

A microscopic view of several cells, likely oocytes, with prominent blue nuclei. The cells are surrounded by a clear, gelatinous layer. The background is a soft, out-of-focus gradient of light and dark tones.

EVOLUTION

SEARCH PARTNERS

INSIGHT REPORT
Predictive Talent Dynamics – March 2023

Table of contents

- 03. | Executive Summary
- 05. | Introduction & Methodology
- 08. | Industry Sub Sector
- 28. | Predictive Talent Market Dynamics



A microscopic view of several cells, likely oocytes or early embryos, with prominent blue-stained nuclei. The cells are surrounded by a clear, gelatinous cytoplasm and are set against a dark, blurred background. A semi-transparent dark grey horizontal band runs across the middle of the image, serving as a backdrop for the text.

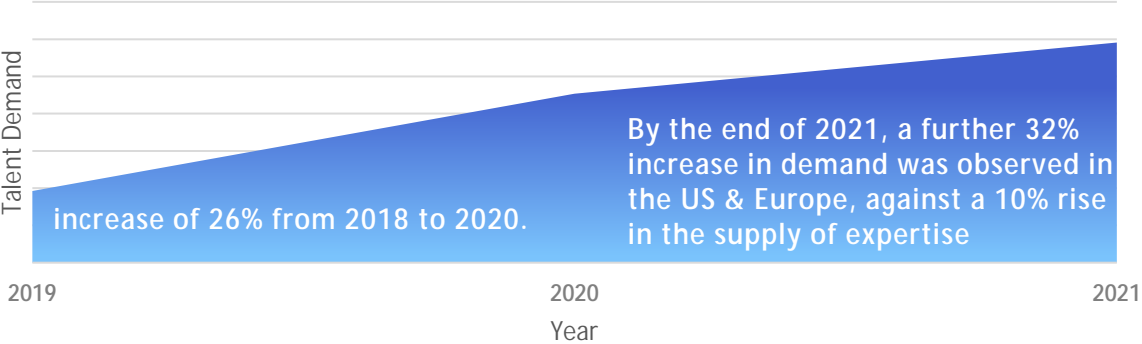
EVOLUTION

SEARCH PARTNERS

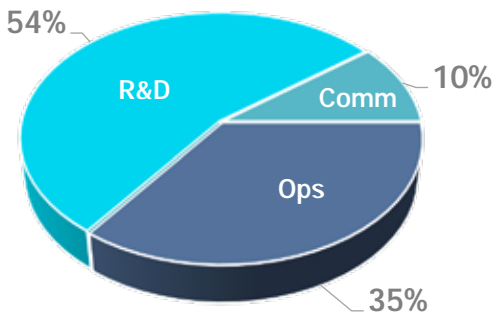
CDMO

Executive Summary

Biomanufacturing Hiring:- Yearly Average



Role Postings:
By Role Type



Top 3 Companies:

Largest Annual Talent Demand Increase
Normalised versus employee no.

WACKER

AVID
BIOSERVICES

SUTRO
BIOPHARMA



2022

Monthly Hiring Demand Change

▼ -4.6%

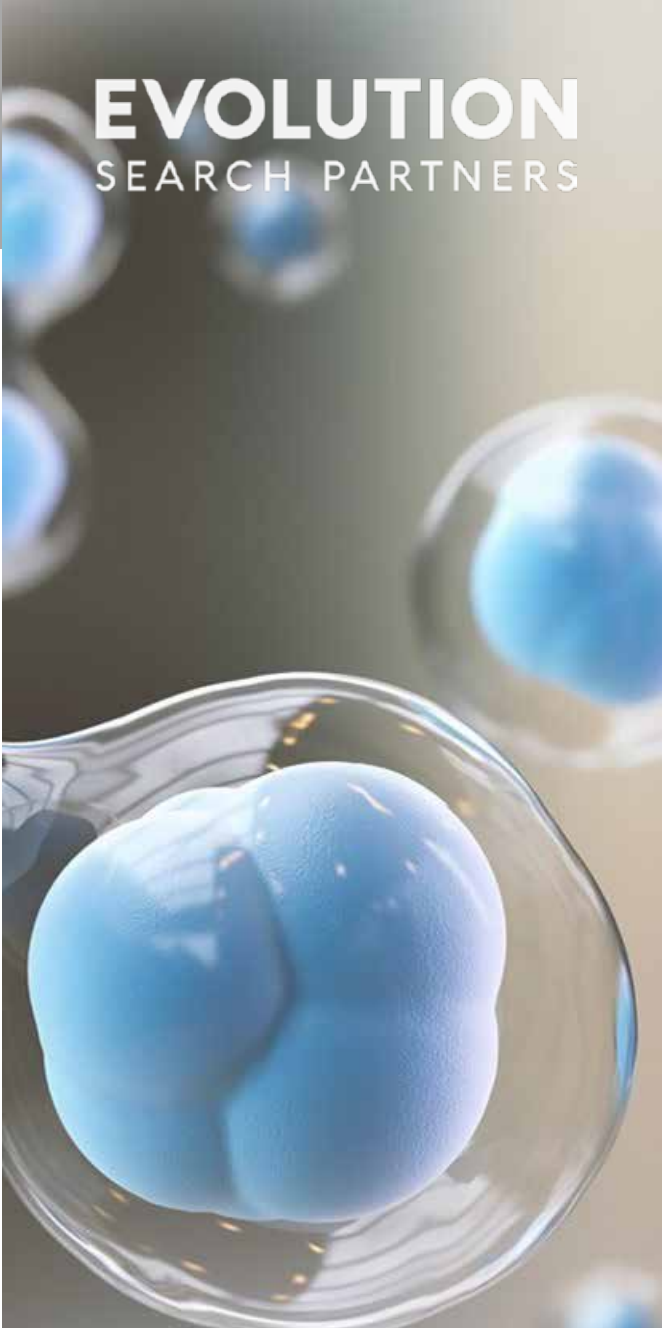
Top 3 Companies:

Largest Monthly Talent Demand Increase
Normalised versus employee no.

Wacker Chemie 14.63%

Avid Bio 9.13%

Sutro Biophar. 8.32%



A microscopic view of several cells, likely oocytes or early embryos, with prominent blue-stained nuclei. The cells are surrounded by a clear, gelatinous cytoplasm and are set against a dark, blurred background. A semi-transparent dark band runs horizontally across the center of the image, serving as a backdrop for the text.

