

The background features several glass containers, possibly beakers or test tubes, arranged in a grid-like pattern. Each container holds a glowing blue sphere. The spheres are connected by thin, dark lines, suggesting a molecular or network structure. The lighting is soft, creating a futuristic and scientific atmosphere.

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INSIGHT REPORT
Industry Hiring Data - October 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.

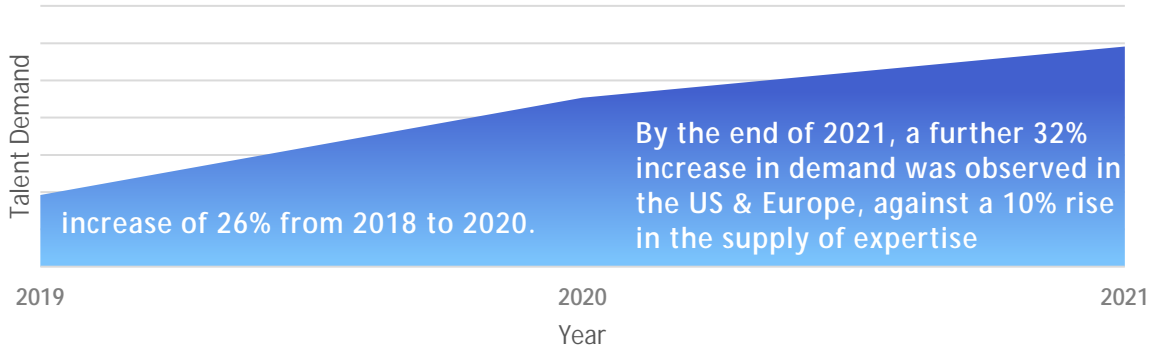
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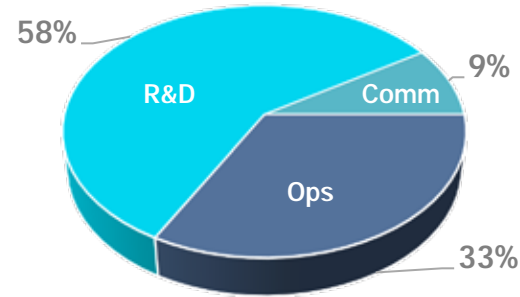
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Executive Summary

Biomanufacturing Hiring:- Yearly Average



**Role Postings:
By Role Type**



Top 3 Companies:

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



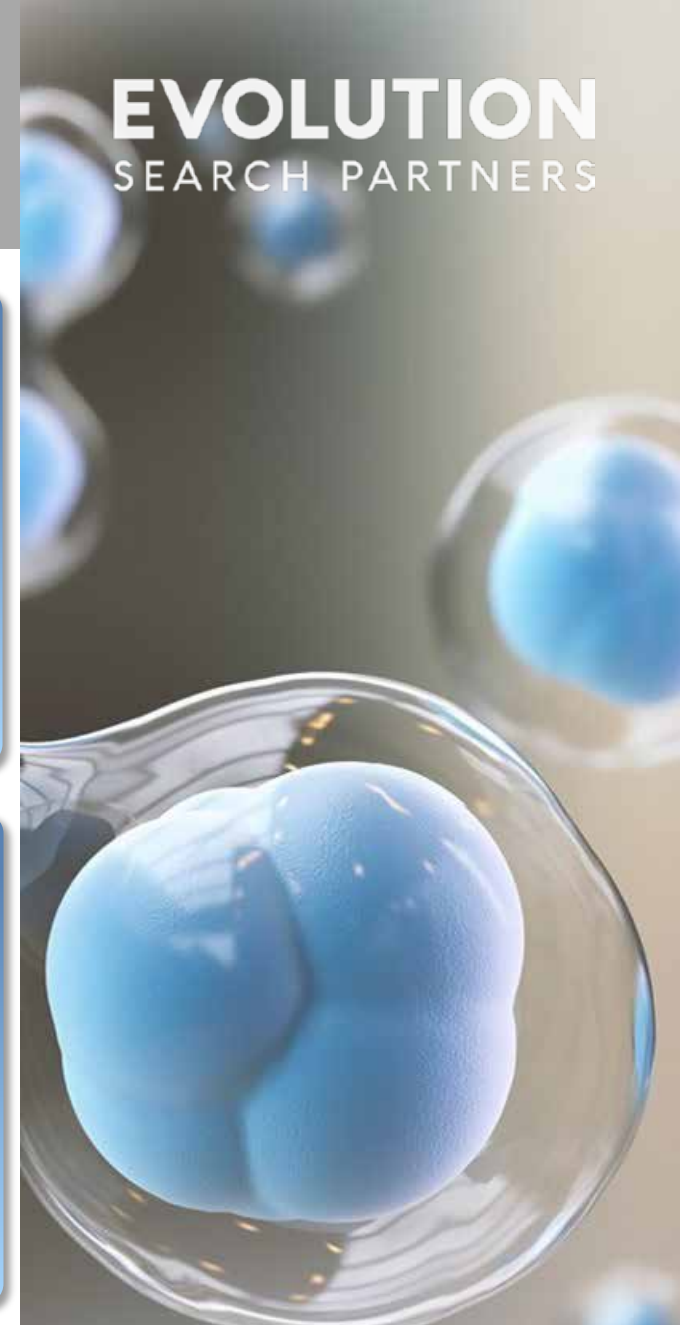
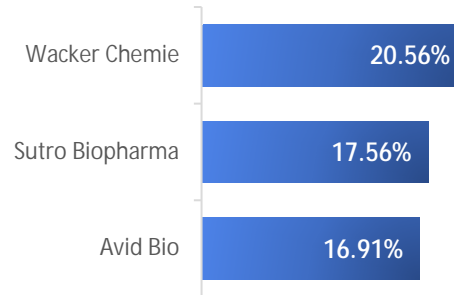
2022

Monthly **Hiring Demand** Change



Top 3 Companies:

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



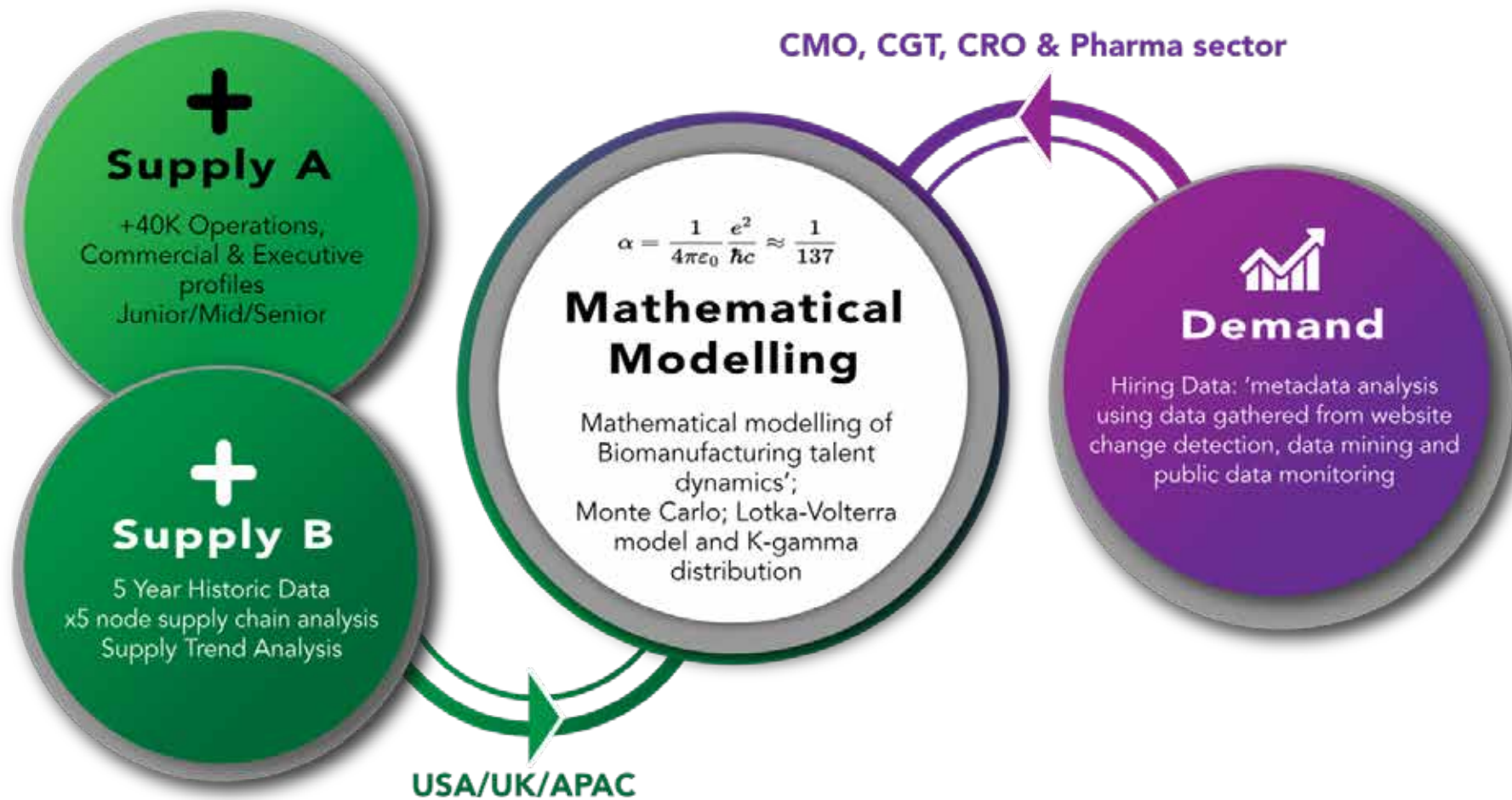
The background features several glass vessels, resembling test tubes or beakers, containing blue, gelatinous spheres. The vessels are arranged in a way that suggests a process of evolution or growth, with some vessels containing larger spheres than others. The lighting is soft and focused on the central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

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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, 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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CDMO Market Dynamics Data

Industry Sub-Sector

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

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

15 | Total Job Number by Job Type

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20 | Market Drivers

25 | Predictive Talent Market Dynamics



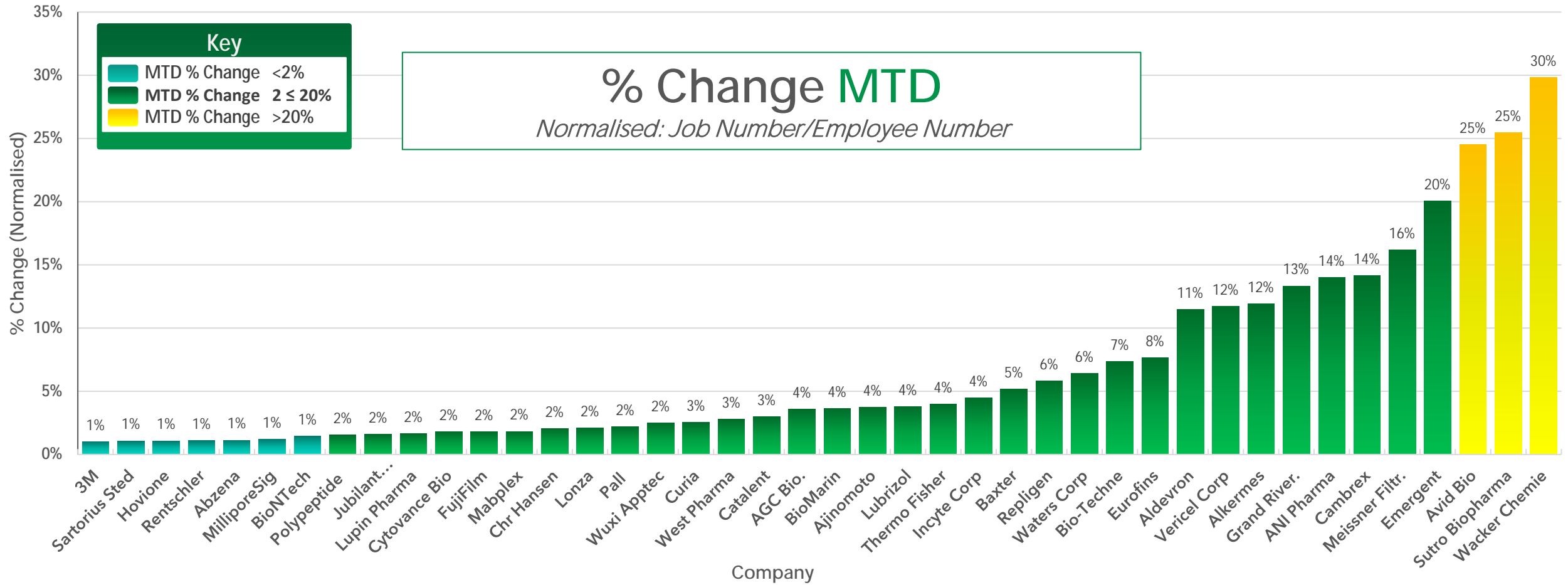
The background features a series of glass vessels, resembling test tubes or beakers, arranged in a branching pattern. Each vessel contains a glowing blue, textured sphere. The vessels are interconnected, suggesting a process of evolution or a network of relationships. The lighting is soft, highlighting the glass and the vibrant blue of the spheres.

