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INSIGHT REPORT

Predictive Talent Dynamics – September 2022

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A microscopic view of several cells, each with a prominent blue nucleus, set against a dark background with a soft light gradient. The cells are connected by thin, clear filaments, suggesting a network or a process of cell division or communication. The overall aesthetic is clean and scientific.

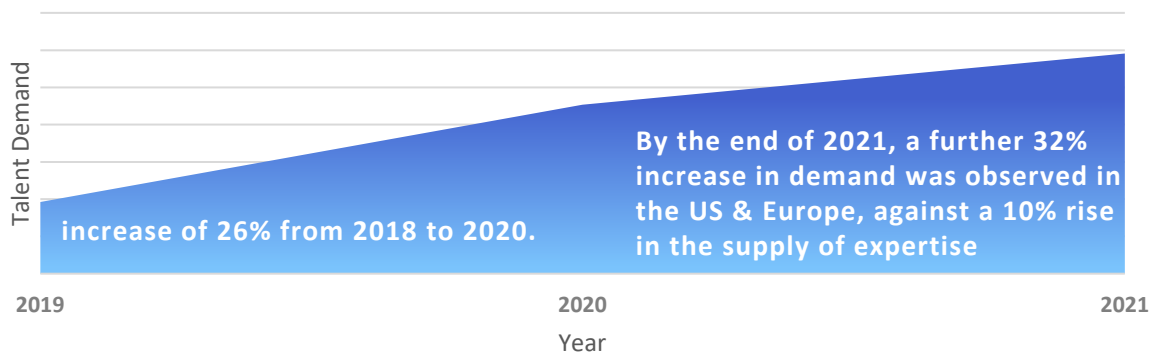
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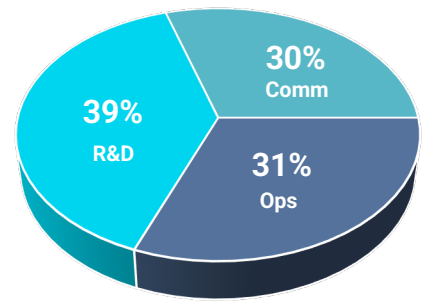
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Executive Summary

Biomanufacturing Hiring:- Yearly Average



**Role Postings:
By Role Type**



Top 3 Companies:

Largest Annual Talent Demand Increase
Normalised versus employee no.



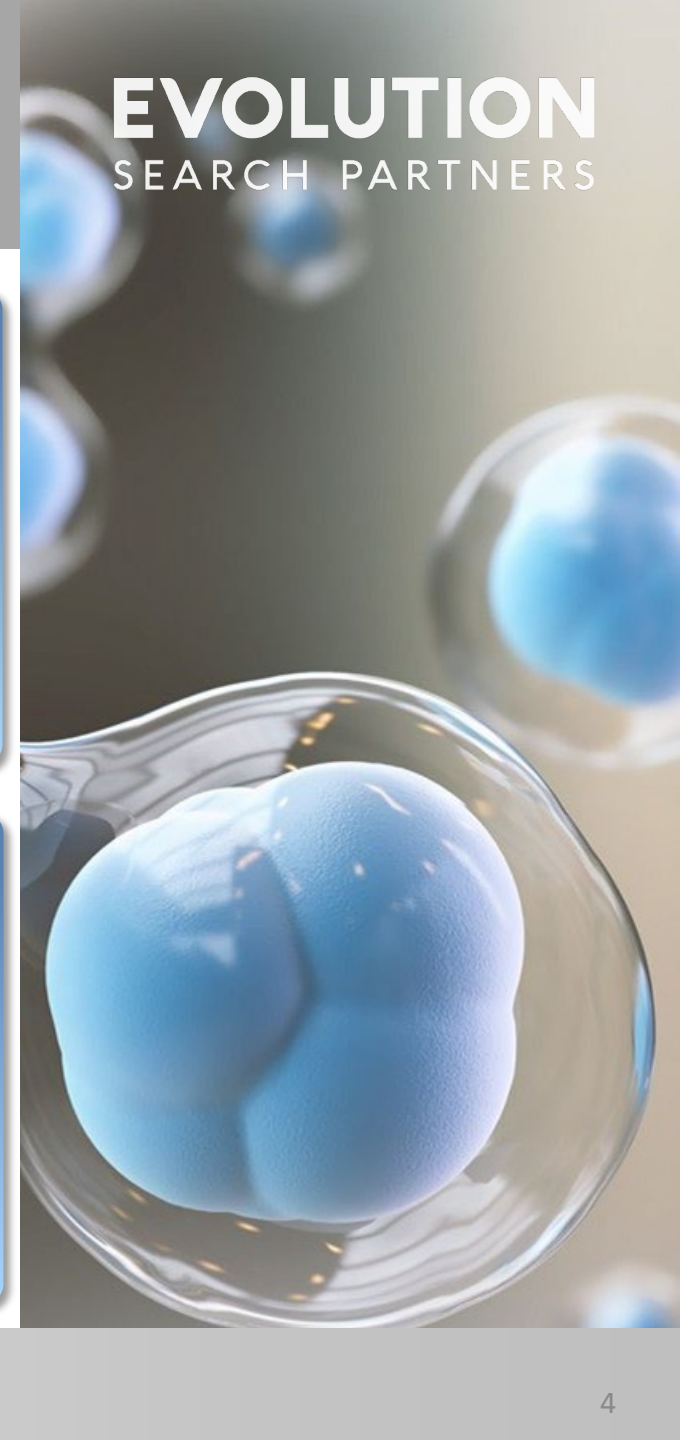
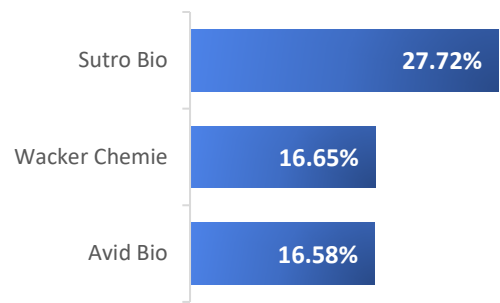
2022

Monthly Hiring Demand Change



Top 3 Companies:

Largest Monthly Talent Demand Increase
Normalised versus employee no.



A microscopic view of several cells, each with a prominent blue nucleus. The cells are connected by thin, clear cytoplasmic bridges. The background is a soft, out-of-focus gradient of light blue and white, suggesting a bright light source. The overall image has a clean, scientific aesthetic.

