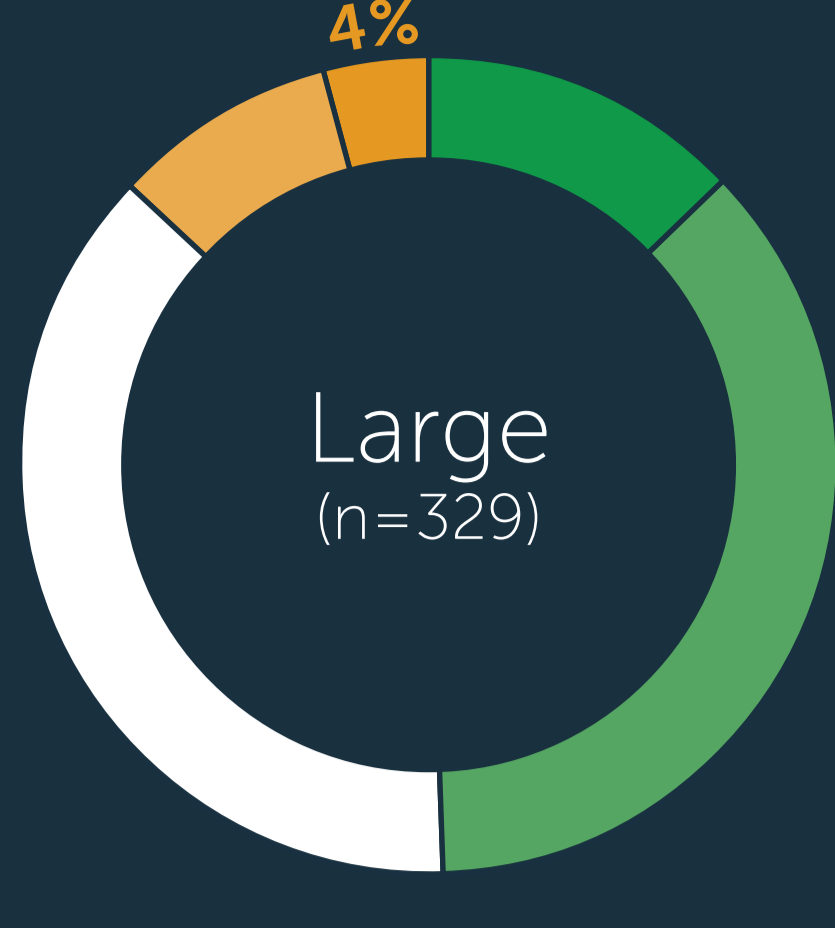


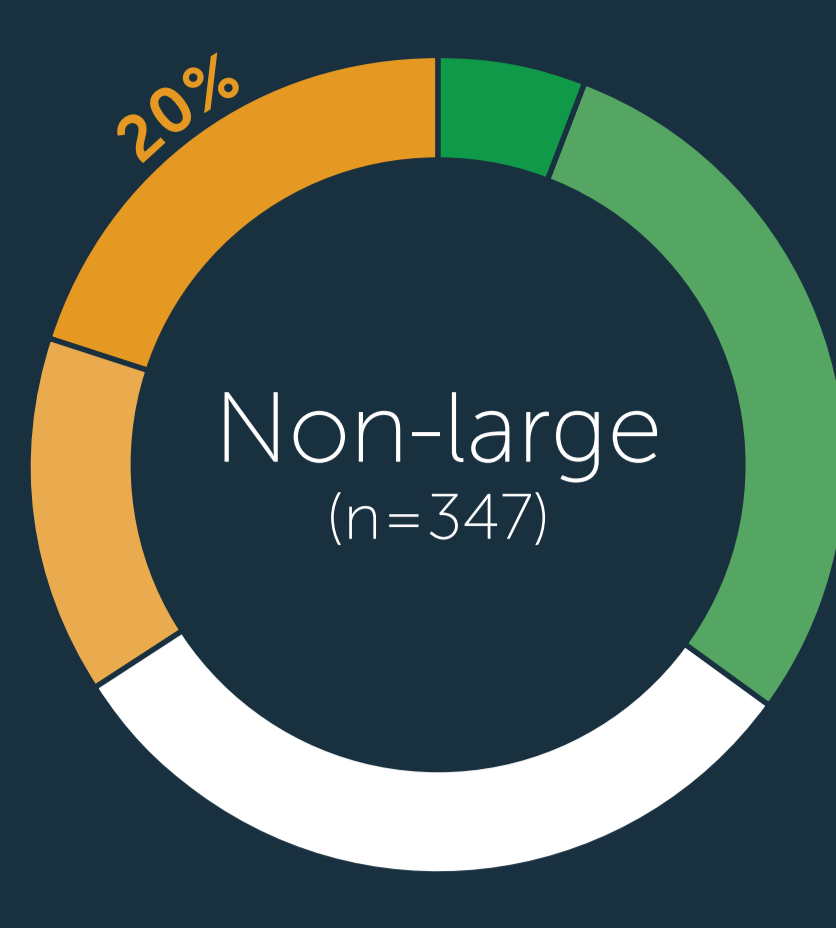
CONTRACT

MANUFACTURING TRENDS

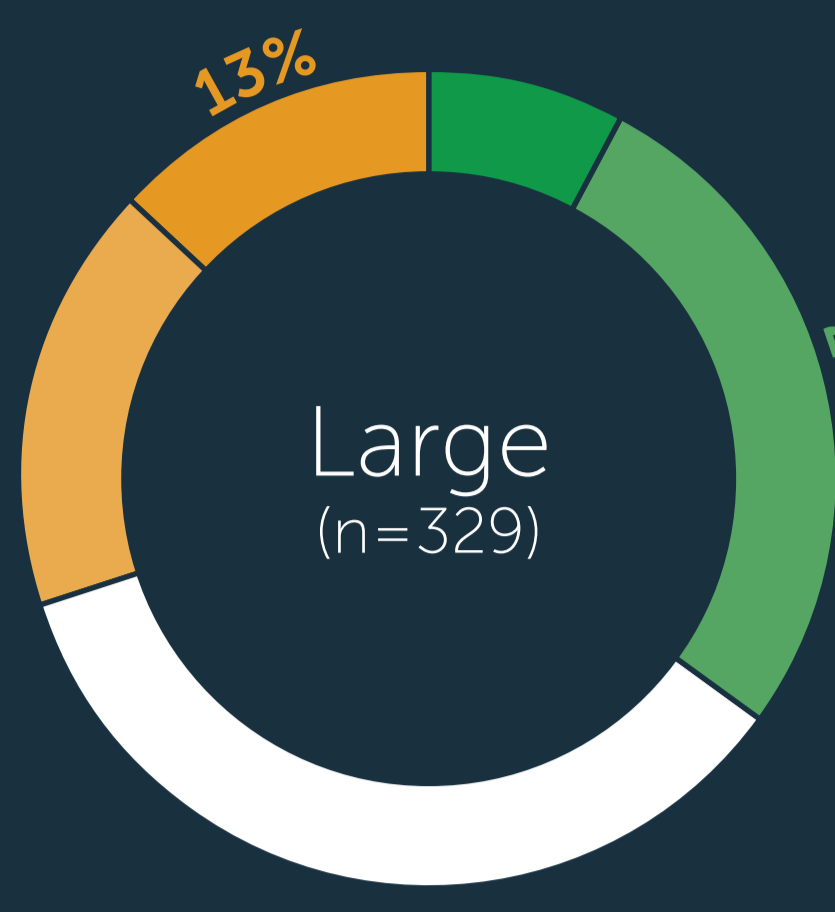
My organization will increase focus on biomanufacturing, including biosimilars