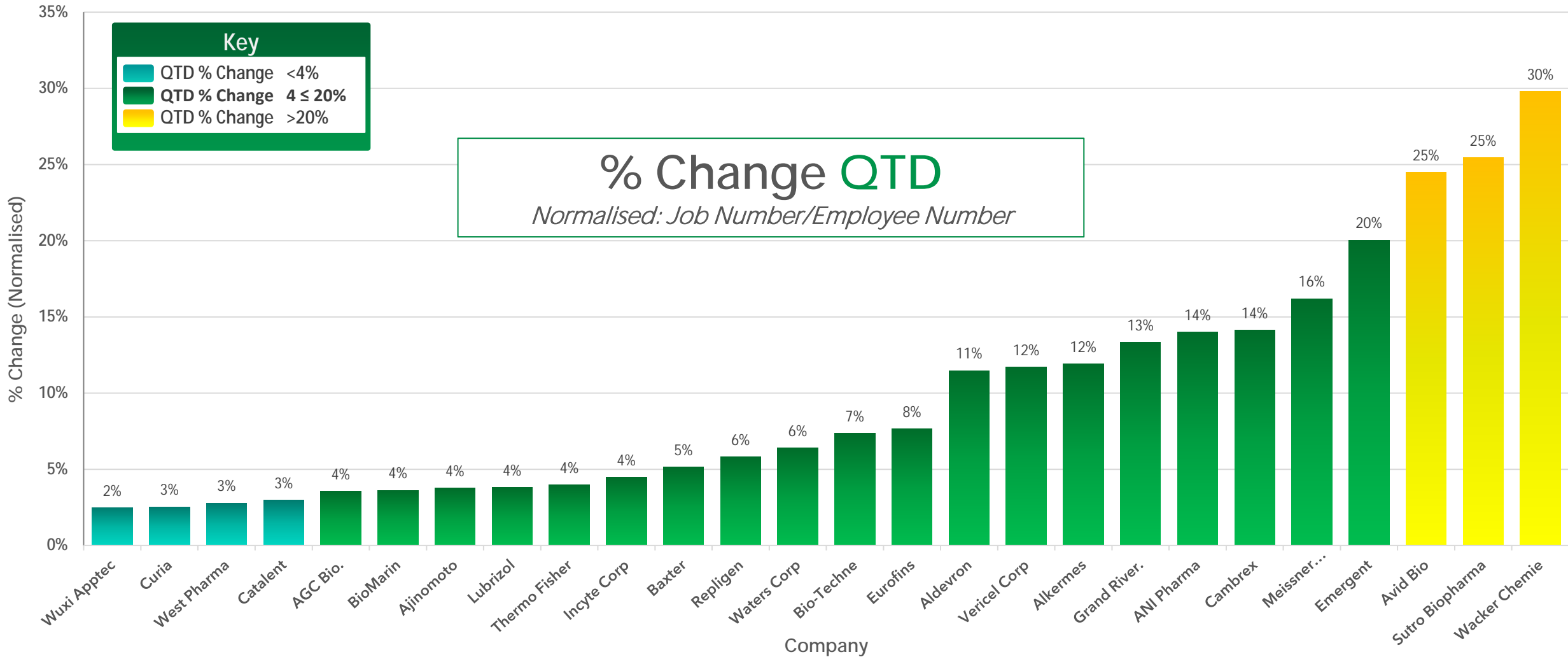
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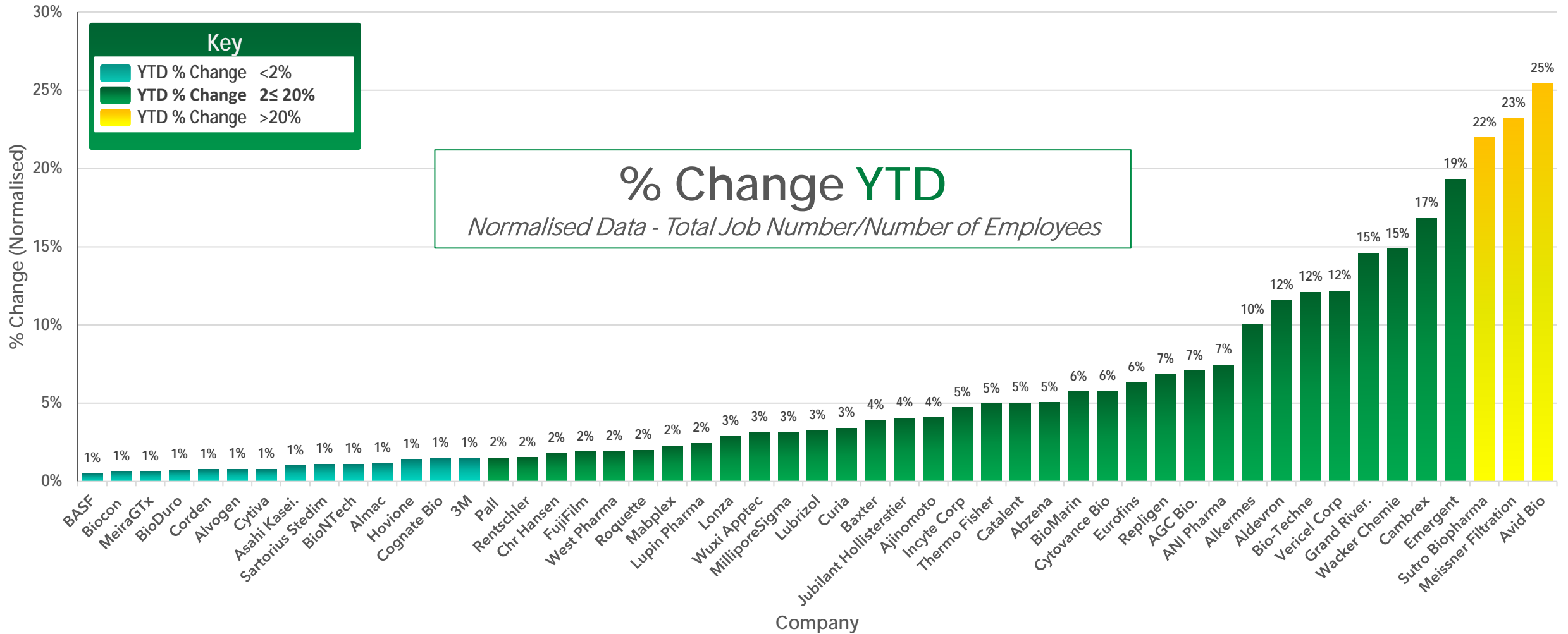
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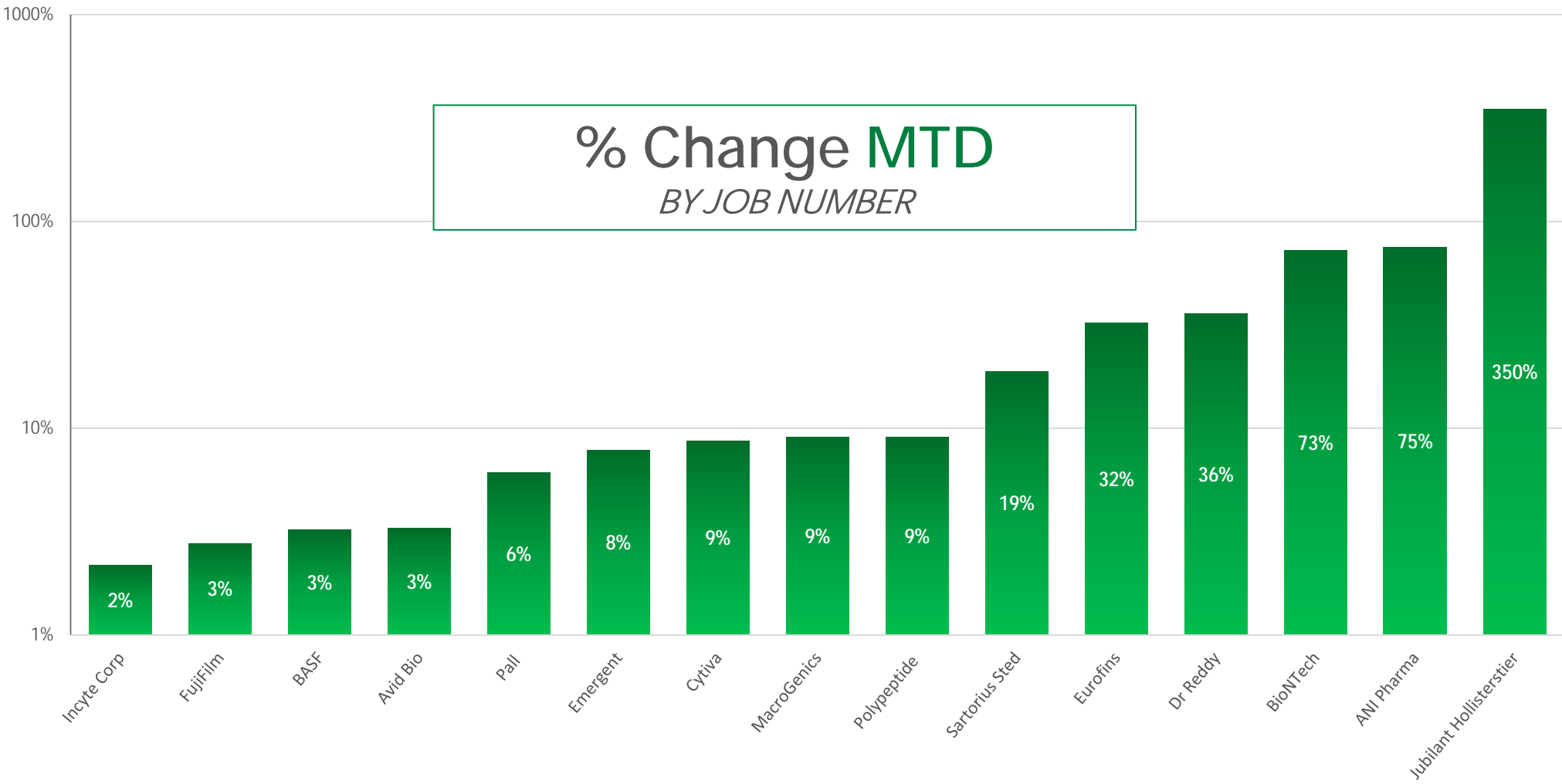
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Assessment of Hiring Frequency by Job Number (*Normalised*)





