



AgileOne

2026

LIFE SCIENCES LABOR MARKET OUTLOOK

Trends Shaping Talent, Skills, and
Workforce Strategy Across Pharma,
Biotech, Medtech & Diagnostics



Executive Summary

The life sciences labor market enters 2026 shaped by a year of transition. Scientific momentum remains strong across therapeutics, diagnostics, and advanced manufacturing, yet hiring patterns reflect a more measured, capability-focused approach. Throughout 2025, companies balanced scientific ambition with economic caution, leading to moderated job growth, selective hiring, and recalibrated workforce strategies. As Europe faces competitiveness pressures and Asia-Pacific continues expanding its scientific and manufacturing ecosystems, global labor dynamics are influencing where and how organizations source talent.

AgileOne's perspective is clear:
talent strategy is now
inseparable from scientific and
operational execution.

Organizations that anticipate labor market shifts, build flexible workforce models, and integrate digital, automation, and advanced therapy skills into their talent architectures will be best positioned to navigate 2026's demands.

Supporting Workforce Strategy in Life Sciences

AgileOne partners with global life sciences organizations to build workforce architectures aligned with scientific, operational, and global expansion priorities. We integrate full-time hiring, contingent workforce solutions, SOW-based delivery, recruiting, vendor governance, and talent analytics to support regulated, rapidly advancing environments.

Industry-Specific Workforce Expertise:

We understand the talent implications across discovery, clinical development, manufacturing, regulatory affairs, and quality systems.

AI- and Digital-Ready Workforce Strategy:

We prepare organizations for emerging skill requirements across AI engineering, automation, digital manufacturing, bioinformatics, and data science.

Data-Driven Workforce Planning:

Our models map skill availability, hiring bottlenecks, geographic labor variation, workforce cost structures, and operational risk.

Global Footprint:

AgileOne operates in 45 countries across The Americas, Europe, and Asia-Pacific, supporting multi-region workforce planning and cross-border compliance.

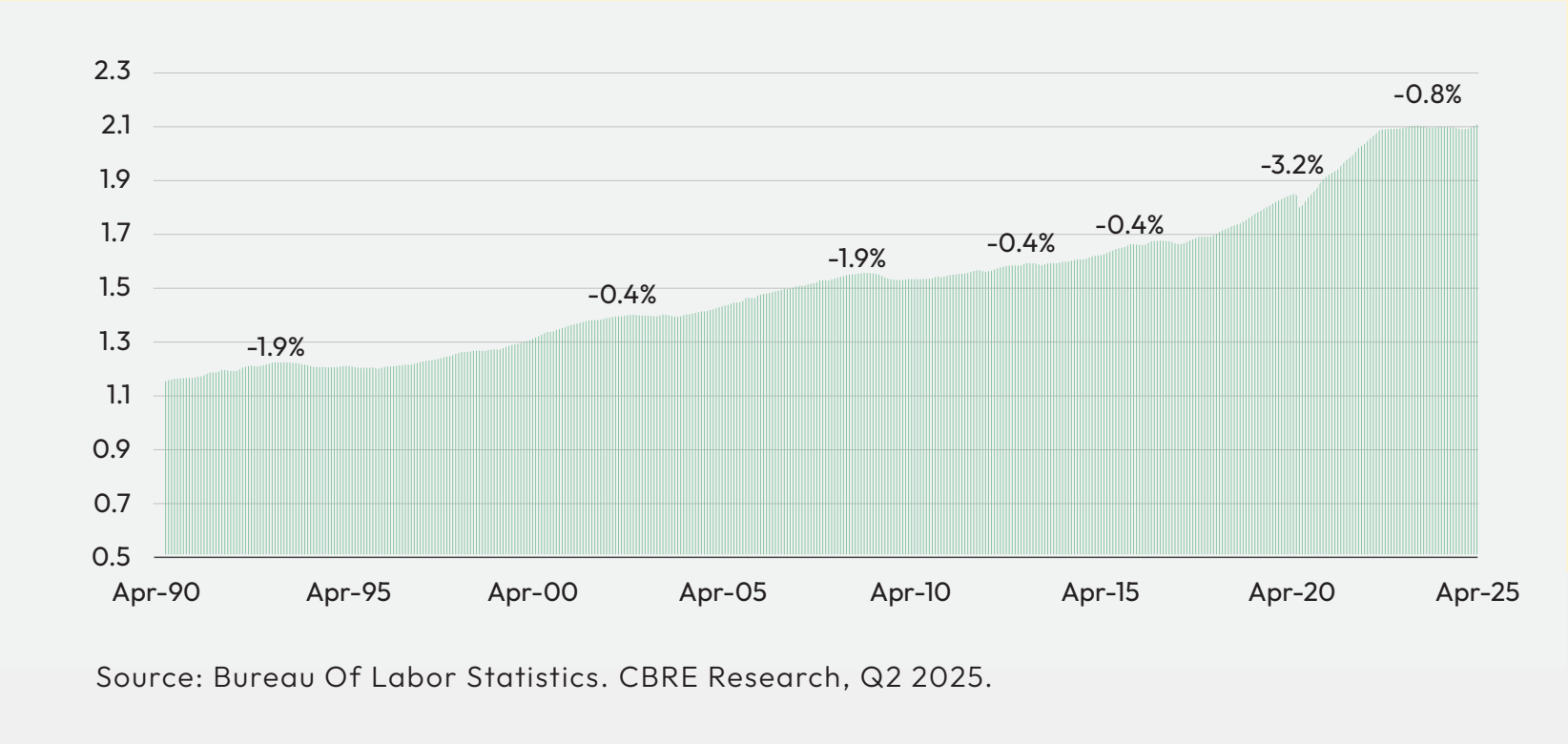
Strategic Partnership:

We work with leadership teams to design resilient, scalable workforce systems that support predictable hiring, manufacturing readiness, and global scale.

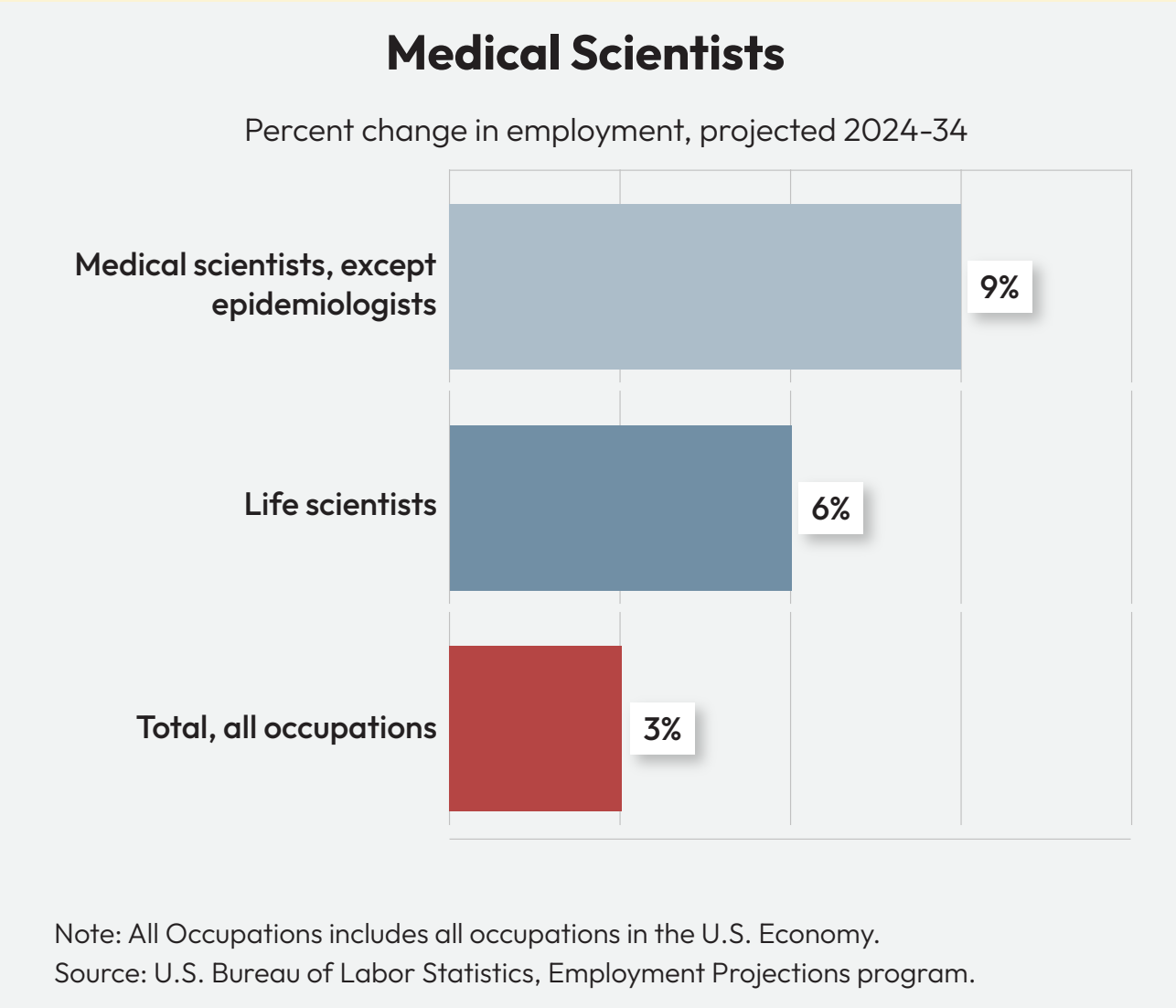
The U.S. Life Sciences Talent Landscape

Despite macroeconomic uncertainty, the U.S. life sciences labor market remains structurally resilient as it enters 2026. Employment reached a record 2.1 million in early 2025,¹ driven by sustained demand across R&D, regulatory, quality, and advanced manufacturing. Over the course of the year, however, the industry began transitioning into a period of moderated growth. In the second quarter of 2025, job levels softened, with hiring slowing and modest workforce contractions emerging, a reflection of tighter financial conditions, increased cost discipline, and recalibrated hiring priorities.²

Total U.S. Life Sciences Employment During Recent Economic Cycles



These trendlines shape expectations for 2026. While the sector remains fundamentally strong, hiring is expected to be selective and skills-based, rather than driven by broad expansion. Scientific occupations remain structurally sound, supported by the Bureau of Labor Statistics’ projection that medical scientist roles will grow 9% from 2024–2034.³ However, employers are increasingly prioritizing capabilities tied to automation, digital enablement, advanced therapy production, and quality infrastructure, areas where skills remain constrained. This environment underscores the need for strategic workforce planning, as selective tightness in specialized roles persists even as overall employment stabilizes.



Workforce Signals from Europe and Asia-Pacific

Global labor dynamics continue to shape workforce strategy as organizations enter 2026, making a multi-region perspective increasingly valuable for life sciences leadership teams. Europe remains one of the world's most sophisticated scientific ecosystems, expanding by more than €100 billion since 2015⁴ and continuing to serve as a hub for R&D excellence, advanced manufacturing, and regulatory expertise. At the same time, shifts in operating conditions, such as evolving regulations, wage movement, and localized talent competition, are prompting companies to reconsider how and where they build capabilities. Industry voices have noted that these dynamics are encouraging organizations to take a fresh look at talent mobility, investment priorities, and long-term workforce planning.⁵