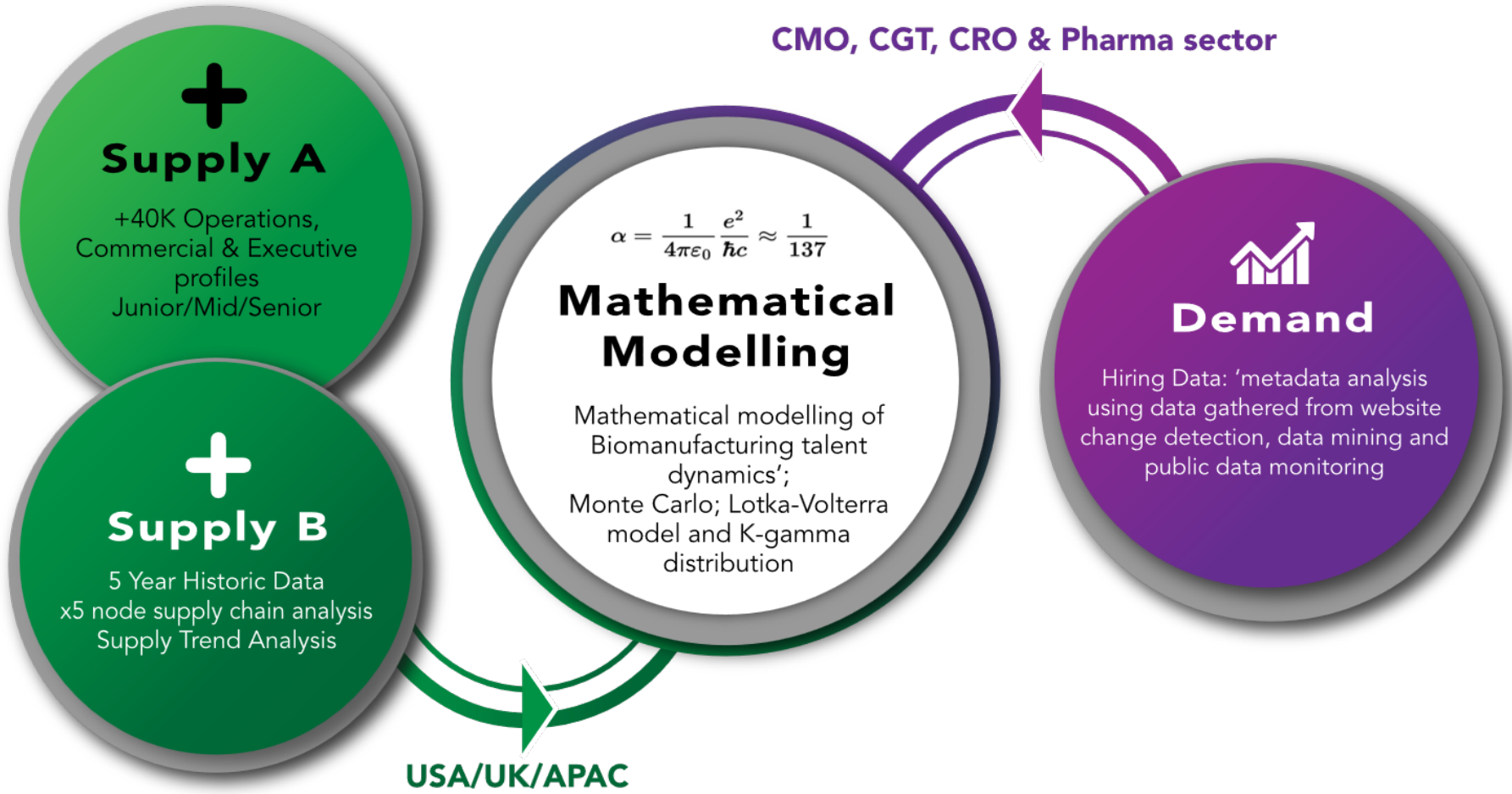
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Introduction and Methodology

Introduction & Methodology



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Introduction & Methodology

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 for 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, and production, with a shifting of resources towards pandemic response. 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, each with a prominent blue nucleus. The cells are connected by thin, clear membranes, suggesting a network or a process of cell division. The background is a soft, out-of-focus gradient of light blue and white.

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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)

14 | Total Job Number by Job Type

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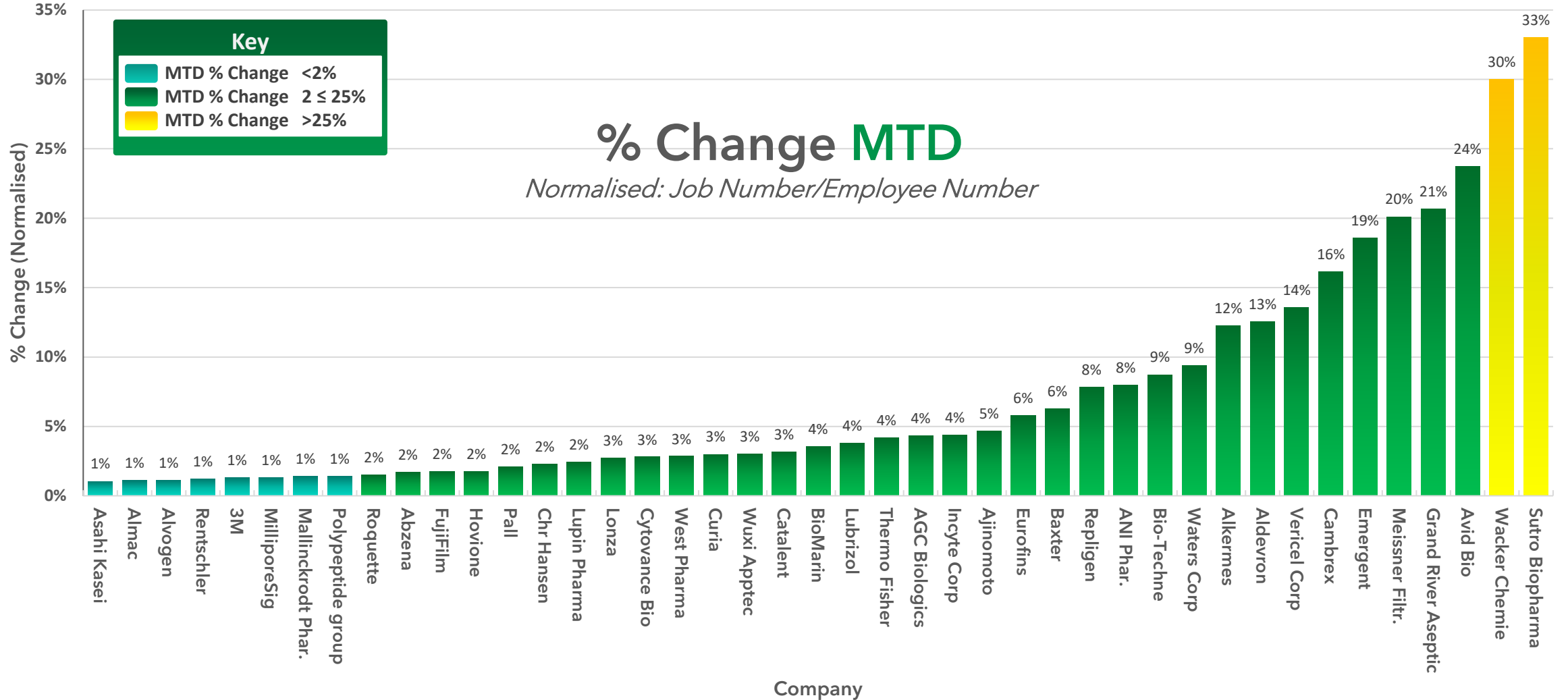