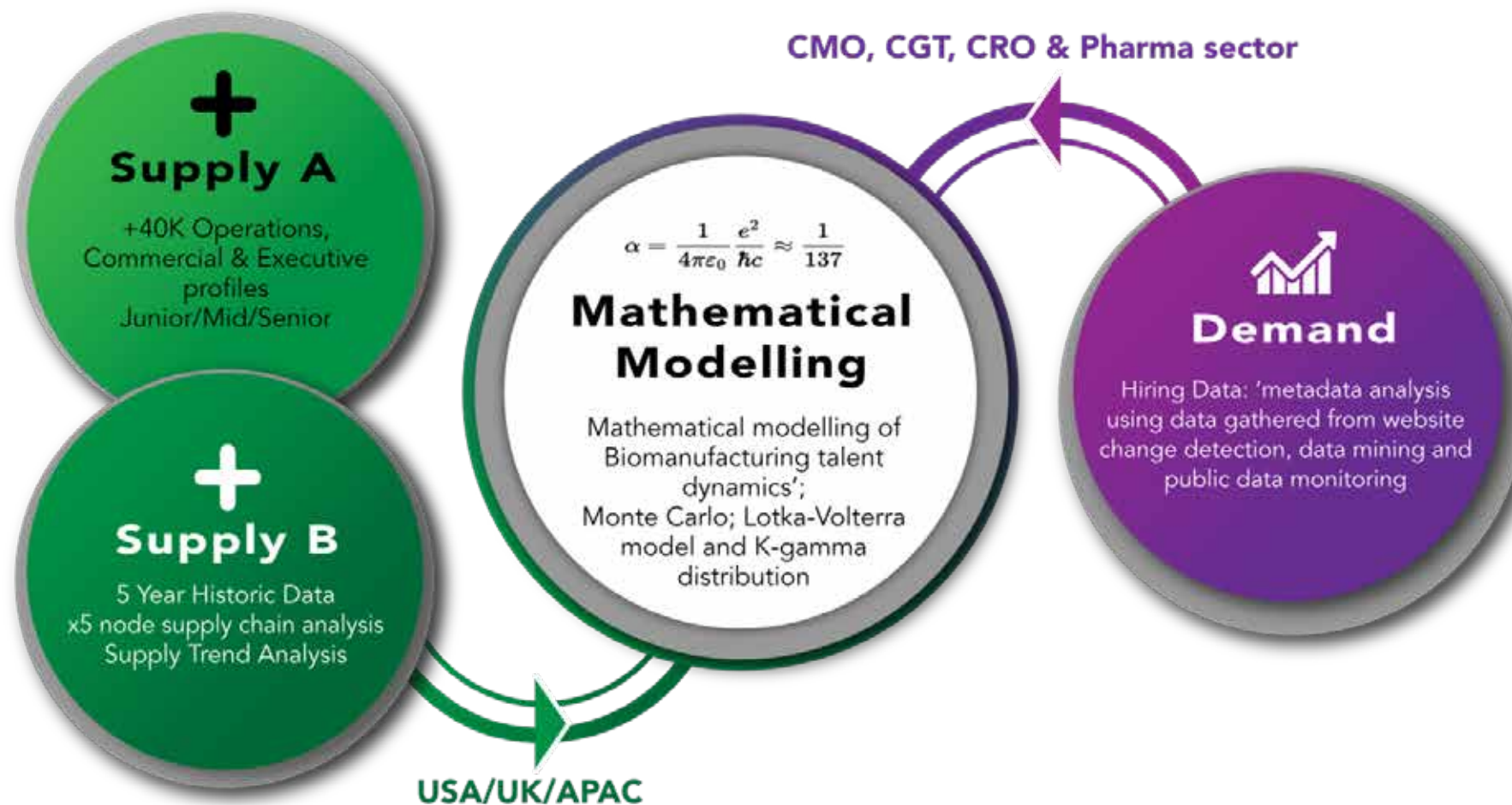
EVOLUTION

SEARCH PARTNERS

CDMO

Introduction and Methodology

Introduction & Methodology



EVOLUTION
SEARCH PARTNERS



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 oocytes or early embryos, with prominent blue-stained nuclei. The cells are surrounded by a clear, gelatinous cytoplasm and are set against a dark, blurred background. The lighting is soft, highlighting the texture of the cell membranes and the vibrant blue of the nuclei.

