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INSIGHT REPORT
Predictive Talent Dynamics – January 2022

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A microscopic view of several cells, each containing a bright blue nucleus. The cells are connected by thin, clear filaments, suggesting a network or a process of cell division. The background is dark and out of focus, with some light spots.

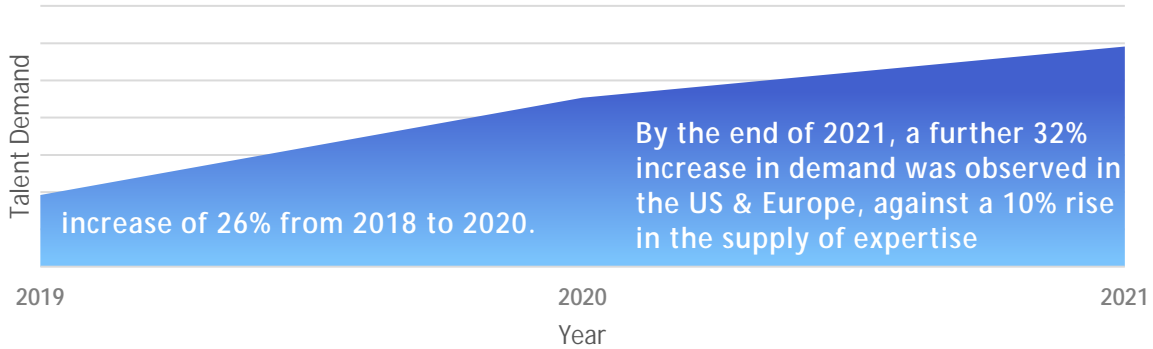
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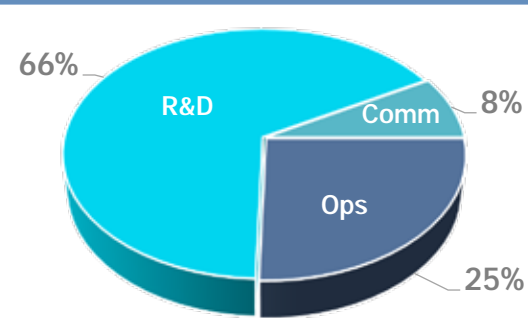
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Executive Summary

Bio manufacturing Hiring:- Yearly Average



**Role Postings:
By Role Type**



Top 3 Companies:

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



Catalent.



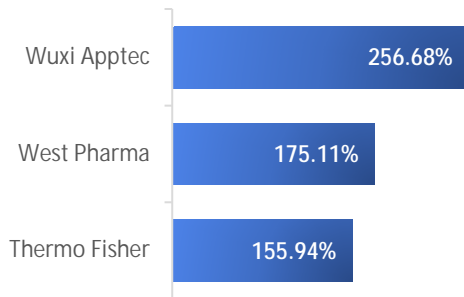
2023

Monthly **Hiring Demand** Change

▼ -16.8

Top 3 Companies:

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



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 interaction. The overall aesthetic is clean and scientific.

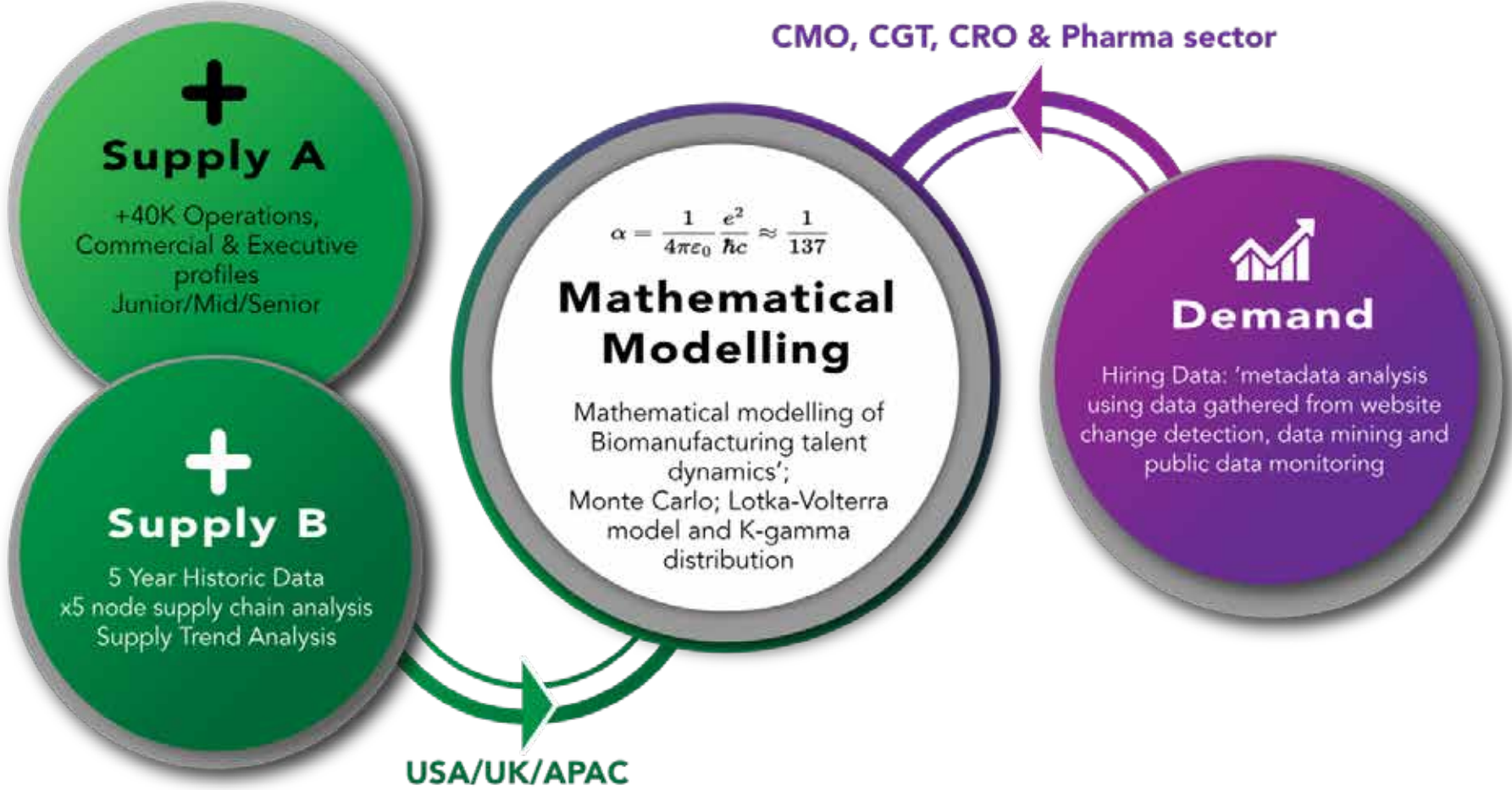
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Introduction and Methodology