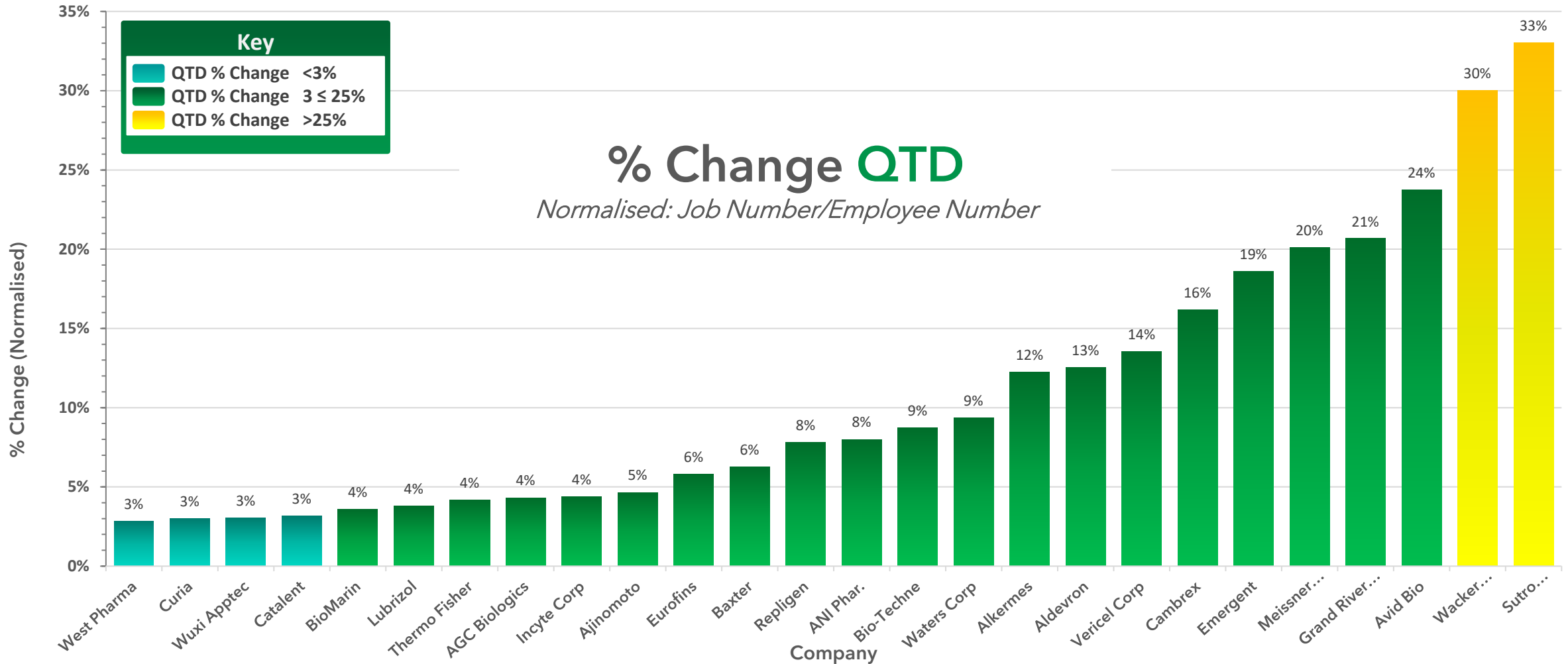
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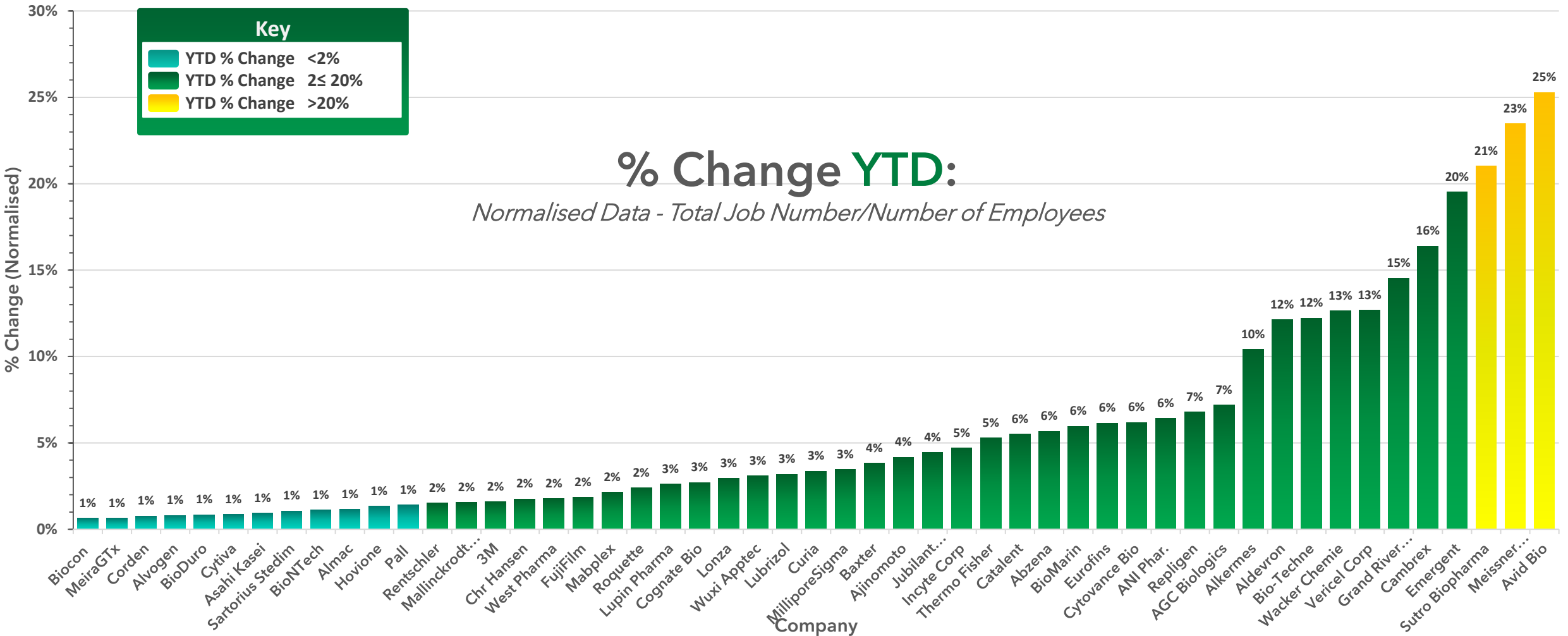
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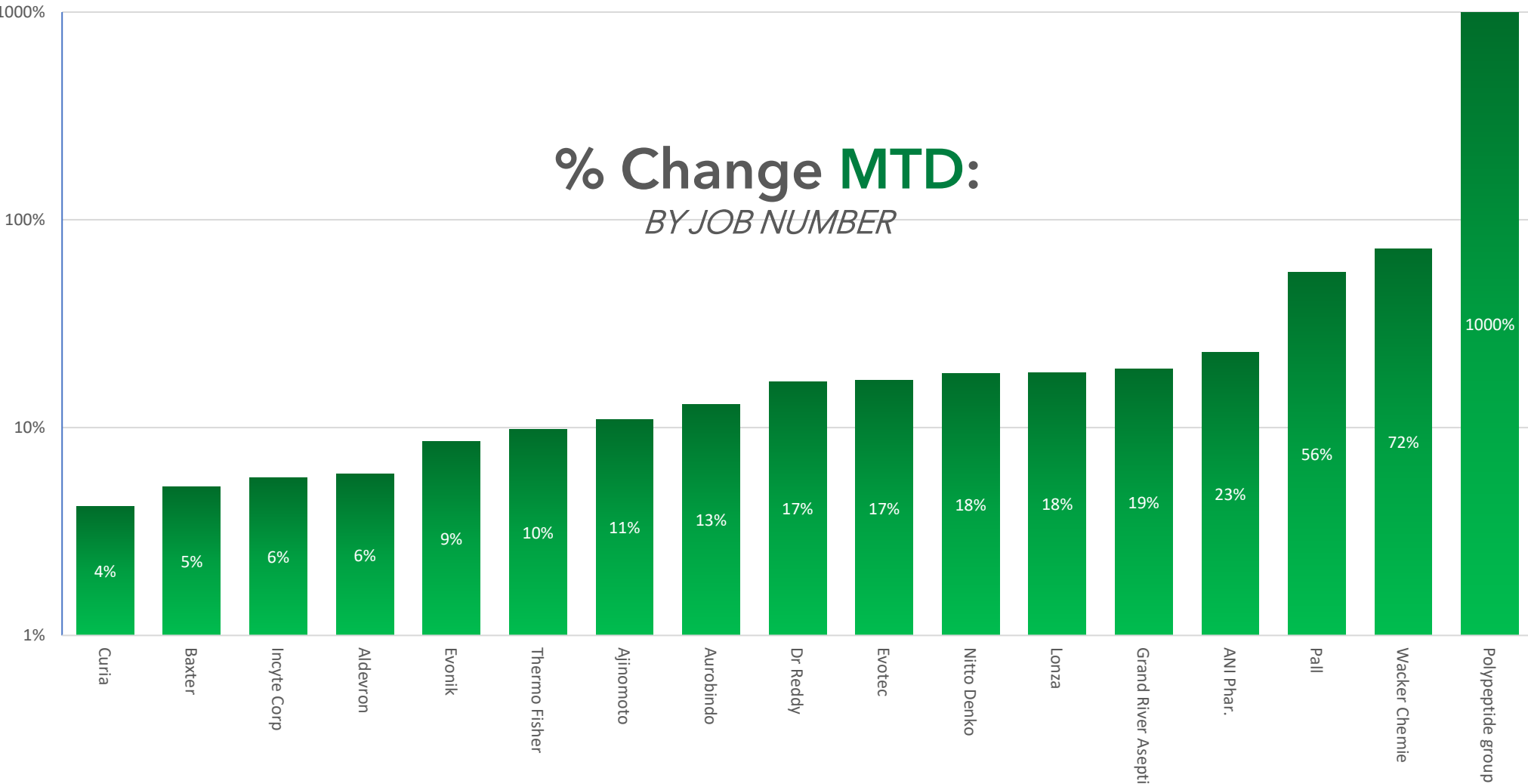
Assessment of Hiring Frequency by Job Number (Normalised)