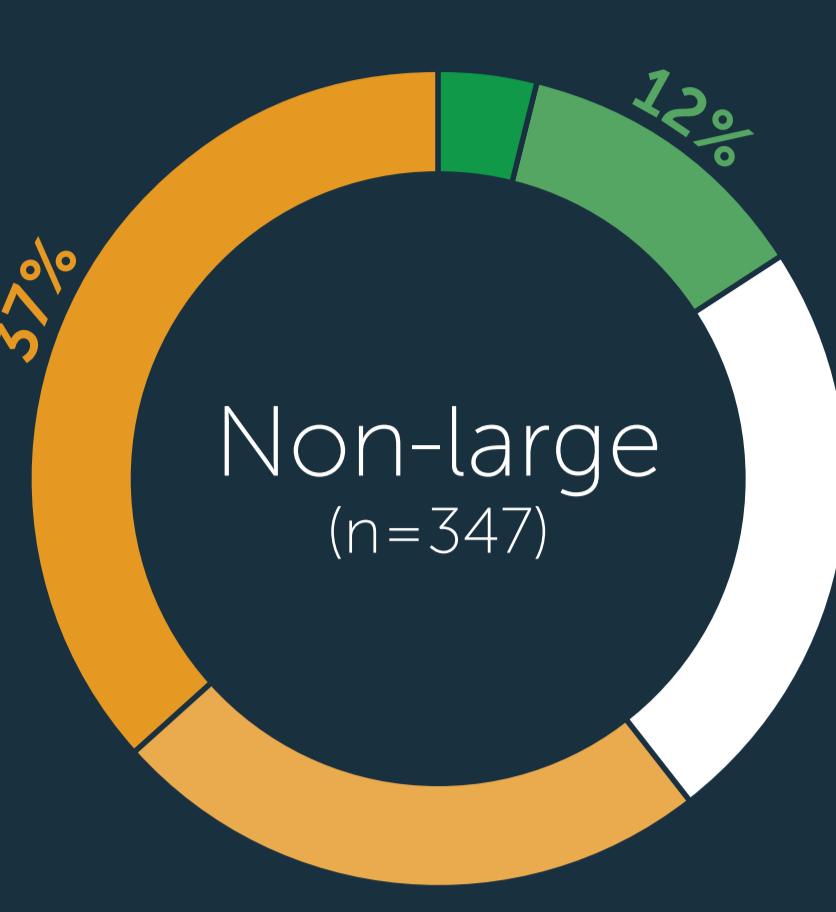
4%	Strongly Agree	6%
13%	Agree	29%
38%	Neither Agree nor Disagree	31%
9%	Disagree	14%
4%	Strongly Disagree	20%



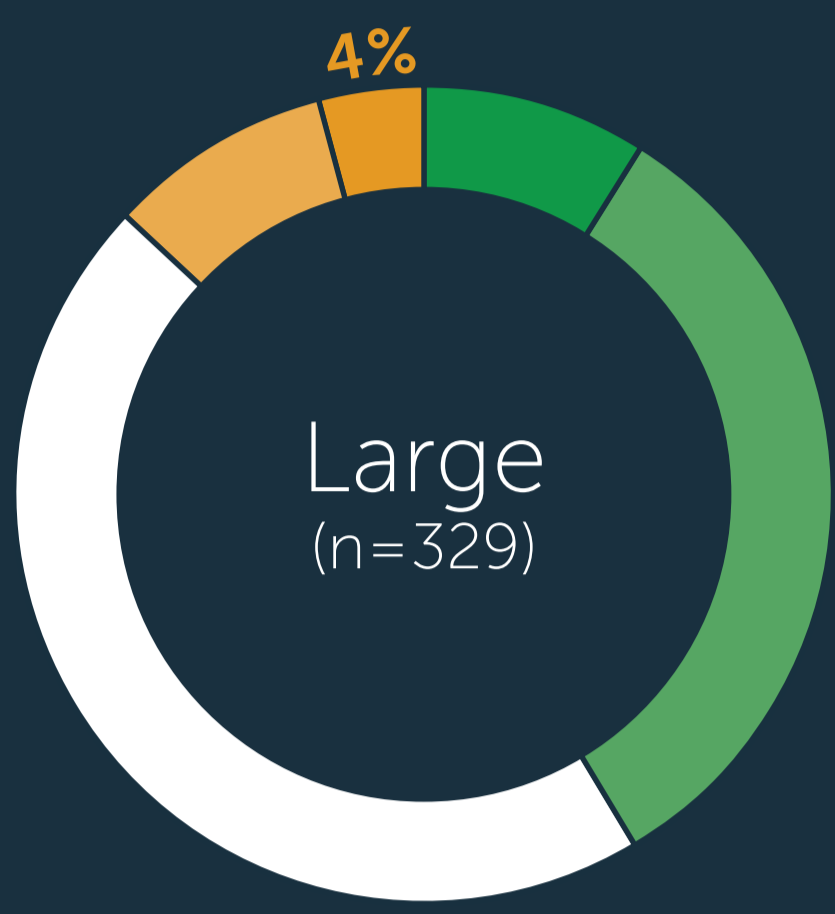
My organization will increase focus on vaccines



