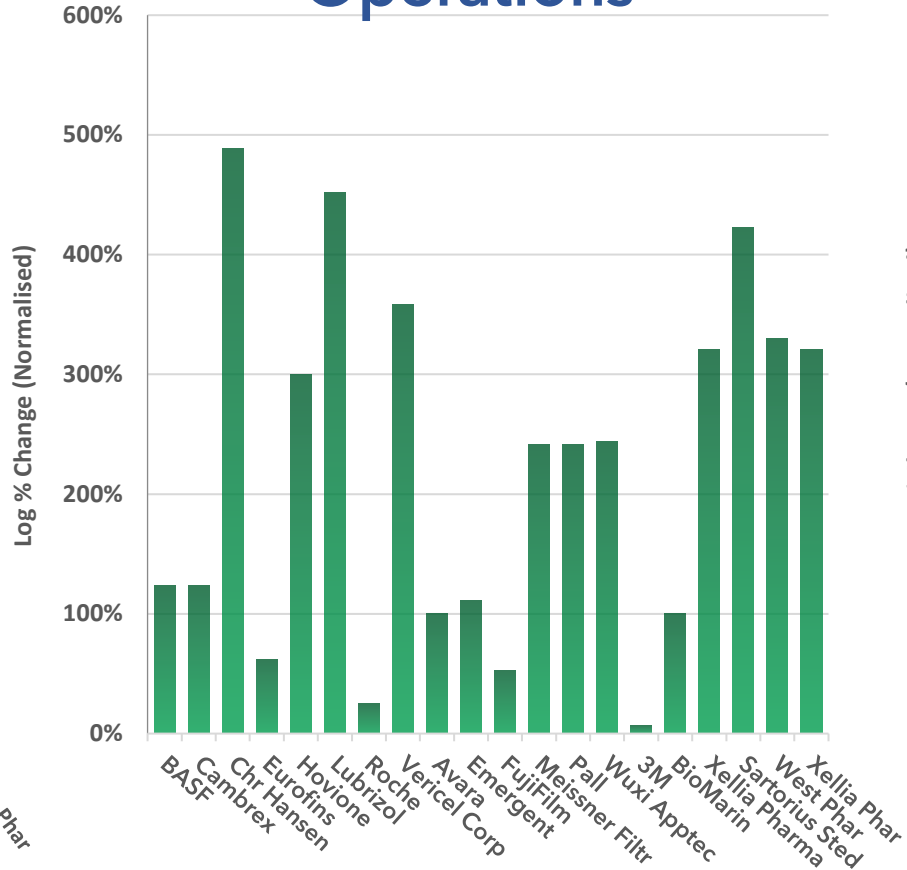
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Assessment of Hiring Frequency by *Job Type*