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, likely yeast or similar microorganisms, with prominent blue-stained nuclei. The cells are connected by thin filaments, suggesting a network or a process of 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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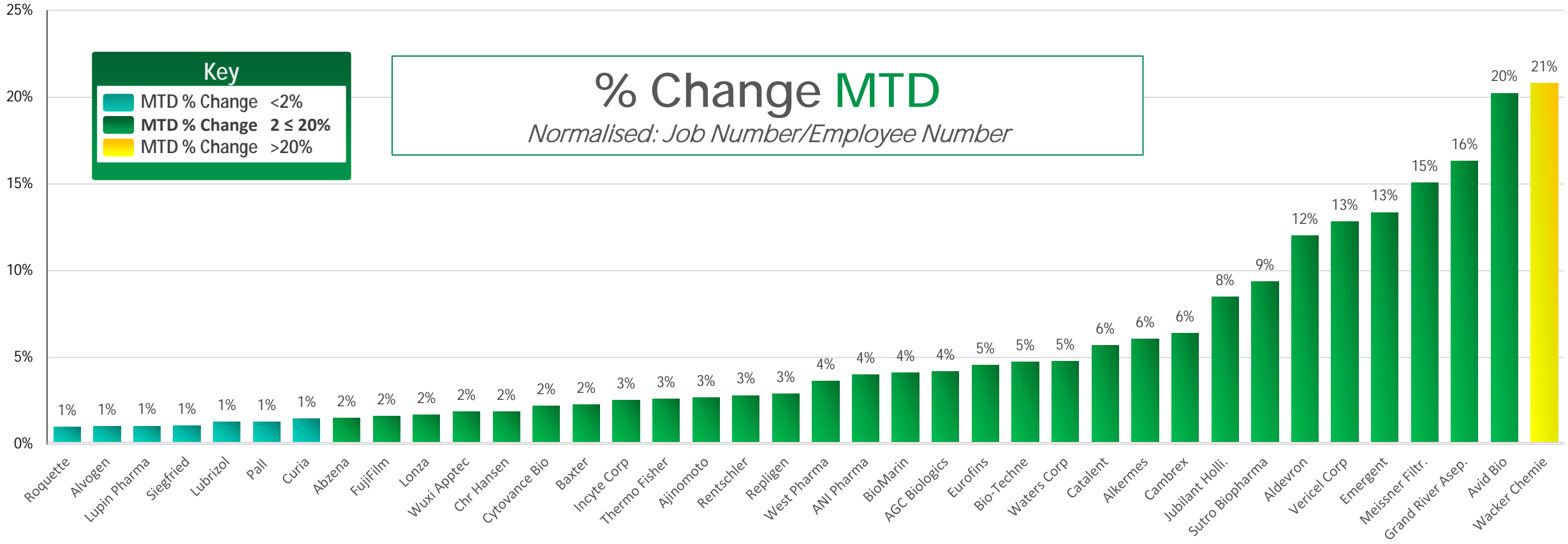
The background features several glass vessels, resembling test tubes or beakers, containing blue, gelatinous spheres. The vessels are arranged in a way that suggests a process of evolution or growth, with some vessels containing multiple spheres. The lighting is soft and focused on the central vessels, creating a sense of depth and scientific inquiry.