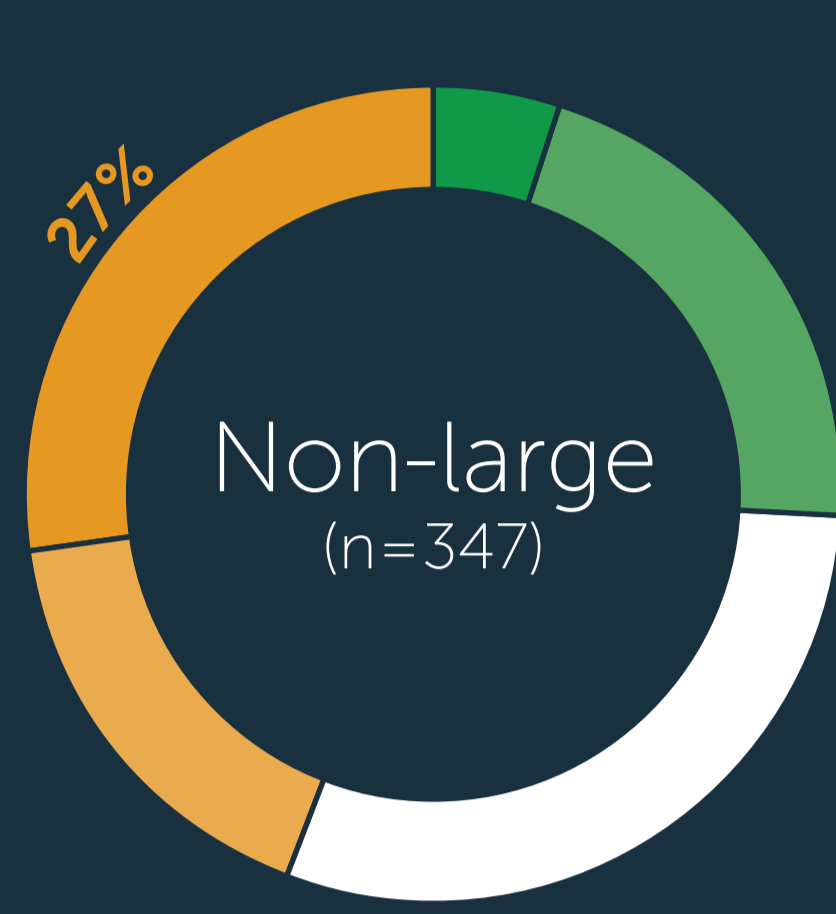
8%	Strongly Agree	4%
27%	Agree	12%
35%	Neither Agree nor Disagree	24%
17%	Disagree	24%
13%	Strongly Disagree	37%



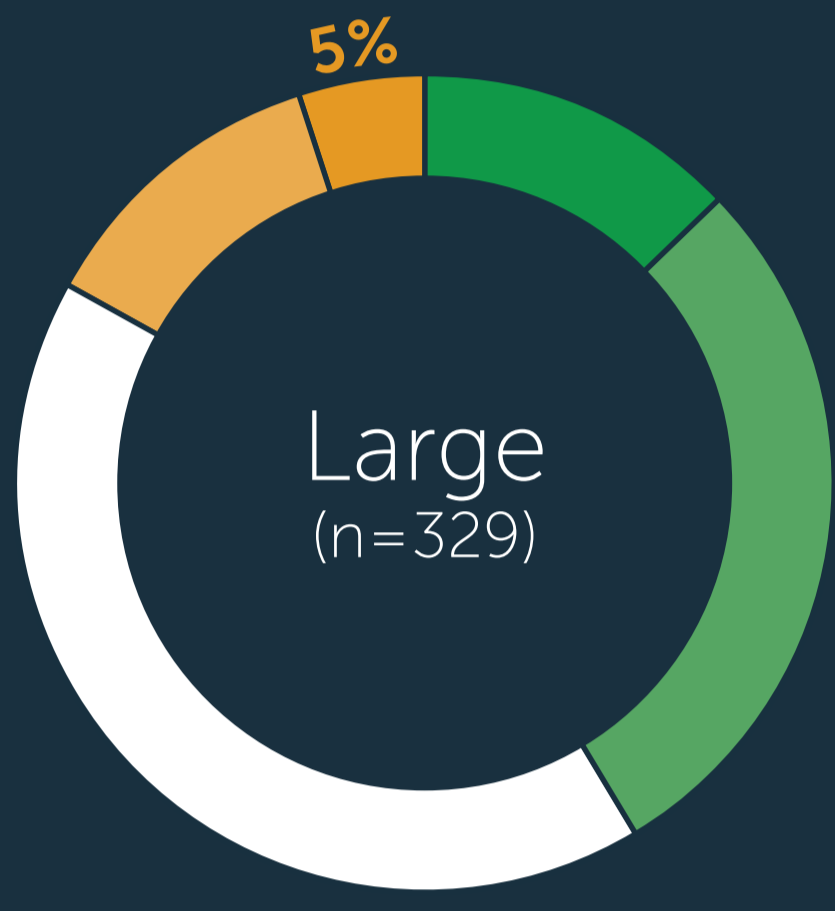
My organization will increase focus on combined therapeutics such as ADCs



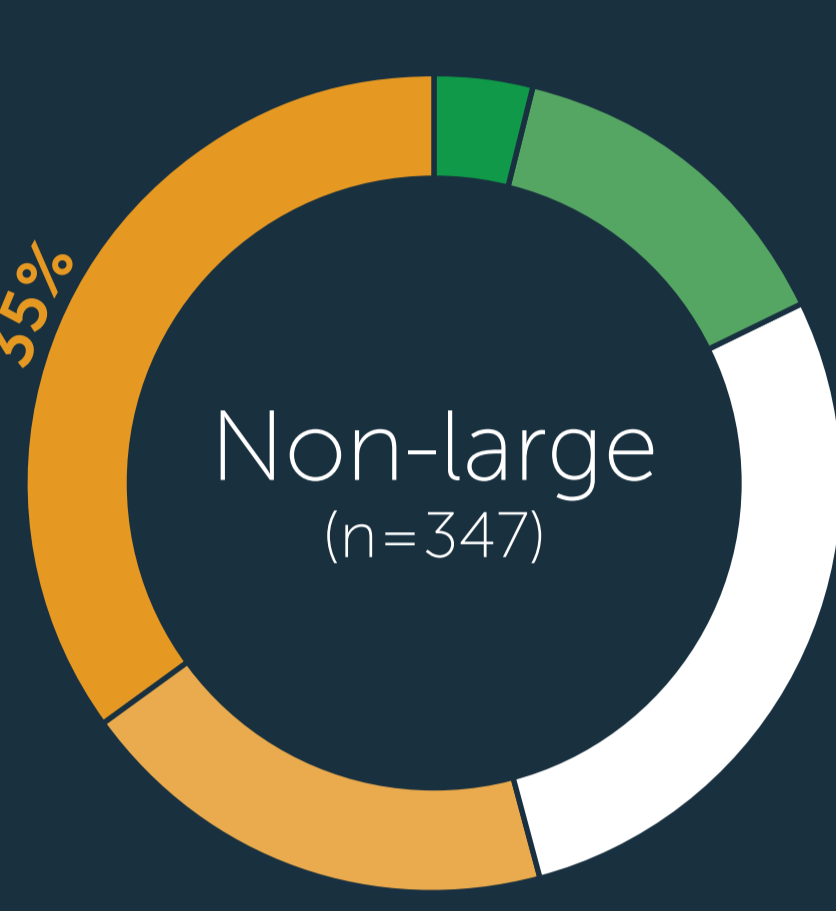
9%	Strongly Agree	5%
33%	Agree	21%
46%	Neither Agree nor Disagree	30%
9%	Disagree	17%
4%	Strongly Disagree	27%