EVOLUTION

SEARCH PARTNERS

CDMO

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

26 | Market Drivers

28 | Predictive Talent Market Dynamics



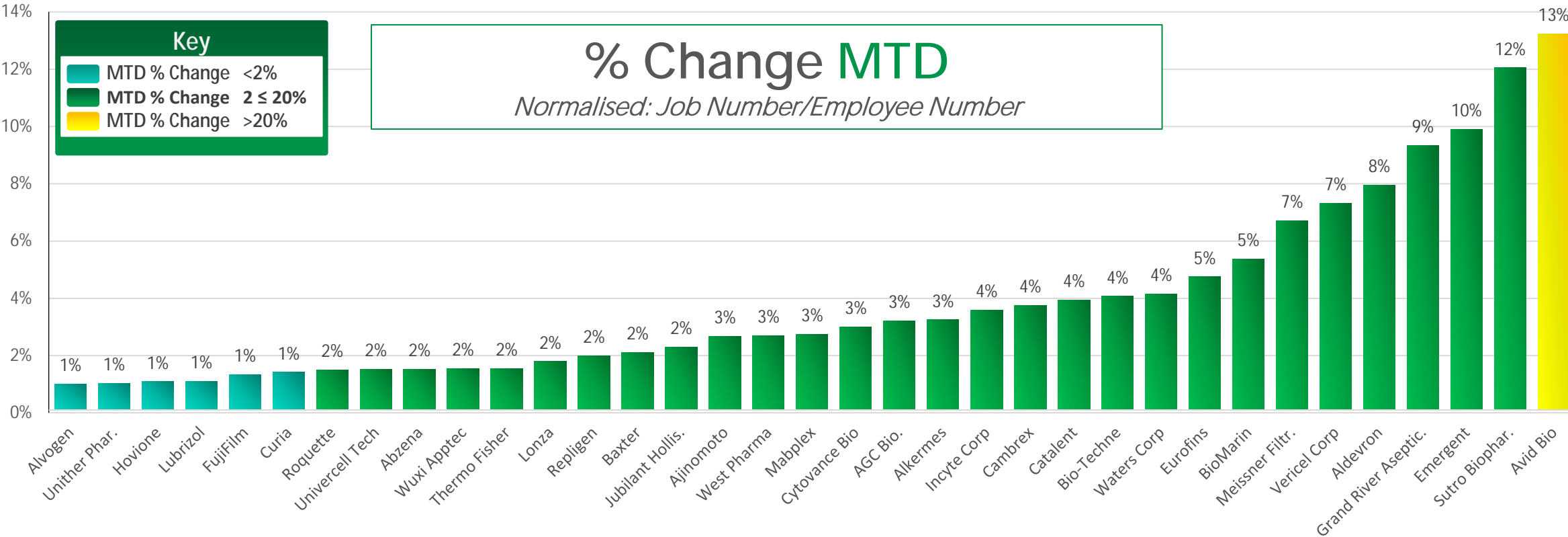