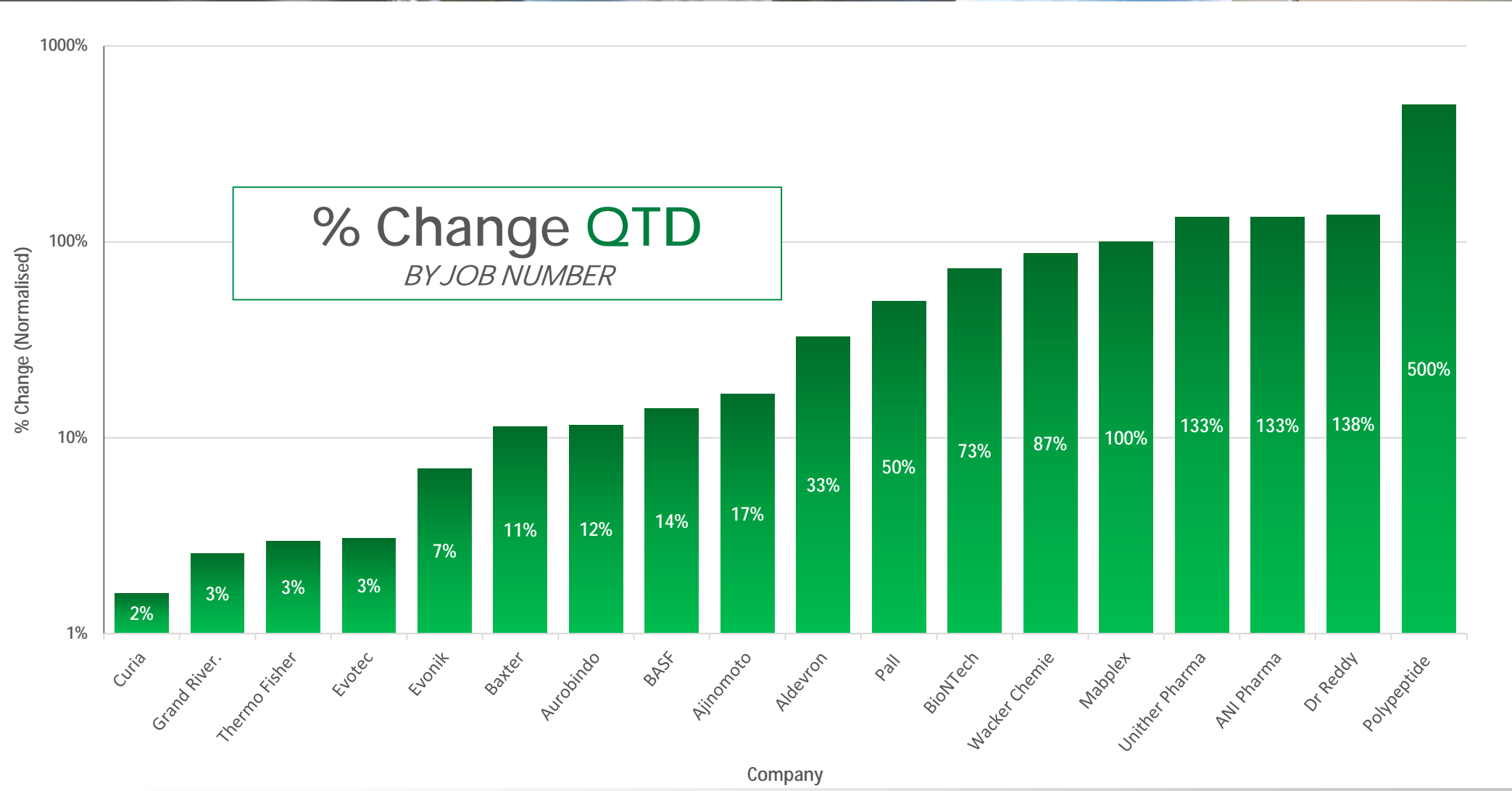




BioNTech
ANI Pharma
Jubilant Hollisterstier



IDT Biologika
Roquette
Vetter Pharma

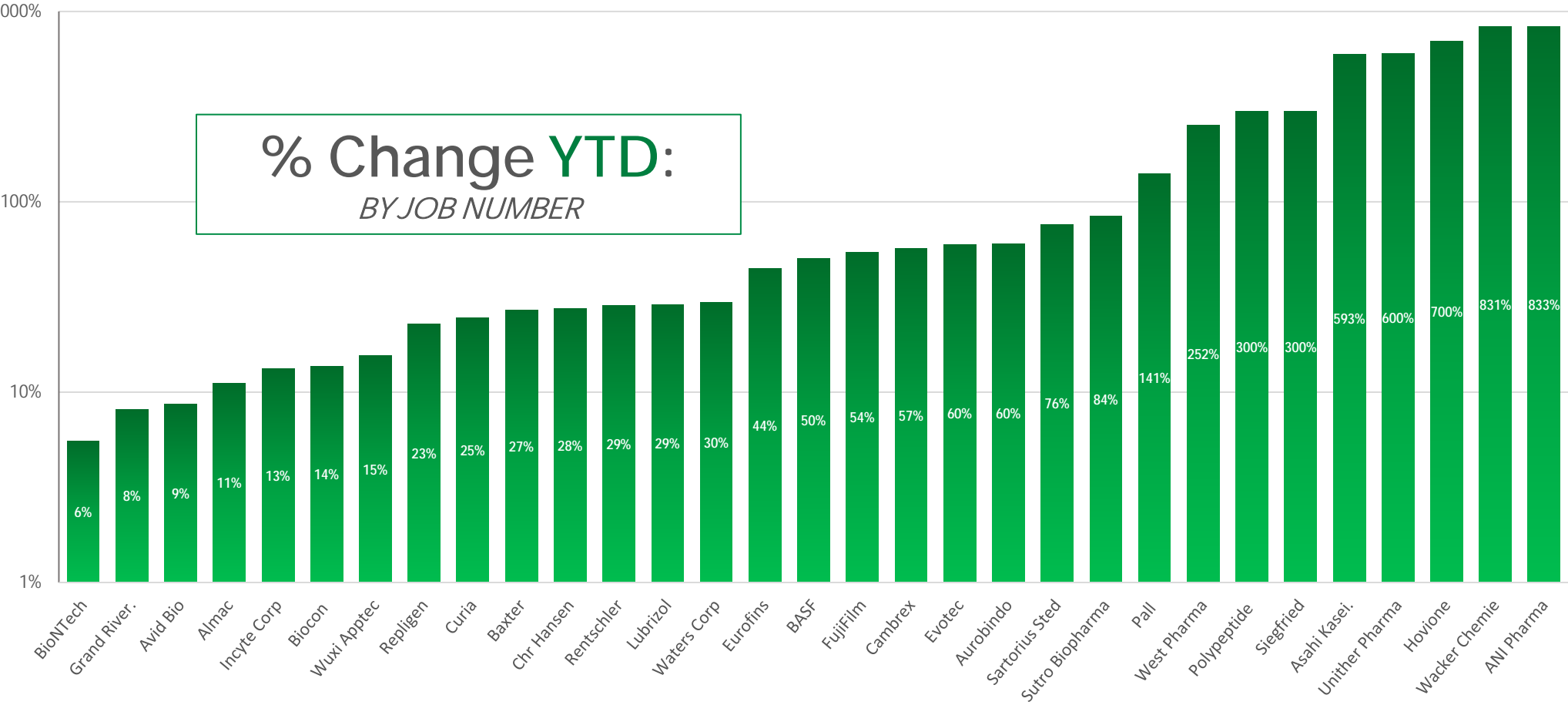


ANI Pharma
Dr Reddy
Polypeptide



IDT Biologika
Roquette
BioDuro

% Change YTD:
BY JOB NUMBER

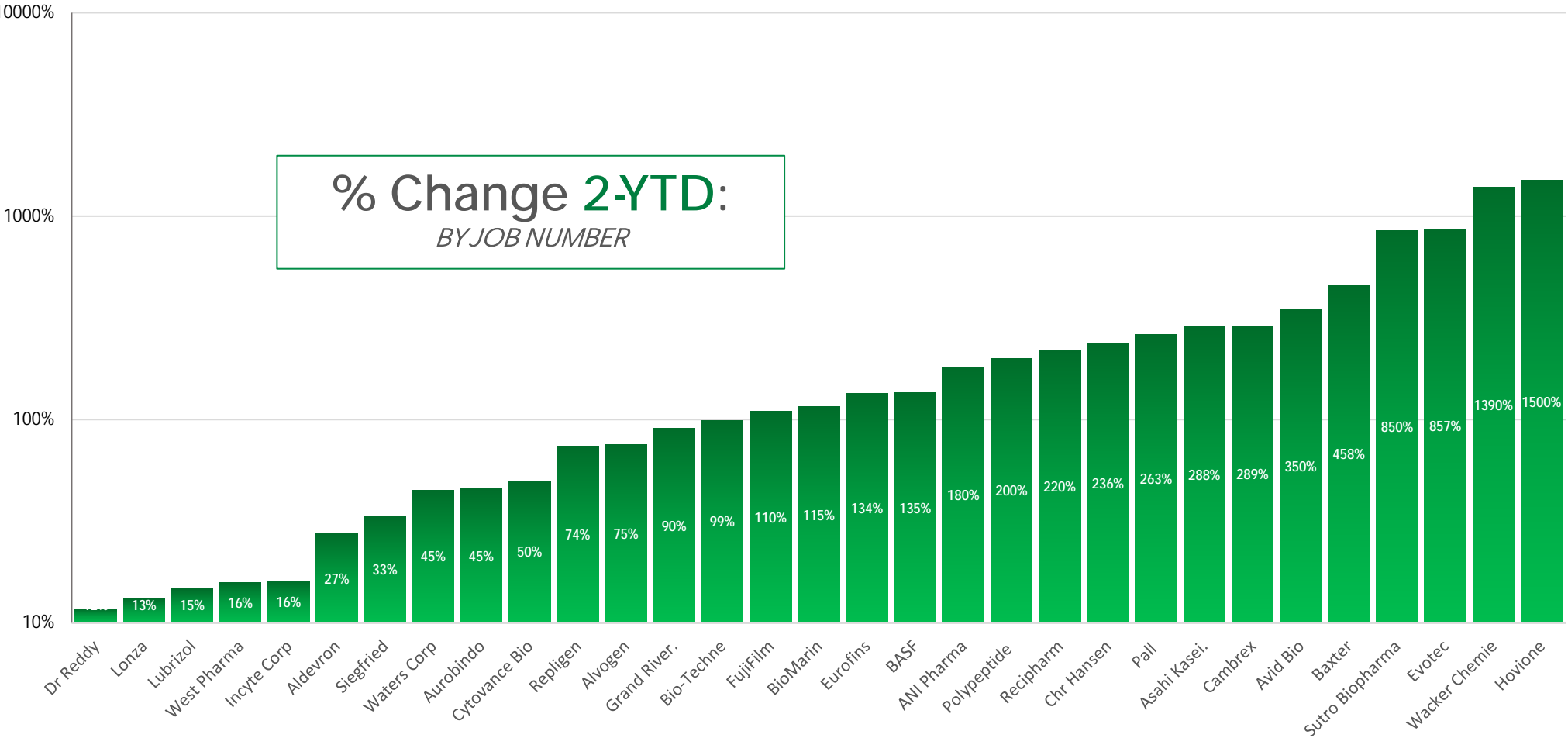


ANI Pharma
Dr Reddy
Polypeptide



IDT Biologika
Roquette
BioDuro

% Change 2-YTD:
BY JOB NUMBER



Sutro Biopharma
Wacker Chemie
Hovione



IDT Biologika
Roquette
Vetter Pharma

A microscopic view of several cells with blue nuclei, arranged in a cluster. The cells are connected by thin, clear filaments, suggesting a network or a process of cell division or communication. The background is dark and slightly blurred, focusing attention on the cells.

