



Evolving Pharma Talent Needs in a Global Market



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The pharmaceutical industry is undergoing a profound transformation, marked by global shifts that are reshaping its value chain and talent requirements, particularly at the executive level. In a recent executive session organized by Pedersen & Partners' Life Sciences & Healthcare Practice Group and moderated by **Michael Buckley**, Client Partner at Pedersen & Partners, **Sarah Dolman**, Partner at Recon Strategy, outlined key dynamics impacting the sector. Her commentary offers valuable context for those seeking to understand how talent needs are evolving in functions such as R&D, manufacturing, regulatory affairs, and commercialization.

An increasingly Global Supply Chain

A major dynamic is the increasing reliance on Contract Development and Manufacturing Organizations (CDMO) and expanding global footprint of the pharma supply chain, for both commercial and in development drugs. While the US and EU continue to lead production of brand and biologic drugs, there is a noticeable shift towards Asia (particularly India and China) for generics and key raw materials (including Active Pharmaceutical Ingredients, APIs). This migration is influenced by factors such as labor costs, flexible environmental regulations, and access to raw materials.

Additionally, end-to-end manufacturing processes are increasingly multi-geographic. For instance, a single drug might involve starting materials from India, processing in Ireland, and finishing in the US. This complexity necessitates executive leaders with significant experience managing cross-border operations and working effectively with CDMOs.

The Rise of Asia in Discovery, Clinical Trials and Talent Pools

Drug discovery and clinical trials are other areas experiencing migration, with China emerging as a significant new hub. Lower talent costs, the availability of large and diverse patient populations, and more flexible regulatory environments contribute to this shift.

Electrification rates are uneven. Europe is relatively advanced, while many US states face energy shortages due to rising consumption, particularly from AI and data centers. Geopolitical shifts are accelerating demand for energy independence.

"More and more of drug development—not just manufacturing—is starting to happen outside of the traditional hubs of the US and the EU," Dolman stated, underlining the need for globally aware leadership in discovery and clinical development. For executive roles specifically in clinical development, this trend increases the demand for leaders who possess on-the-ground experience in Asia. Familiarity with local regulatory bodies and the capability to manage teams distributed across different geographies are becoming crucial differentiators for success.

Complexity of Drug Modalities and Manufacturing Challenges

The types of pharmaceutical products themselves have become more varied and complex. The industry now deals with a range of modalities, from traditional small molecules and peptides to cutting-edge biologics such as Cell and Gene therapies (CGT). Each of these presents unique challenges in terms of production, storage, and logistics.

Newer modalities like CGT require that are not fungible with other modalities. Despite their technological promise, CGTs are uniquely challenging for executives, as the facilities and talent required are not typically fungible, and the future demand remains unclear. ***"There's really only a handful of cell & gene therapies on the market today, and commercially they haven't been very successful,"*** Dolman observed. ***"There's downward pressure on what companies can charge, despite the high cost of development"***. Executives overseeing these modalities must be adept at navigating uncertain market uptake, while minimizing costs



US Policy and Talent Constraints

The United States government has used multiple tactics to encourage reshoring of pharma research and manufacturing, such as facility-build incentives, penalizing working with foreign CDMOs, and even tariffs on imported drugs. Despite these efforts, any changes face long implementation timelines and practical barriers. For example, building or converting FDA-compliant facilities can take a significant five to ten years. ***"You can't just flip a switch and build capability. The facilities, approvals, and skilled personnel all take years,"*** Dolman emphasized.

Furthermore, the US is confronting a shortage of graduates in STEM fields relevant to pharma, such as synthetic biology or chemical engineering. Many students are opting to specialize in areas like computer science and machine learning instead. ***"You can't bring things back here—not the higher value jobs—if you don't have the talent to support [that] innovation,"*** Dolman noted, pointing to the limits of reshoring without parallel investment in technical capabilities. This talent gap could potentially hinder the sustainability of domestic innovation unless addressed through long-term workforce planning.

Implications for Executive Search

These global dynamics have clear implications for executive search and the profile of desired leadership talent. Key requirements for future pharma executives include:

- **Global Experience:** Executives with cross-regional experience, particularly in Asia, are in high demand.
- **Strategic Supply Chain Leadership:** Leaders must be able to manage complex supplier networks and mitigate geopolitical risks effectively.
- **Scientific and Regulatory Acumen:** A deep understanding of diverse drug modalities and their associated regulatory pathways is considered essential.
- **Digital Adaptation:** Proficiency in leveraging digital tools, such as remote monitoring and digital twins, which are increasingly integrated into clinical operations, requires leadership with digital fluency.
- **Digital Integration in Manufacturing Process Maintenance:** Leveraging digital technologies to enhance equipment reliability, reduce downtime, and maintain regulatory compliance across global pharma manufacturing operations.
- **Workforce Transformation:** Organizations need to invest in internal upskilling or look to attract talent from non-traditional sectors to meet evolving technical needs.

Conclusion

The session, hosted by Pedersen & Partners, underscored the pharmaceutical industry's shifting global landscape—from R&D and clinical trials to manufacturing and commercialisation. With growing complexity across geographies, technologies, and regulatory frameworks, the sector faces both strategic risks and growth opportunities.

Executive leadership will be critical to navigating this transformation. As Sarah Dolman noted, ***"You need people who understand what it's like to conduct research in different regions and manage production across borders."*** The message is clear: talent strategy will define the next chapter of pharmaceutical innovation.