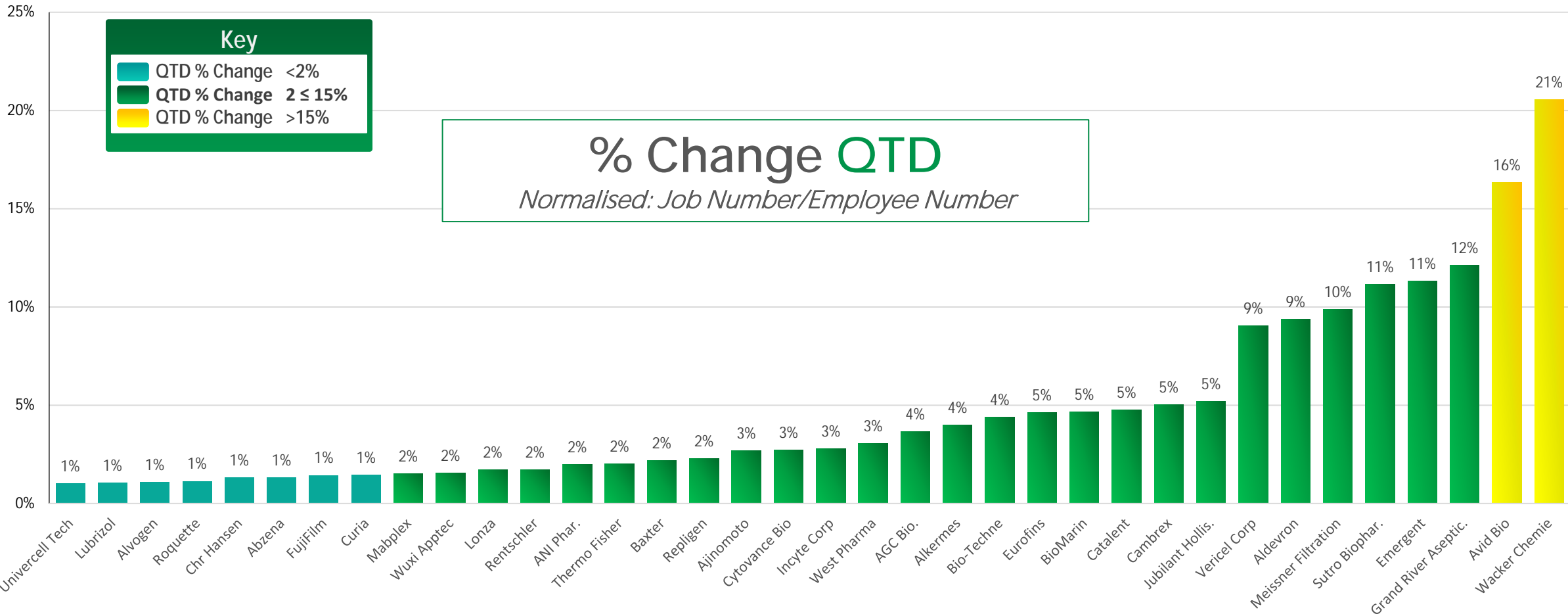
EVOLUTION

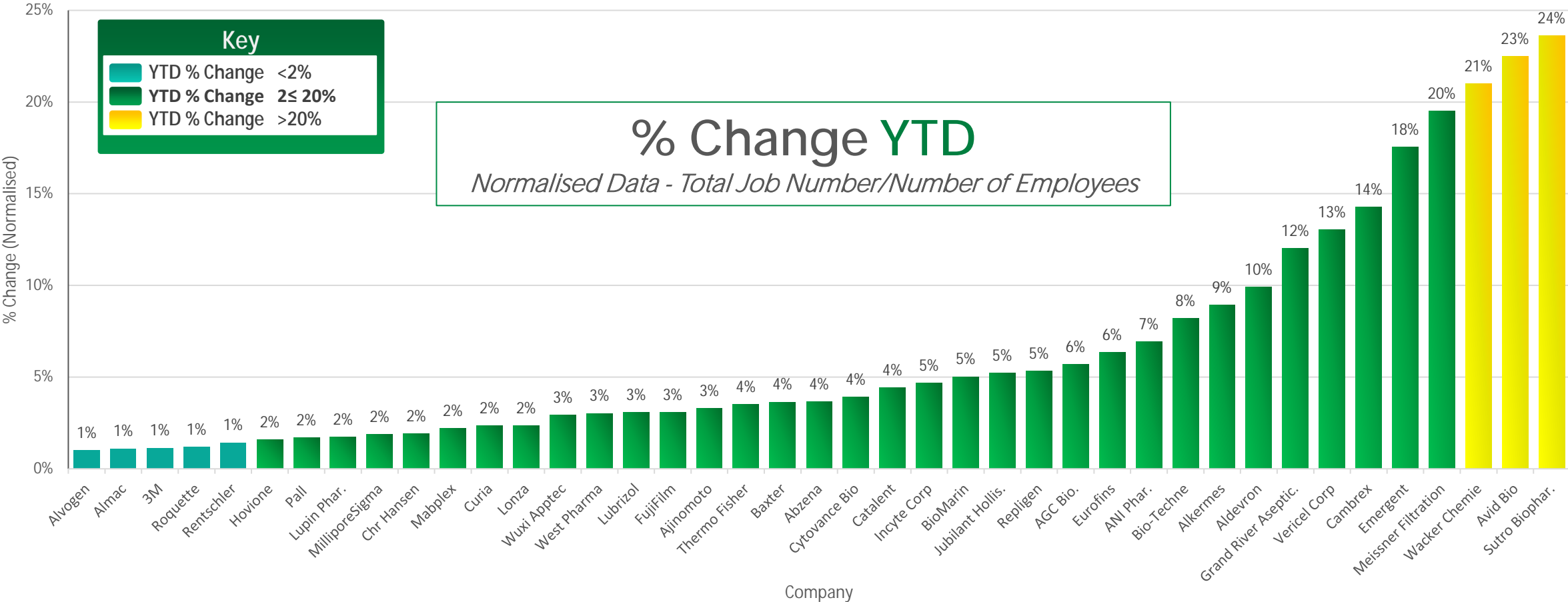
SEARCH PARTNERS

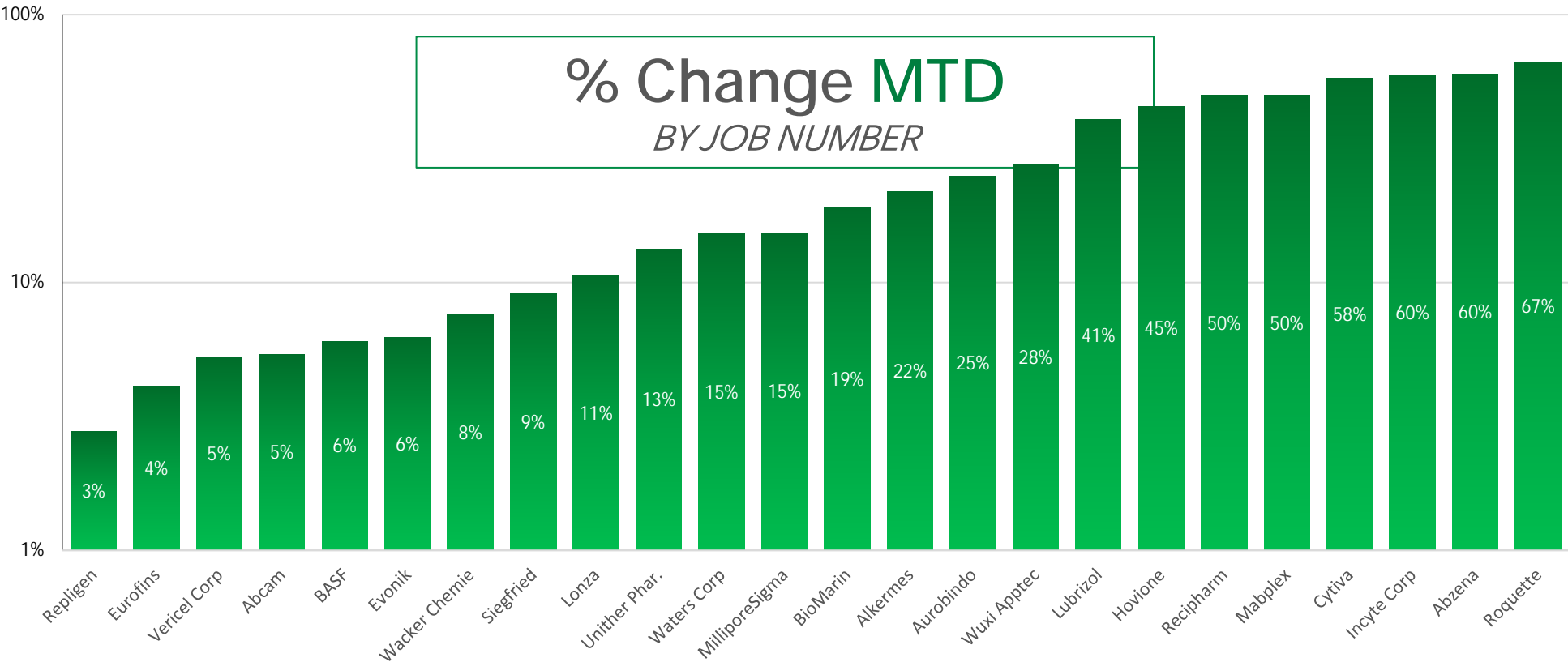
CDMO

Assessment of Hiring Frequency by Job Number (Normalised)