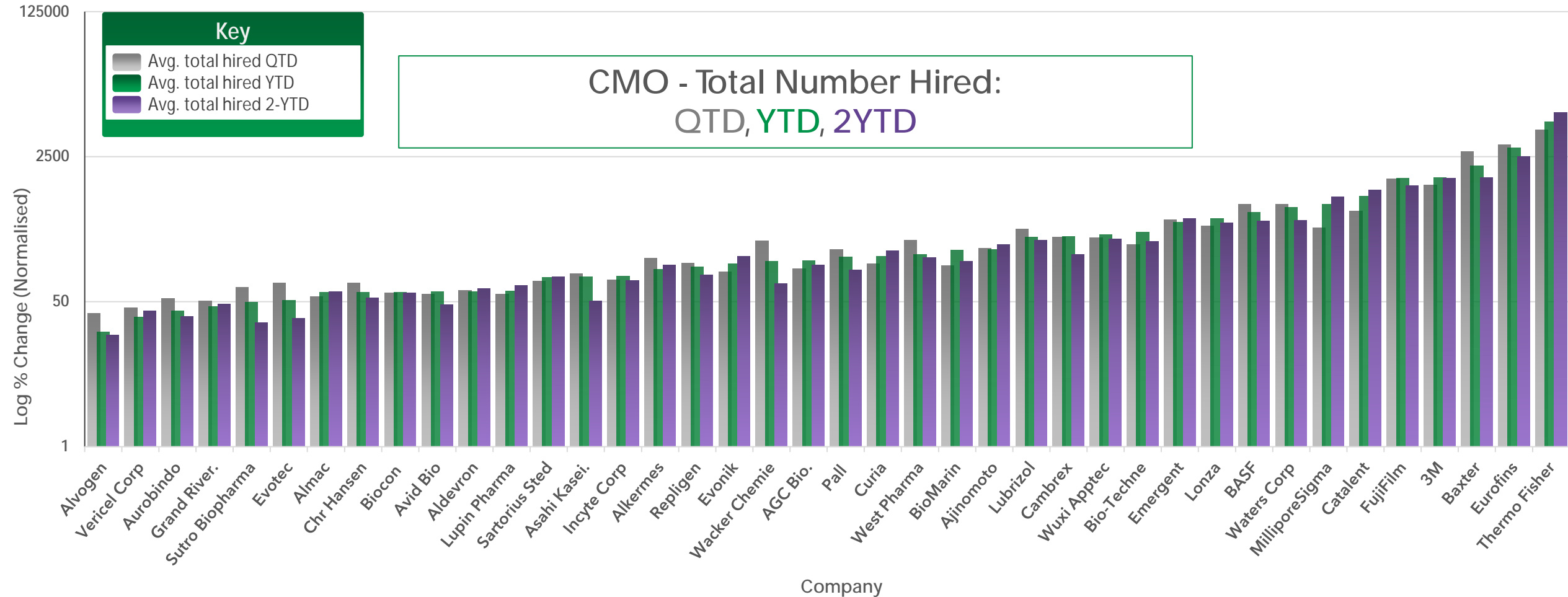
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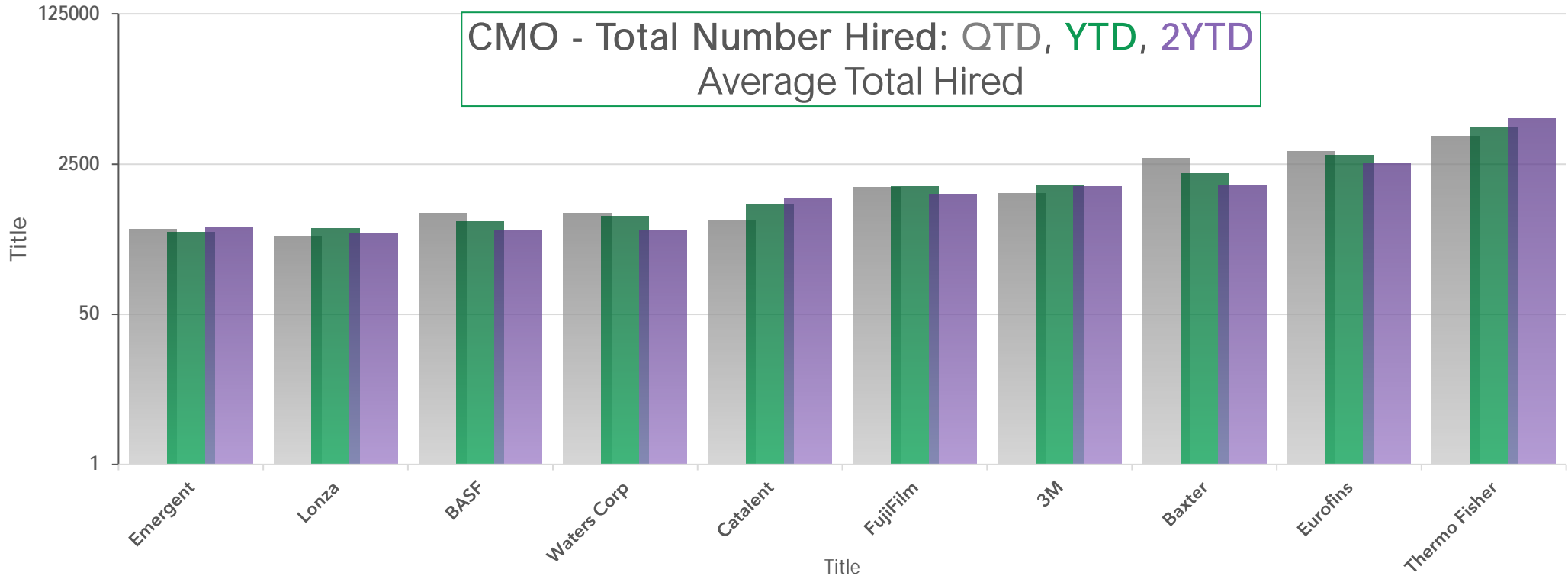
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Assessment of Hiring Frequency by Job Number (Average)

QTD, YTD, 2-YTD
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 AVG. TOTAL NUMBER HIRED





Key

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

Thermo Fisher Scientific
 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.

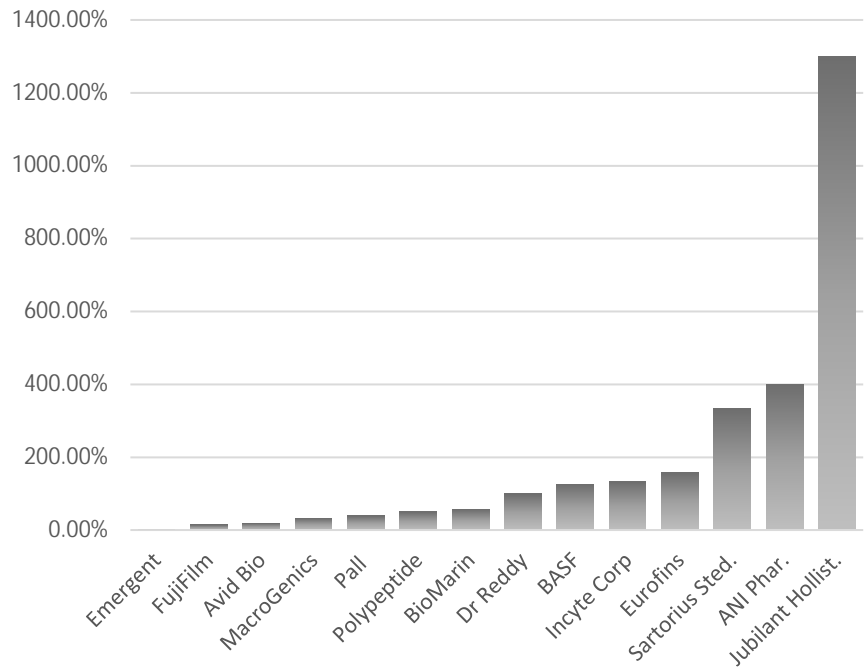
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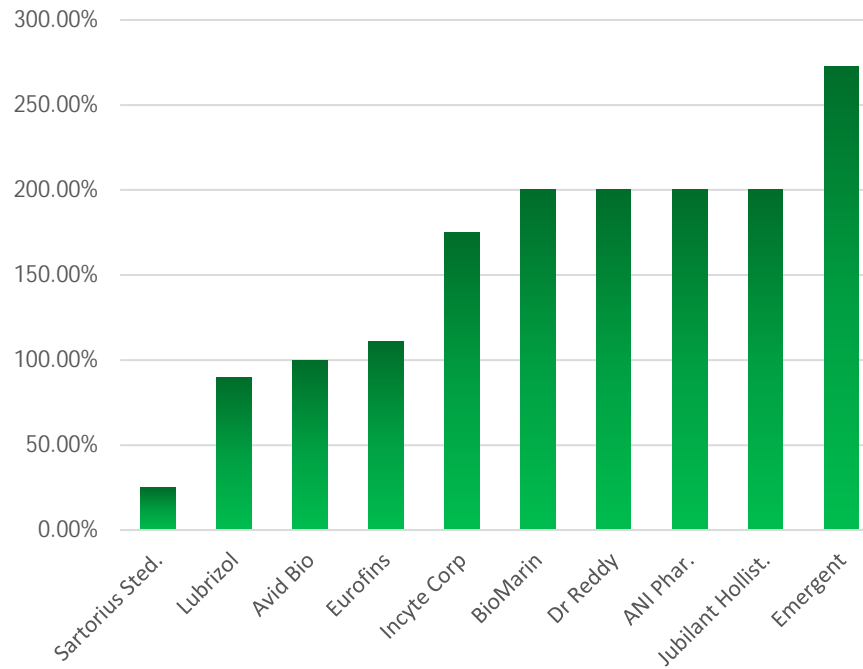
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Assessment of Hiring Frequency by Job Type