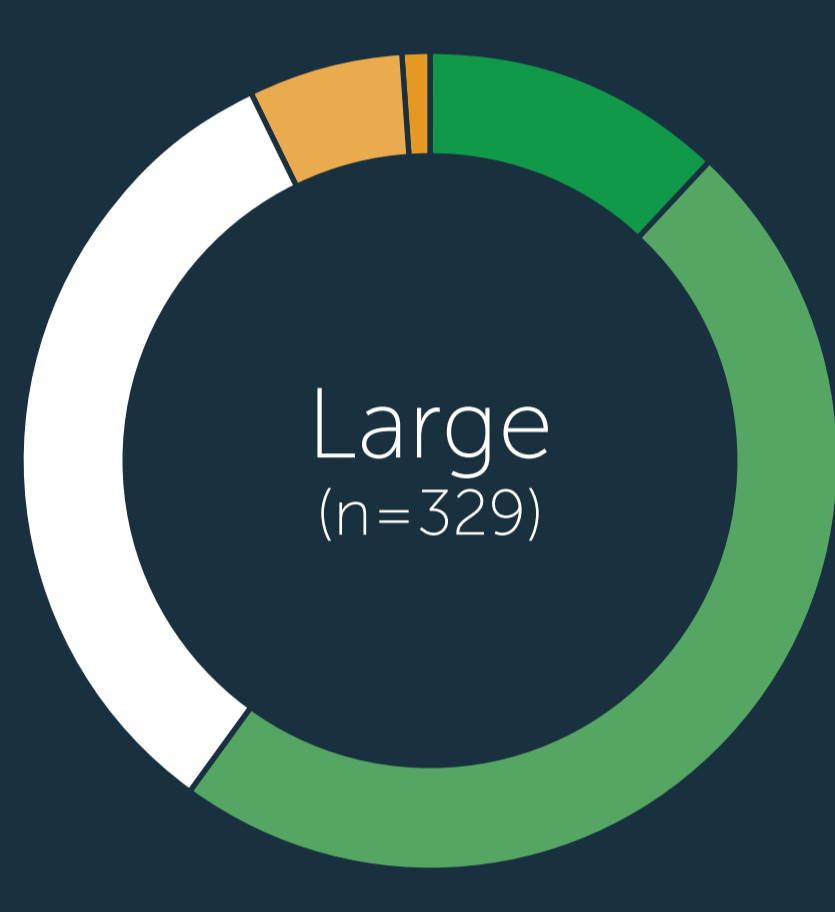
My organization will increase focus on developing CAR T-cell cancer therapies (Chimeric Antigen Receptors)



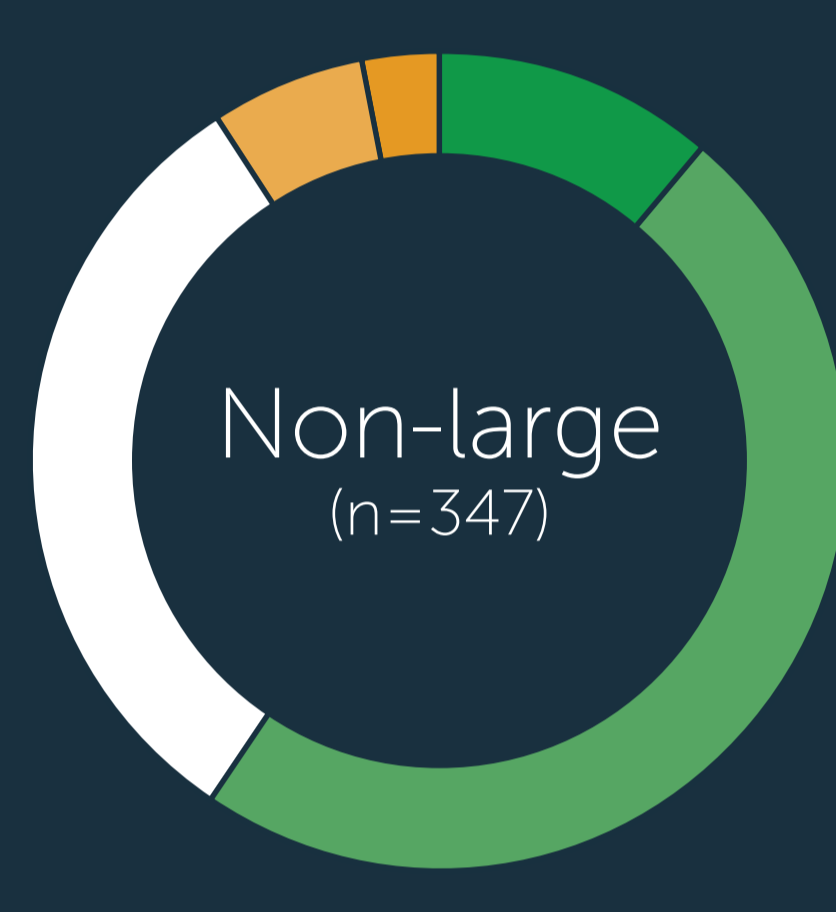
13%	Strongly Agree	4%
29%	Agree	14%
42%	Neither Agree nor Disagree	28%
12%	Disagree	19%
5%	Strongly Disagree	35%



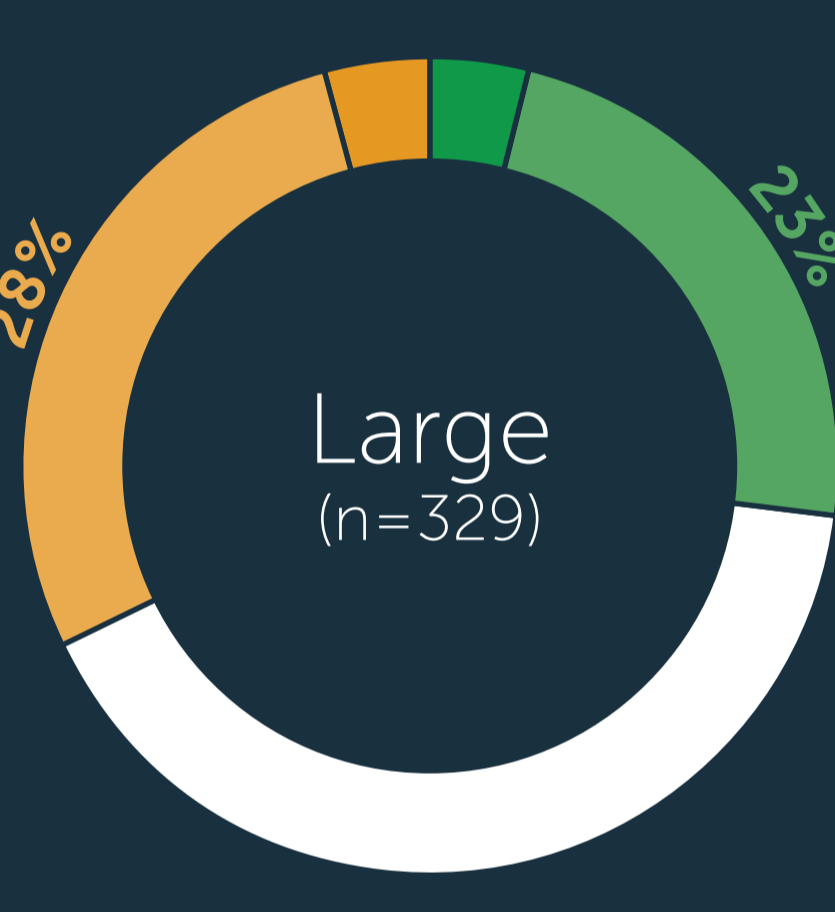
My organization's focus on developing new, innovative treatments will impact our outsourcing practices



