



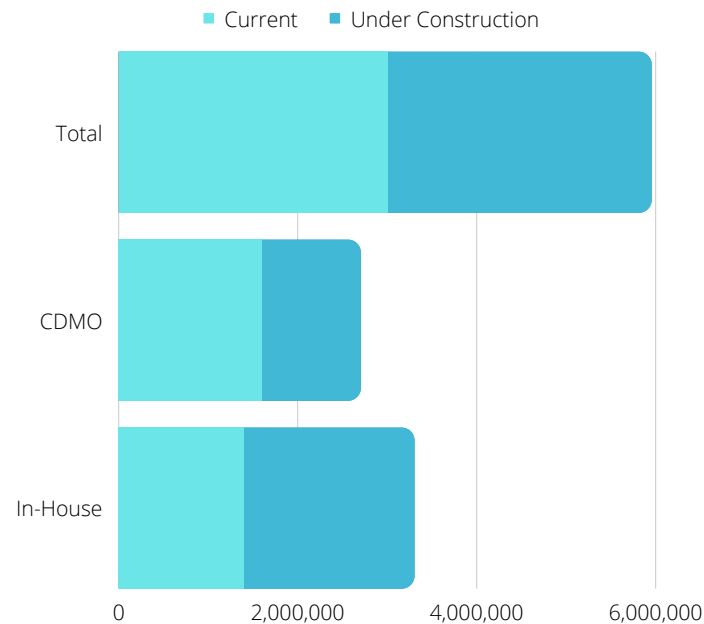
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GREATER BOSTON'S ADVANCED THERAPIES MANUFACTURING OVERVIEW

Facility Square Feet (SF) Overview

- By the End of 2025, Greater Boston's Advanced Therapies (AT) Manufacturing Capacity will be Surpass **5.9 Million Square Feet (MSF)**
- Currently, **3MSF** is Under Construction, equivalent to **102%** of the Current Capacity of 2.95MSF. Breakdown:
 - **CDMO - 1.1MSF** of CDMO Capacity is Under Construction, **68%** of Current CDMO Capacity (1.6MSF)
 - **In-house - 1.9MSF** of In-house Capacity is Under Construction, equal to **143%** of Current In-house Capacity (1.4MSF)
- From 2016-2025 Boston's AT Manufacturing SF CAGR = 20%. Breakdown:
 - **CDMO** = 14% CAGR
 - **In-house** = 32% CAGR

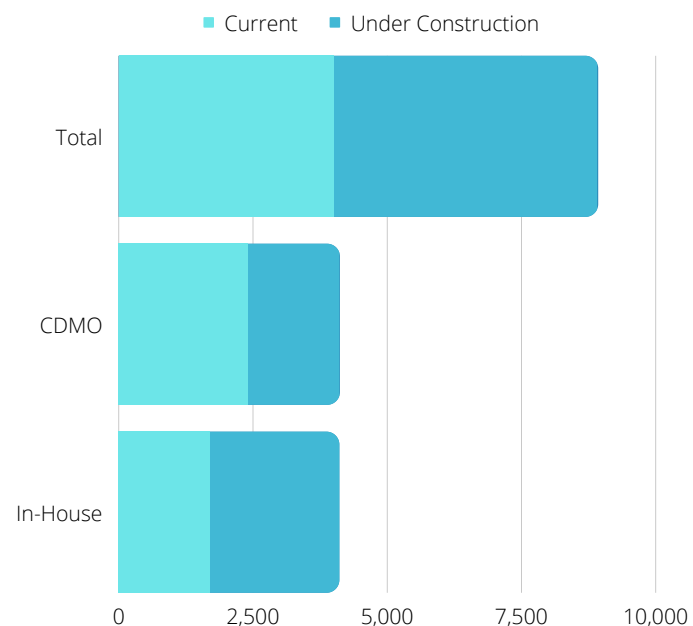
SF Breakdown as %



Employment Overview

- By the End of 2025, Greater Boston will employ Over **8,900** AT Manufacturing Professionals.
- Currently, Boston has **4,000** AT Manufacturing Professionals. An Additional **4,900** AT Manufacturing Jobs will be Created by Under Construction Projects, equal to **123%** of the Current Workforce.
 - **CMDO - 1,700** CDMO Jobs will be Created by Under Construction Projects, equal to 72% of Current CDMO Jobs (2,400)
 - **In-house - 3,200** In-house Jobs will be Created by Under Construction Projects, equivalent to 204% of Current In-House AT Manufacturing Jobs (1,700)
- From 2016-to 2025 Boston's AT Manufacturing Employment CAGR = 20%. Breakdown:
 - **CDMO** = 14% CAGR
 - **In-house** = 33% CAGR