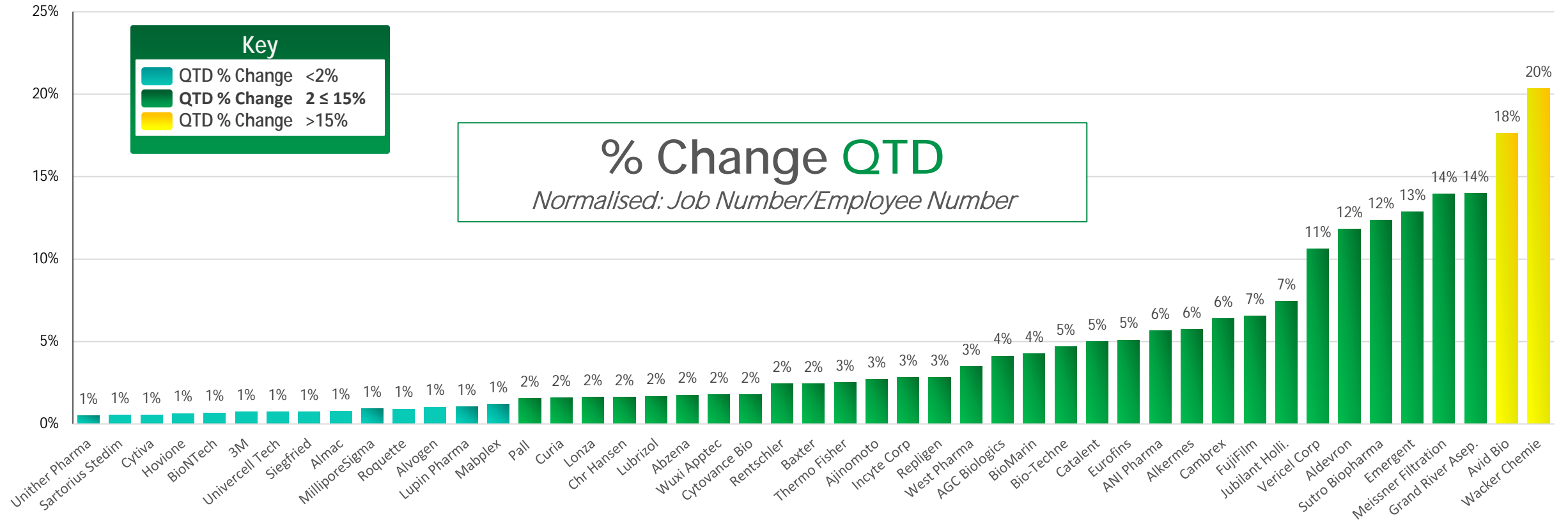
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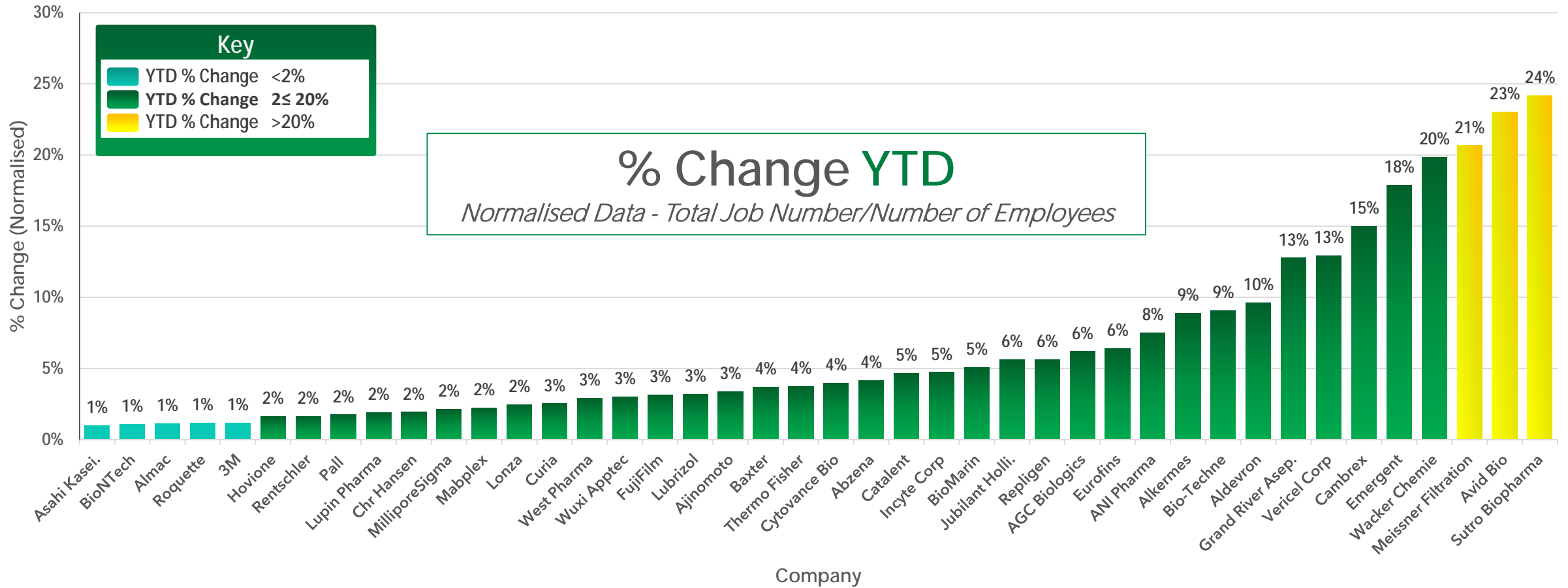
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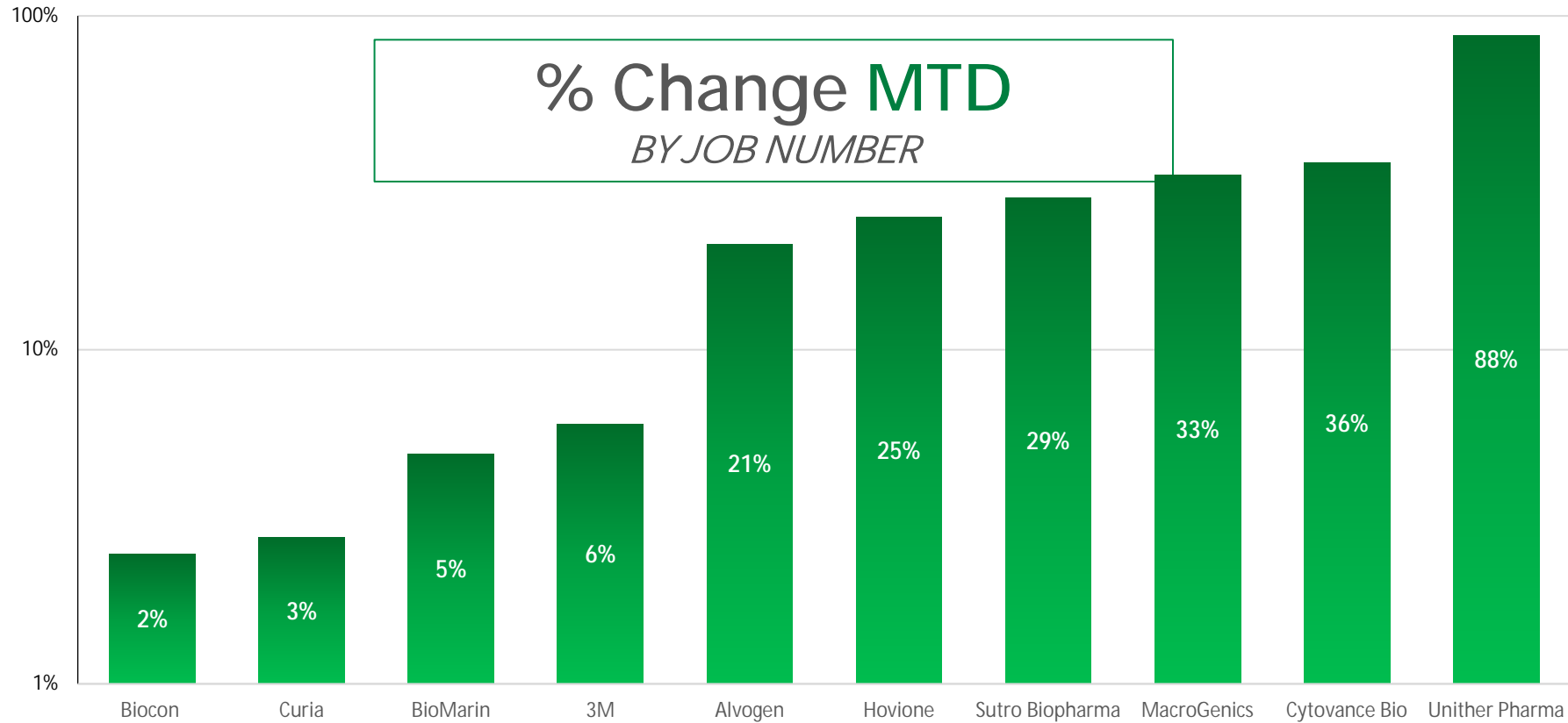
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Assessment of Hiring Frequency by Job Number (Normalised)