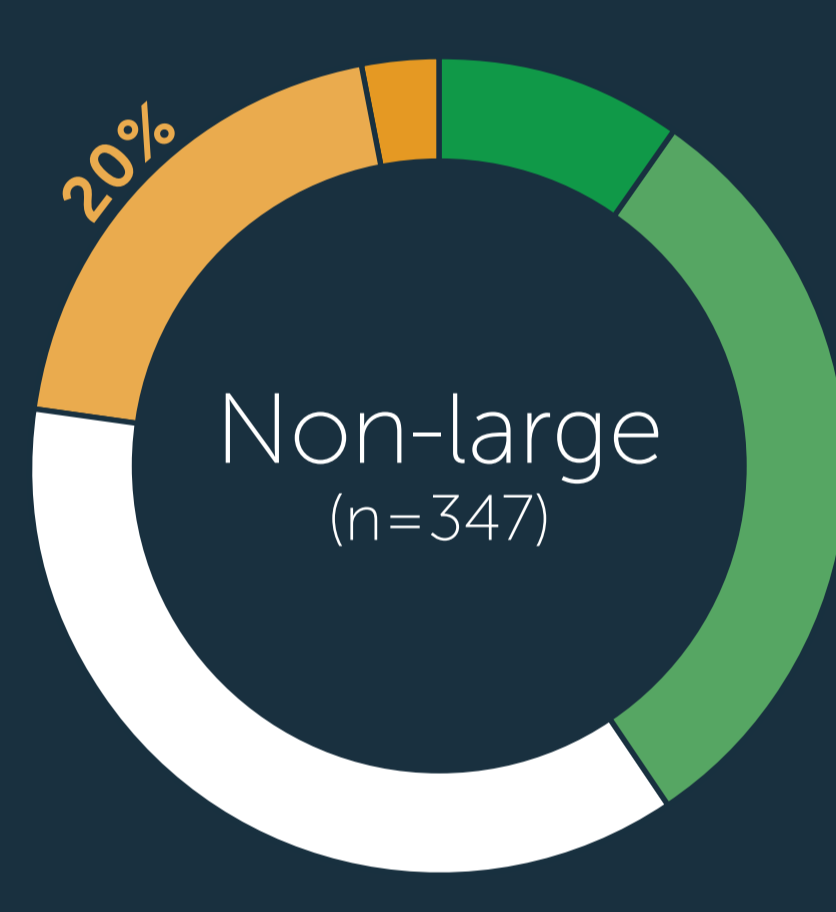
12%	Strongly Agree	11%
48%	Agree	48%
33%	Neither Agree nor Disagree	31%
6%	Disagree	6%
1%	Strongly Disagree	3%



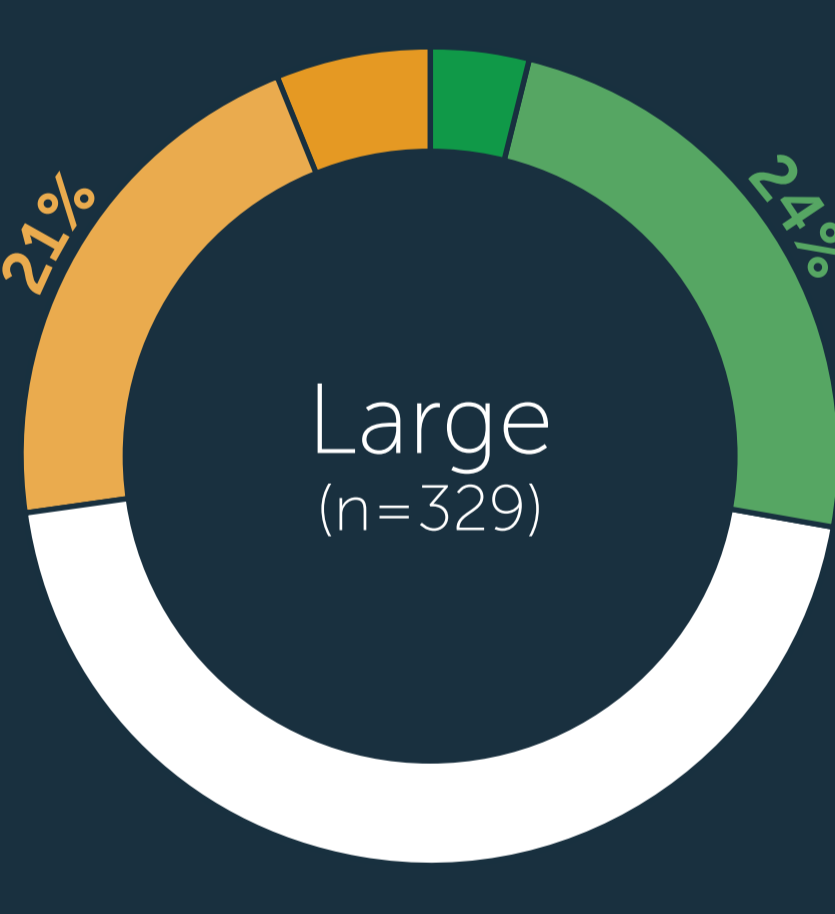
My organization's use of CMOs is not likely to change much in the next two years