Employment Breakdown



Year-over- Year Breakdown

AT Biomfg Capacity (SF)	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Current	Under Construction	Under Construction / Current
CDMO	837,698	141,950	69,000	90,530	64,000	378,000	750,600	319,300	0	0	1,581,178	1,069,900	68%
IN-HOUSE	275,000	0	212,000	275,000	592,000	12,000	426,169	748,000	440,000	344,000	1,366,000	1,958,169	143%
Academic & Research	12,000	0	0	0	0	0	0	0	0	0	12,000	0	0%
Total	1,124,698	141,950	281,000	365,530	656,000	390,000	1,176,769	1,067,300	440,000	344,000	2,959,178	3,028,069	102%
Cumulative AT Biomfg (SF)											CAGR	Total Added	9 Yr Growth
CDMO	837,698	979,648	1,048,648	1,139,178	1,203,178	1,581,178	2,331,778	2,651,078	2,651,078	2,651,078	14%	1,813,380	216%
IN-HOUSE	275,000	275,000	487,000	762,000	1,354,000	1,366,000	1,792,169	2,540,169	2,980,169	3,324,169	32%	3,049,169	1109%
Academic & Research	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	0%	0	0%
Total	1,124,698	1,266,648	1,547,648	1,913,178	2,569,178	2,959,178	4,135,947	5,203,247	5,643,247	5,987,247	20%	4,862,549	432%
Y-o-Y Growth	N/A	13%	22%	24%	34%	15%	40%	26%	8%	6%			

AT Biomfg Employment	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Current	Under Construction	Under Construction / Current
CDMO	1,311	289	100	266	125	347	1,014	737	0	0	2,437	1,751	72%
IN-HOUSE	364	0	221	249	706	21	701	1,277	711	500	1,561	3,189	204%
Academic & Research	21	0	0	0	0	0	0	0	0	0	21	0	0%
Total	1,696	289	321	515	831	368	1,715	2,014	711	500	4,019	4,940	123%
Cumulative MFG Talent in Region											CAGR	Total Added	9 Yr Growth
CDMO	1,311	1,599	1,699	1,965	2,090	2,437	3,451	4,188	4,188	4,188	14%	2,877	219%
IN-HOUSE	364	364	585	834	1,540	1,561	2,262	3,539	4,250	4,750	33%	4,386	1204%
Academic & Research	21	21	21	21	21	21	21	21	21	21	0%	0	0%
Total	1,696	1,985	2,306	2,820	3,651	4,019	5,734	7,748	8,459	8,959	20%	7,263	428%
Y-o-Y Growth	N/A	17%	16%	22%	29%	10%	43%	35%	9%	6%			

CDMO's Included in Report:

Lonza, Curia, MassBiologics, National Resilience, Lykan Bioscience, Oxford Biomedica /Homology, Emergent Bio, Recipharm - Vibologics, Recipharm - Arranta Bio, Northway Biotech, Landmark Bio, Wuxi Biologics, Renschler Biopharma, Cytiva, FUJIFILM Diosynth Biotechnologies

In-House Manufacturing Included in Report:

Pfizer, Rubius Therapeutics, Sarepta, uniQure, Takeda, Mustang Bio, Moderna, Elevate Bio. Sanofi Genzyme, Alnylam Pharmaceuticals, Azzur Cleanrooms on Demand, TSCAN, Factor Bioscience, Astellas Institute for Regenerative Medicine (AIRM), Generation Bio, Ultragenyx, Vor Biopharma, CRISPR, Oncorus, BMS, Vericel, Intellia, Vertex

Academic / Research Institutes Included in Report:

Boston Children's Hospital - hESC Core Facility, Charter One - Cell Immunotherapy & Gene Therapy (CITGT)
Harvard & Mass Eye & Ear Gene Transfer Vector Core (GTVC), Mass General Brigham Vector Core

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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