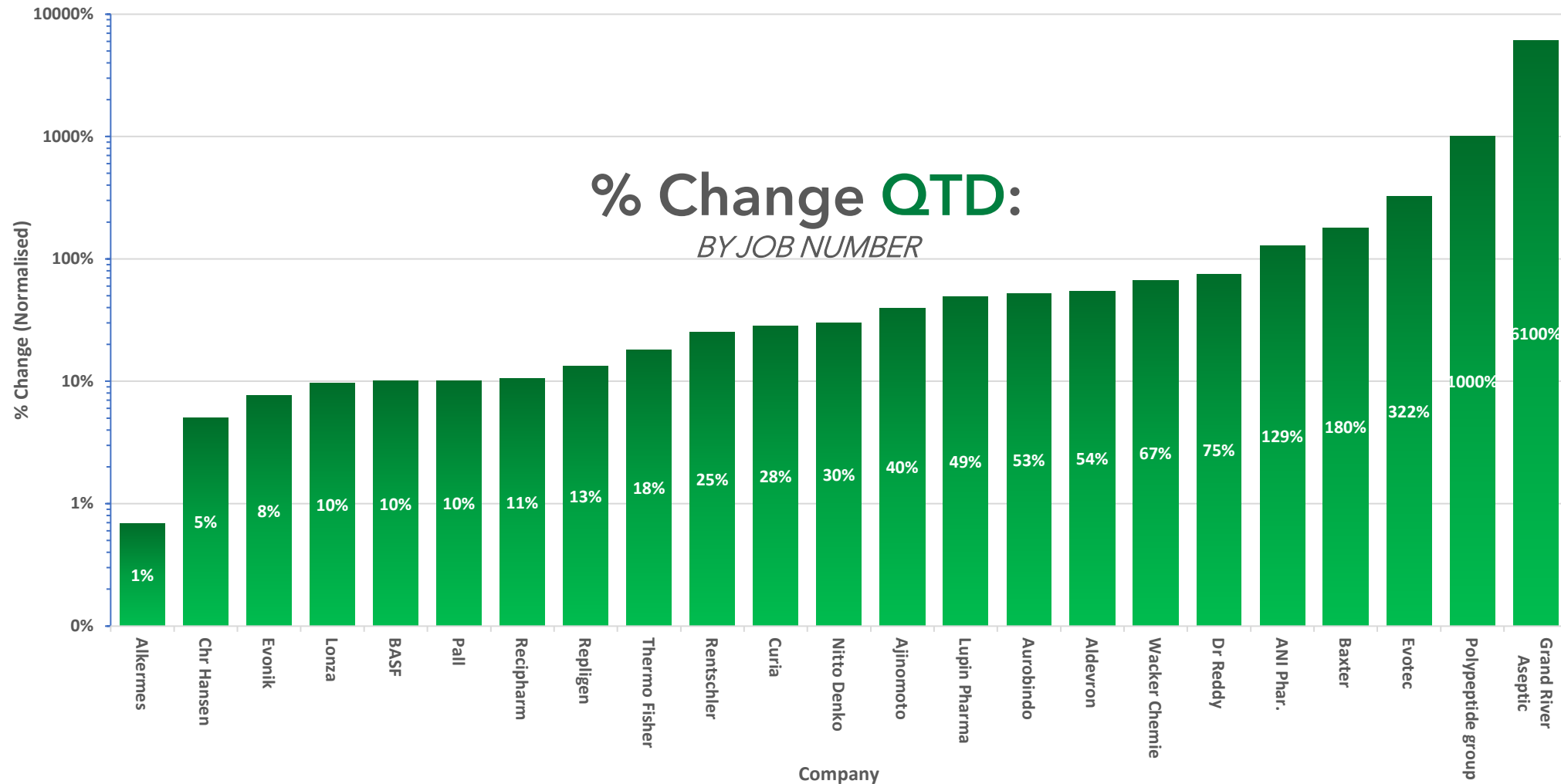
% Change MTD:
BY JOB NUMBER



Polypeptide group
Wacker Chemie
Pall



BioDuro
Mabplex
Novasep

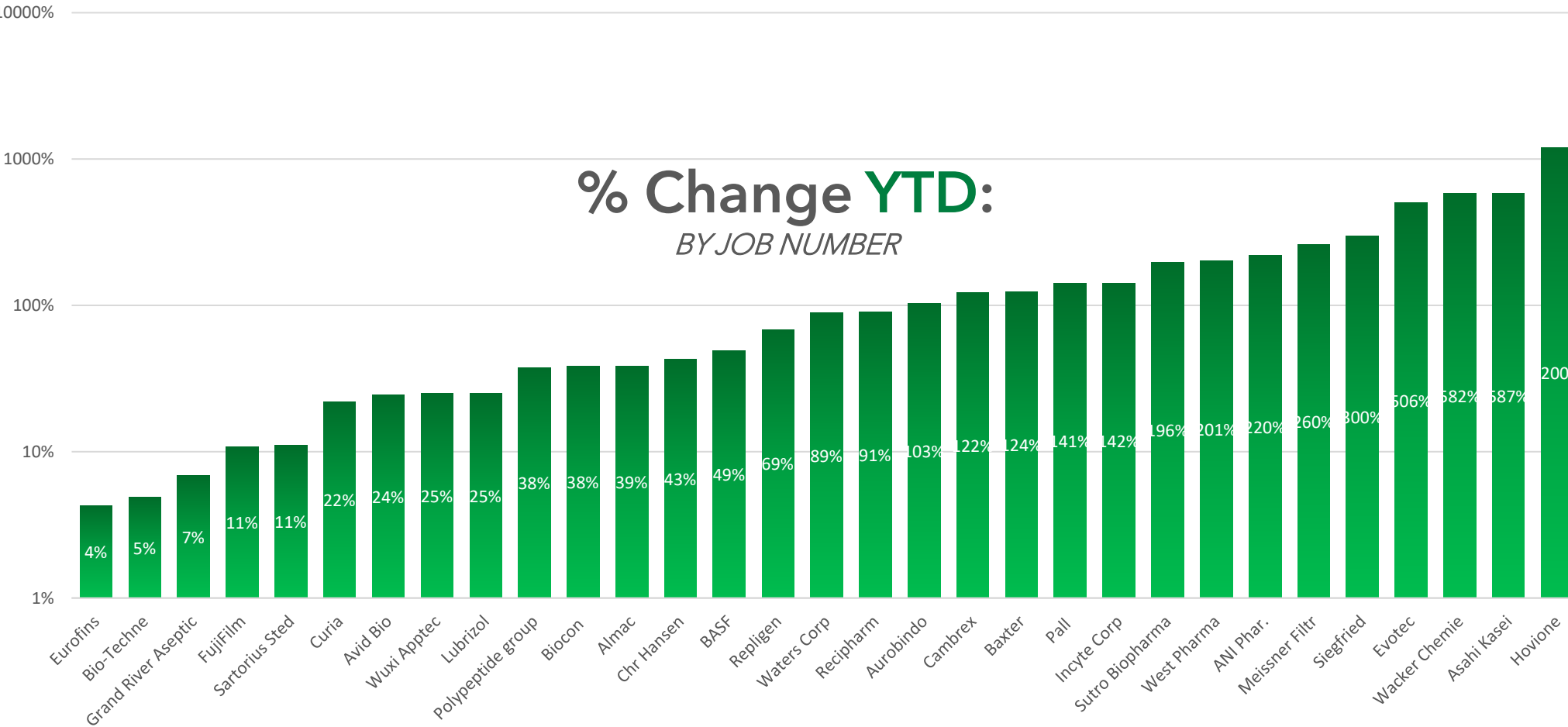


Evotec
Polypeptide group
Grand River Aseptic



BioDuro
Mabplex
Novasep

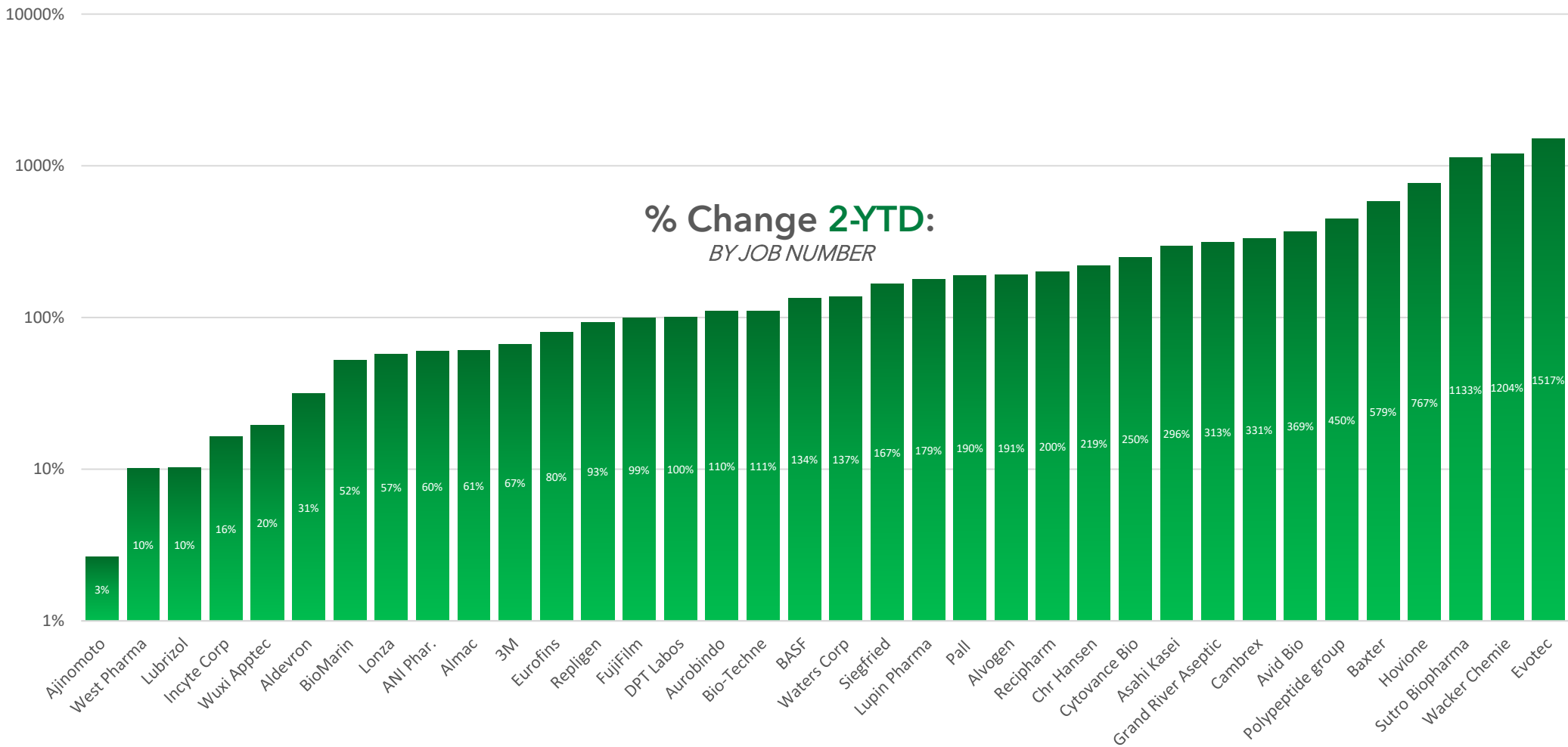
% Change YTD:
BY JOB NUMBER



Wacker Chemie
Asahi Kasei
Hovione



BioDuro
Novasep
Cognate Bio



Evotec
Wacker Chemie
Sutro Biopharma



Unither Pharma
Vetter Pharma
Mablex

A microscopic view of several cells, each with a prominent blue nucleus, set against a dark background with a soft light gradient. The cells are connected by thin, clear filaments, suggesting a network or a process of division. The overall aesthetic is clean and scientific.