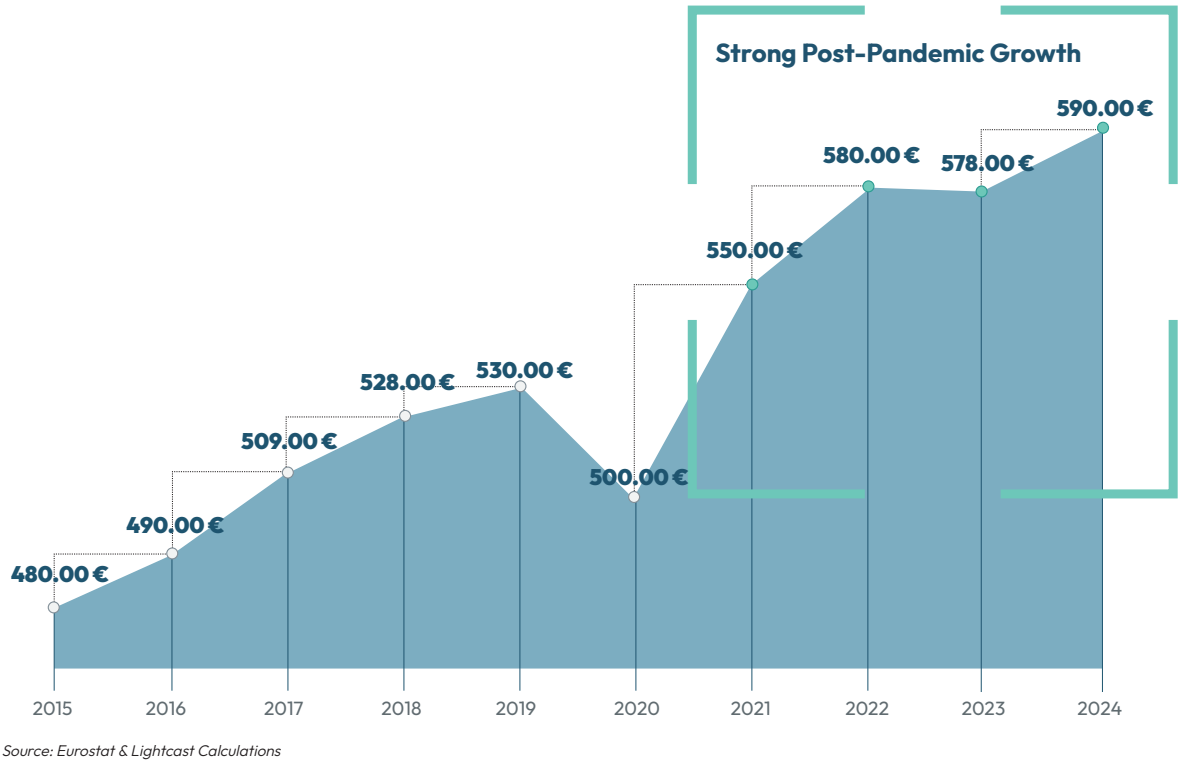


Recent investment patterns in the UK illustrate this broader realignment rather than a retreat. UK pharmaceutical R&D has grown more steadily than rapidly in recent years, increasing at 1.9% annually compared with the 6.6% global average, and experienced a £100 million dip in 2023. Life sciences foreign direct investment reached £795 million in 2023, compared with £1.893 billion in 2017, which has shifted the UK's relative ranking among peer markets.⁵ These trends reflect changes in capital allocation cycles and global portfolio strategies, common across a sector that continually adapts to emerging technologies, new modalities, and evolving global demand.

For life sciences organizations, the takeaway is not one of reduced opportunity but of strategic recalibration. Europe continues to offer deep talent pools in areas such as drug discovery, regulatory affairs, clinical operations, and biomanufacturing. What is changing is the importance of understanding how regional labor markets interact with global capability needs, whether organizations are expanding in Europe, building complementary hubs in the U.S. or Asia, or distributing capabilities across multiple markets.