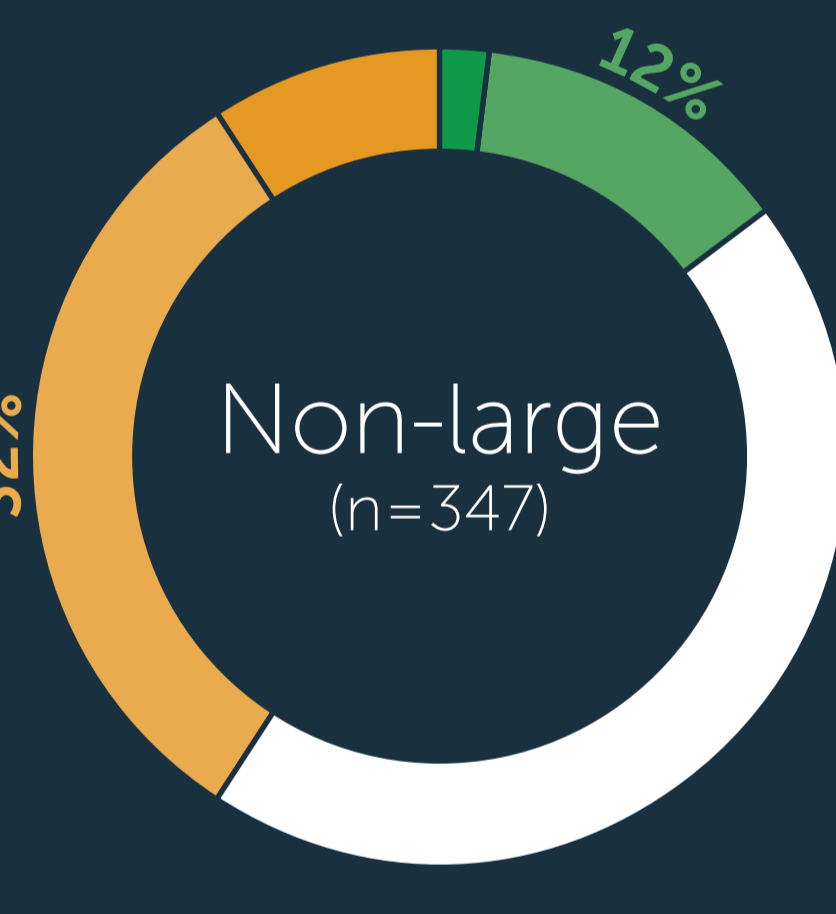
4%	Strongly Agree	10%
23%	Agree	31%
41%	Neither Agree nor Disagree	37%
28%	Disagree	20%
4%	Strongly Disagree	3%



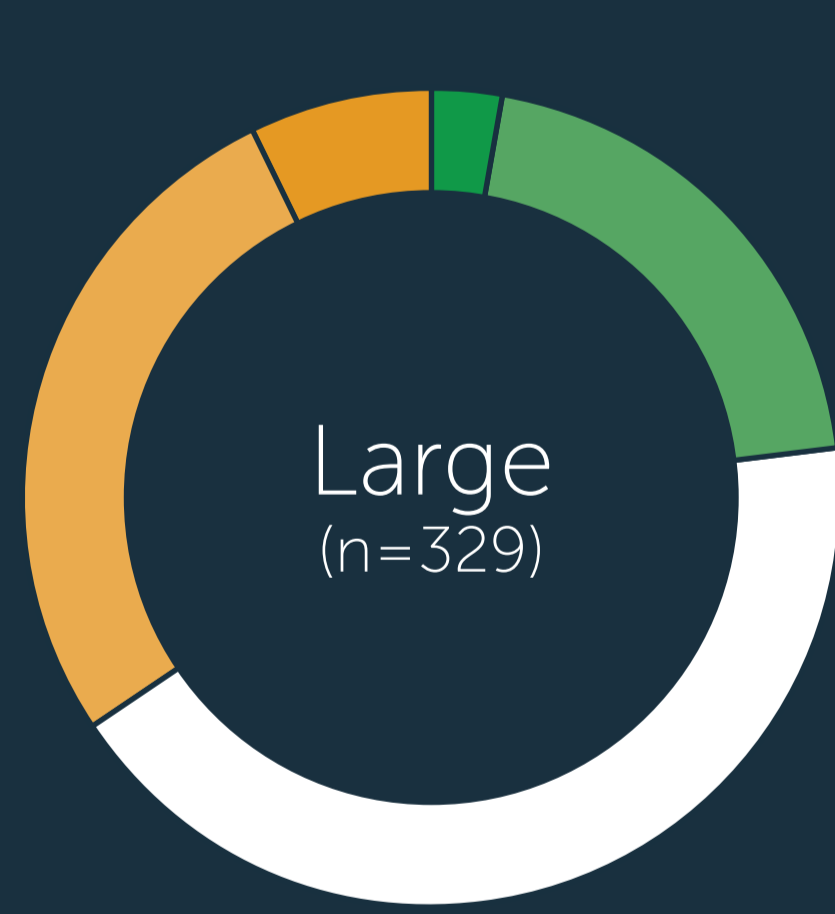
Mergers and Acquisitions tend to create better quality CMOs



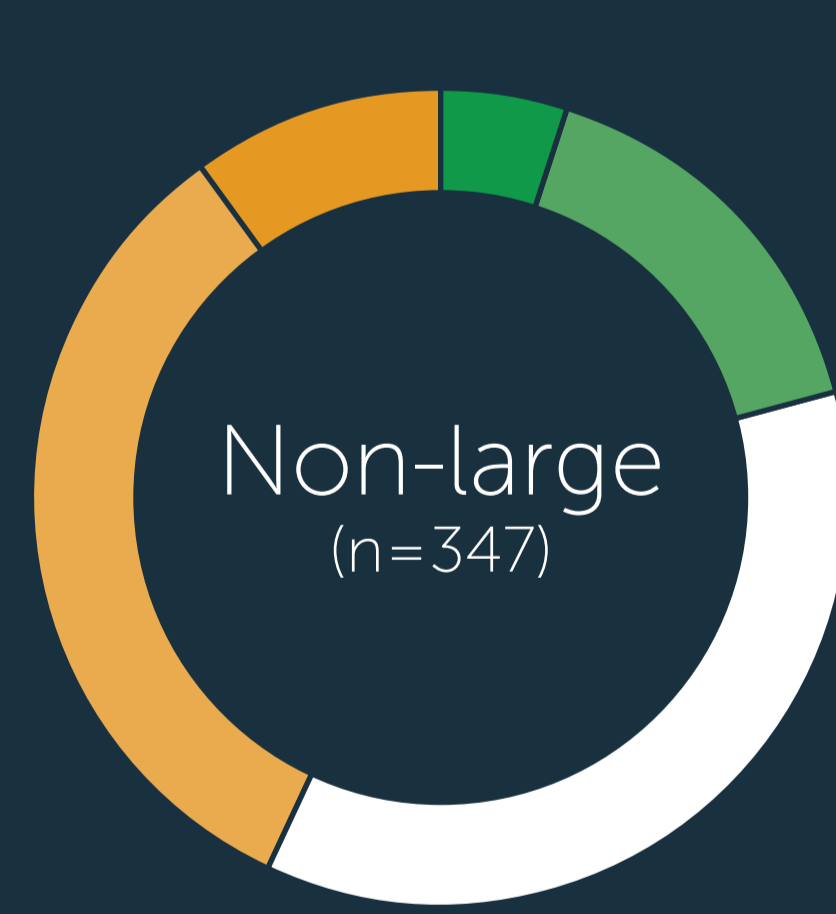
4%	Strongly Agree	2%
24%	Agree	12%
45%	Neither Agree nor Disagree	45%
21%	Disagree	32%
6%	Strongly Disagree	9%