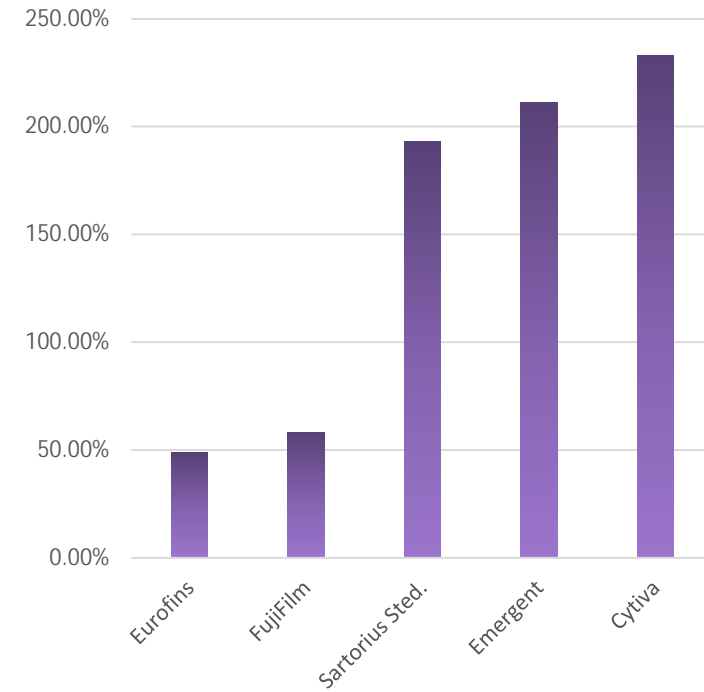
R&D



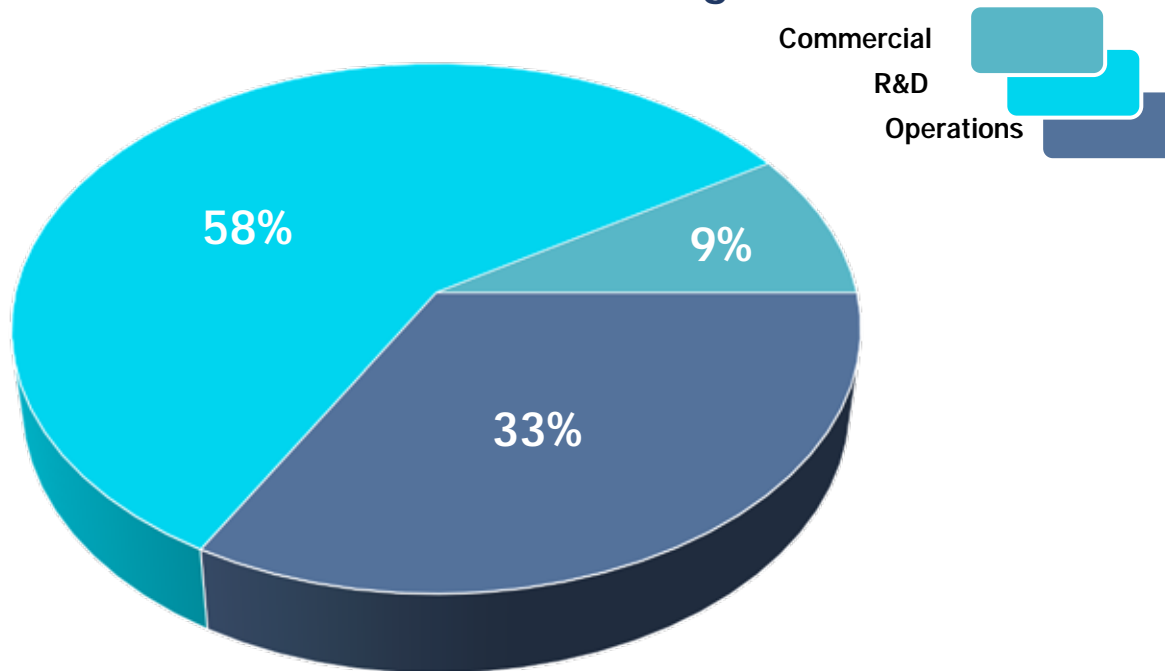
Operations



Commercial



Breakdown of Roles Postings



YTD (Increasing)

Commercial:

Emergent

Operations:

Pall
Lubrizol

R&D:-

Pall
Lubrizol

MTD (Increasing)

Commercial:

Emergent
Cytiva

Operations:

Dr Reddy
Emergent

R&D:-

ANI Phar.
Jubilant Hollis.

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.

