



# EVOLUTION

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INSIGHT REPORT

Predictive Talent Dynamics – December 2022

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A microscopic view of several blue, spherical cells, likely yeast or bacteria, in a petri dish. The cells are arranged in a cluster, with some showing budding or division. The background is a soft, out-of-focus gradient of light blue and white, suggesting a laboratory setting.

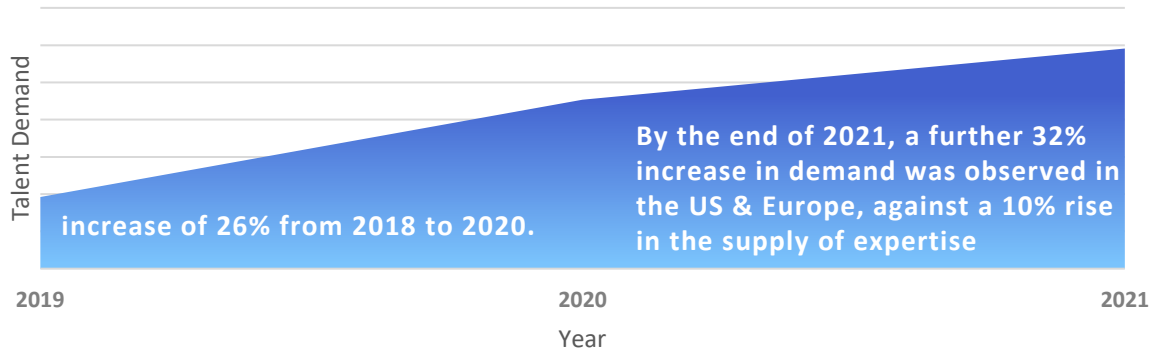
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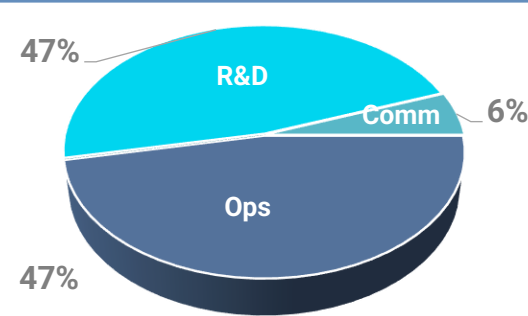
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Executive Summary

**Biomanufacturing Hiring:- Yearly Average**



**Role Postings:  
By Role Type**



**Top 3 Companies:**

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



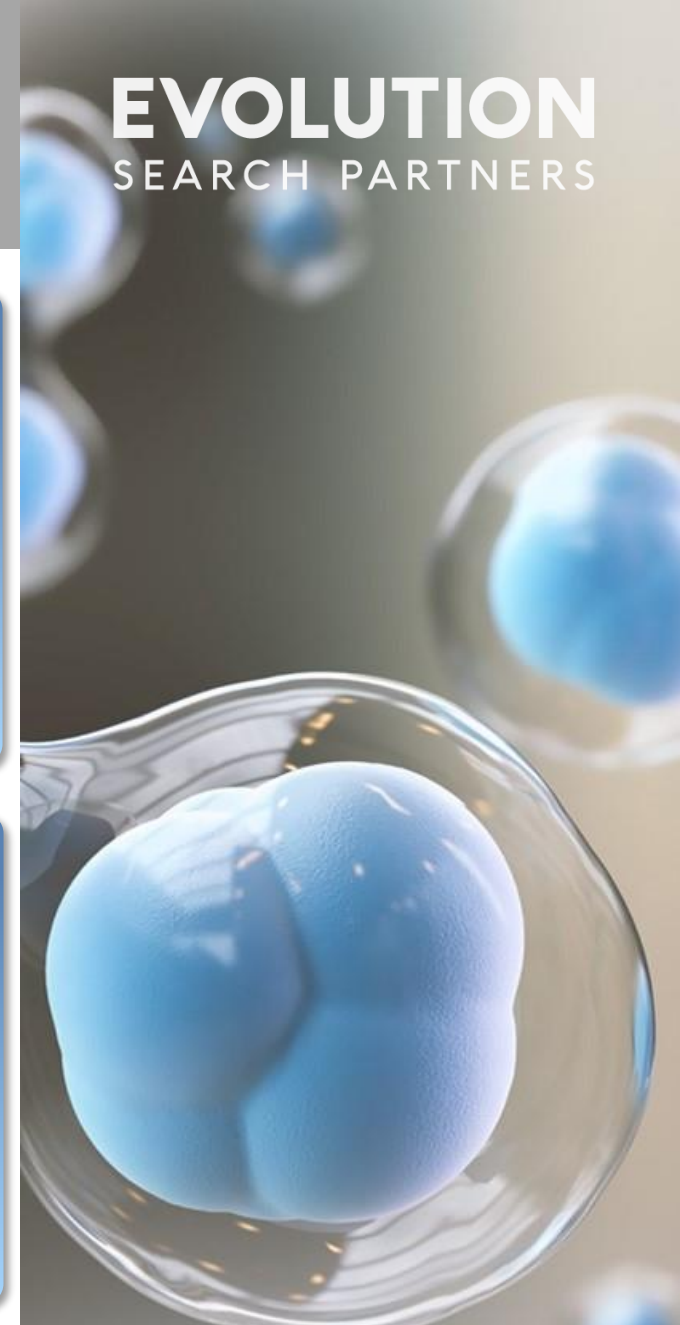
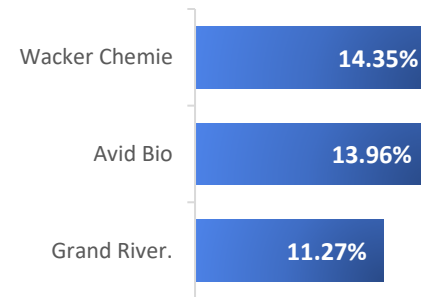
**2022**

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.