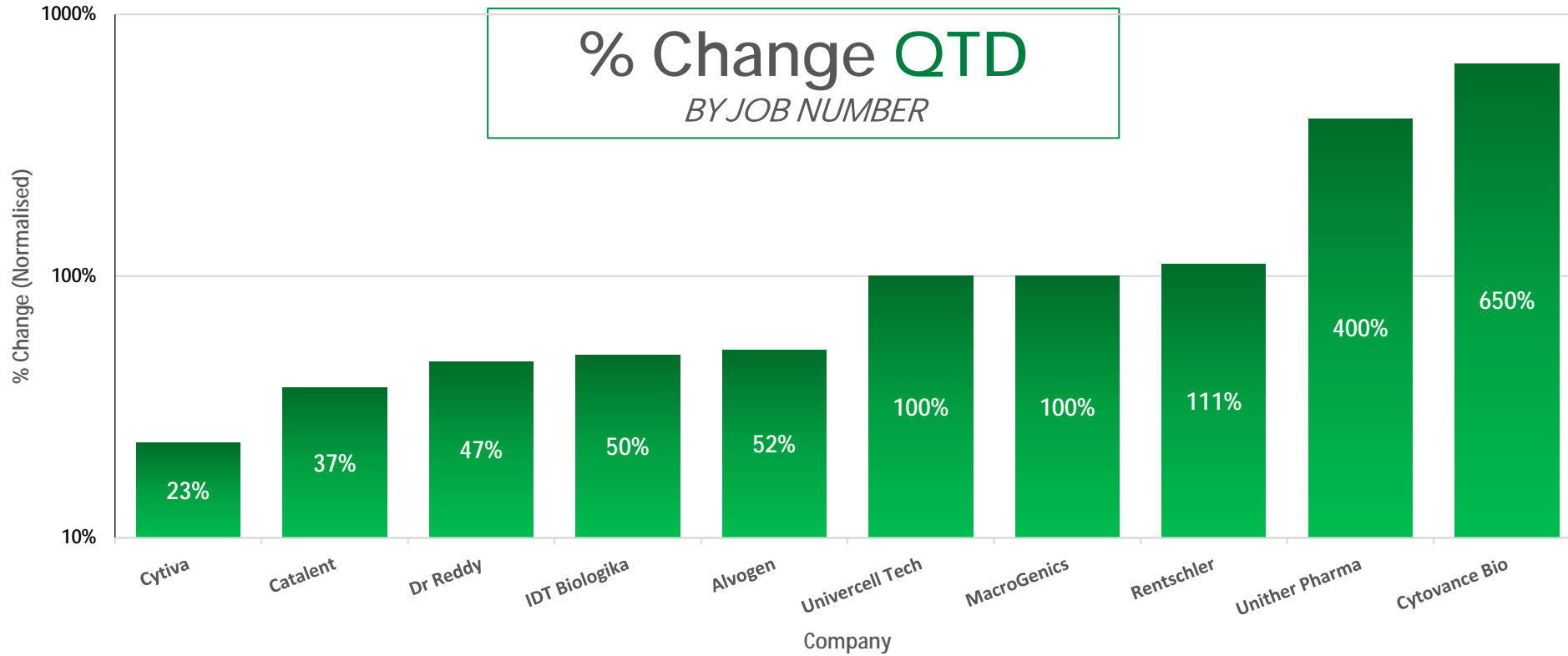




MacroGenics
Cytovance Bio
Unither Pharma



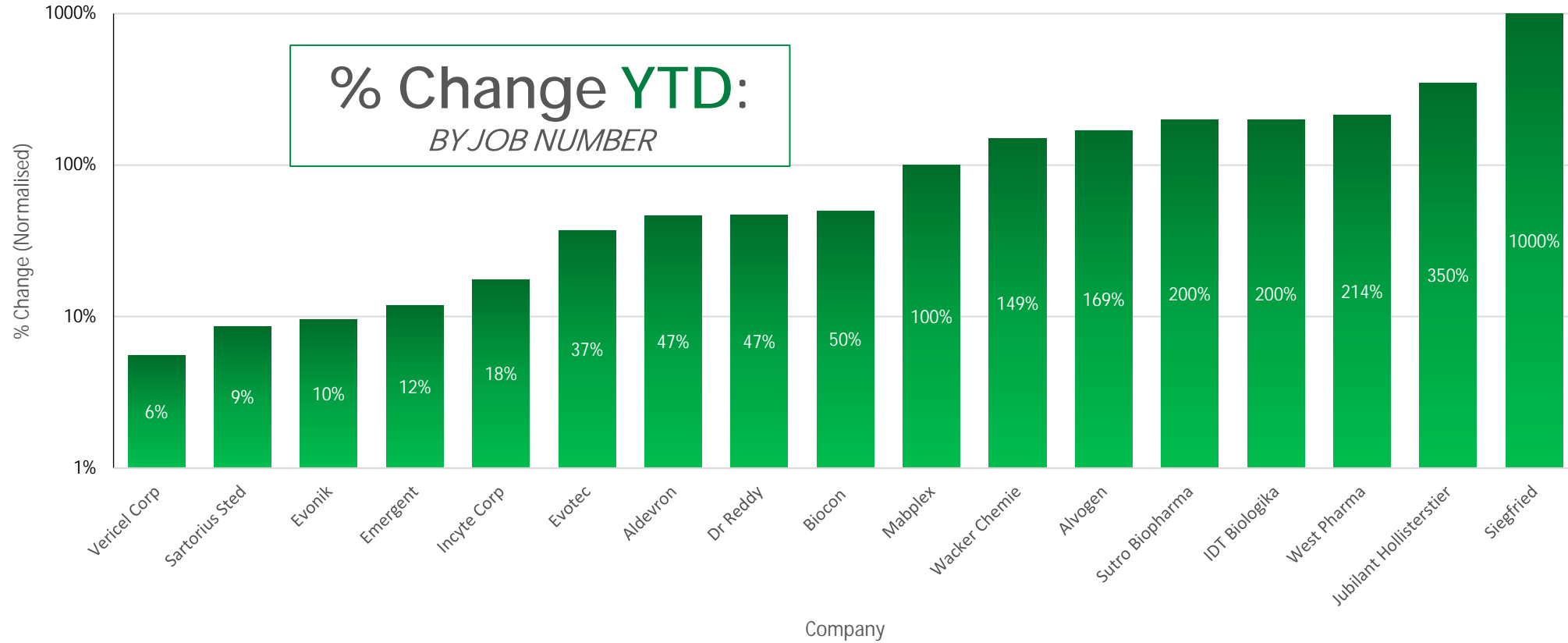
BioDuro
Asahi Kasei America
BioNTech



Rentschler
Unither Pharma
Cytovance Bio



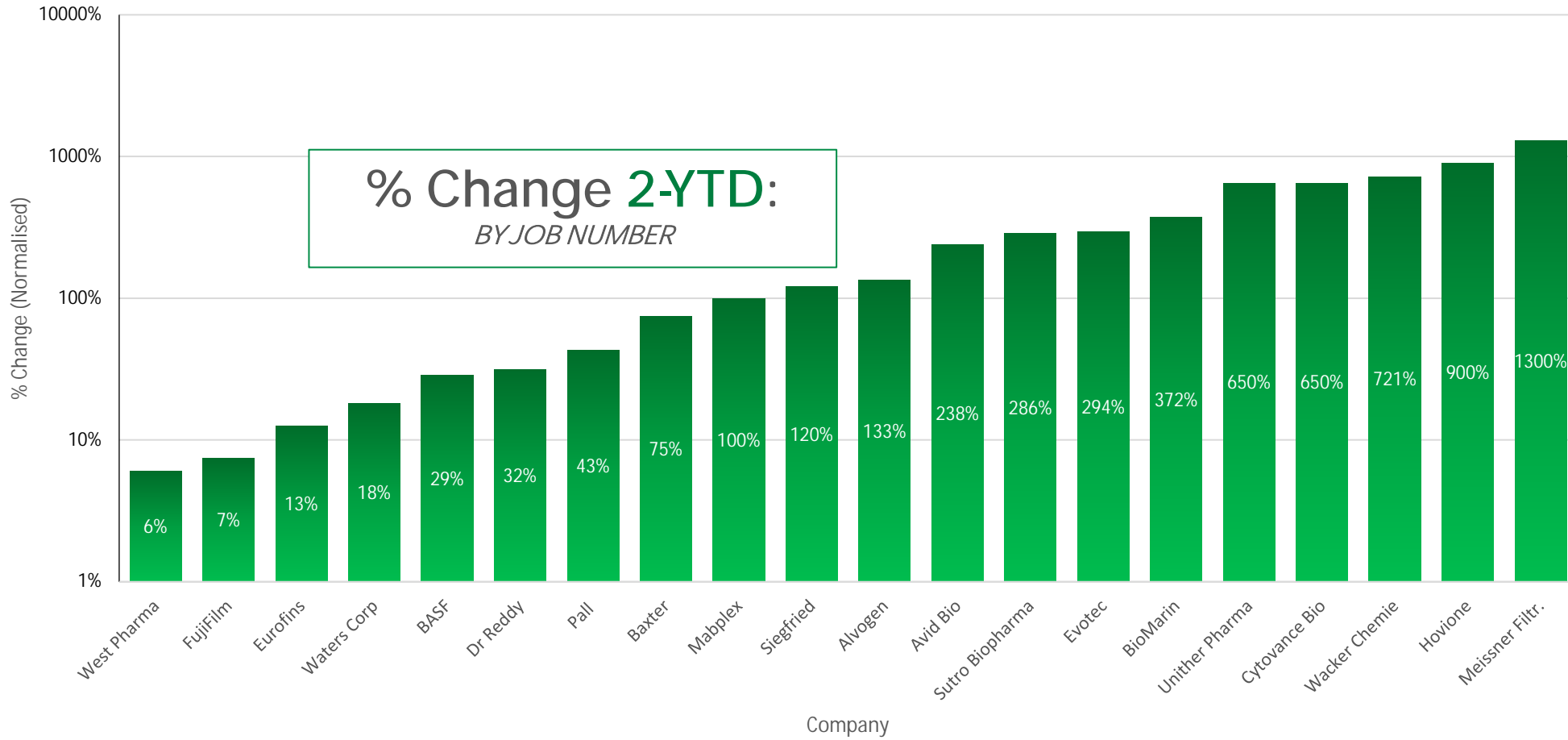
BioDuro
DPT Labos
Nitto Denko



West Pharma
Jubilant Hollisterstier
Siegfried



3M
BioDuro
DPT Labs