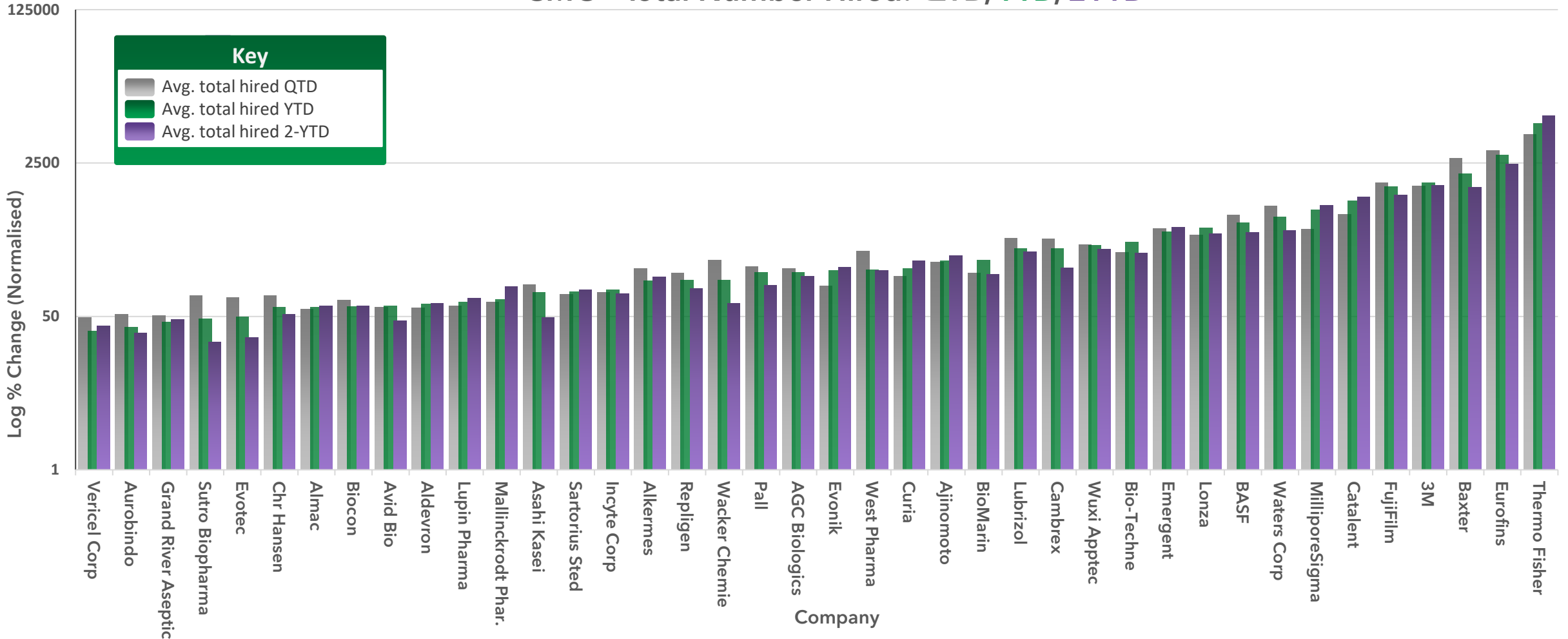
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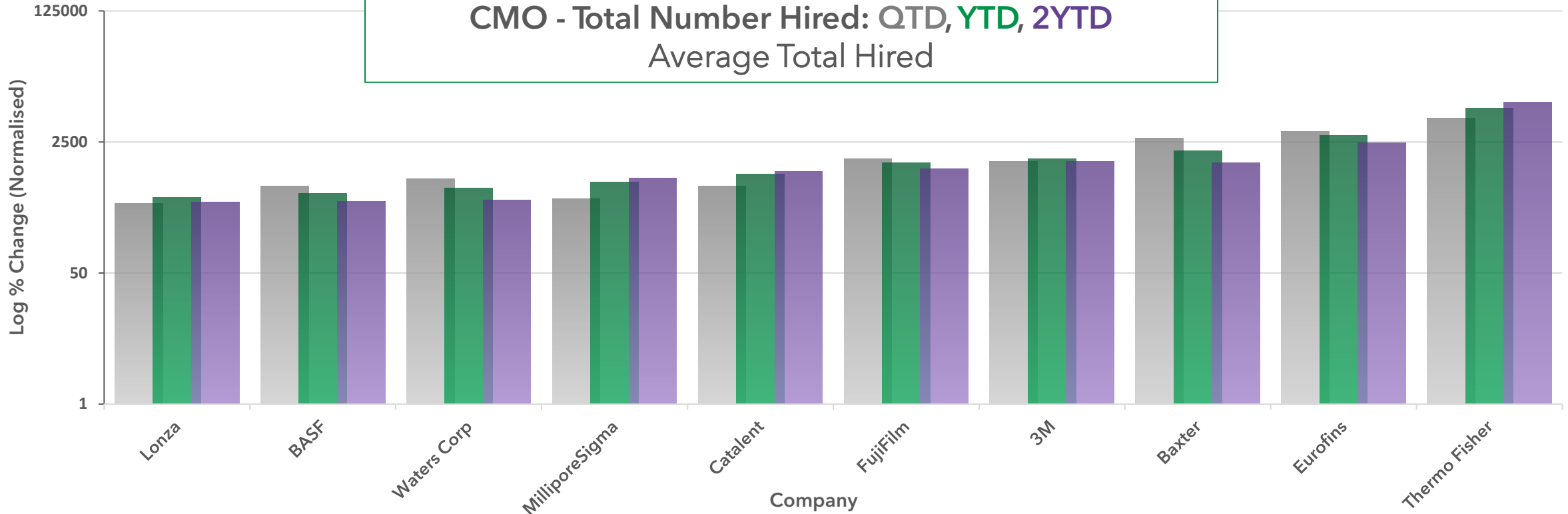
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Assessment of Hiring Frequency by Job Number (Average)

CMO - Total Number Hired: QTD, YTD, 2YTD



CMO - Total Number Hired: QTD, YTD, 2YTD
 Average Total Hired



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.

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 channels, suggesting a network or process of evolution. The text is overlaid on a semi-transparent dark horizontal band.

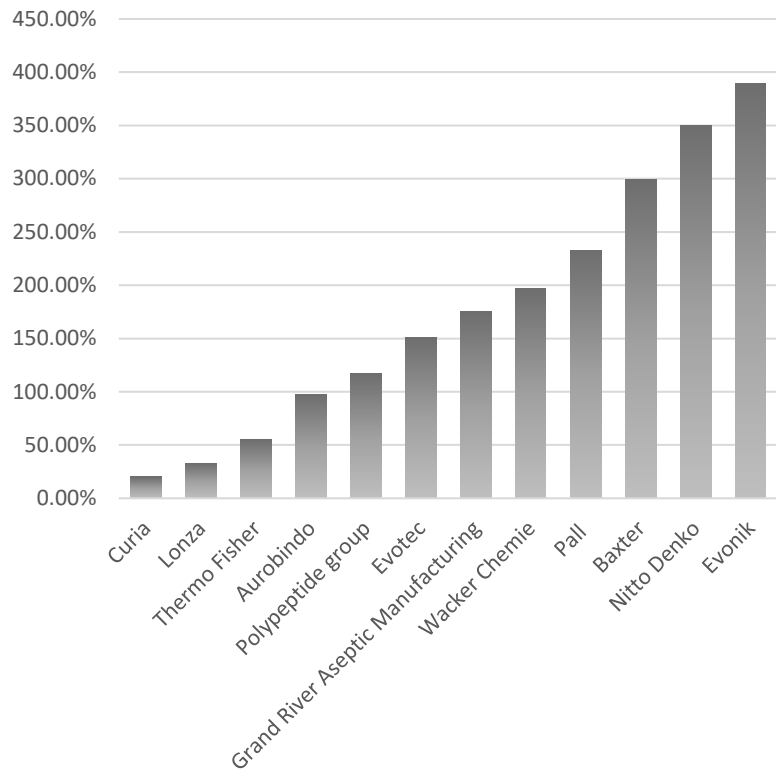
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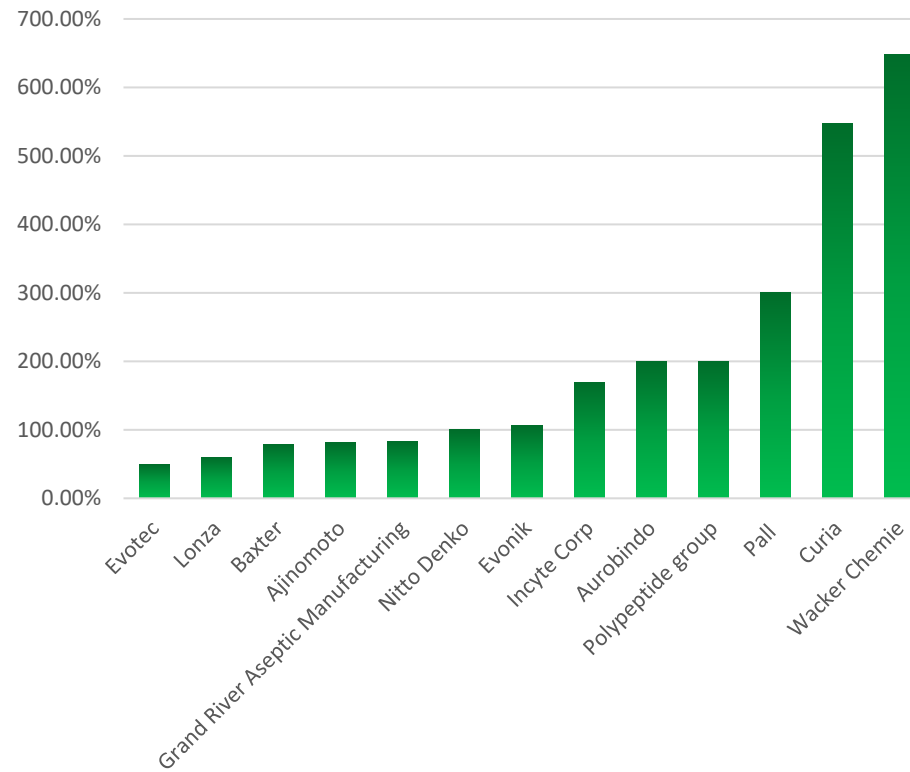
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Assessment of Hiring Frequency by Job Type