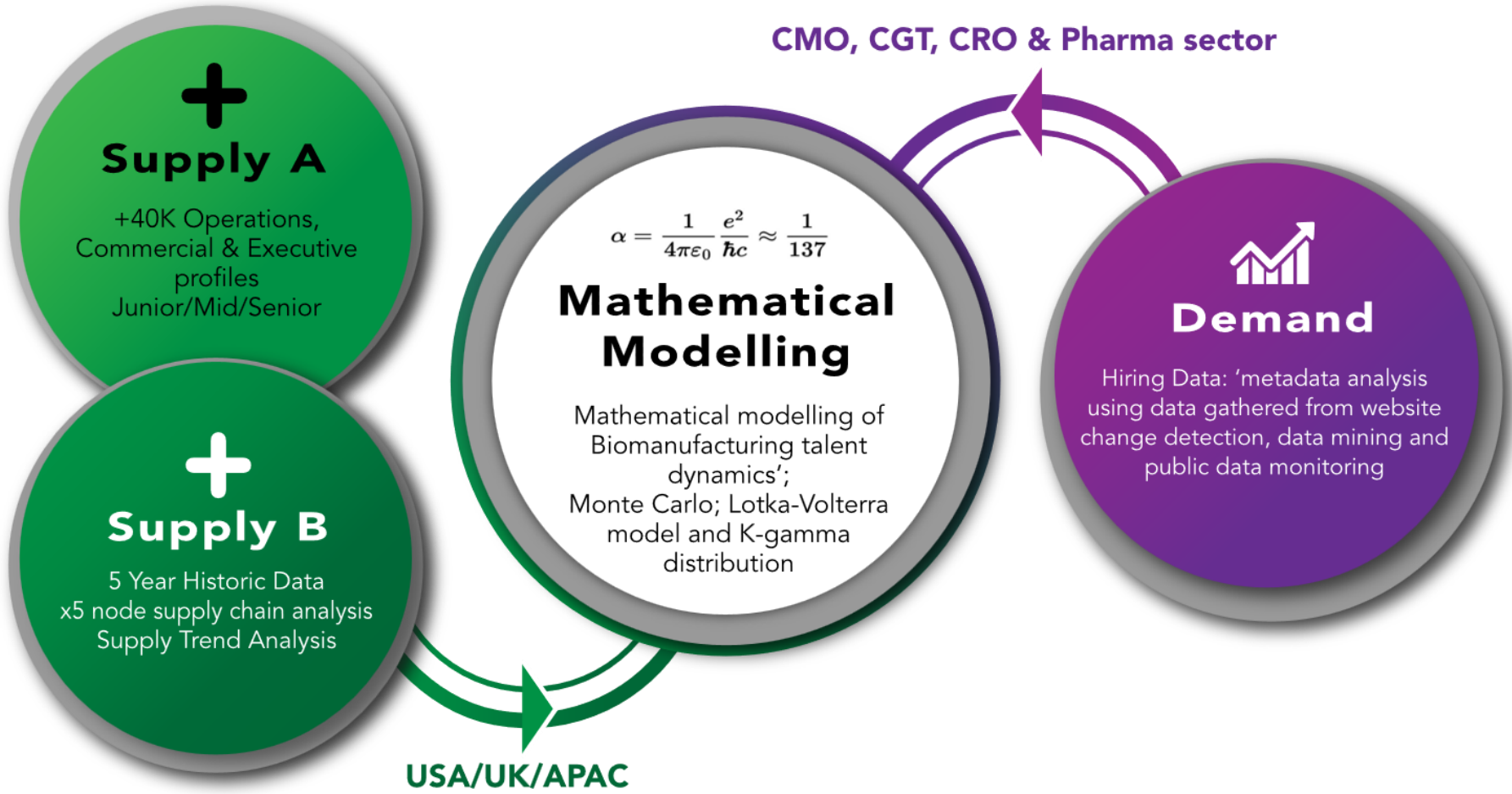
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**Introduction and Methodology**

# 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 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 center of the image, serving as a background for the text.

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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

18 | Data Summary – Monthly Hiring Insight

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28 | Predictive Talent Market Dynamics



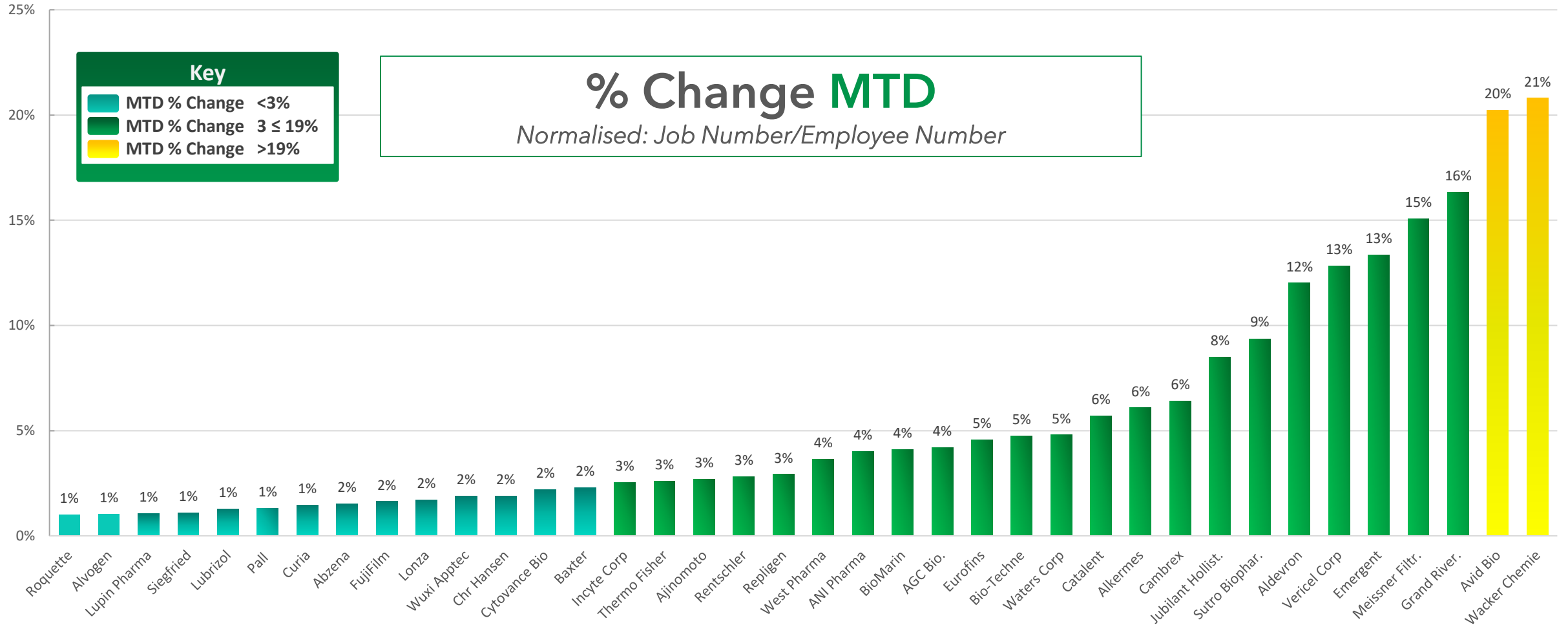
A microscopic view of several blue, spherical cells with clear, glass-like membranes, set against a dark, blurred background. The cells are arranged in a cluster, with some in sharp focus and others blurred in the foreground and background. The lighting creates a soft glow around the cells, highlighting their texture and the way they are connected.