Wacker Chemie
Hovione
Meissner Filtration



BioDuro
Nitto Denko
MeiraGTX

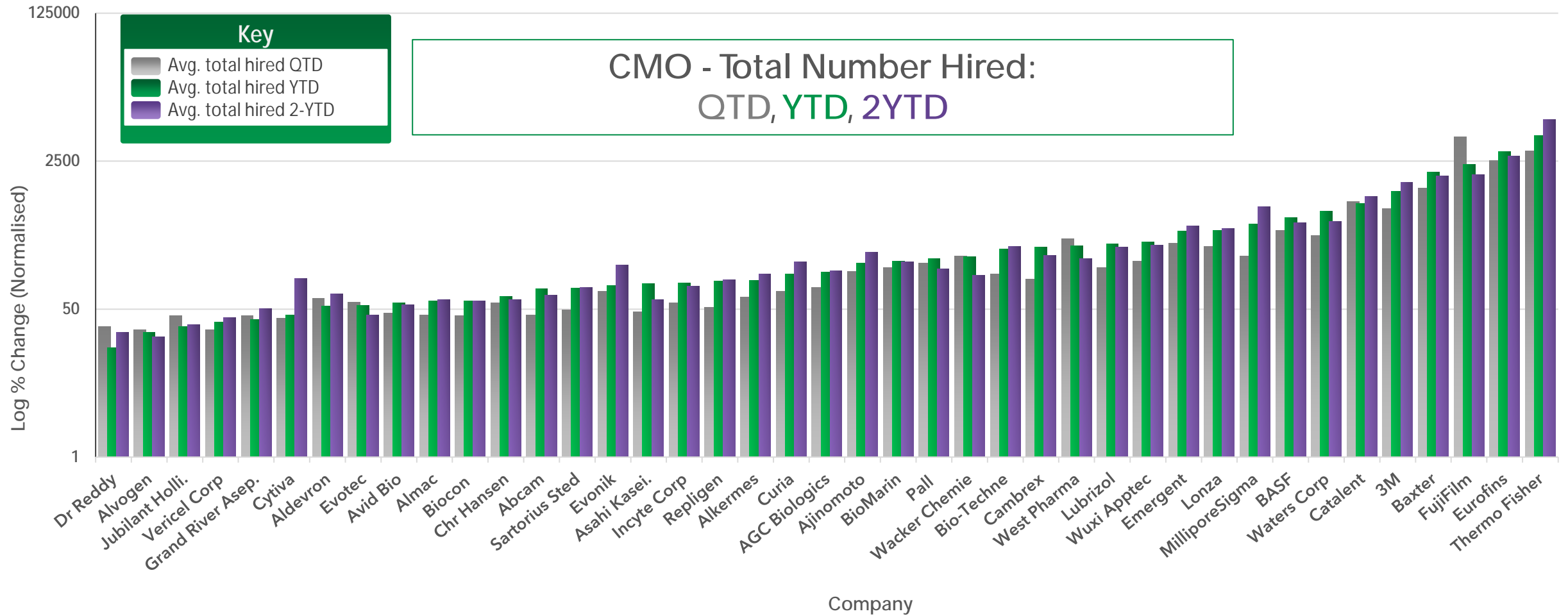
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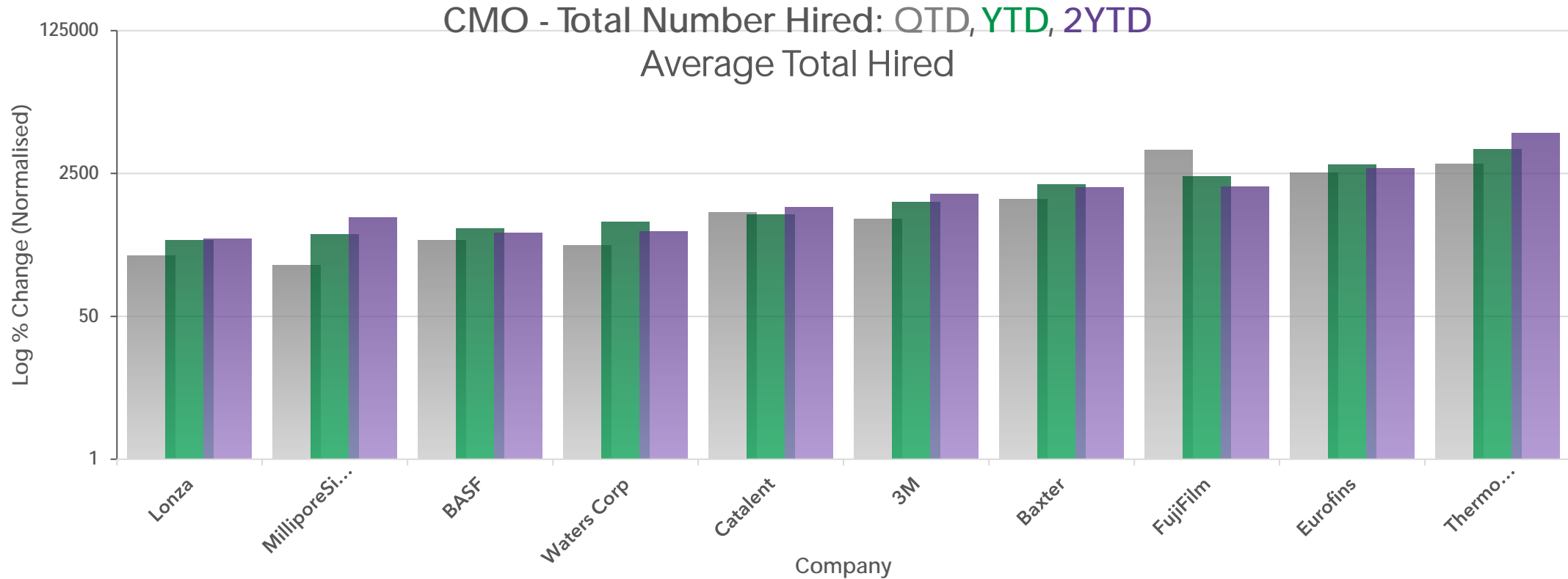
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Assessment of Hiring Frequency by Job Number (Average)





Key

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

