

OVERVIEW OF SAN DIEGO'S ADVANCED THERAPIES BIOMANUFACTURING CAPACITY

- NOVEMBER 2022 -

Capacity Overview:

- By the End of 2025, San Diego's Advanced Therapies (AT) Manufacturing Capacity will reach almost **984,000 Square Feet (SF)**.
- Currently, **292,000SF** is Under Construction, equivalent to **42%** of the Current Capacity of roughly **691,000SF**.
- From 2016-2025 San Diego's AT Biomanufacturing Capacity (SF) Compounded Annual Growth Rate (CAGR) is estimated to reach **24%**.
 - **CDMO CAGR = 25%**
 - **In-house CAGR = 22%**

Type	Breakdown of AT Biomanufacturing Capacity (SF)			Ratios	
	Current	Under Construction	Total	% of Total	Under Construct. / Current
CDMO	500,000	200,000	700,000	71%	40%
IN-HOUSE	185,544	92,000	277,544	28%	50%
Academic & Research	6,000	0	6,000	1%	0%
Total	691,544	292,000	983,544		42%

Employment Overview:

- By the End of 2025, San Diego will employ almost **1,700** AT Biomanufacturing Professionals to support AT Biomanufacturing activities.
- Currently, San Diego has **1,200** AT Biomanufacturing Professionals. An Additional **450** AT Biomanufacturing jobs will be created by Under Construction projects, equal to **36%** of the Current AT Biomanufacturing Workforce.
- From 2016-to 2025, San Diego's AT Biomanufacturing Employment CAGR is estimated to reach **29%**.
 - **CDMO CAGR = 28%**
 - **In-house CAGR = 31%**

Type	Breakdown of AT Biomanufacturing Jobs			Ratios	
	Current	Under Construction	Total	% of Total	Under Construct. / Current
CDMO	953	286	1,239	74%	30%
IN-HOUSE	281	160	441	26%	57%
Academic & Research	9	0	9	1%	0%
Total	1,234	446	1,680		36%

Year-over- Year Breakdown

AT Biomfg Capacity Added (SF)	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Total
CDMO	91,000	45,000	111,000	118,000	68,000	67,000	140,000	60,000	0	0	700,000
IN-HOUSE	47,000	0	0	24,197	14,747	99,600	92,000	0	0	0	277,544
Academic & Research	6,000	0	0	0	0	0	0	0	0	0	6,000
Total	144,000	45,000	111,000	142,197	82,747	166,600	232,000	60,000	0	0	983,544
Cumulative AT Biomfg (SF)											CAGR
CDMO	91,000	136,000	247,000	365,000	433,000	500,000	640,000	700,000	700,000	700,000	25%
IN-HOUSE	47,000	47,000	47,000	71,197	85,944	185,544	277,544	277,544	277,544	277,544	22%
Academic & Research	6,000	6,000	6,000	6,000	6,000	6,000	6,000	6,000	6,000	6,000	0%
Total	144,000	189,000	300,000	442,197	524,944	691,544	923,544	983,544	983,544	983,544	24%
Y-o-Y Growth		31%	59%	47%	19%	32%	34%	6%	0%	0%	

AT Biomfg Jobs Added	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Total
CDMO	130	64	159	350	100	150	200	86	0	0	1,239
IN-HOUSE	40	0	0	42	26	173	160	0	0	0	441
Academic & Research	9	0	0	0	0	0	0	0	0	0	9
Total	170	64	159	392	126	323	360	86	0	0	1,680
Cumulative MFG Talent											CAGR
CDMO	130	194	353	703	803	953	1,153	1,239	1,239	1,239	28%
IN-HOUSE	40	40	40	82	108	281	441	441	441	441	31%
Academic & Research	9	9	9	9	9	9	9	9	9	9	0%
Total	170	234	393	785	911	1,234	1,594	1,680	1,680	1,680	29%
Y-o-Y Growth	N/A	38%	68%	100%	16%	35%	29%	5%	0%	0%	

CDMOs Included in Analysis:

Thermo Fischer, BioReliance- MilliporeSigma, TriLink Biotech, Ajinomoto Althea, Abenza, Cellpoint, Wacker, Argonaut Manufacturing Services, Excellos

In-House Manufacturing Included in Analysis:

Artiva Biotherapeutics, Poseida, Fate Therapeutics, VetStem, Kite / Gilead, Azzur Cleanrooms-on-demand, Sanofi,

Academic / Research Institutes Included in Report:

UC San Diego Center for Advanced Laboratory Medicine (CALM)

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