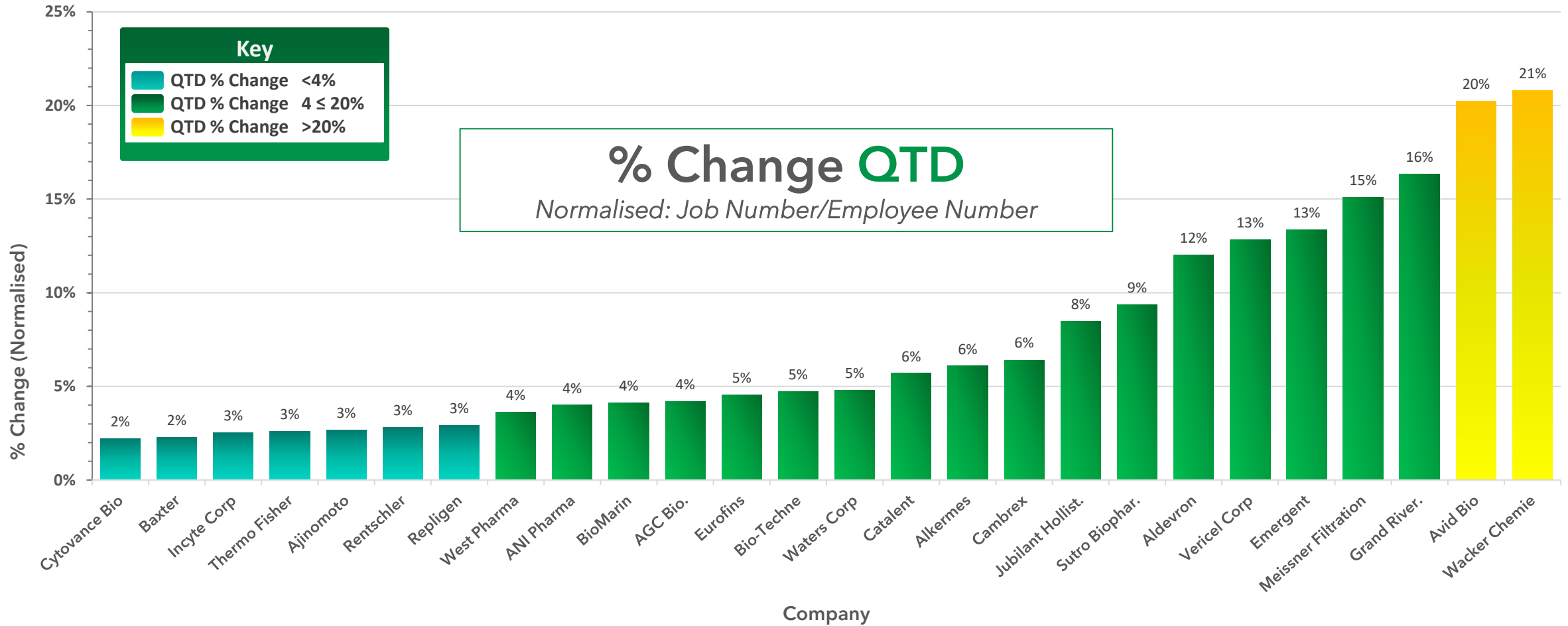
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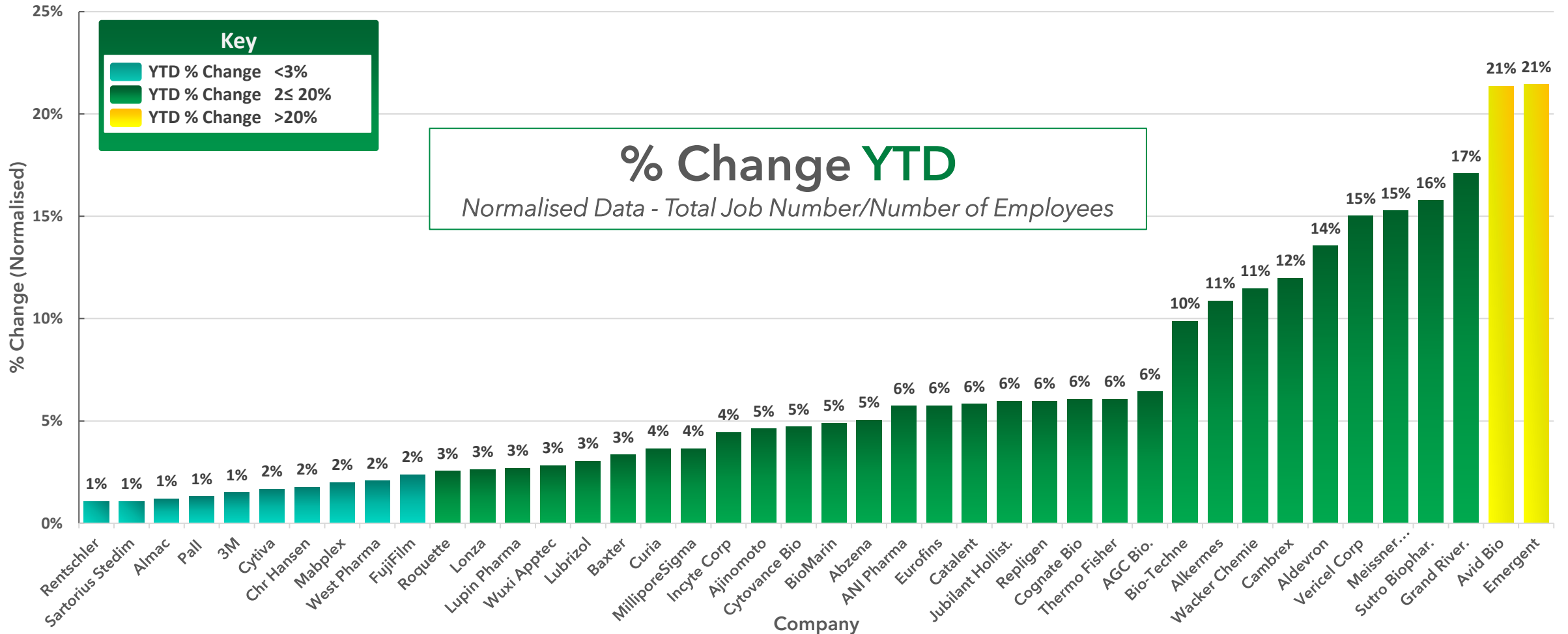
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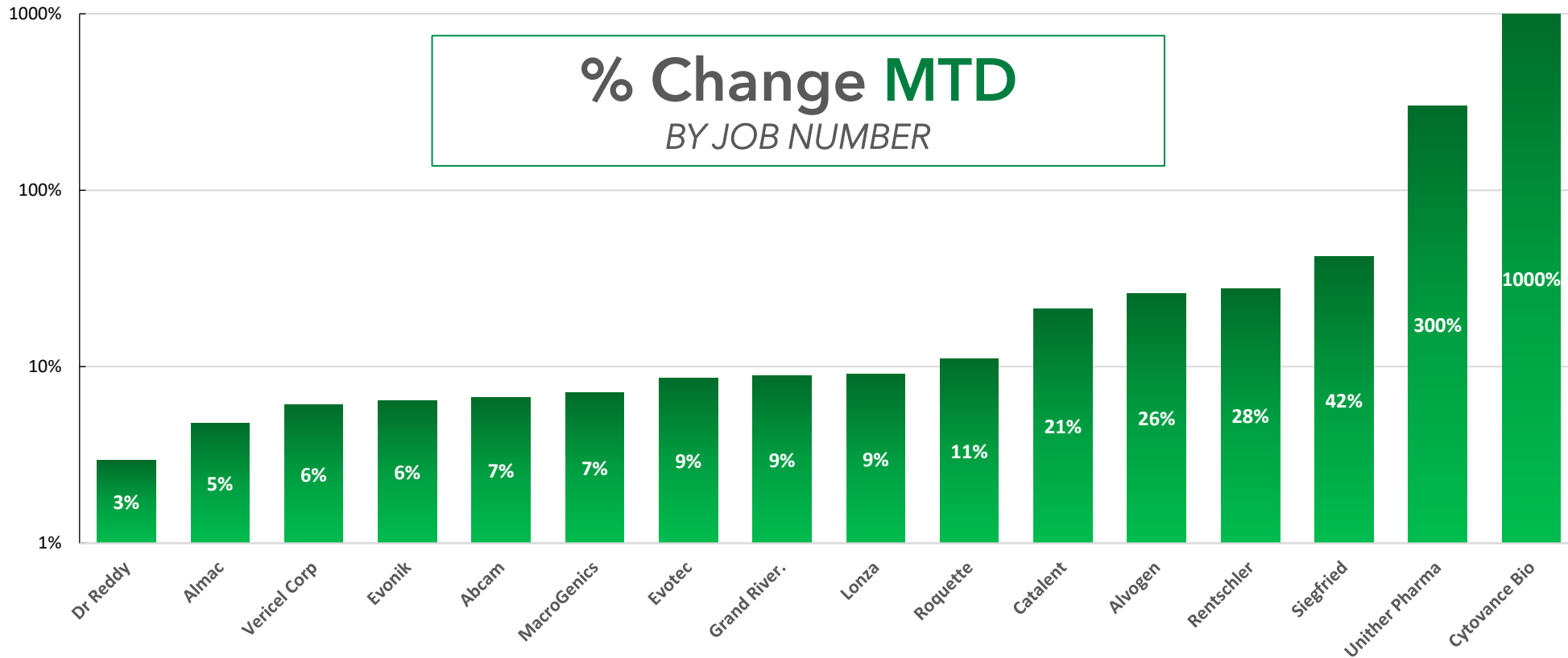
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Assessment of Hiring Frequency by Job Number (Normalised)