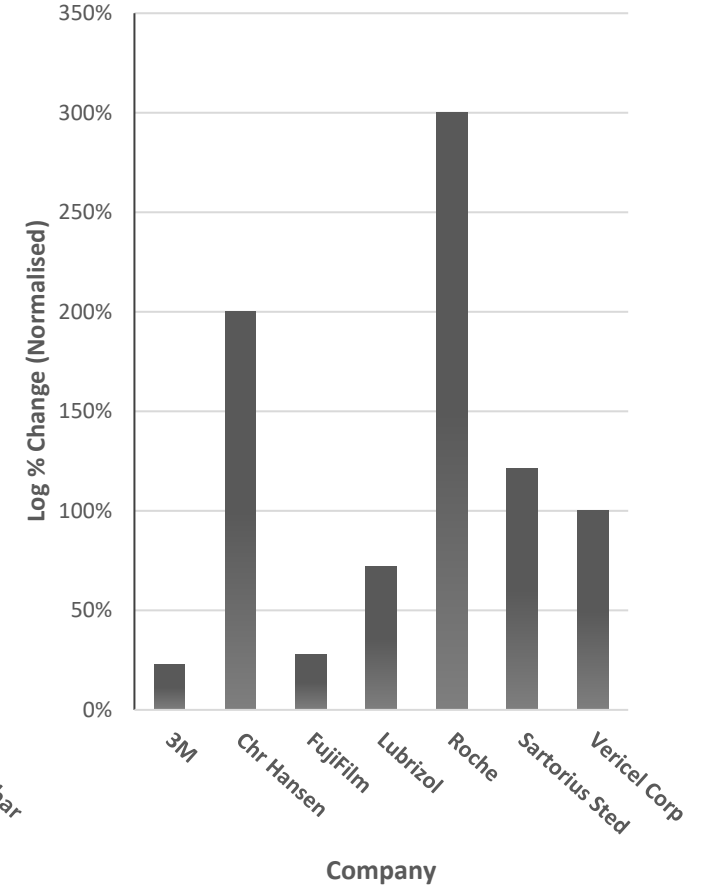
R&D



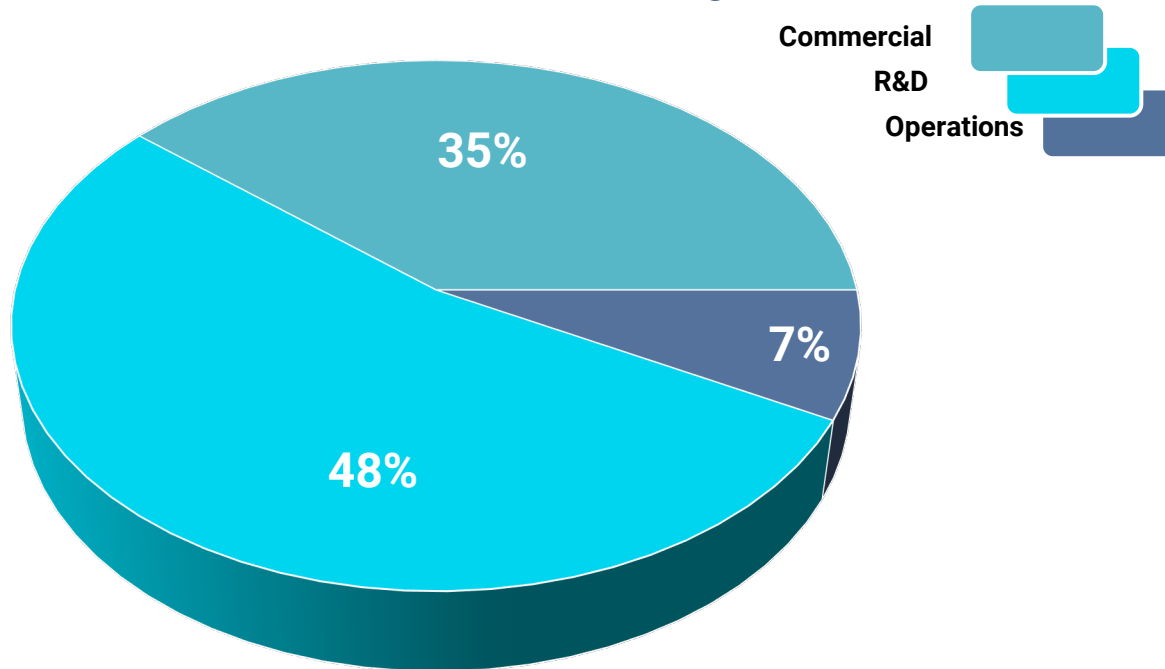
Operations



Commercial



Breakdown of Roles Postings



YTD (Increasing)

Commercial:

Sartorius Sted

Operations:

Cambrex
BASF

R&D:-

Wuxi Apptec

MTD (Increasing)

Commercial:

Roche
Chr Hansen

Operations:

Chr Hansen
Lubrizol

R&D:-

Sartorius Sted

The background features a dark, gradient background with several glass vessels containing blue, textured spheres. The vessels are interconnected, resembling a molecular or biological structure. The spheres have a matte, slightly grainy texture and are illuminated from the side, creating highlights and shadows. The overall aesthetic is clean, modern, and scientific.

