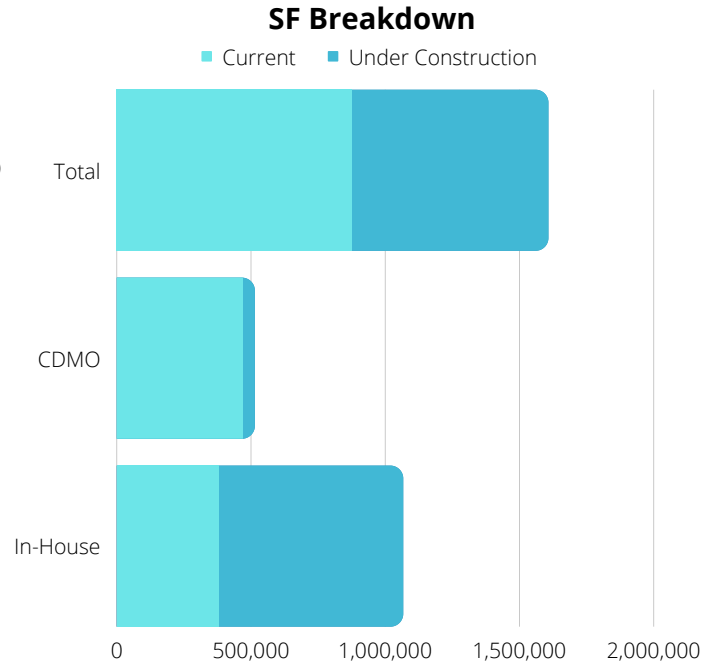


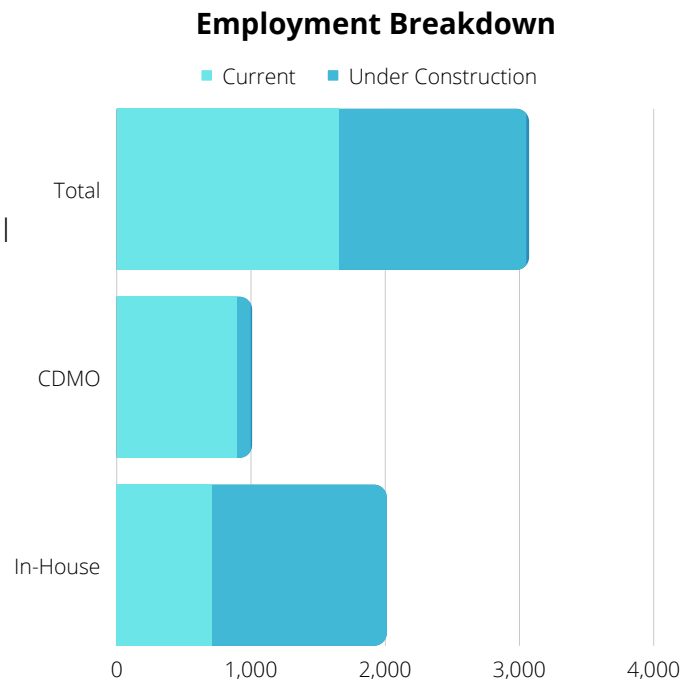
Facility Square Feet (SF) Overview

- By the End of 2025, San Francisco's Advanced Therapies (AT) Manufacturing Capacity will reach almost **1.7 Million Square Feet (MSF)**
- Currently, **902,000SF** is Under Construction, equivalent to **84%** of the Current Capacity of roughly **762,000SF**.
Breakdown:
 - **CDMO** - **54,000SF** of CDMO Capacity is Under Construction, **11%** of the Current CDMO Capacity of **494,000SF**.
 - **In-house** - roughly **708,000SF** of In-house Capacity is Under Construction, equal to **187%** of the Current In-house Capacity of **379,000SF**.
- From 2016-2025 San Francisco's AT Biomanufacturing SF **CAGR = 26%**. Breakdown:
 - **CDMO = 12% CAGR**
 - **In-house = 63% CAGR**