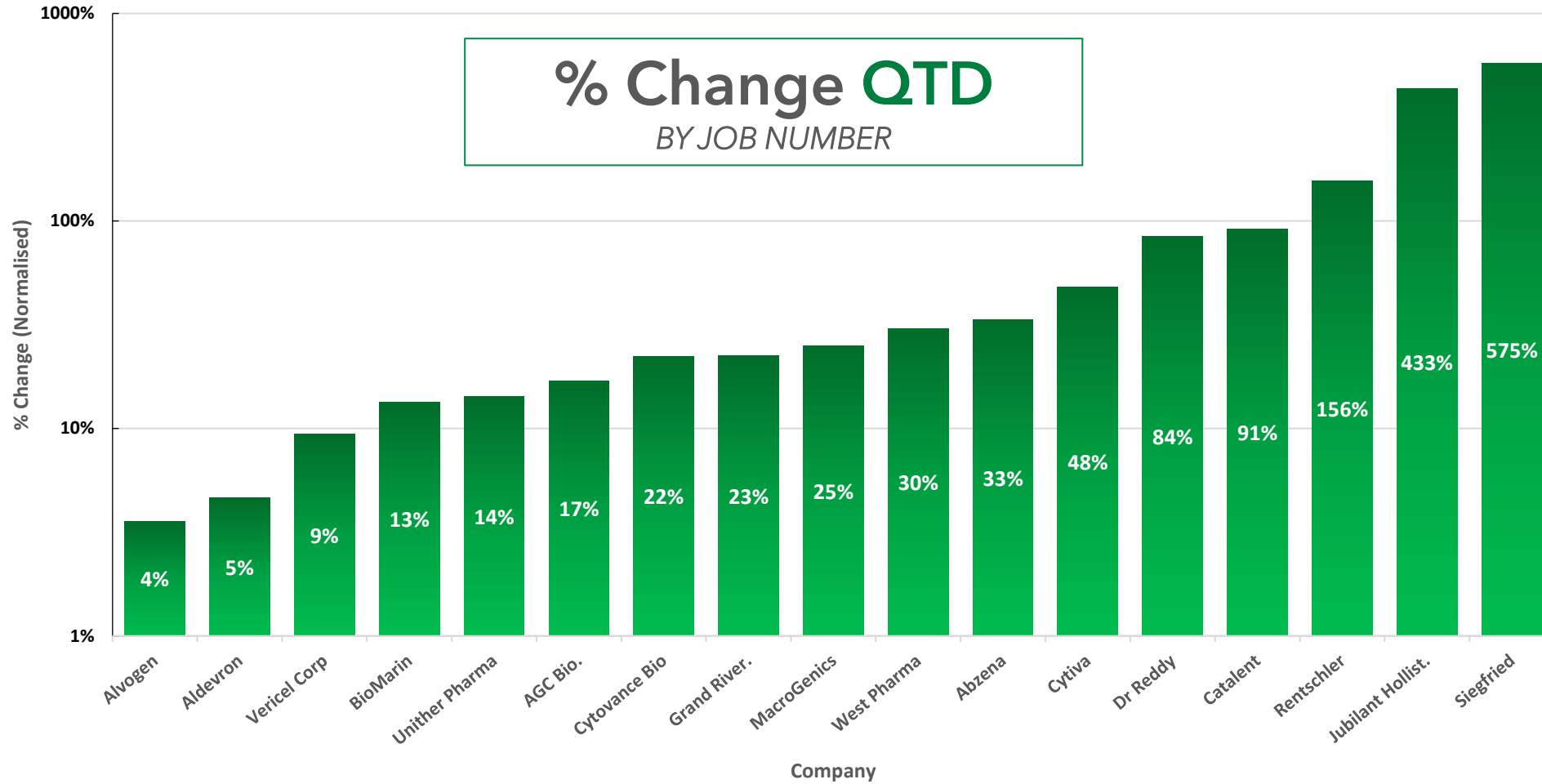




Siegfried  
Unither Pharma  
Cytovance Bio



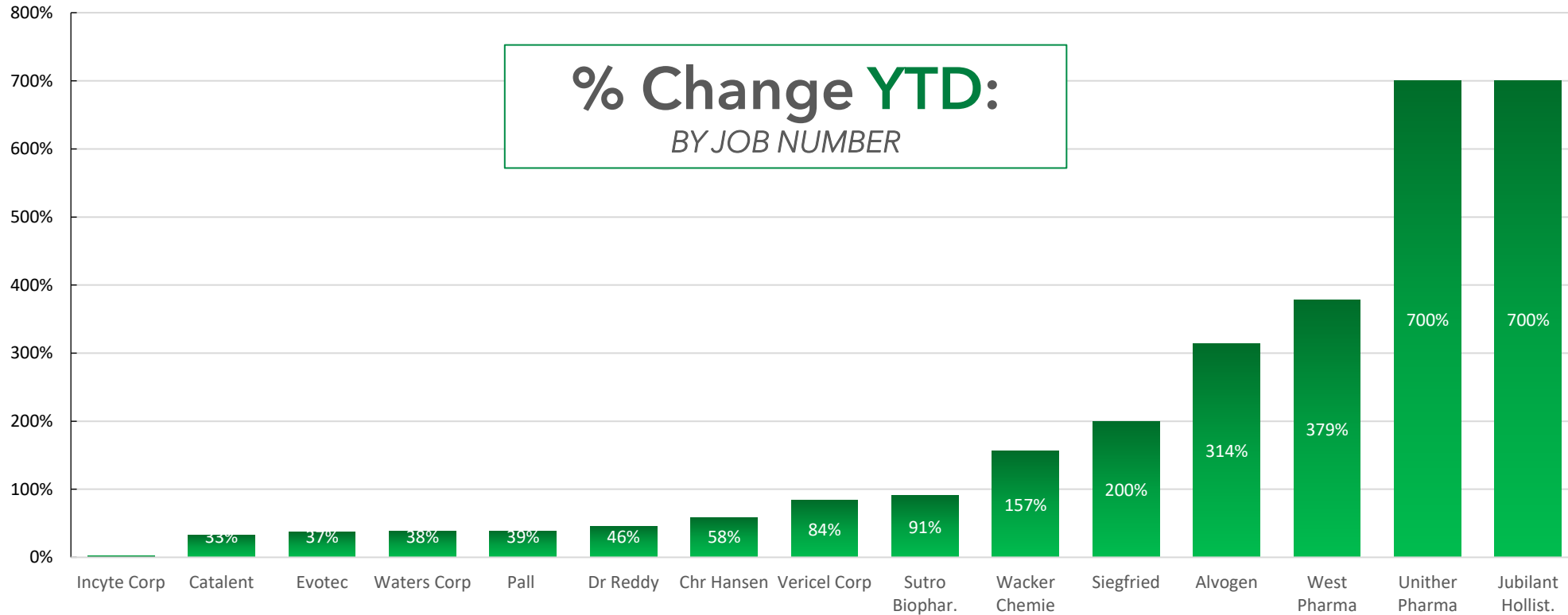
FujiFilm  
Mabplex  
Univercell Tech



Rentschler  
Jubilant Hollist.  
Siegfried



Nitto Denko  
Mabplex  
Univercell Tech

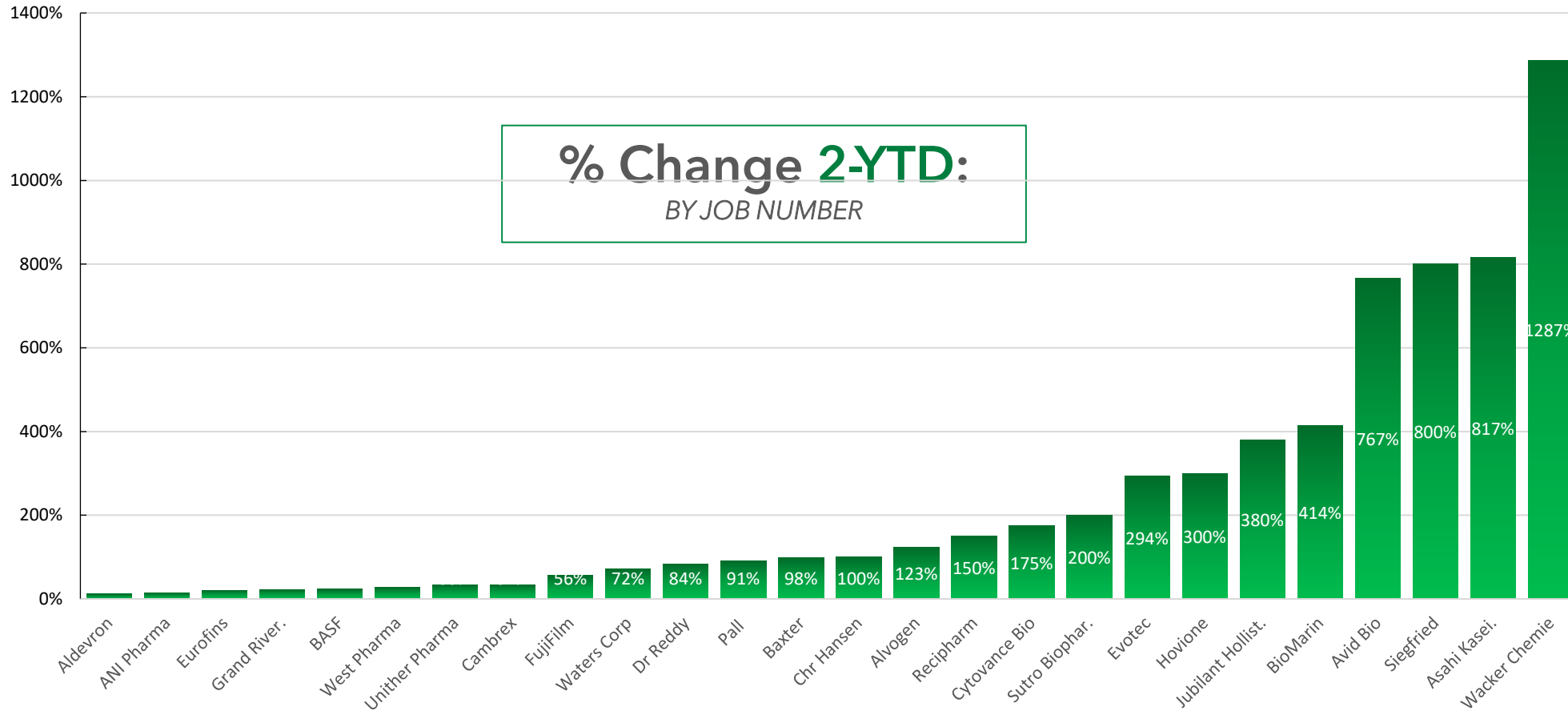


West Pharma  
Unither Pharma  
Jubilant Hollist.



Corden  
Nitro Denko  
Mabplex





Siegfried  
Asahi Kasei.  
Wacker Chemie



MeiraGTx  
Nitto Denko  
