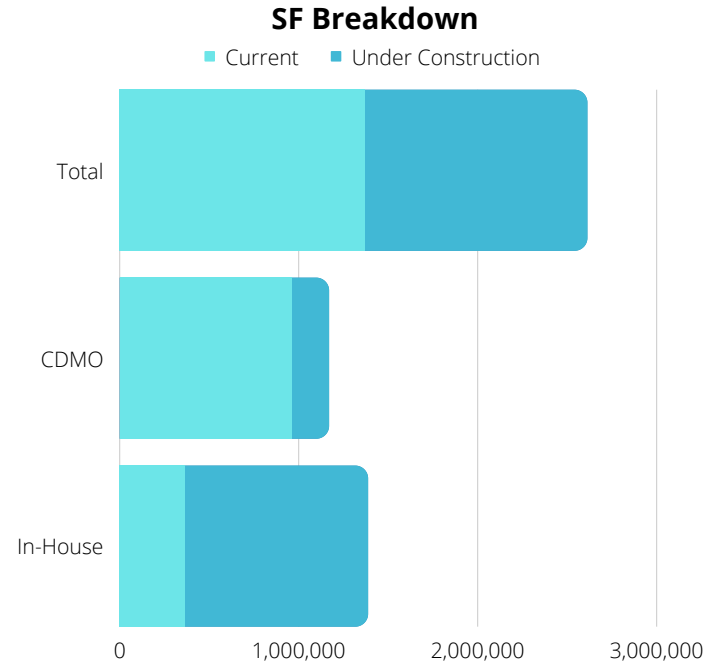


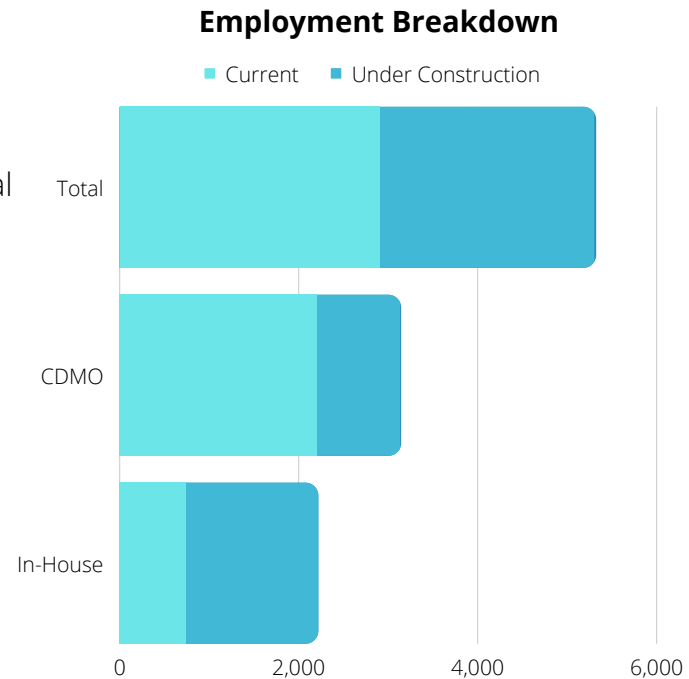
## Facility Square Feet (SF) Overview

- By the End of 2025, Maryland's Advanced Therapies (AT) Manufacturing Capacity will Surpass **2.6 Million Square Feet (MSF)**
- Currently, **1.2MSF** is Under Construction, equivalent to **91%** of the Current Capacity of 1.4MSF. Breakdown:
  - **CDMO - 209,000SF** of CDMO Capacity is Under Construction, **22%** of the Current CDMO Capacity of 957,000SF.
  - **In-house - 1MSF** of In-house Capacity is Under Construction, equal to **281%** of the Current In-house Capacity of 364,000SF.
- From 2016-2025 Maryland's AT Biomanufacturing SF **CAGR = 33%**. Breakdown:
  - **CDMO = 22% CAGR**
  - **In-house = 66% CAGR**