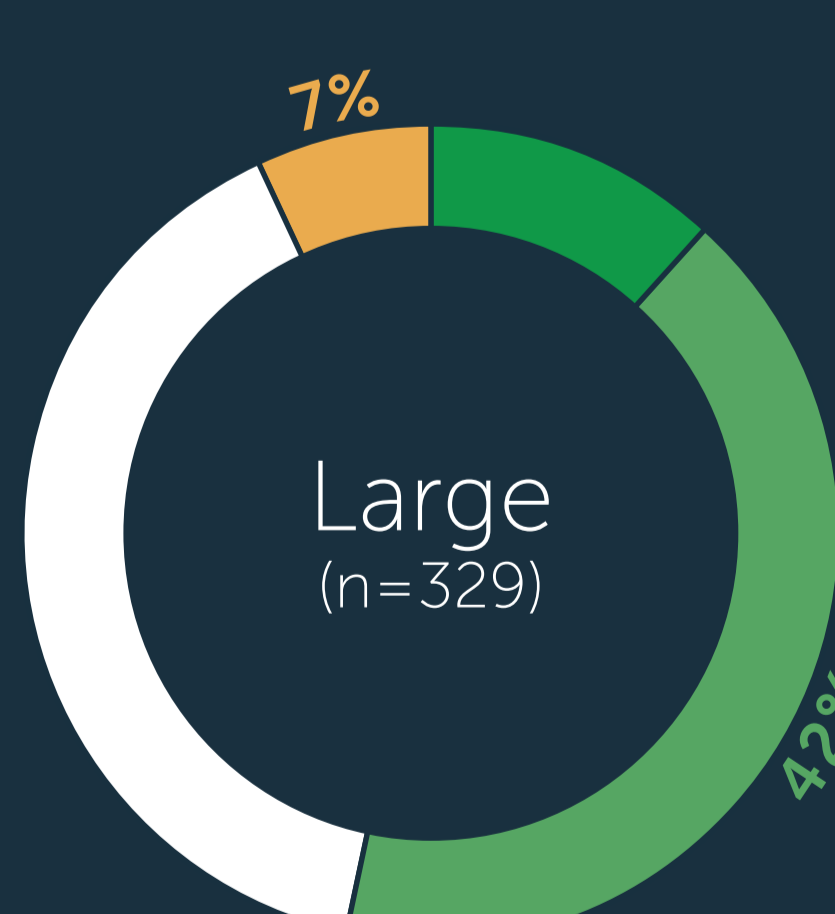
My organization is nearing its maximum outsourcing activity level



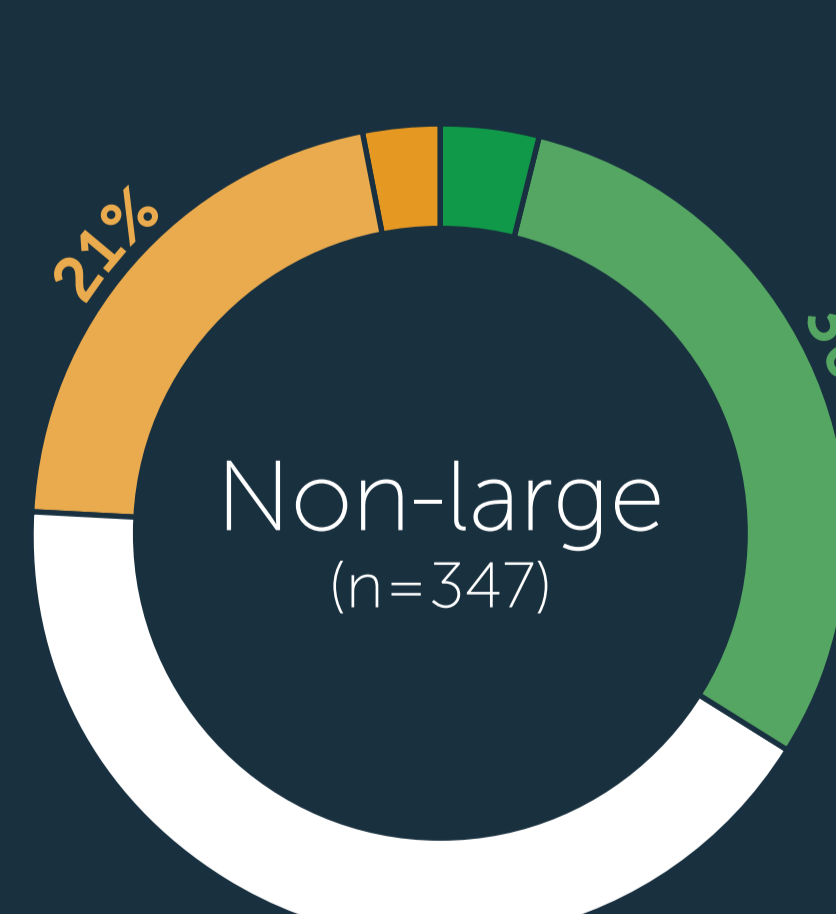
3%	Strongly Agree	5%
20%	Agree	16%
42%	Neither Agree nor Disagree	36%
27%	Disagree	33%
7%	Strongly Disagree	10%



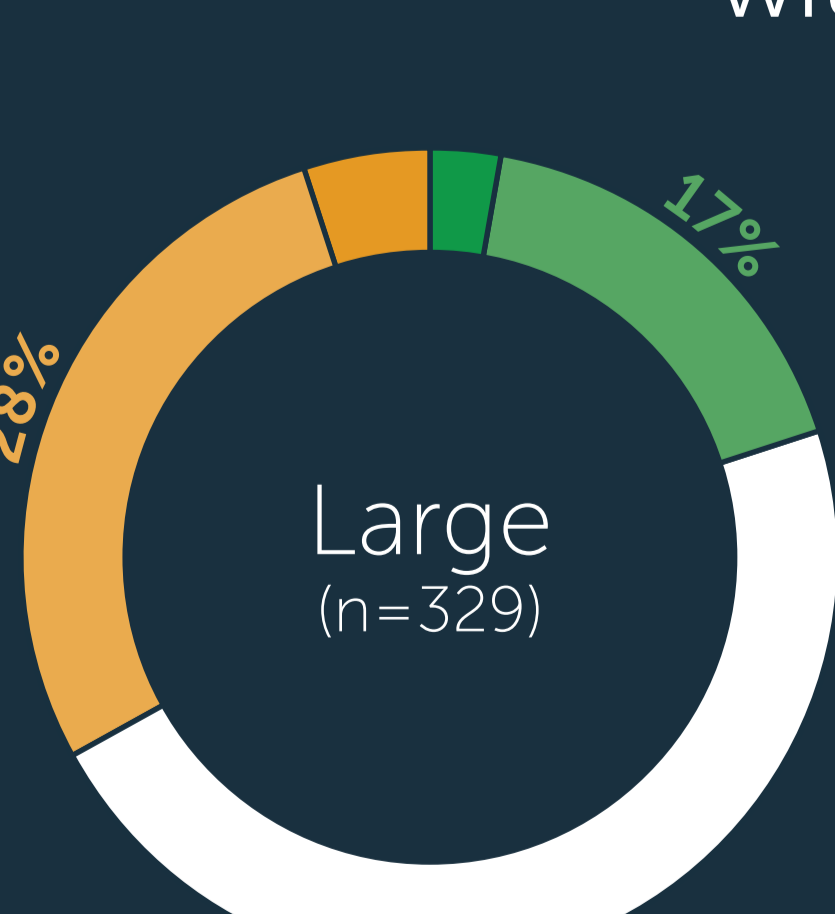
My organization prefers large, global CMOs with broad capabilities