Cognate Bio

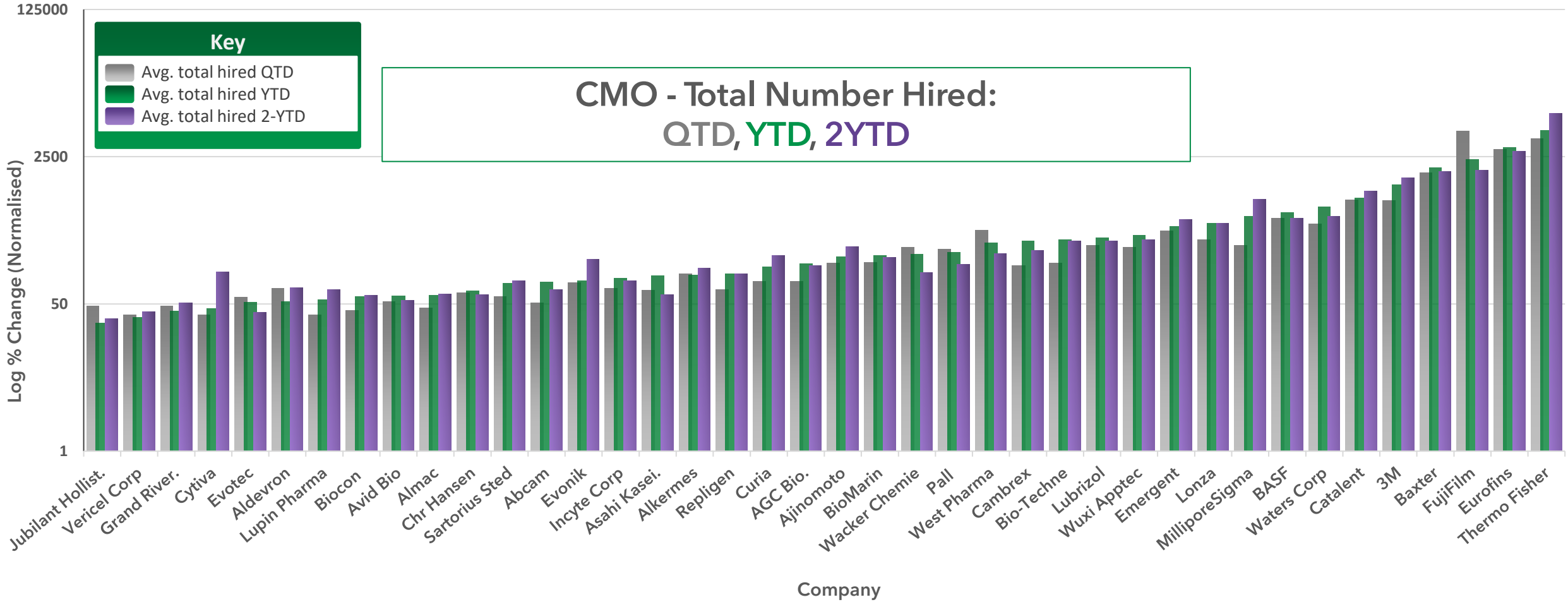
The background of the slide is a microscopic view of several blue, spherical cells, likely yeast or bacteria, each enclosed in a clear, glass-like membrane. The cells are arranged in a somewhat circular pattern, with some in the foreground and others in the background, creating a sense of depth. A semi-transparent horizontal band is overlaid across the center of the image, containing the text.

