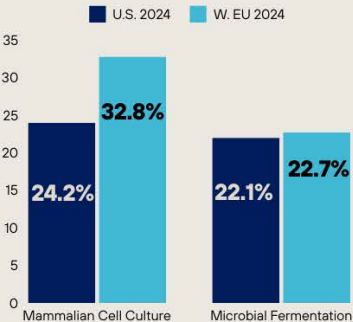


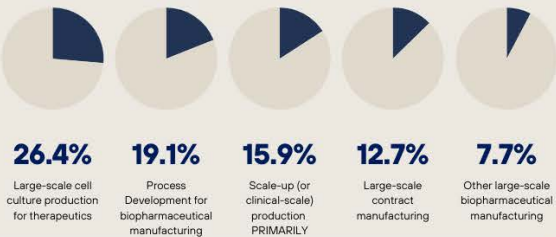
21st Annual Report *Analysis*

Total Global Biomanufacturing Capacity up 15% in 2024

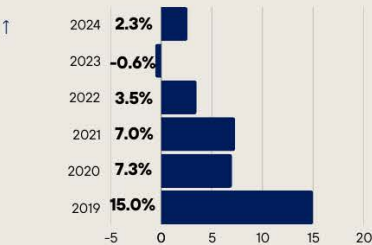


In the 2024 survey, W. European respondents project larger average capacity increases, in five-years, in nearly all areas, compared to U.S. respondents.

Primary Facility Demographics for Respondents



Vendor Price Changes in CMO Services



CMO Price Changes (2009-2023, projected 2024)

Projected pricing changes generally show a pricing change stability

Biopharma Business and Marketing Plans, 2024



Average Annual R&D Spending/Budget for New Products/Services (2020-2024) (USD millions)