Thermo Fisher, Thermo Fisher and Fujiflim

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.

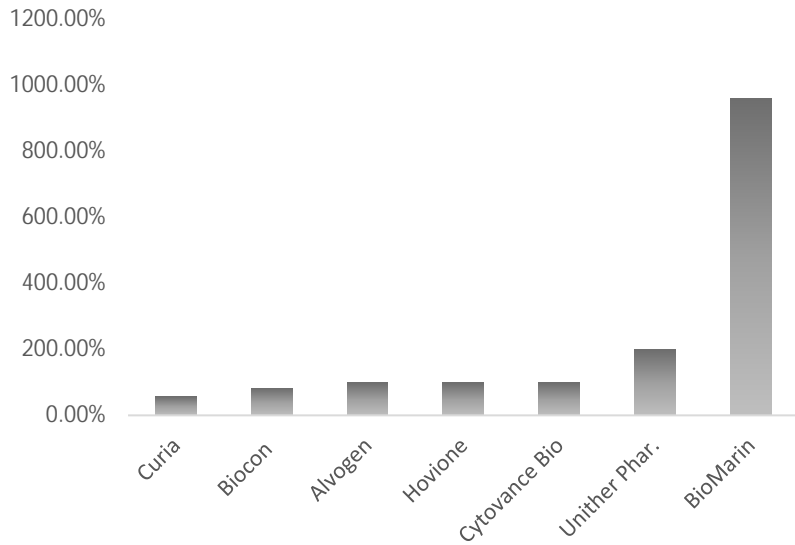
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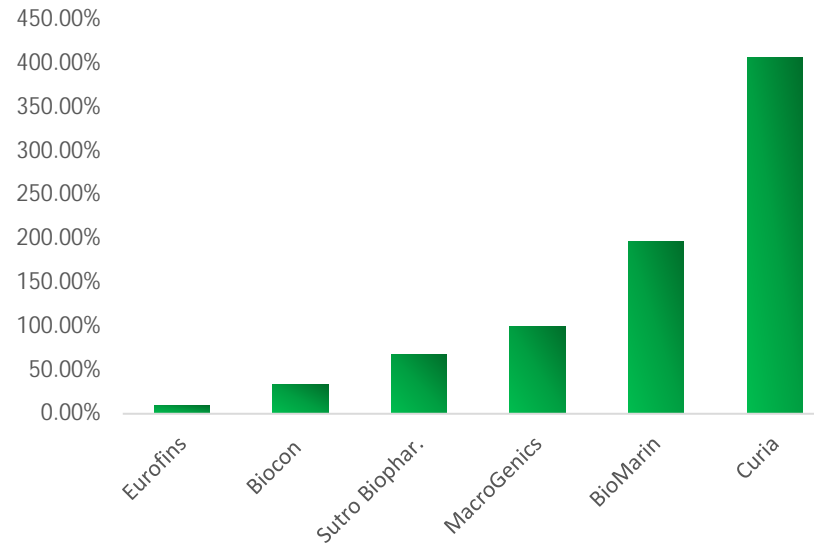
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Assessment of Hiring Frequency by Job Type