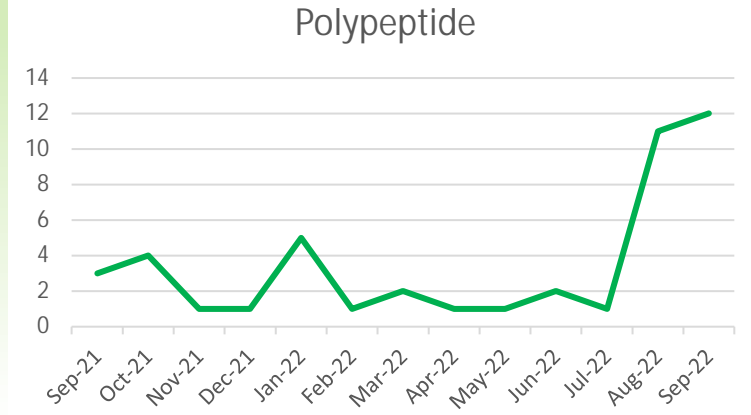
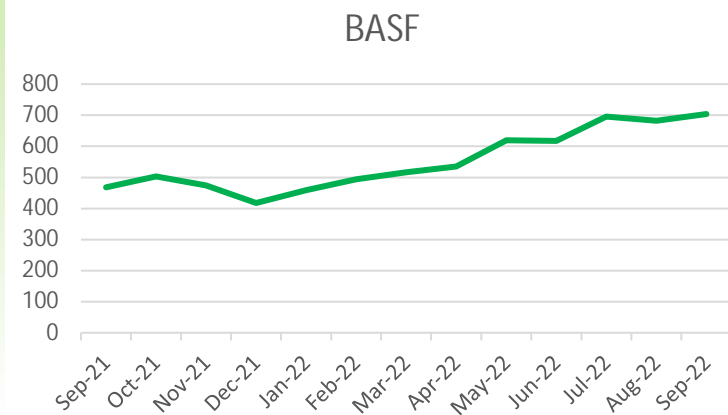
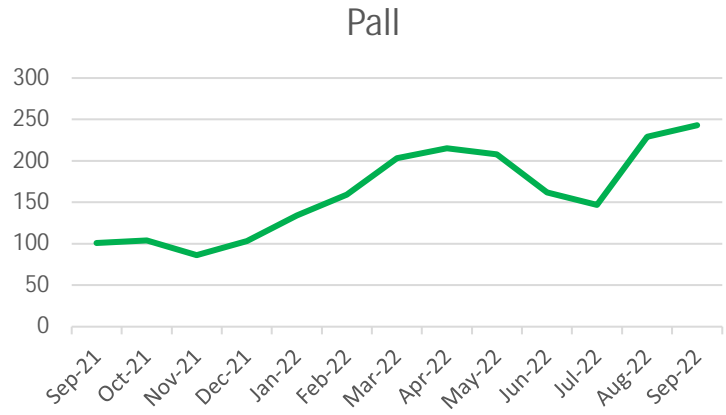
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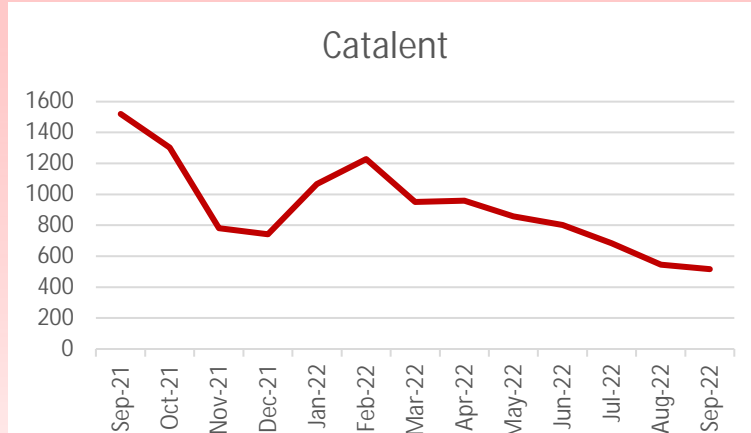
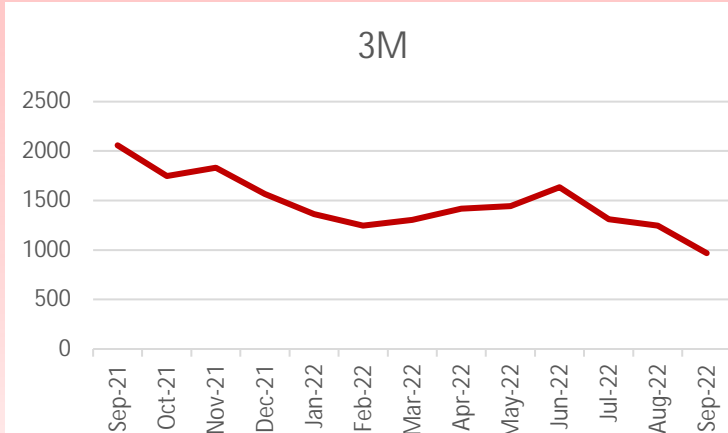
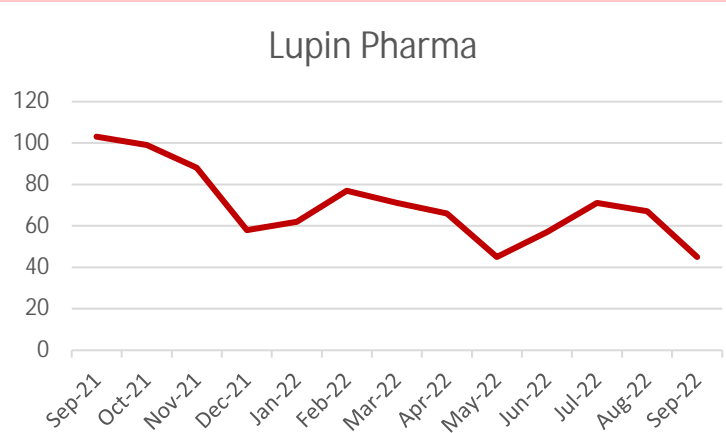
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Data Summary – Monthly Hiring Industry Insight

INCREASING



DECREASING



A microscopic view of several cells with blue nuclei, some in the process of dividing. The cells are set against a dark background with a soft, glowing light source from the top, creating a bokeh effect. A semi-transparent dark horizontal band is overlaid across the middle of the image, serving as a background for the text.

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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.

A microscopic view of several cells with blue nuclei, some in focus and others blurred in the background. A semi-transparent dark grey horizontal band is overlaid across the center of the image.

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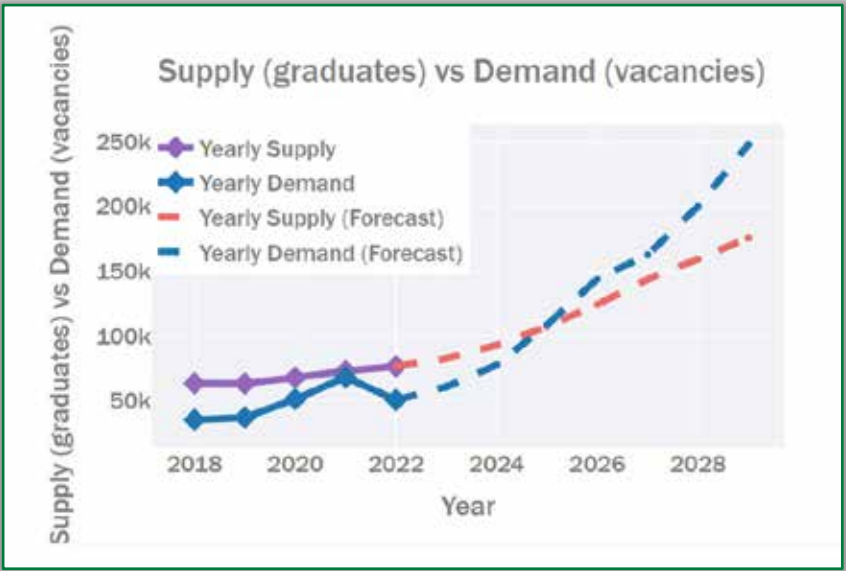
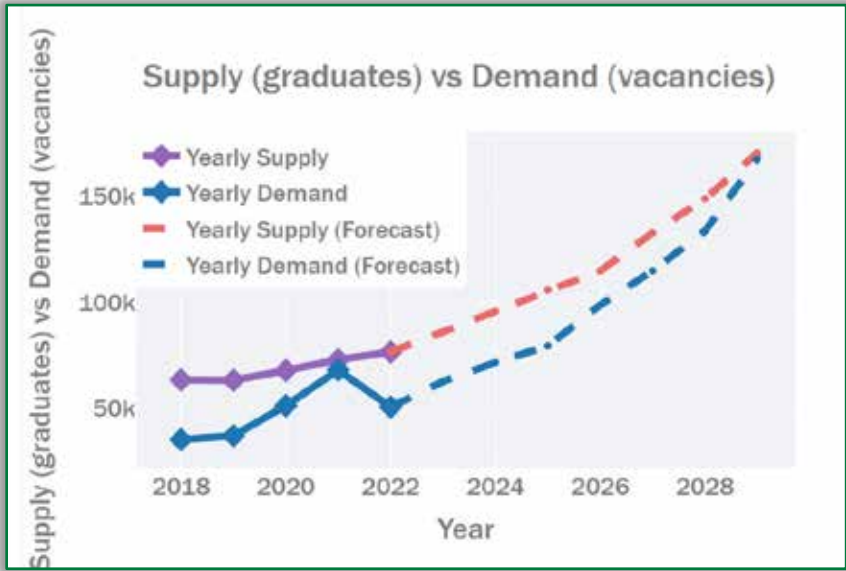
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Predictive Talent Market Dynamics

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.