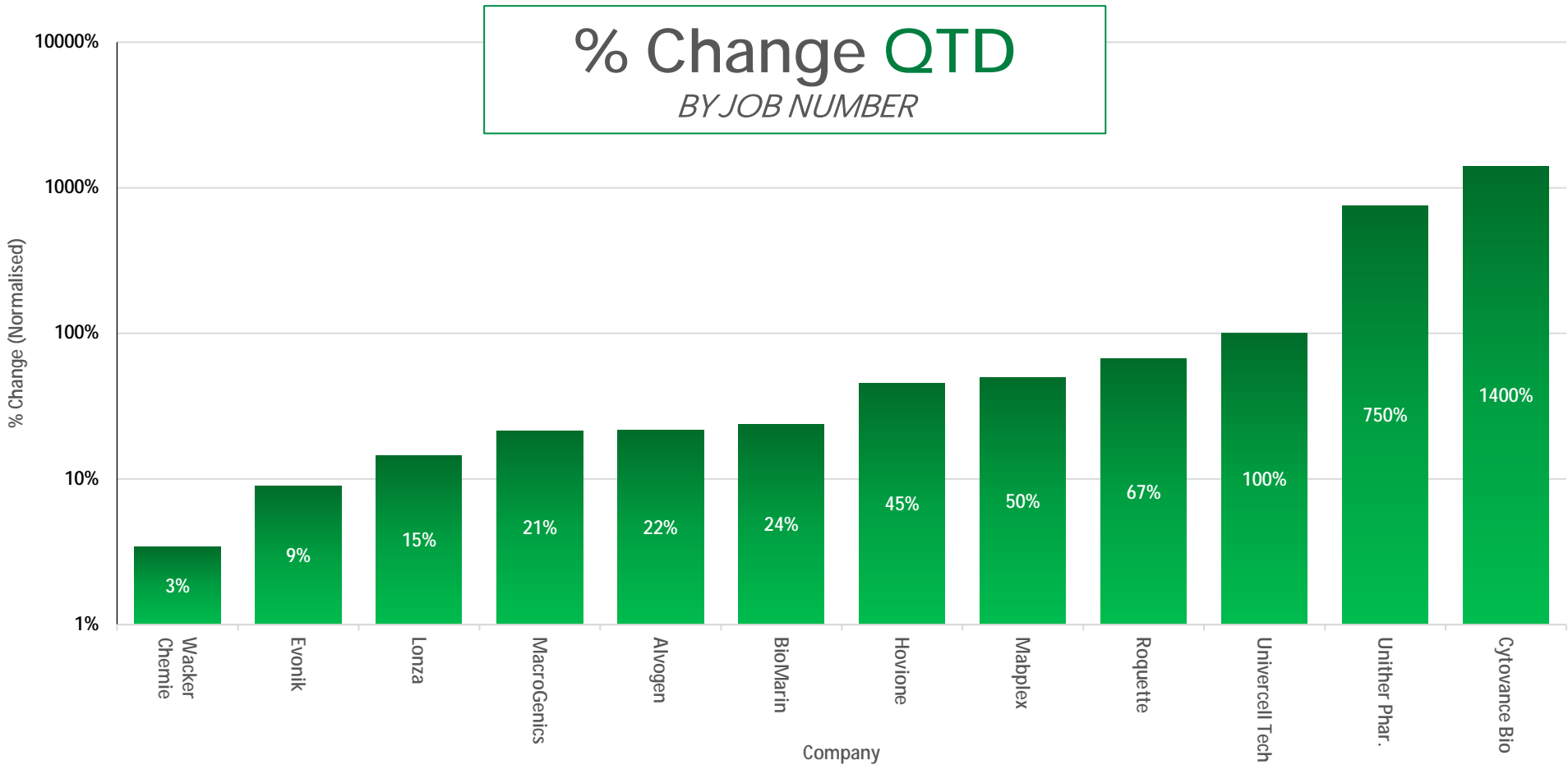




MacroGenics
Cytovance Bio
Unither Pharma



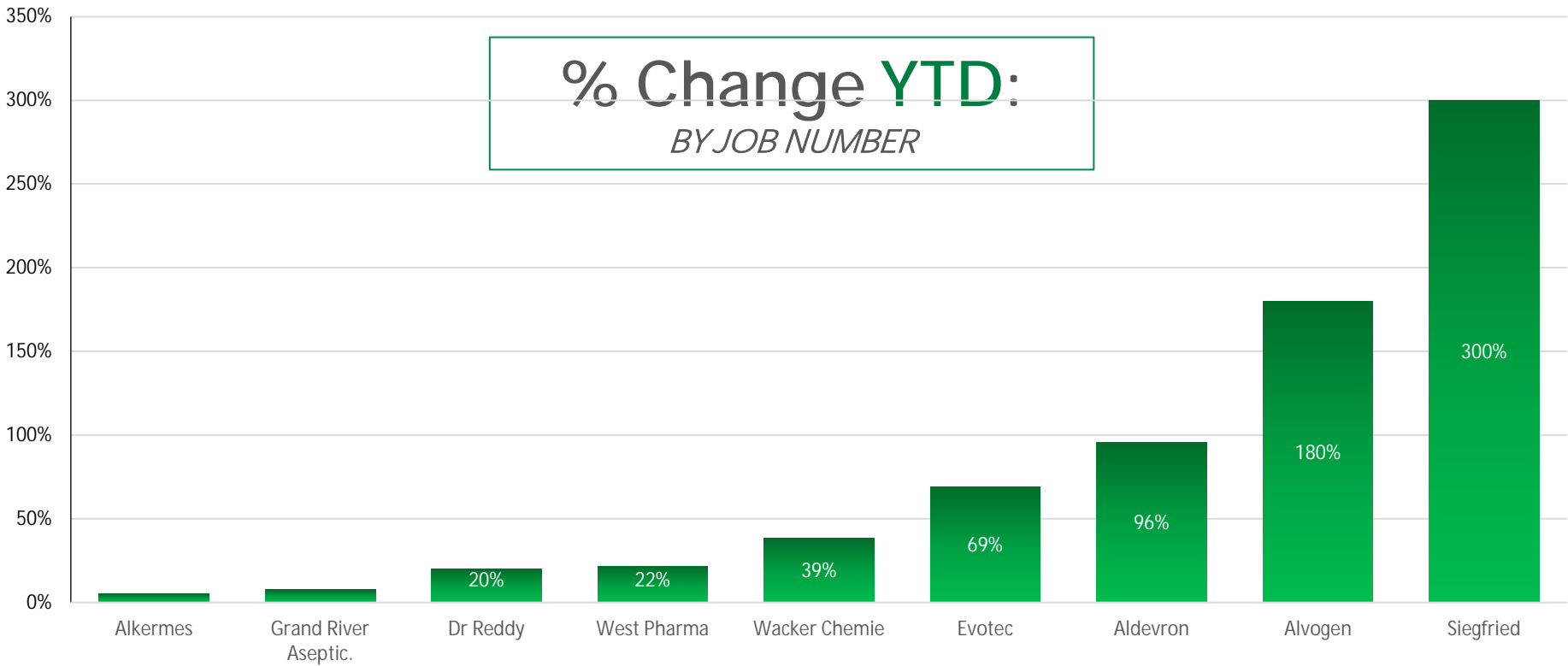
Incyte Corp
Abzena
Roquette



Univercell Tech
Unither Phar.
Cytovance Bio



3M
Rentschler
BioDuro

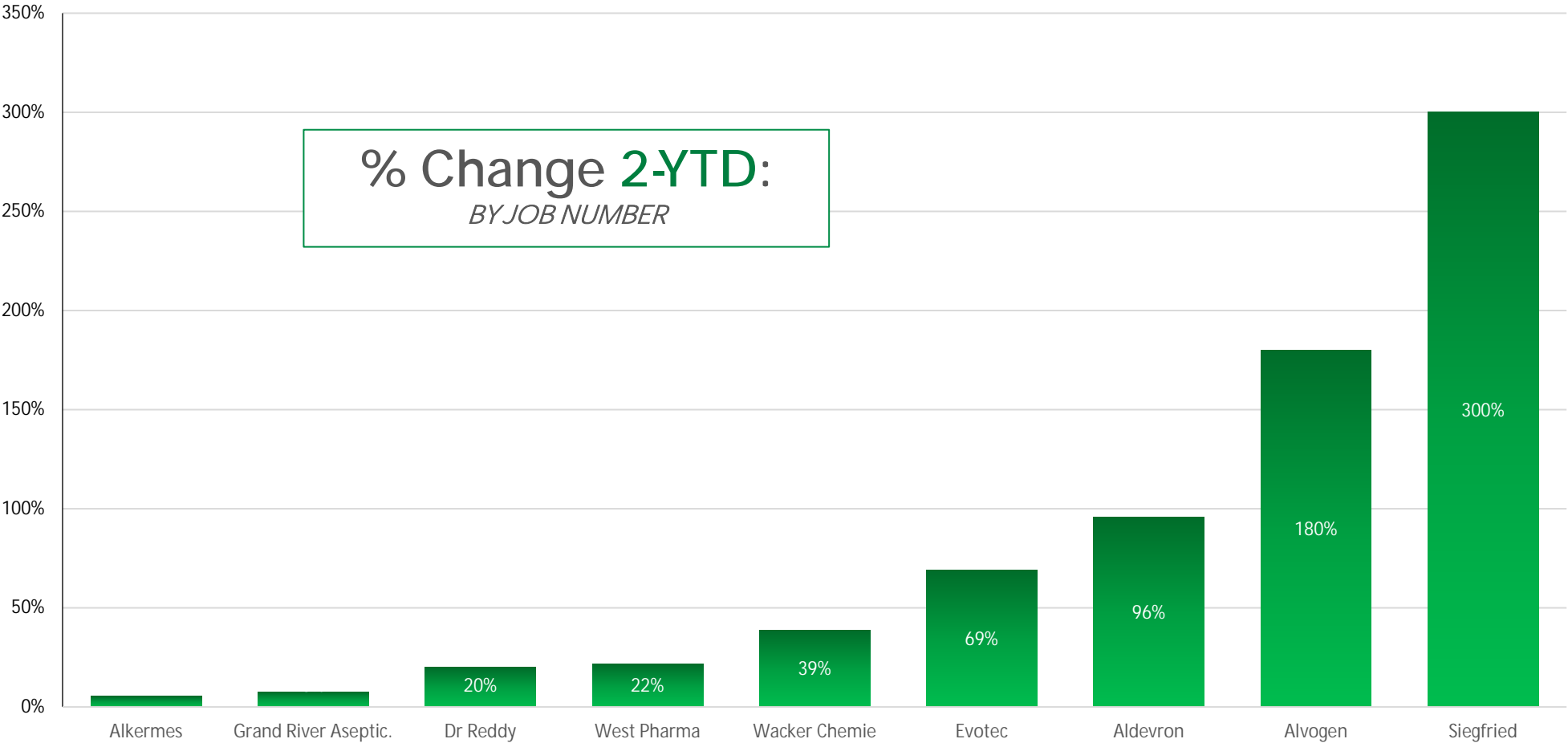


Aldevron
Alvogen
Siegfried



Rentschler
BioDuro
Corden

% Change 2-YTD:
BY JOB NUMBER



Meissner Filtration
Wacker Chemie
Unither Phar.