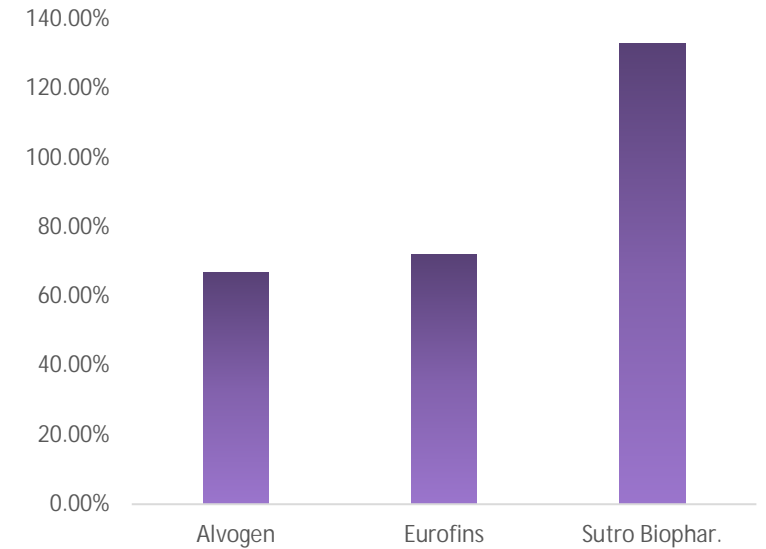
R&D



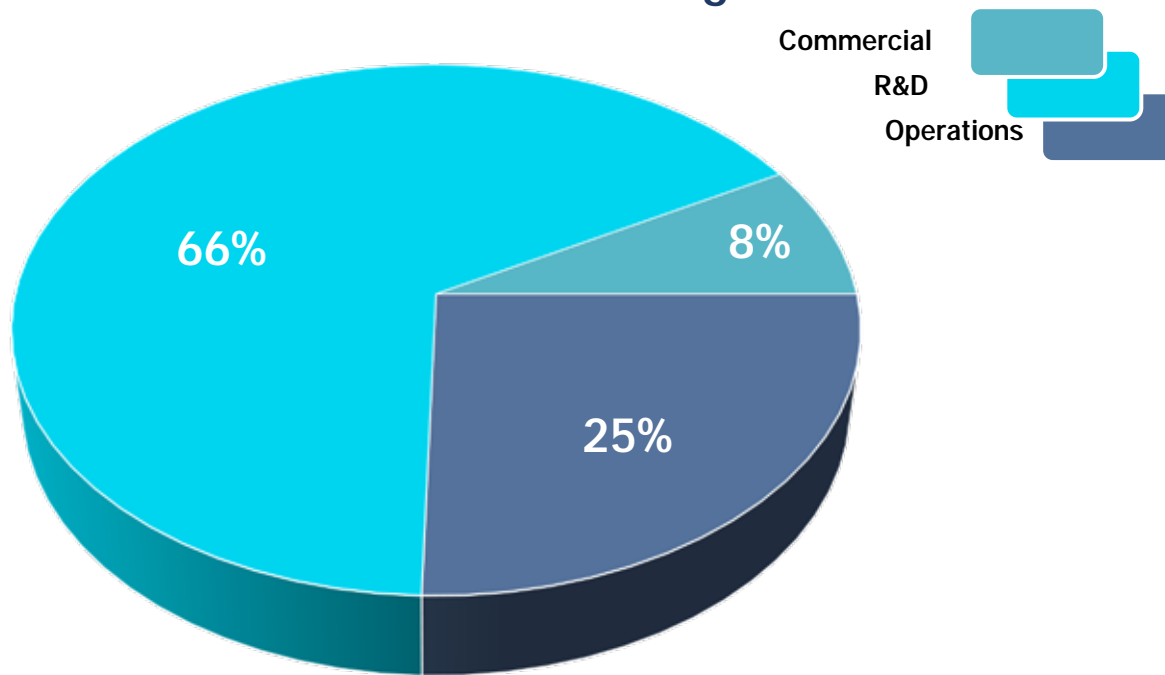
Operations



Commercial



Breakdown of Roles Postings



YTD
(Increasing)

Commercial:

Eurofins

Operations:

MacroGenics
BioMarin

R&D:-

Curia
Biocon

MTD
(Increasing)

Commercial:

Eurofins
Sutro Biophar.

Operations:

Biocon
Curia

R&D:-

Unither Phar.
BioMarin

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 flow. The text is overlaid on a semi-transparent dark horizontal band.