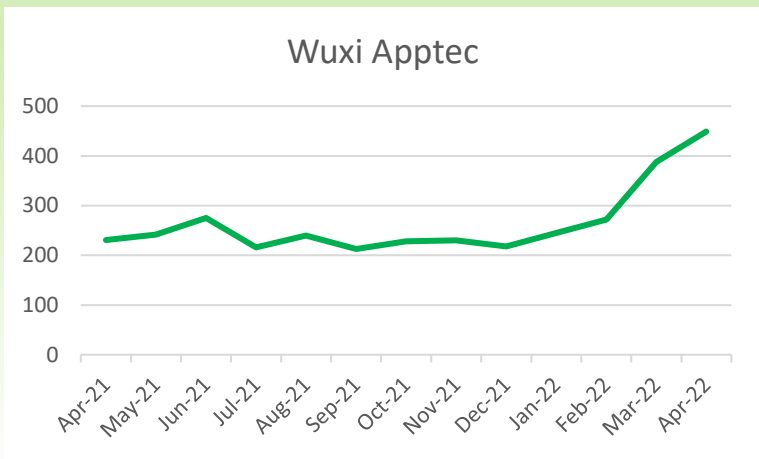
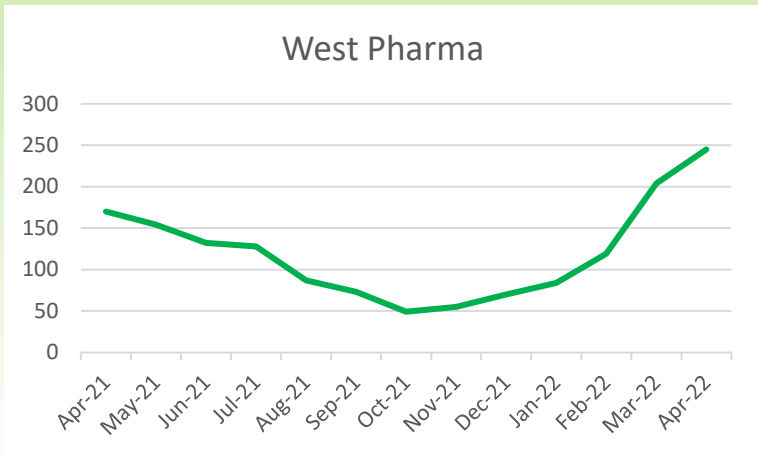
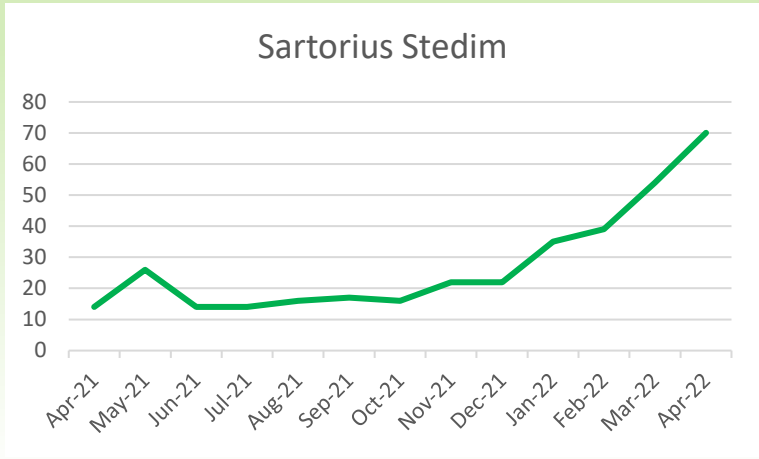
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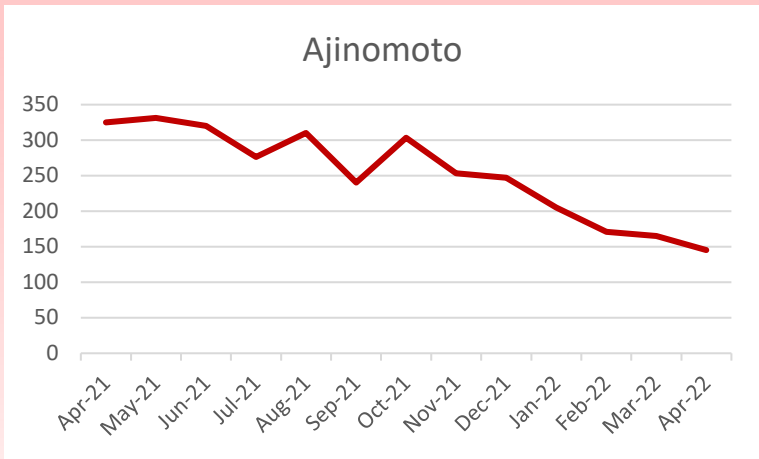
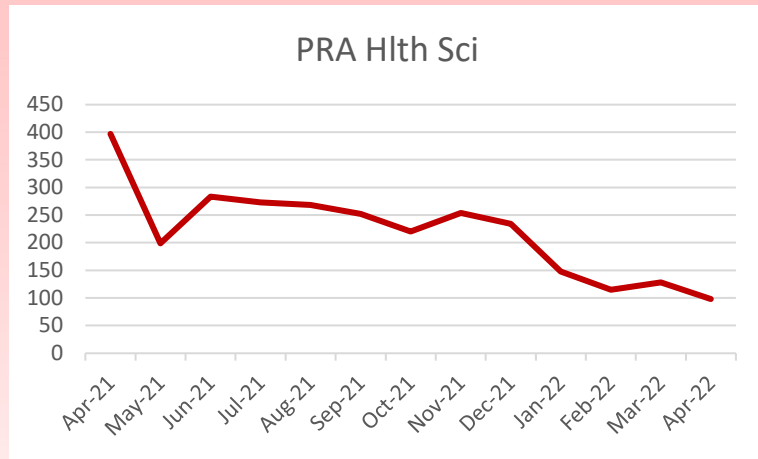
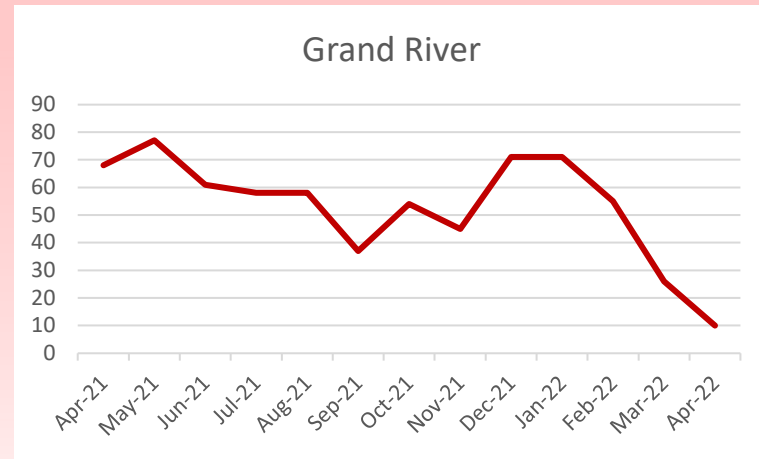
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Data Summary – Monthly Hiring Industry Insight