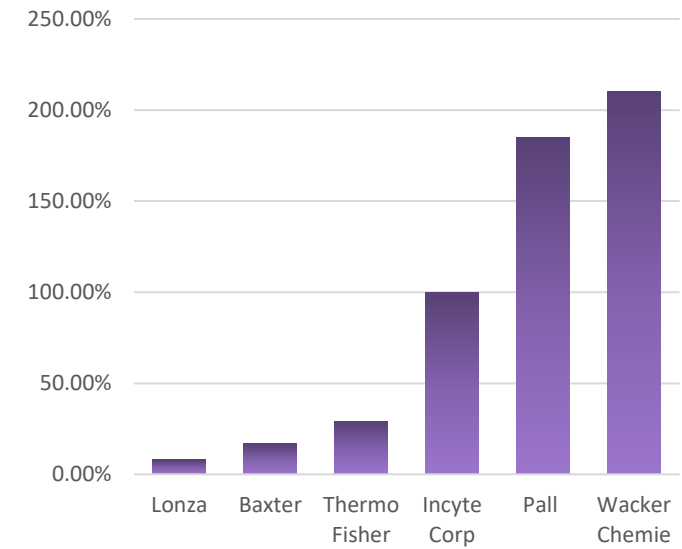
R&D



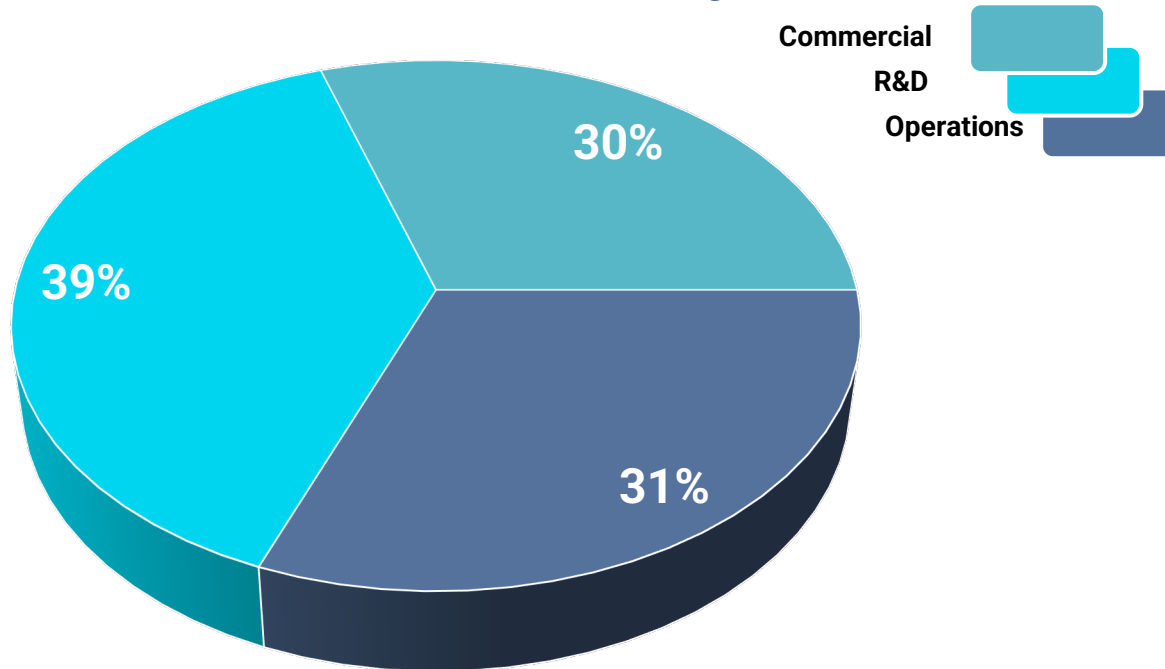
Operations



Commercial



Breakdown of Roles Postings



YTD (Increasing)

Commercial:

Wacker Chemie

Operations:

Baxter
Evotec

R&D:-

Baxter
Evotec

MTD (Increasing)

Commercial:

Wacker Chemie

Operations:

Wacker Chemie

R&D:-

Evonic

The background features a series of blue, textured spheres contained within clear glass vessels, resembling a molecular or biological structure. The spheres are arranged in a network, with some larger and more prominent than others. The lighting is soft, creating a sense of depth and highlighting the reflective surfaces of the glass and the texture of the spheres.

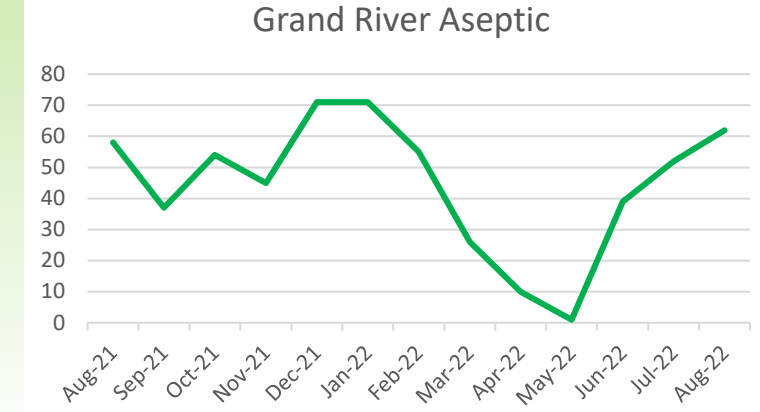
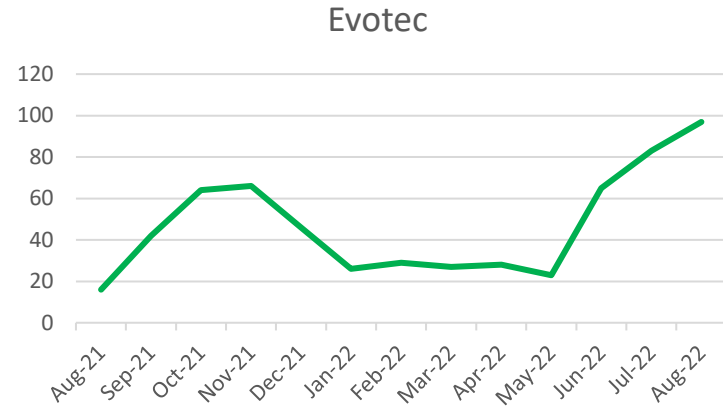
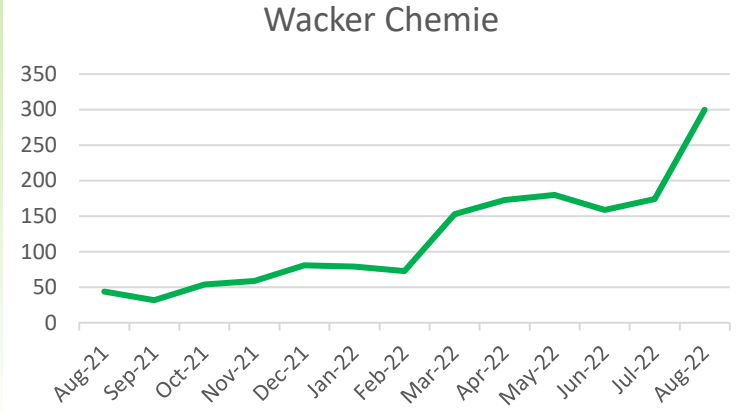
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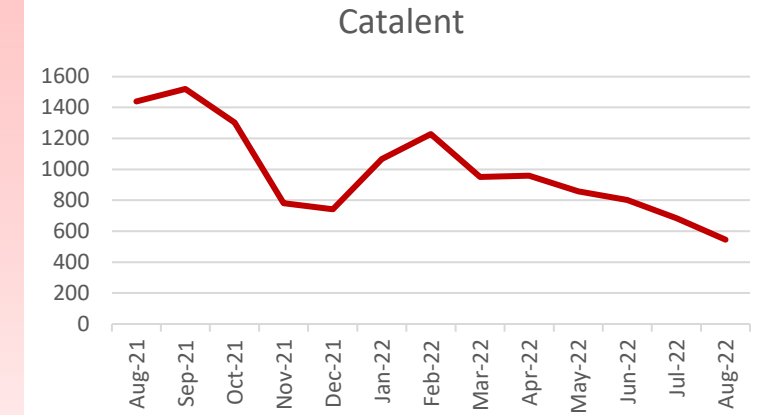
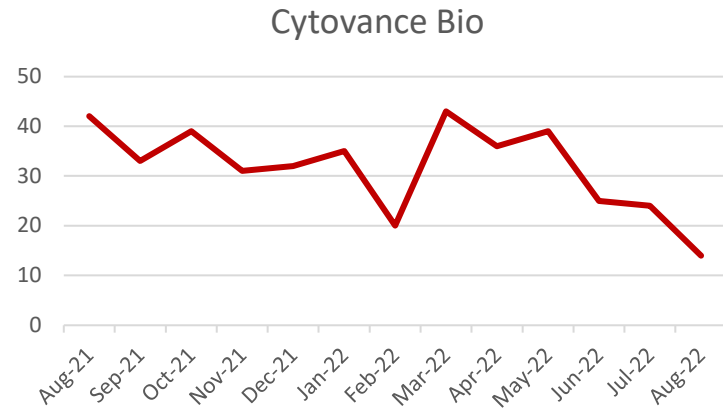
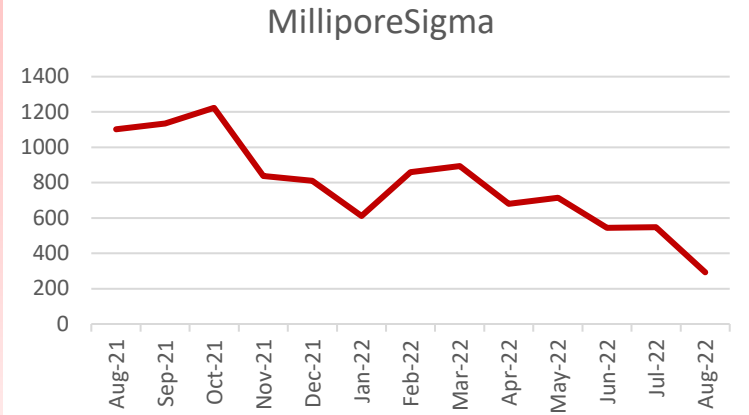
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Data Summary – Monthly Hiring Industry Insight

