

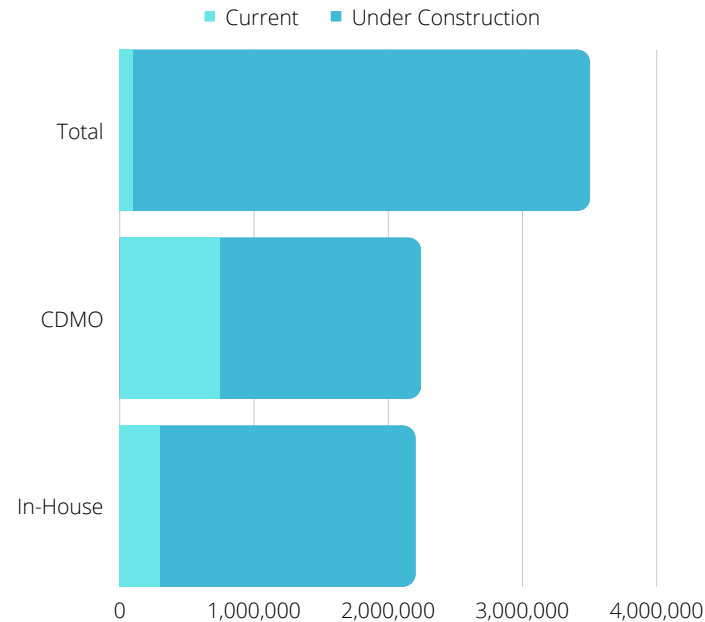


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### Facility Square Feet (SF) Overview

- By the End of 2025, North Carolina's Advanced Therapies (AT) Manufacturing Capacity will be Surpass **4.4 Million Square Feet (MSF)**
- Currently, **3.4MSF** is Under Construction, equivalent to **322%** of the Current Capacity of 1MSF. Breakdown:
  - **CDMO** - **1.5MSF** of CDMO Capacity is Under Construction, **199%** of the Current CDMO Capacity of 741,000SF.
  - **In-house** - **1.9MSF** of In-house Capacity is Under Construction, equal to **627%** of the Current In-house Capacity of 300,000SF.
- From 2016-2025 North Carolina's AT Manufacturing SF **CAGR = 27%**. Breakdown:
  - **CDMO = 17% CAGR**
  - **In-house = 72% CAGR** (2019-2025)

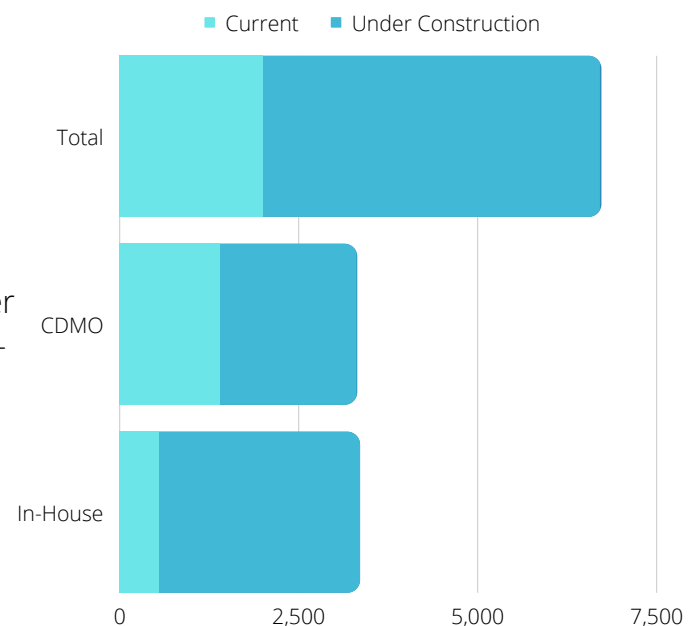
#### SF Breakdown



### Employment Overview

- By the End of 2025, North Carolina will employ Over **6,700** AT Manufacturing Professionals.
- Currently, NC has **2,000** AT Manufacturing Professionals. An Additional **4,700** AT Manufacturing Jobs will be Created by Under Construction Projects, equal to **238%** of the Current Workforce.
  - **CMDO** - **1,900** CDMO Jobs will be Created by Under Construction Projects, equal to **132%** of the Current CDMO Jobs of 1,400.
  - **In-house** - **2,800** In-house Jobs will be Created by Under Construction Projects, equivalent to **517%** of Current In-House AT Manufacturing Jobs of 550.
- From 2016-to 2025, NC's AT Manufacturing Employment CAGR = 22%. Breakdown:
  - **CDMO = 13% CAGR**
  - **In-house = 69% CAGR** (2019-2025)