# EVOLUTION

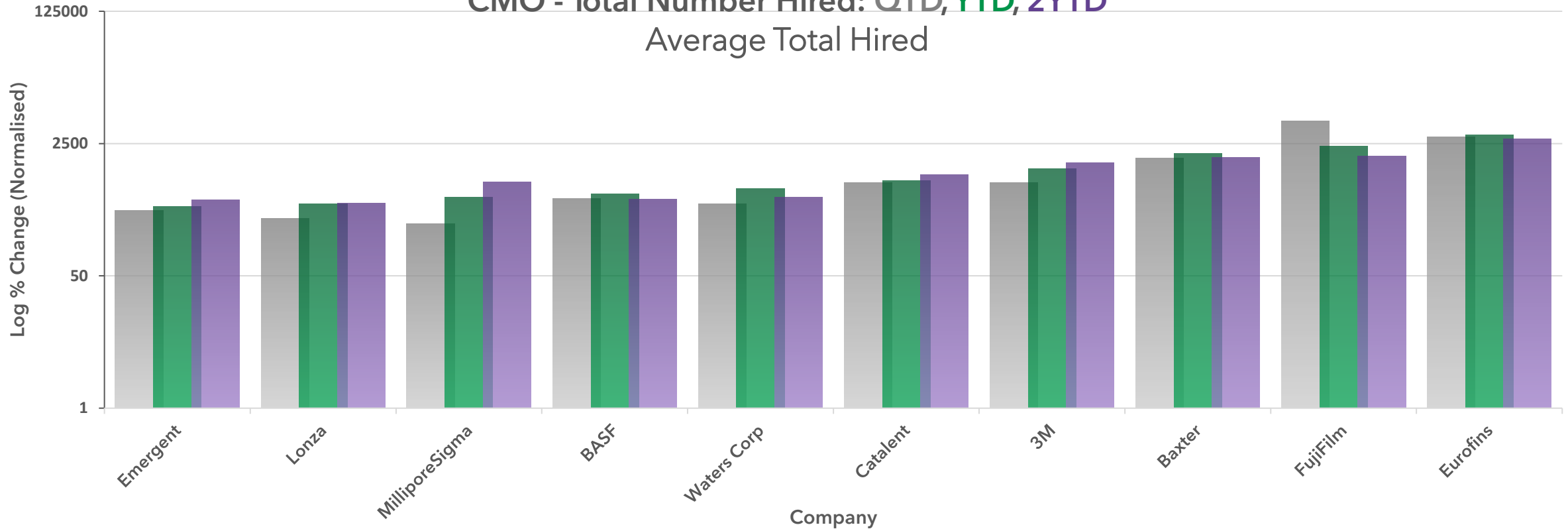
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Assessment of Hiring Frequency by Job Number (Average)



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



**Key**

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

**Fujifilm, Eurofins and Eurofins**  
Largest increase across QTD, YTD, 2YTD.

A microscopic view of several blue, spherical cells with clear, glass-like membranes, set against a dark, blurred background. The cells are of various sizes and are connected by thin, clear filaments, suggesting a network or a process of cell division or interaction. The lighting is soft, highlighting the texture of the cell surfaces.

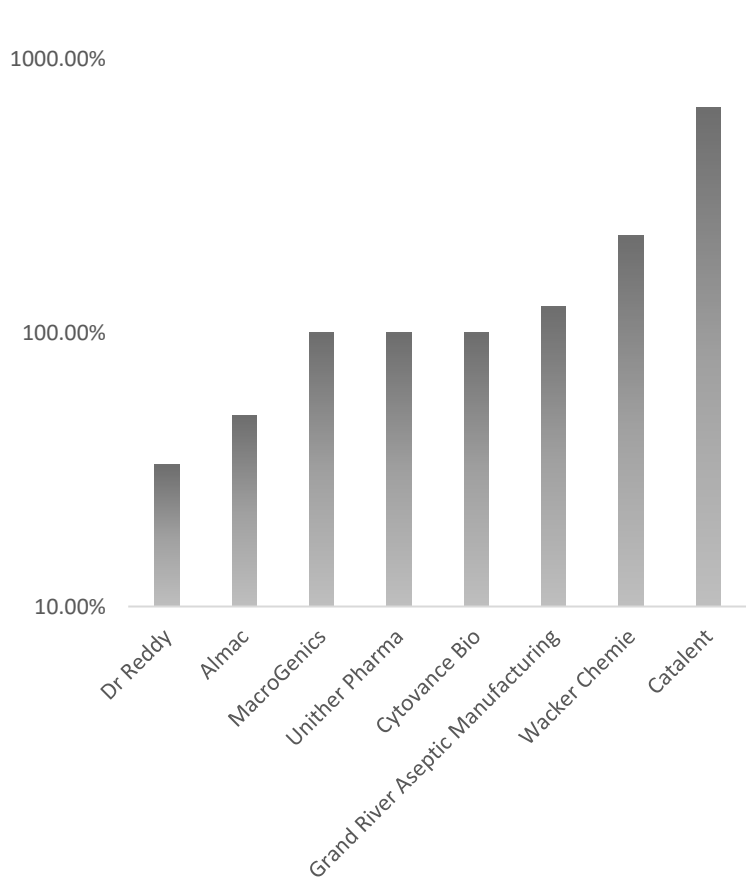
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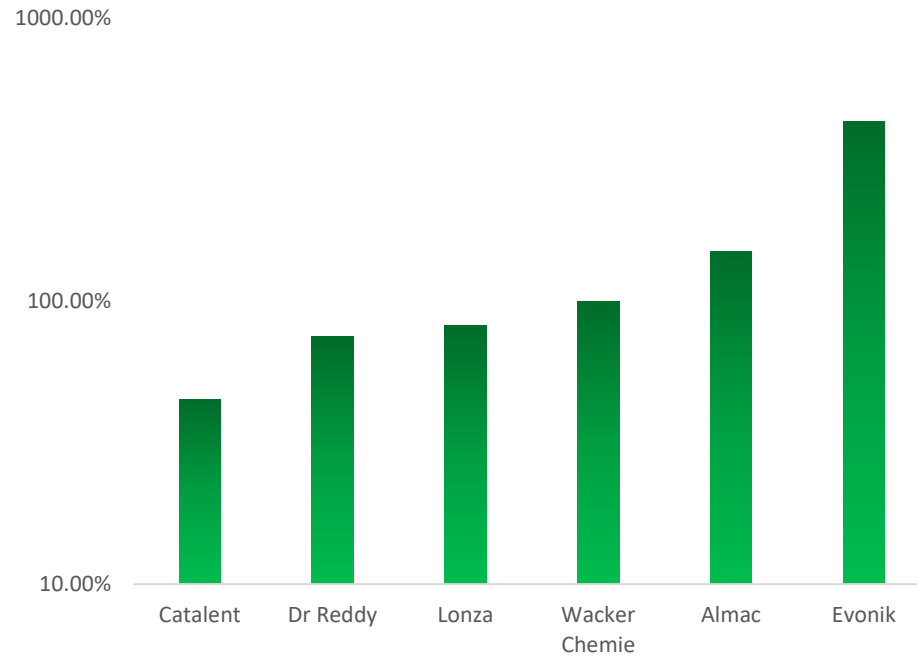
**CDMO**