INCREASING



DECREASING



A microscopic view of several cells, likely cancer cells, with prominent blue nuclei. The cells are shown in various stages of division or interaction, with some appearing to be fusing or budding. The background is dark and out of focus, highlighting the cells in the foreground.

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Market Drivers



AGC Biologics investing millions to add capabilities at Longmont plant

AGC Biologics announced expansion plans for the company's Heidelberg facility to increase manufacturing capacities for plasmid-DNA (pDNA) and messenger RNA (mRNA) projects.

AGC Biologics has broken ground at its Copenhagen, Denmark, site for a new multipurpose facility that will expand the company's capacity and space to accommodate new and existing projects



FUJIFILM Diosynth Biotechnologies Breaks Ground on Expansion of its BioProcess Innovation Center

FUJIFILM Diosynth breaks ground for major expansion of its large scale biologics production facility in Denmark

FUJIFILM to create 350 new jobs at Billingham plant - The new facilities are expected to be operational by late 2023, the firm said.



Avid Bioservices Announces Official Opening of Second Downstream Processing Suite Within Myford North Facility

Avid Bioservices Announces Expansion into Viral Vector Development and Manufacturing Services for Cell and Gene Therapy

Avid Bioservices, Inc. is expanding its CDMO service offering into the cell and gene therapy market: constructing a purpose-built 53,000 sq. ft. viral vector development and CGMP manufacturing facility in Costa Mesa, CA.