Employment Overview

- By the End of 2025, San Francisco will employ over **3,000** AT Biomanufacturing Professionals.
- Currently, San Francisco has **1,650** AT Biomanufacturing Professionals. An Additional **1,400** AT Biomanufacturing Jobs will be Created by Under Construction Projects, equal to **85%** of the Current Workforce.
 - **CDMO** - **100** CDMO Jobs will be Created by Under Construction Projects, equal to **12%** of the Current CDMO Jobs of **890**.
 - **In-house** - **1,300** In-house Jobs will be Created by Under Construction Projects, equivalent to **183%** of Current In-House AT Biomanufacturing Jobs of **710**.
- From 2016-to 2025, San Francisco's AT Biomanufacturing Employment **CAGR = 29%**. Breakdown:
 - **CDMO = 15% CAGR**
 - **In-house = 64% CAGR**



Year-over- Year Breakdown

AT Biomfg Capacity Added (SF)	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Current	Under Construction	Under Construction / Current
CDMO	190,000	93,500	0	0	0	210,000	44,000	10,000	0	0	493,500	54,000	11%
IN-HOUSE	13,500	43,000	25,667	69,265	88,000	139,200	412,046	295,242	0	0	378,632	707,288	187%
Academic & Research	2,500	0	4,500	0	0	23,000	0	0	0	0	30,000	0	0%
Total	206,000	136,500	30,167	69,265	88,000	372,200	456,046	305,242	0	0	902,132	761,288	84%
Cumulative AT Biomfg (SF)											CAGR	Total Added	9 Yr Growth
CDMO	190,000	283,500	283,500	283,500	283,500	493,500	537,500	547,500	547,500	547,500	12%	357,500	188%
IN-HOUSE	13,500	56,500	82,167	151,432	239,432	378,632	790,678	1,085,920	1,085,920	1,085,920	63%	1,072,420	7944%
Academic & Research	2,500	2,500	7,000	7,000	7,000	30,000	30,000	30,000	30,000	30,000	32%	27,500	1100%
Total	206,000	342,500	372,667	441,932	529,932	902,132	1,358,178	1,663,420	1,663,420	1,663,420	26%	1,457,420	707%
Y-o-Y Growth		66%	9%	19%	20%	70%	51%	22%	0%	0%			

AT Biomfg Jobs Added	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Current	Under Construction	Under Construction / Current
CDMO	293	187	0	0	0	406	88	20	0	0	886	108	12%
IN-HOUSE	23	75	76	120	176	242	771	533	0	0	713	1,305	183%
Academic & Research	4	0	20	0	0	33	0	0	0	0	56	0	0%
Total	320	262	96	120	176	681	859	553	0	0	1,656	1,413	85%
Cumulative MFG Talent											CAGR	Total Added	9 Yr Growth
CDMO	293	480	480	480	480	886	974	994	994	994	15%	701	239%
IN-HOUSE	23	98	174	295	471	713	1,484	2,018	2,018	2,018	64%	1,994	8494%
Academic & Research	4	4	24	24	24	56	56	56	56	56	36%	53	1480%
Total	320	582	678	799	975	1,656	2,515	3,068	3,068	3,068	29%	2,748	858%
Y-o-Y Growth	N/A	82%	17%	18%	22%	70%	52%	22%	0%	0%			

CDMOs Included in Analysis:

Curia (Lake Pharma), Minaris Regenerative Medicine, Milteny Biotech, Applied StemCell, National Resilience, Lonza, Bionova (AGC), Applied StemCell, Thermo Fischer

In-House Manufacturing Included in Analysis:

Sangamo, BioMarin, Sutro Bio, Gritstone Bio, Allogene, SentiBio, Ambys Medicine, Astellas Gene Therapy (Audentes), Novo Nordisk, Applied Molecular Transport, 4DMT, Nkarta, Azzue Cleanrooms-on-Demand, BioCardia, SmartLabs, Bayer, Sythegeo, Tenaya Therapeutics

Academic / Research Institutes Included in Report:

Human Islet and Cell Transplant Facility at UCSF, Stanford Cell & Gene Therapy, UCSF

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.



For Information about Project Evolution or our AT Biomanufacturing Research, Contact Bryan Kennedy at BK@Projectevolution.org