**Assessment of Hiring Frequency by Job Type**

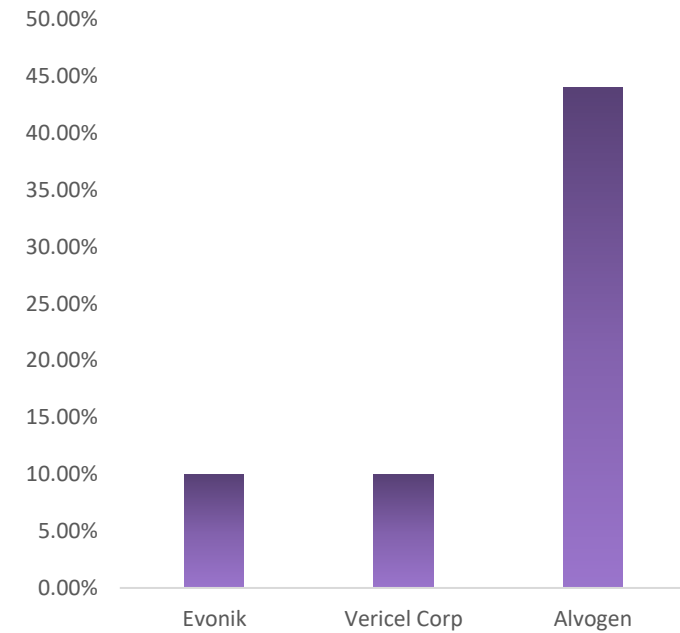
### R&D



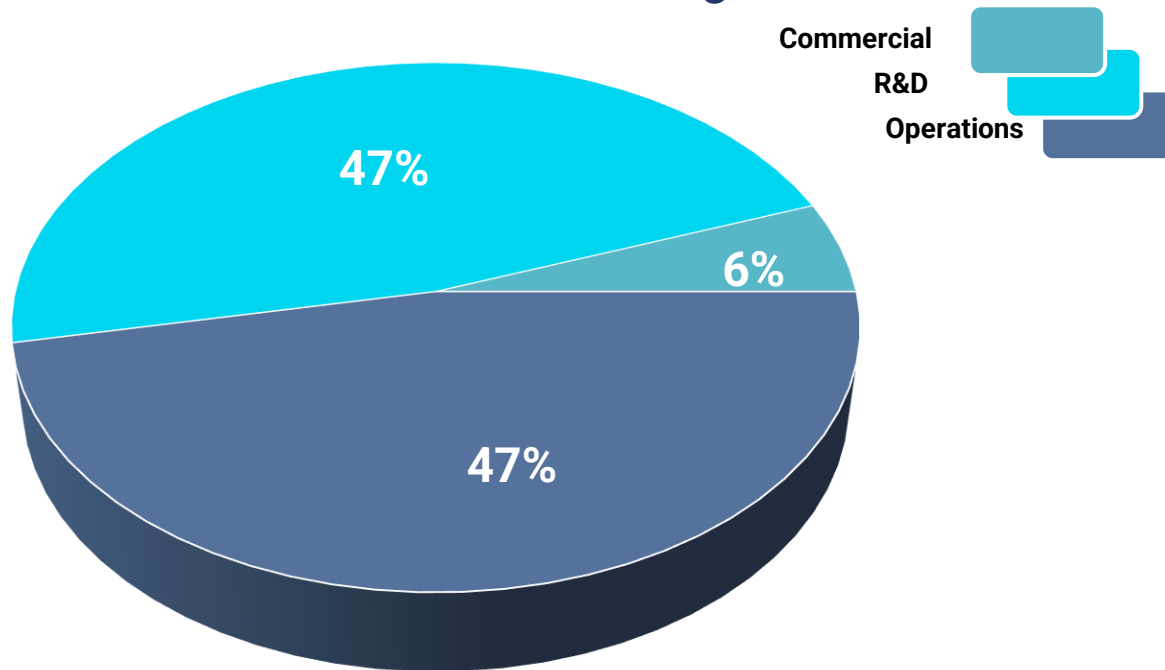
### Operations



### Commercial



### Breakdown of Roles Postings



#### YTD (Increasing)

##### Commercial:

Wacker Chemie  
Evonik

##### Operations:

Catalent  
Wacker Chemie

##### R&D:-

Rentschler  
Wacker Chemie

#### MTD (Increasing)

##### Commercial:

Vericel Corp  
Alvogen

##### Operations:

Almac  
Evonik

##### R&D:-

Wacker Chemie  
Catalent

A microscopic view of several blue, spherical cells with clear, glass-like membranes, set against a dark, blurred background. The cells are arranged in a cluster, with some in sharp focus and others blurred in the foreground and background. A semi-transparent dark grey horizontal band runs across the middle of the image, serving as a background for the text.