A microscopic view of several cells with blue nuclei, set against a dark background with a light gradient. The cells are connected by thin, clear filaments, suggesting a network or evolutionary path. The text is overlaid on a semi-transparent dark horizontal band.

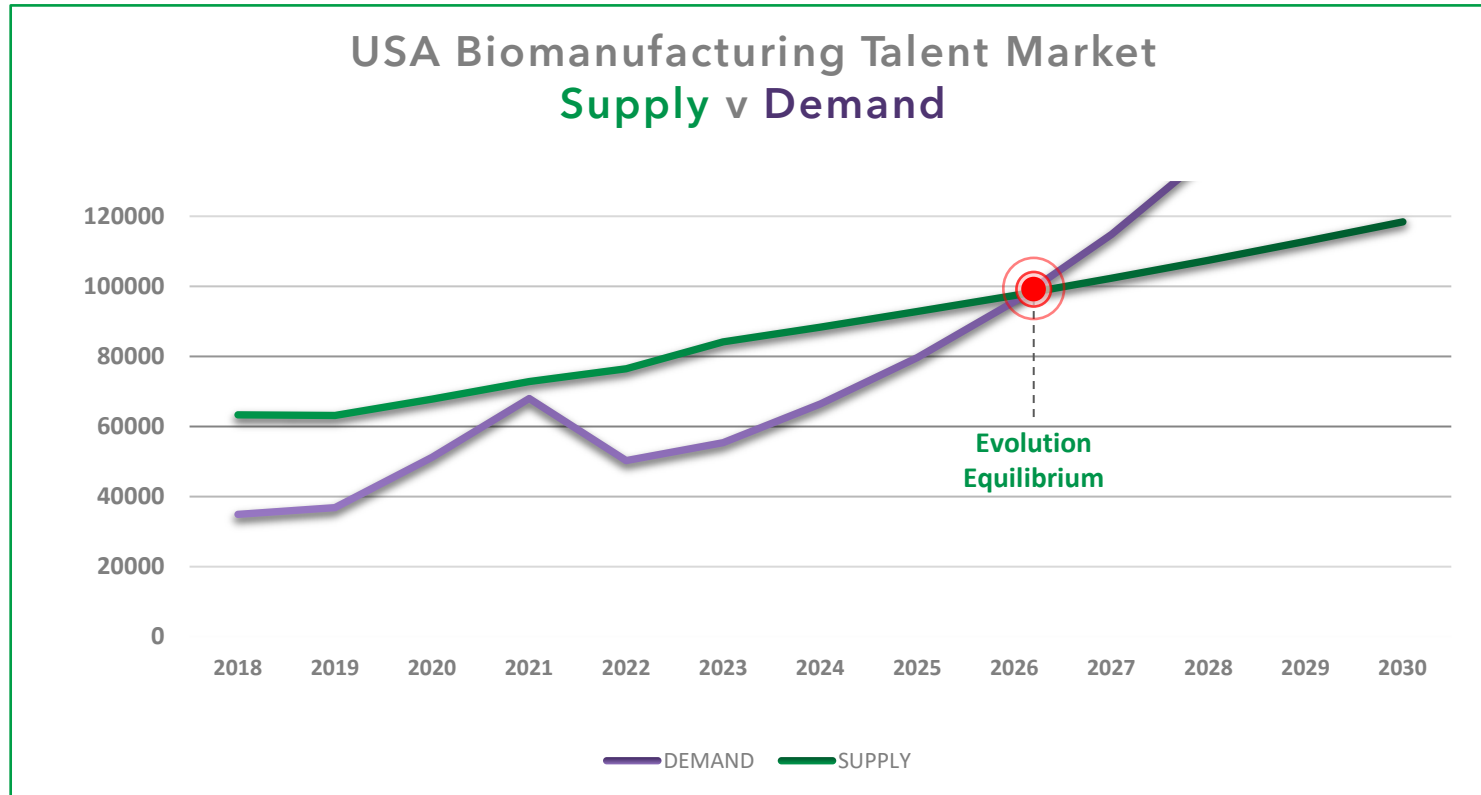
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Predictive Talent Market Dynamics

Predictive Talent Market Dynamics



Key

- Supply
- Demand

Evolution Equilibrium: using predictive analytics, the point where Supply will exceed demand: Q1 2026