BioDuro
Corden
MeiraGTx

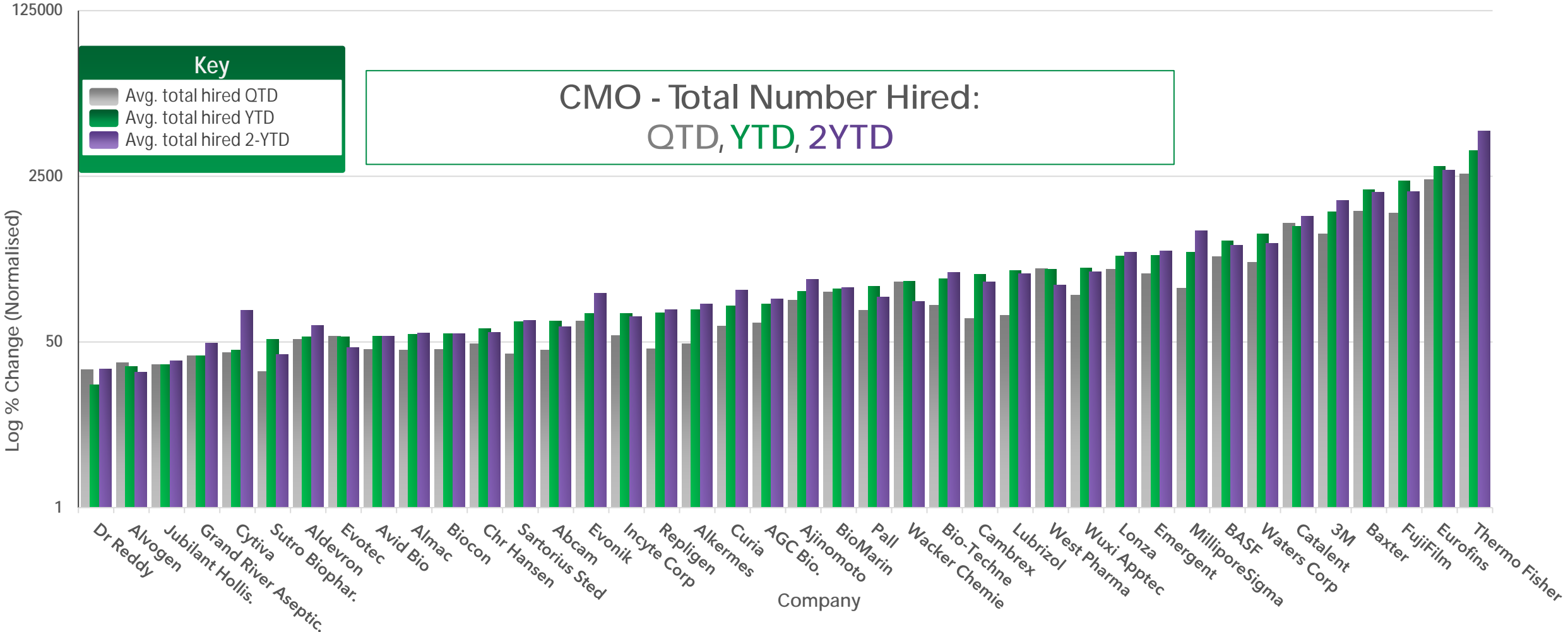
A microscopic view of several cells, likely from a developing organism, showing large, clear cytoplasm and prominent, bright blue nuclei. The cells are arranged in a cluster, with some showing signs of division or budding. The background is dark and out of focus, highlighting the cellular structures.

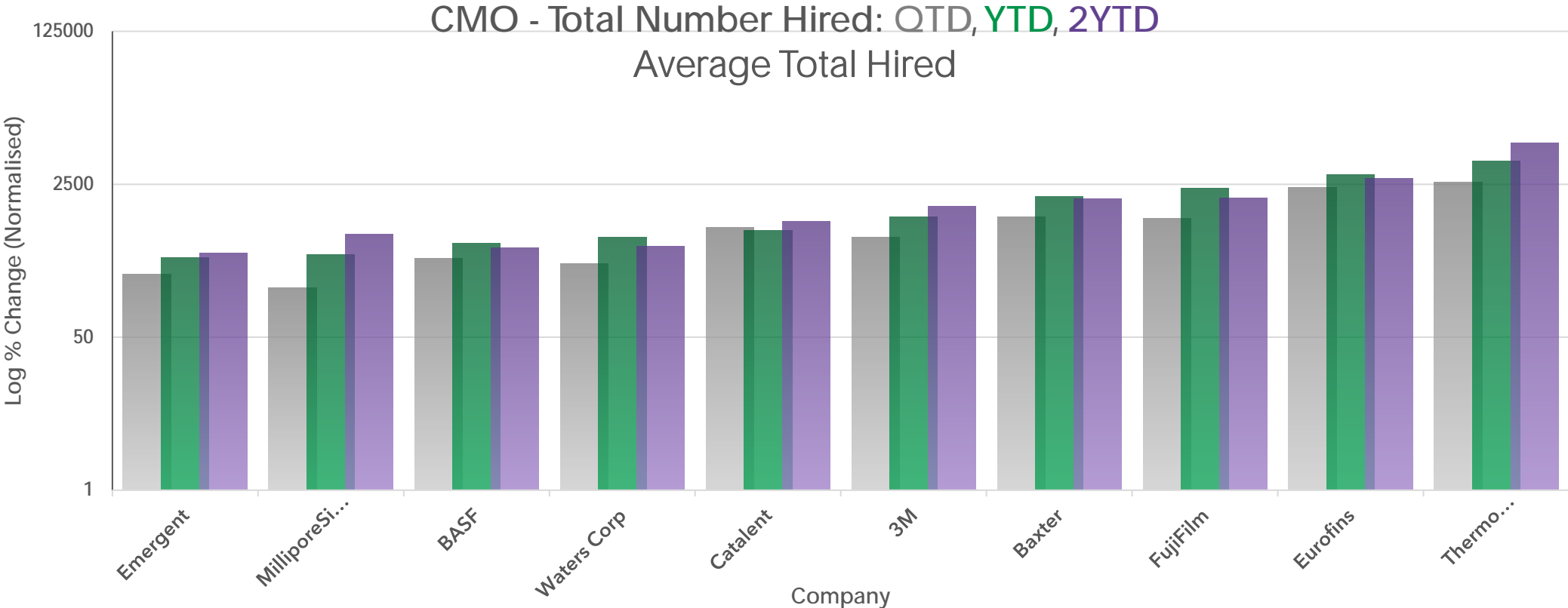
EVOLUTION

SEARCH PARTNERS

CDMO

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, likely from a developing organism, showing clear cell membranes and bright blue nuclei. The cells are arranged in a cluster, with some showing more complex internal structures. The background is a soft, out-of-focus light blue and white.