INCREASING



DECREASING



A microscopic view of several cells with blue, spherical nuclei. The cells are connected by thin, clear cytoplasmic bridges. The background is a soft, out-of-focus gradient of light blue and white, suggesting a bright light source. The overall image has a clean, scientific aesthetic.

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Market Drivers



- In 2022, Sutro Biopharma entered a worldwide, strategic collaboration and licensing agreement with Astellas focused on the discovery and development of novel immunostimulatory antibody-drug conjugates (iADCs).
- Sutro initiated a collaboration and licensing agreement with BioNova Pharmaceuticals Limited (BioNova) to develop and commercialize STRO-001, a CD74-targeting Antibody-Drug Conjugate (ADC)
- Sutro initiated a collaboration and licensing agreement with Tasly Biopharmaceuticals Co., Ltd



- Meissner Filtration Products Awarded Contract from BARDA for COVID-19 Production Capacity Expansion (\$13.4 million)
- Meissner Announces Its New European Manufacturing Facility in Castlebar, Ireland
- Meissner Filtration products announced that it has acquired PDC Aseptic Filling Systems, a supplier of advanced aseptic filling systems and sealers to the pharmaceutical industry.



- Avid Bioservices Announces Launch of Analytical and Process Development Suites Within New, World-Class Viral Vector Development and Manufacturing 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.



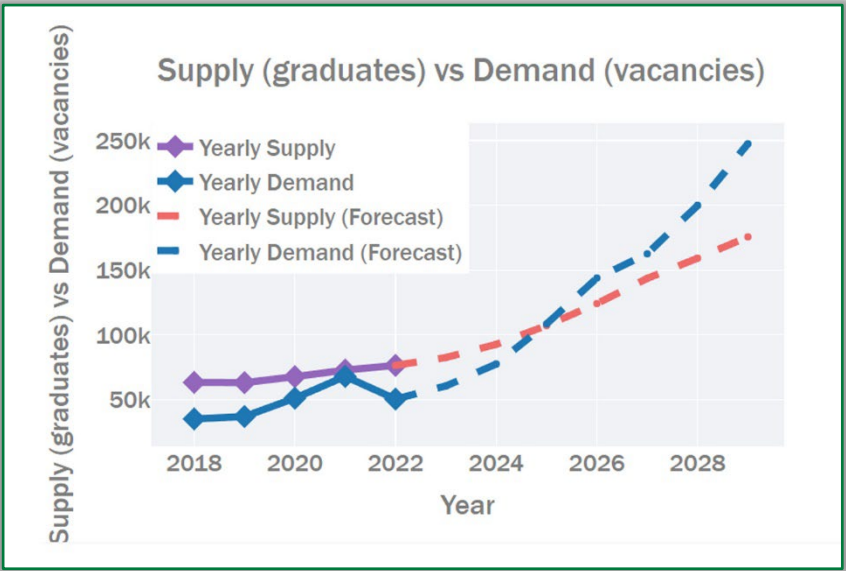
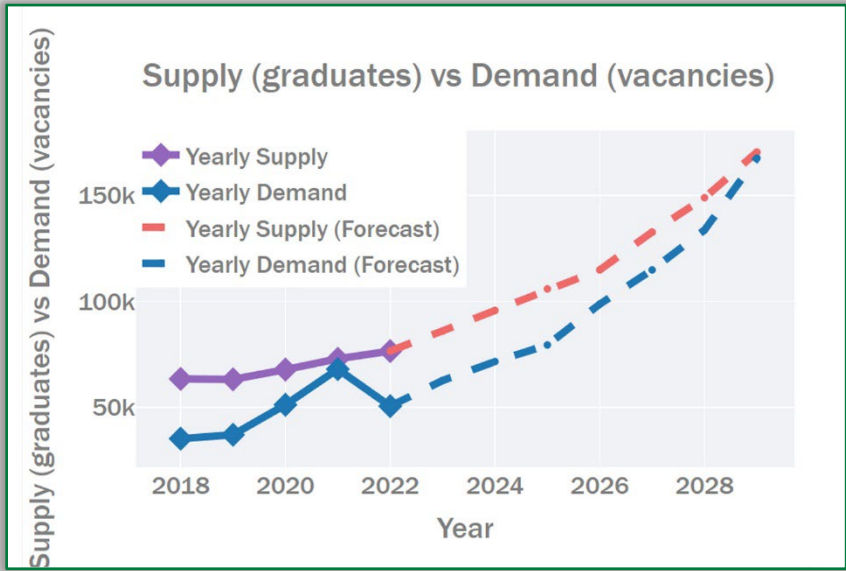
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Predictive Talent Market Dynamics

Predictive Talent Market Dynamics

Various models presented below exemplify the 'Supply versus Demand' market growth assumptions:



USA Biomanufacturing Supply versus Demand modelling. Various market growth options. Talent Supply presented at 10% growth (median over 12 years); Talent Demand growth projected at 10% (left) and 20% (right) respectively. Intersecting lines illustrate where talent demand and supply are in equilibrium (Evolution, 2022). Supply refers to number of graduates and post-graduates entering Biomanufacturing industry; demand specific to Biomanufacturing job vacancies.