#### Employment Breakdown



# Year-over- Year Breakdown

A T Biomfg Capacity (SF)	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Current	Under Construction	Under Construction / Current	
CDMO	512,000	0	103,742	125,000	0	0	359,000	0	0	1,117,000	740,742	1,476,000	199%	
IN-HOUSE	0	0	0	83,800	216,700	0	624,350	710,000	75,000	475,972	300,500	1,885,322	627%	
Academic & Research	1,600	0	0	0	0	0	0	0	0	0	1,600	0	0%	
<b>Total</b>	<b>513,600</b>	<b>0</b>	<b>103,742</b>	<b>208,800</b>	<b>216,700</b>	<b>0</b>	<b>983,350</b>	<b>710,000</b>	<b>75,000</b>	<b>1,592,972</b>	<b>1,042,842</b>	<b>3,361,322</b>	<b>322%</b>	
Cumulative A T Biomfg (SF)												CAGR	Total	9 Yr Growth
CDMO	512,000	512,000	615,742	740,742	740,742	740,742	1,099,742	1,099,742	1,099,742	2,216,742	18%	1,704,742	333%	
IN-HOUSE	0	0	0	83,800	300,500	300,500	924,850	1,634,850	1,709,850	2,185,822	72%	2,185,822	2608%	
Academic & Research	1,600	1,600	1,600	1,600	1,600	1,600	1,600	1,600	1,600	1,600	0%	0	0%	
<b>Total</b>	<b>513,600</b>	<b>513,600</b>	<b>617,342</b>	<b>826,142</b>	<b>1,042,842</b>	<b>1,042,842</b>	<b>2,026,192</b>	<b>2,736,192</b>	<b>2,811,192</b>	<b>4,404,164</b>	<b>27%</b>	<b>3,890,564</b>	<b>758%</b>	
Y-o-Y Growth		0%	20%	34%	26%	0%	94%	35%	3%	57%				

A T Biomfg Employment	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Current	Under Construction	Under Construction / Current	
CDMO	1,123	0	207	100	0	0	845	0	0	1,050	1,430	1,895	132%	
IN-HOUSE	0	0	0	144	400	0	1,235	904	130	546	544	2,816	517%	
Academic & Research	2	0	0	0	0	0	0	0	0	0	2	0	0%	
<b>Total</b>	<b>1,125</b>	<b>0</b>	<b>207</b>	<b>244</b>	<b>400</b>	<b>0</b>	<b>2,080</b>	<b>904</b>	<b>130</b>	<b>1,596</b>	<b>1,977</b>	<b>4,711</b>	<b>238%</b>	
Cumulative MFG Talent in Region												CAGR	Total	9 Yr Growth
CDMO	1,123	1,123	1,330	1,430	1,430	1,430	2,275	2,275	2,275	3,325	13%	2,202	196%	
IN-HOUSE	0	0	0	144	544	544	1,779	2,683	2,814	3,360	69%	3,360	2327%	
Academic & Research	2	2	2	2	2	2	2	2	2	2	0%	0	0%	
<b>Total</b>	<b>1,125</b>	<b>1,125</b>	<b>1,333</b>	<b>1,577</b>	<b>1,977</b>	<b>1,977</b>	<b>4,057</b>	<b>4,961</b>	<b>5,092</b>	<b>6,688</b>	<b>22%</b>	<b>5,563</b>	<b>494%</b>	
Y-o-Y Growth	N/A	0%	18%	18%	25%	0%	105%	22%	3%	31%				

## CDMO's Included in Report:

National Resilience, FUJIFILM Diosynth Biotechnologies, Thermofischer, KBI, Abzena

## In-House Manufacturing Included in Report:

Pfizer, SCM Life Science, Novartis Gene Therapies, Precision Bio, Locus Bio, Stride Bio, Taysha Gene Therapy, Adverum, Astellas Regenerative Medicine, Collectis, Beam Therapeutics, Kriya Therapeutics, Jaguar Gene Therapy, Biogen, Amgen, Enzyvant, CARSGen, Azzur Clean-Rooms-On-Demand

## Academic / Research Institutes Included in Report:

Duke University

## About Project Evolution:

Project Evolution is a full-service Human Capital platform that is a Joint Venture between Berke Executive Search and GTS Scientific. The highly collaborative platform bridges contingent and executive search enabling clients to secure and scale talent at all levels quickly and efficiently.



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For Information about Project Evolution or our AT Biomanufacturing Research Contact Bryan Kennedy at [BK@Projectevolution.org](mailto:BK@Projectevolution.org)