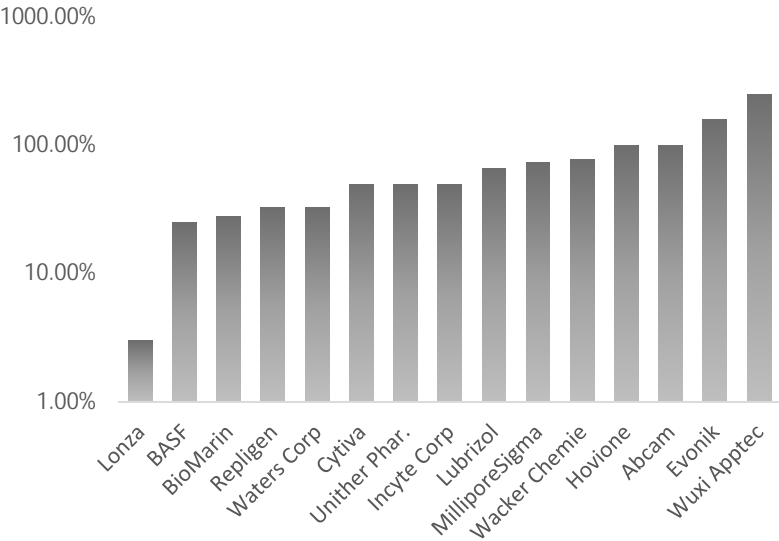
EVOLUTION

SEARCH PARTNERS

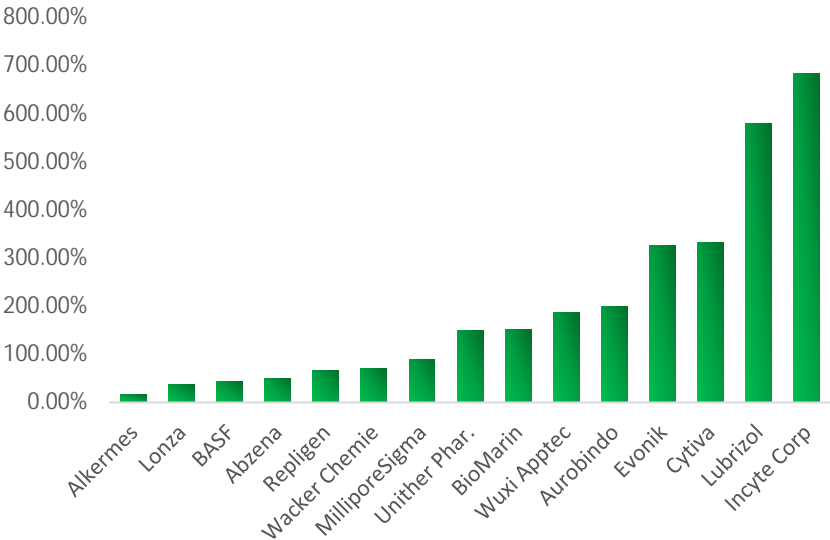
CDMO

Assessment of Hiring Frequency by Job Type

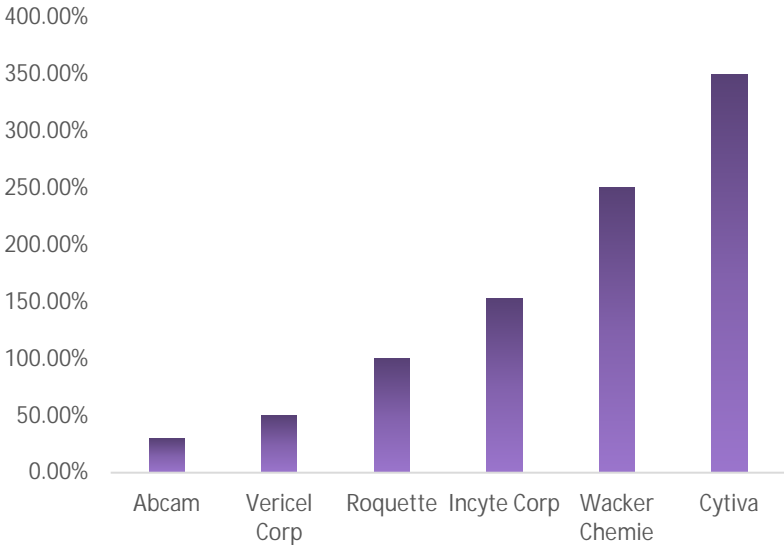
R&D



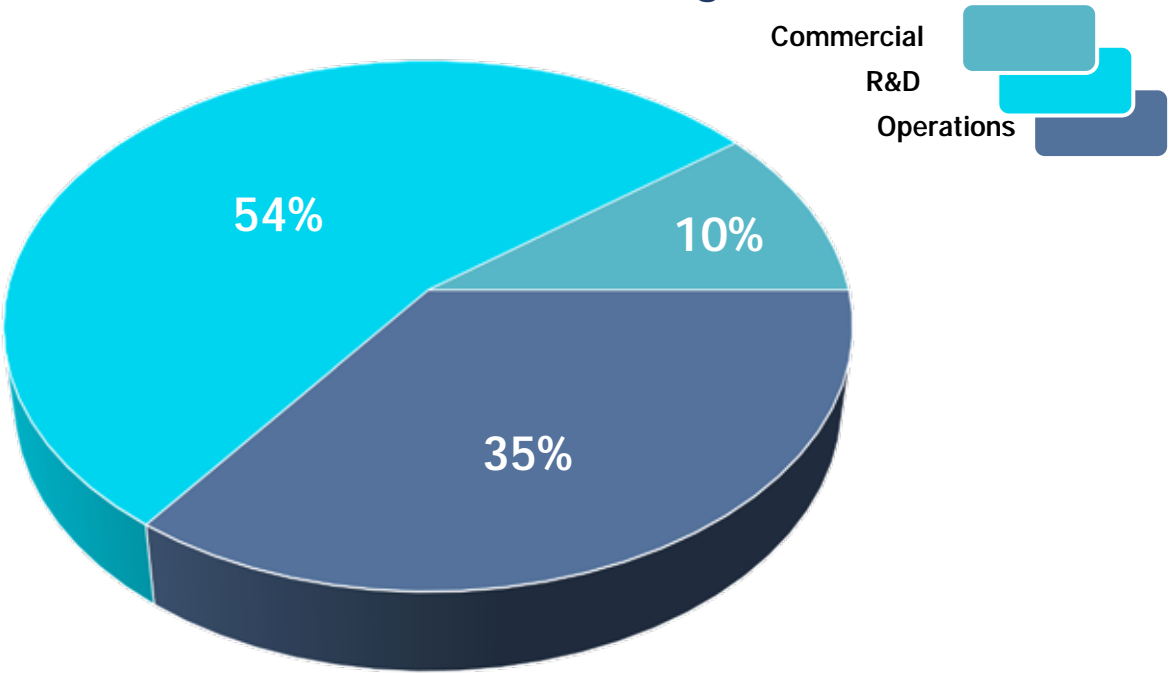
Operations



Commercial



Breakdown of Roles Postings



YTD
(Increasing)

Commercial:

Wuxi Apptec
Incyte Corp

Operations:

Cytiva
Wacker Chemie

R&D:-

Evonik
Wacker Chemie

MTD
(Increasing)

Commercial:

Wacker Chemie
Cytiva

Operations:

Lubrizol
Incyte Corp

R&D:-

Evonik
Wuxi Apptec

A microscopic view of several cells, likely oocytes or early embryos, with prominent blue-stained nuclei. The cells are surrounded by a clear, gelatinous cytoplasm and are set against a dark, blurred background. A semi-transparent dark blue horizontal band is overlaid across the center of the image, serving as a background for the text.