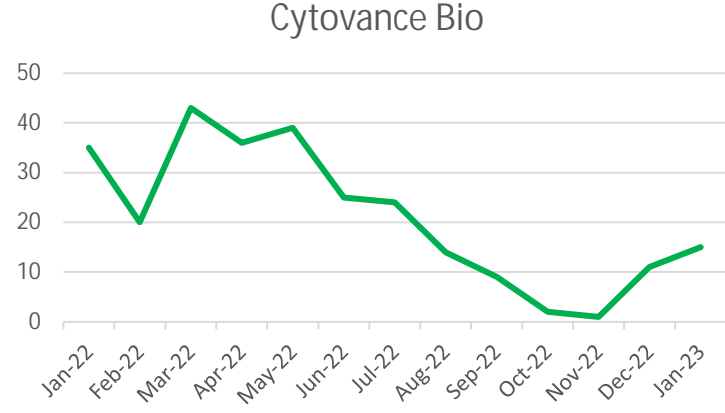
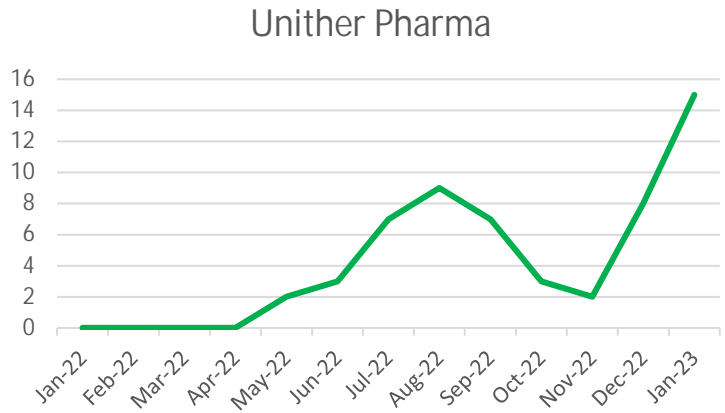
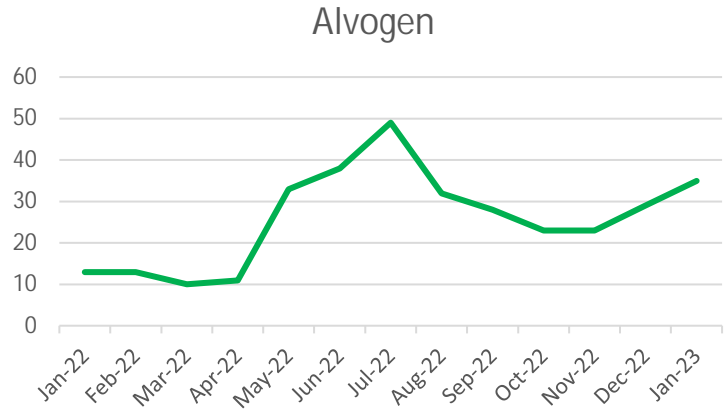
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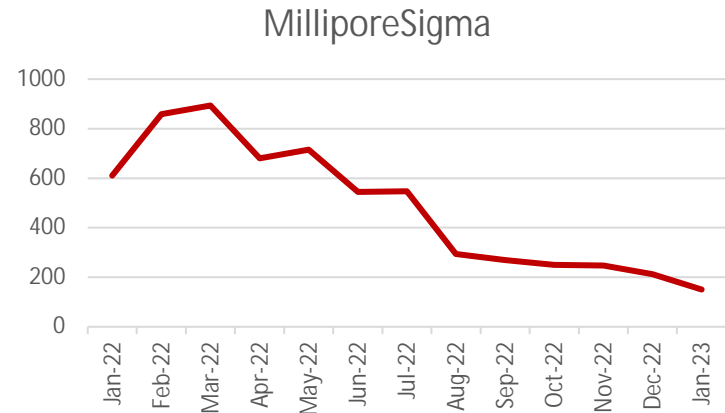
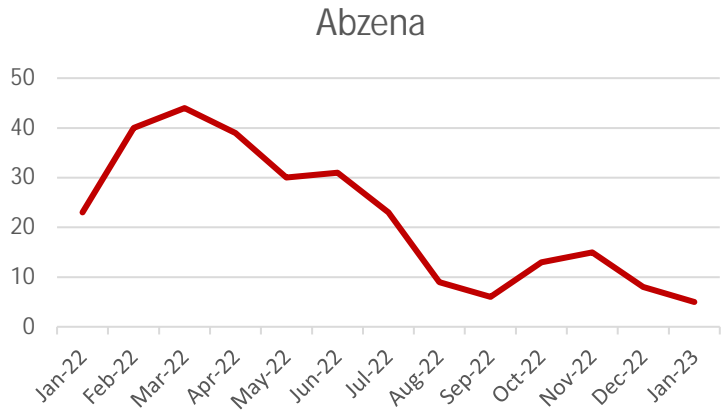
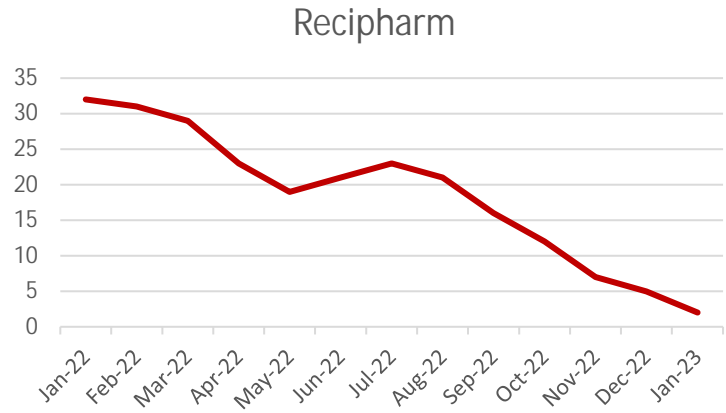
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Data Summary – Monthly Hiring Industry Insight

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

Catalent.

- Catalent opened a new commercial-scale plasmid DNA (pDNA) manufacturing facility at its European Center of Excellence for Cell Therapies in Gosselies, Belgium.
- Catalent to build a \$40M analytical services facility in North Carolina's Research Triangle



- Meissner experience 80% increase in headcount over a 2-year period due to significant global demand for filtration products and services, significant growth across Engineering, Ops and Research.



- Swiss CDMO Celonic finds a home at Novartis' Stein hub, plans to add 250 new jobs centered on next-gen drugs
- Celonic become a long-term partner of the federal republic of germany for vaccine supply

A microscopic view of several cells with blue nuclei, arranged in a branching pattern. The cells are connected by thin, clear filaments, suggesting a network or evolutionary path. The background is dark with a soft, golden glow.

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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.