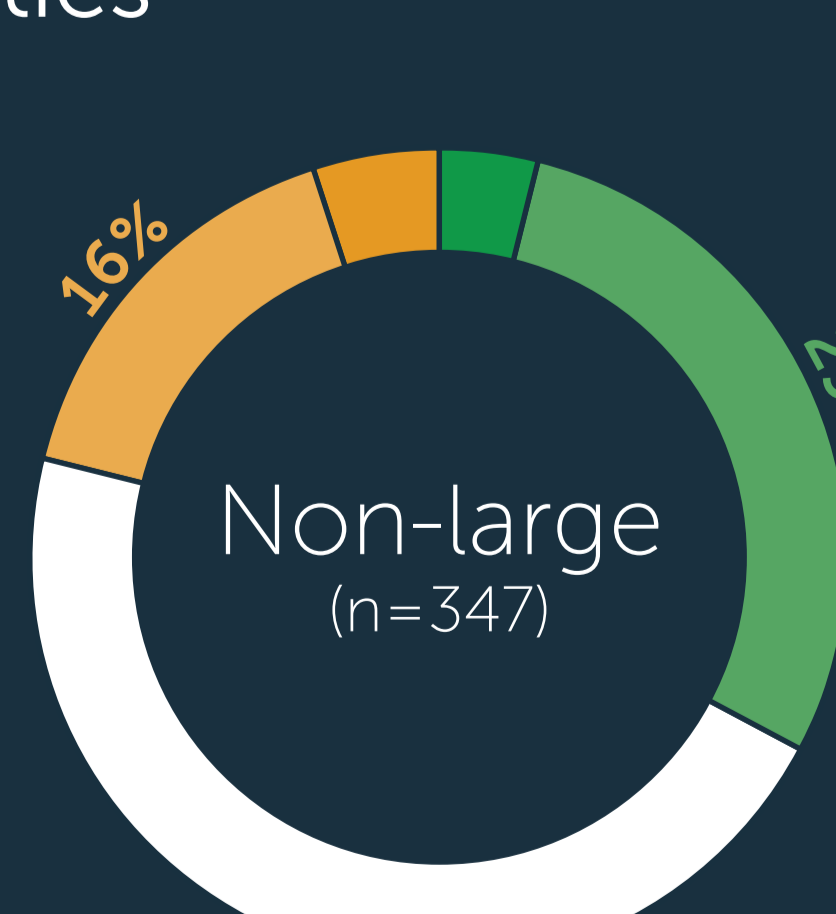
12%	Strongly Agree	4%
42%	Agree	30%
40%	Neither Agree nor Disagree	42%
7%	Disagree	21%
0%	Strongly Disagree	3%



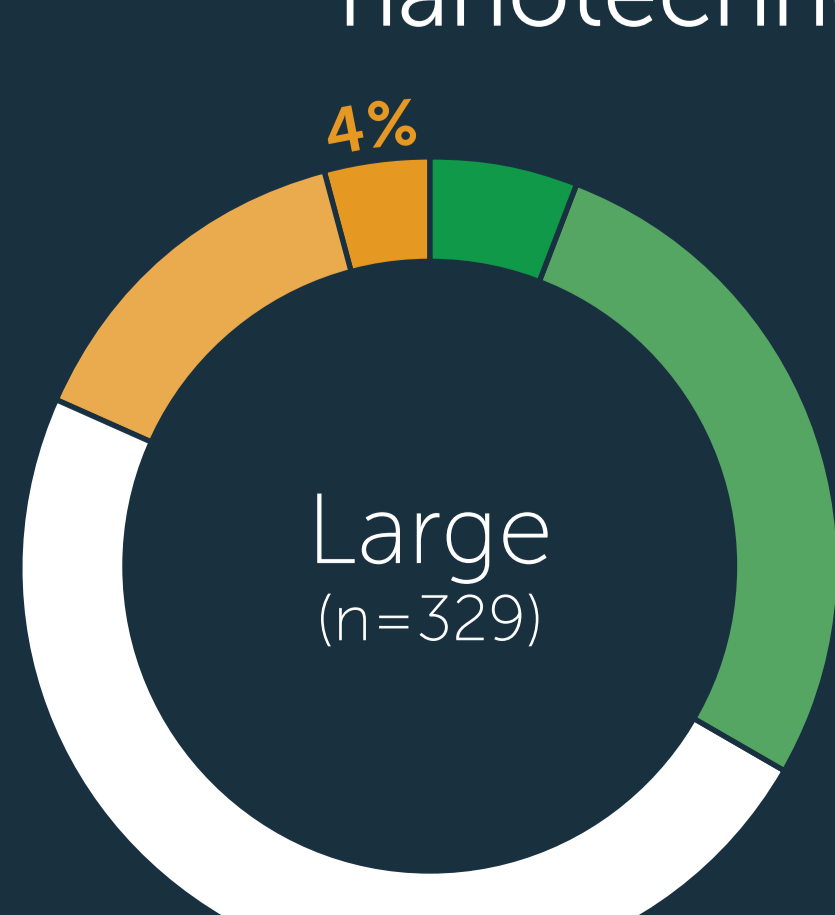
My organization prefers smaller, niche CMOs with highly specialized capabilities



3%	Strongly Agree	4%
17%	Agree	29%
47%	Neither Agree nor Disagree	46%
28%	Disagree	16%
5%	Strongly Disagree	5%



My organization will increase focus on applying nanotechnology to drug development and delivery



6%	Strongly Agree	4%
27%	Agree	22%
48%	Neither Agree nor Disagree	35%
14%	Disagree	18%
4%	Strongly Disagree	21%