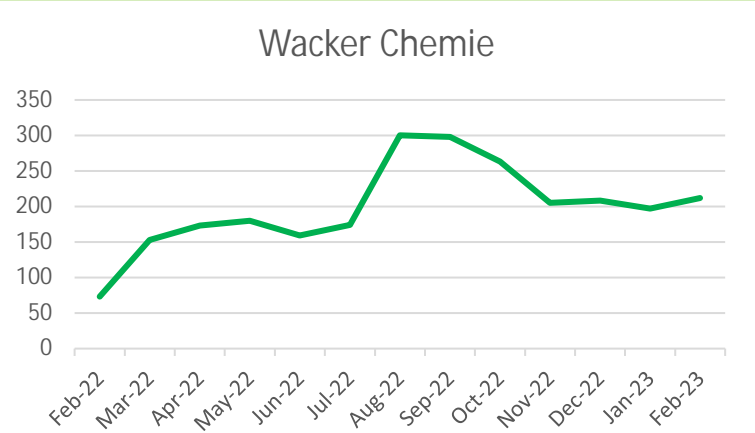
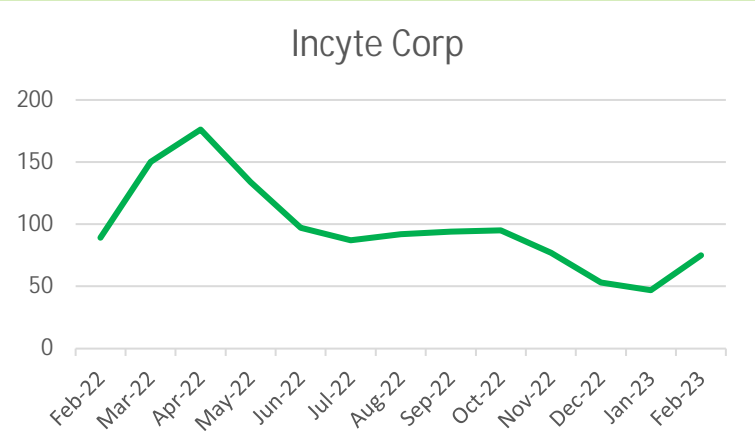
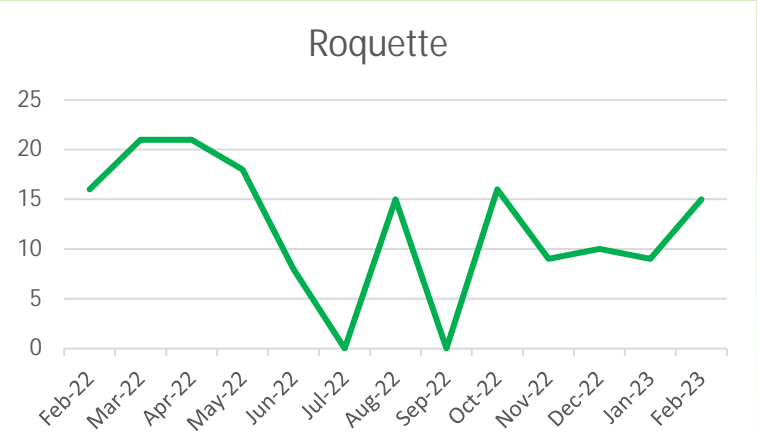
EVOLUTION

SEARCH PARTNERS

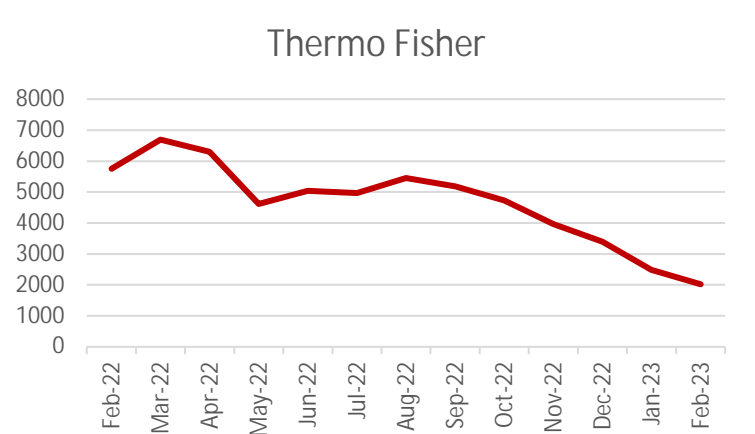
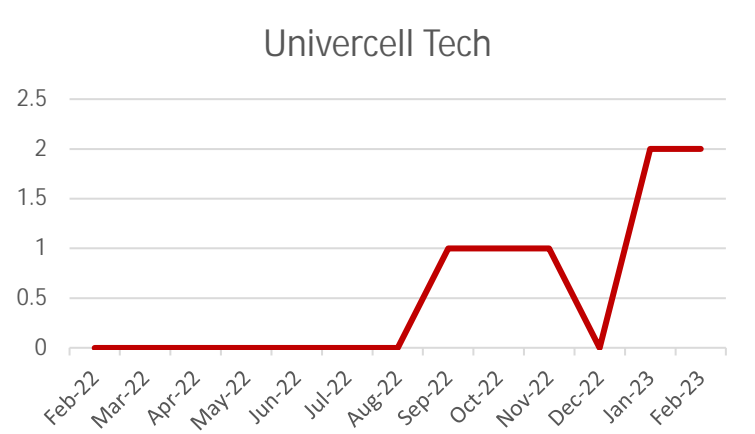
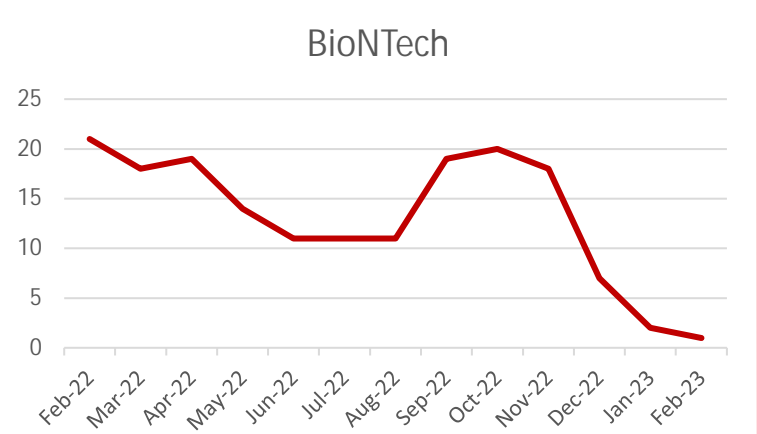
CDMO

Data Summary – Monthly Hiring Industry Insight

INCREASING



DECREASING



A microscopic view of several cells, likely oocytes or early embryos, with prominent blue nuclei. The cells are surrounded by a clear, gelatinous cytoplasm and are set against a dark, blurred background. A semi-transparent dark blue horizontal band is overlaid across the center of the image, serving as a background for the text.

EVOLUTION

SEARCH PARTNERS

CDMO

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



- 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 oocytes or early embryos, with prominent blue-stained nuclei. The cells are surrounded by a clear, gelatinous layer. The background is dark and out of focus, with some light reflecting off the cells.

EVOLUTION

SEARCH PARTNERS

CDMO

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.