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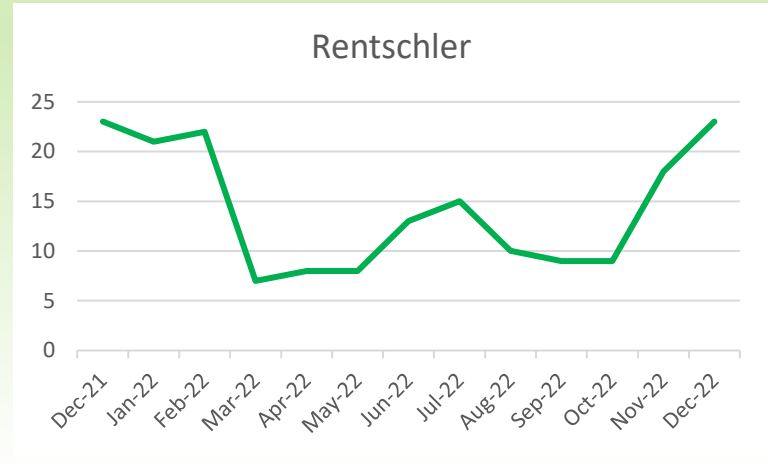
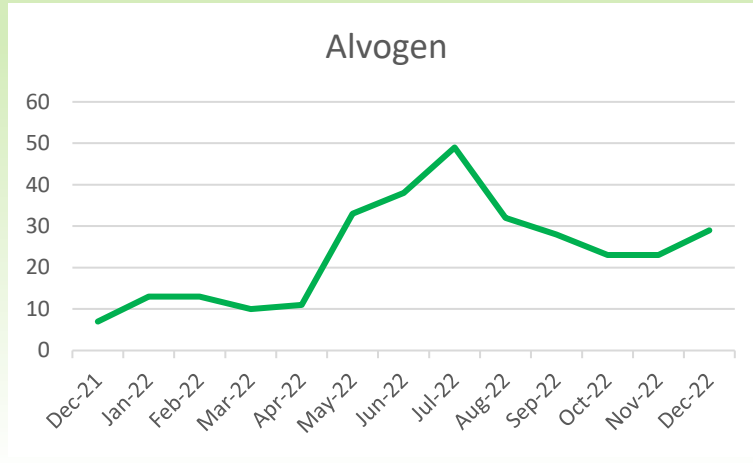
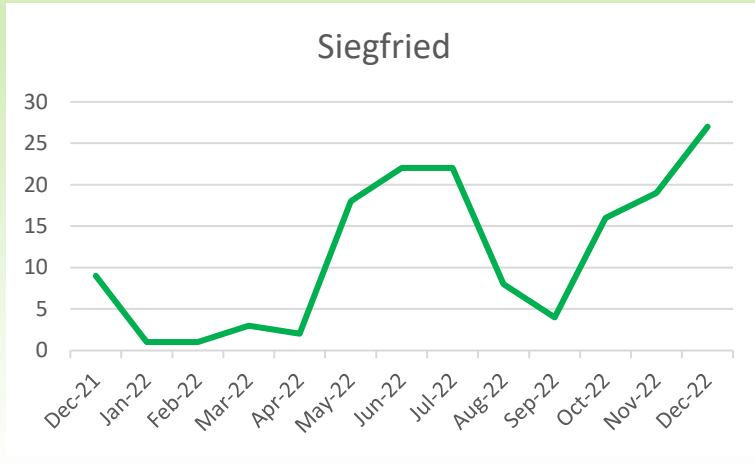
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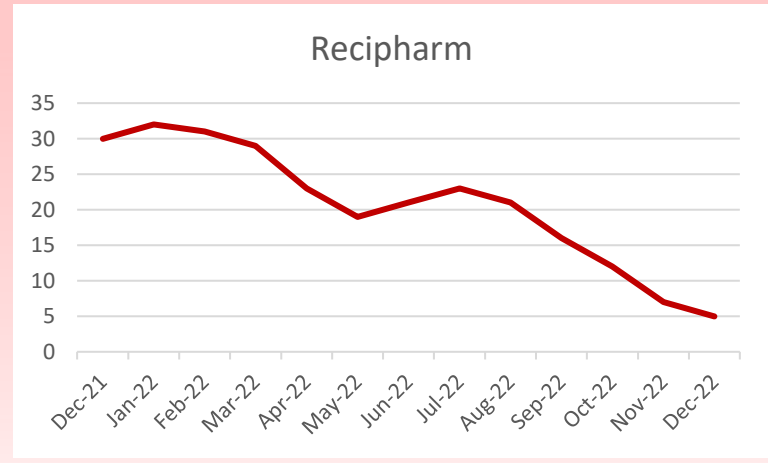
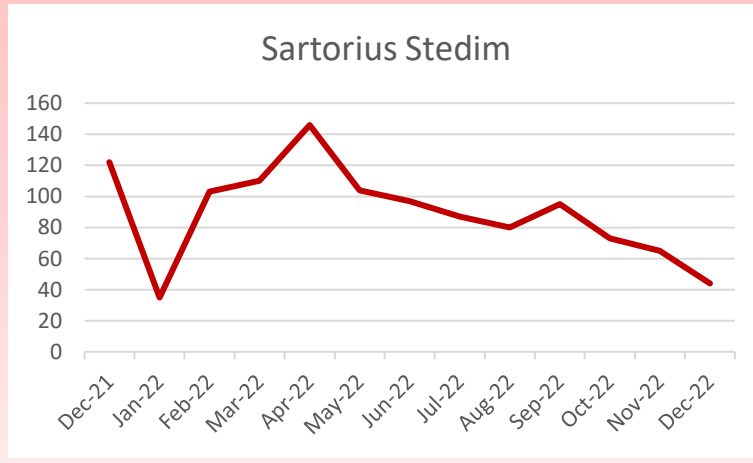
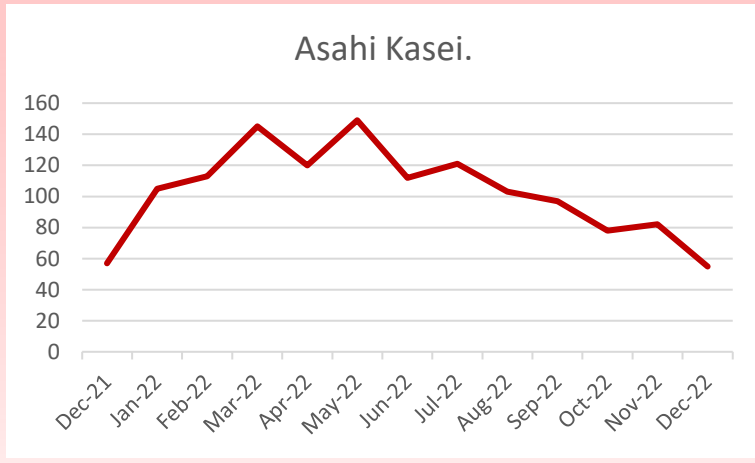
**Data Summary – Monthly Hiring Industry Insight**



INCREASING



DECREASING



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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Market Drivers



- Grand River Aseptic Manufacturing Invests \$160 Million with Award from U.S. Government to Support Continued and Future Growth
- Grand River Aseptic Manufacturing Inc. in Grand Rapids has signed a deal with Danish vaccine company Bavarian Nordic to fill and finish a smallpox and monkeypox vaccine.
- Grand River Aseptic Manufacturing Completes Phase II Expansion with Installation of Two New Sterile Filling Lines.



- Wacker \$200 million expansion to add another 200 jobs in Charleston, Tennessee



- 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, 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 a soft, out-of-focus gradient of light blue and white.

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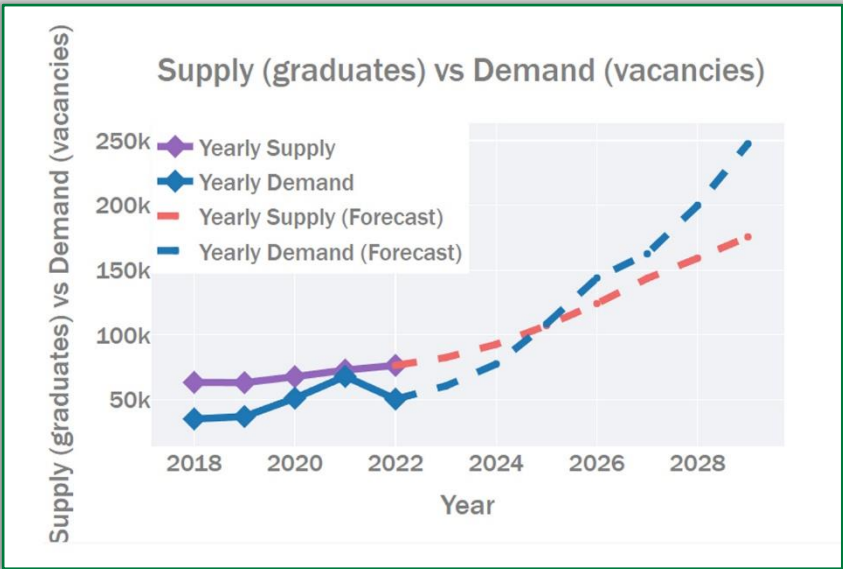
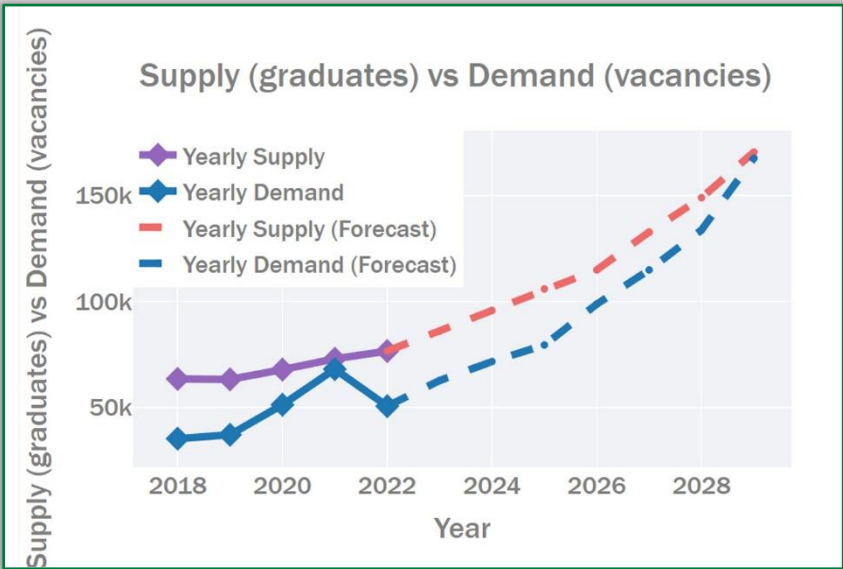
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Predictive Talent Market Dynamics

# 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.