## Employment Overview

- By the End of 2025, Maryland will employ Over **5,400** AT Biomanufacturing Professionals.
- Currently, MD has **2,900** AT Biomanufacturing Professionals. An Additional **2,400** AT Biomanufacturing Jobs will be Created by Under Construction Projects, equal to **82%** of the Current Workforce.
  - **CMDO - 930** CDMO Jobs will be Created by Under Construction Projects, equal to **43%** of the Current CDMO Jobs of 2,200.
  - **In-house - 1,500** In-house Jobs will be Created by Under Construction Projects, equivalent to **200%** of Current In-House AT Biomanufacturing Jobs of 740.
- From 2016-to 2025, MD's AT Biomanufacturing Employment **CAGR = 34%**. Breakdown:
  - **CDMO = 27% 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	188,000	160,000	0	437,000	50,000	122,000	209,000	0	0	0	957,000	209,000	22%
IN-HOUSE	14,500	7,200	0	5,000	206,000	132,000	939,000	85,000	0	0	364,700	1,024,000	281%
Academic & Research	0	0	3,000	0	14,200	29,150	0	7,000	0	0	46,350	7,000	15%
<b>Total</b>	<b>202,500</b>	<b>167,200</b>	<b>3,000</b>	<b>442,000</b>	<b>270,200</b>	<b>283,150</b>	<b>1,148,000</b>	<b>92,000</b>	<b>0</b>	<b>0</b>	<b>1,368,050</b>	<b>1,240,000</b>	<b>91%</b>
Cumulative AT Biomfg (SF)											CAGR	Total Added	9 Yr Growth
CDMO	188,000	348,000	348,000	785,000	835,000	957,000	1,166,000	1,166,000	1,166,000	1,166,000	22%	978,000	520%
IN-HOUSE	14,500	21,700	21,700	26,700	232,700	364,700	1,303,700	1,388,700	1,388,700	1,388,700	66%	1,374,200	9477%
Academic & Research	0	0	3,000	3,000	17,200	46,350	46,350	53,350	53,350	53,350	51%	53,350	1778%
<b>Total</b>	<b>202,500</b>	<b>369,700</b>	<b>372,700</b>	<b>814,700</b>	<b>1,084,900</b>	<b>1,368,050</b>	<b>2,516,050</b>	<b>2,608,050</b>	<b>2,608,050</b>	<b>2,608,050</b>	<b>33%</b>	<b>2,405,550</b>	<b>1188%</b>
Y-o-Y Growth		83%	1%	119%	33%	26%	84%	4%	0%	0%			

AT Biomfg Jobs Added	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Current	Under Construction	Under Construction / Current
CDMO	357	325	0	1,281	100	120	934	0	0	0	2,184	934	43%
IN-HOUSE	25	13	0	9	460	230	1,300	175	0	0	736	1,475	200%
Academic & Research	0	0	4	0	20	42	0	30	0	0	66	30	45%
<b>Total</b>	<b>382</b>	<b>338</b>	<b>0</b>	<b>1,290</b>	<b>560</b>	<b>350</b>	<b>2,234</b>	<b>175</b>	<b>0</b>	<b>0</b>	<b>2,920</b>	<b>2,409</b>	<b>83%</b>
Cumulative MFG Talent in Region											CAGR	Total Added	9 Yr Growth
CDMO	357	683	683	1,964	2,064	2,184	3,118	3,118	3,118	3,118	27%	2,760	773%
IN-HOUSE	25	38	38	46	506	736	2,036	2,211	2,211	2,211	64%	2,186	8668%
Academic & Research	0	0	4	4	25	66	66	96	96	96	56%	96	#DIV/0!
<b>Total</b>	<b>382</b>	<b>720</b>	<b>720</b>	<b>2,010</b>	<b>2,570</b>	<b>2,920</b>	<b>5,154</b>	<b>5,329</b>	<b>5,329</b>	<b>5,329</b>	<b>34%</b>	<b>4,946</b>	<b>1294%</b>
Y-o-Y Growth	N/A	88%	0%	179%	28%	14%	77%	3%	0%	0%			

## CDMOs Included in Analysis:

Catalent, EmergentBio Solutions, Advanced Bioscience Labs (ABL), IDT Biologika, BioReliance-MilliporeSigma, Charles River, Lentigen, Orgenesis

## In-House Manufacturing Included in Analysis:

Gilead - Kite, BioNTech, RegenXBio, Cartesian, Novavax, TCR2, Marcogenics, Precigen, Adaptive Phage Therapeutics

## Academic / Research Institutes Included in Report:

Frederick National Lab for Cancer Research, University of MD Greenebaum Comprehensive Cancer Center, NCI Advanced Technology Research Facility, National Institutes of Health

## 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)