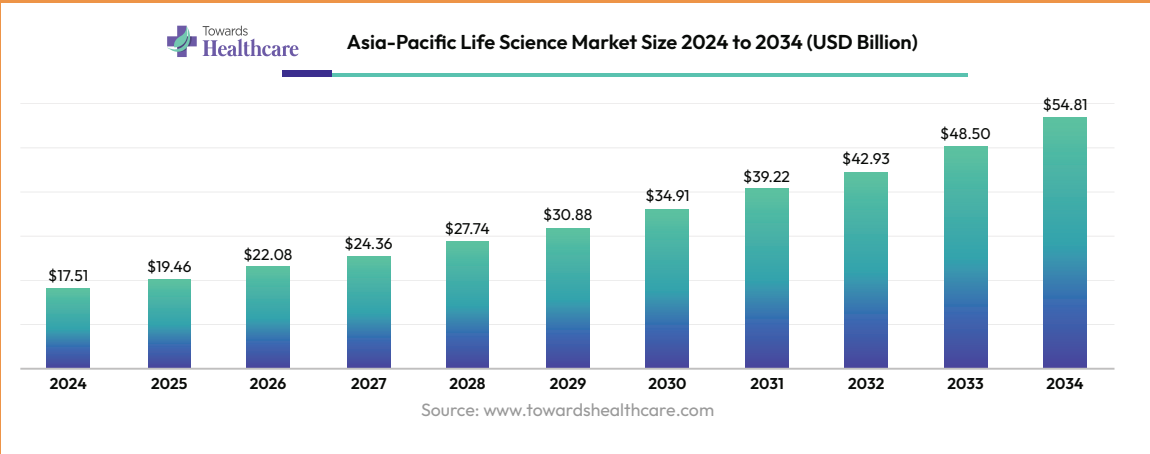
AgileOne supports this perspective by providing a global lens on workforce planning. Through multi-region labor analytics, local market insight, and flexible talent models, AgileOne helps clients understand how shifts across Europe, The Americas and Asia-Pacific influence skills availability, hiring timelines, and long-term workforce strategy. Our goal is to help organizations align talent planning with global scientific and operational priorities, ensuring they remain agile, competitive, and well-positioned wherever their teams need to grow.

EU Life Sciences - Value Added Economic Output



The Asia-Pacific region’s life sciences market is forecast to grow from \$98.63 billion in 2025 to \$269.56 billion by 2034, representing a compound annual growth rate of ~11.8%. China accounts for approximately 35% of this market, while Singapore, South Korea, India, and Australia continue strengthening their scientific and biomanufacturing ecosystems.⁶ Across APAC, demand for biomanufacturing specialists, QA/QC professionals, regulatory experts, and digital scientists continues to outpace supply.⁷

For multinational organizations planning for 2026, these regional shifts underscore the importance of multi-hub workforce strategies that balance cost, capability depth, and long-term scalability.



SKILLS, CAPABILITIES, AND WORKFORCE MODELS TO WATCH

Digital transformation continues to reshape skill requirements across life sciences. AI-enabled discovery, computational modeling, and digital clinical operations are accelerating the need for data scientists, bioinformaticians, and automation engineers. These roles increasingly complement traditional scientific functions, creating hybrid talent profiles that combine lab-based expertise with digital fluency.

Advanced manufacturing, particularly in biologics, cell therapies, and gene therapies, continues to be a driver of workforce demand. Process engineers, validation specialists, and QA/QC talent remain in high demand, often with limited geographic supply.

Workforce models are evolving accordingly. Many organizations are adopting blended models that integrate full-time hiring, contingent labor, and SOW-based project teams. This approach offers flexibility as companies navigate variable clinical timelines, capital allocation cycles, and evolving regulatory expectations.

OPERATIONAL IMPLICATIONS FOR LIFE SCIENCES EMPLOYERS

The labor environment shaping 2026 has direct implications for organizational planning and scientific execution. Tight labor markets in specialized functions, such as regulatory affairs, digital systems, and advanced manufacturing, can extend development timelines, delay manufacturing readiness, and increase compliance risk. Conversely, strategic workforce planning can improve operational predictability, accelerate scale-up timelines, and support global expansion.

As Europe recalibrates and Asia-Pacific expands, location strategy is increasingly tied to talent strategy. Organizations evaluating new analytical, manufacturing, or digital hubs must weigh workforce availability, wage trends, regulatory factors, and long-term sustainability.

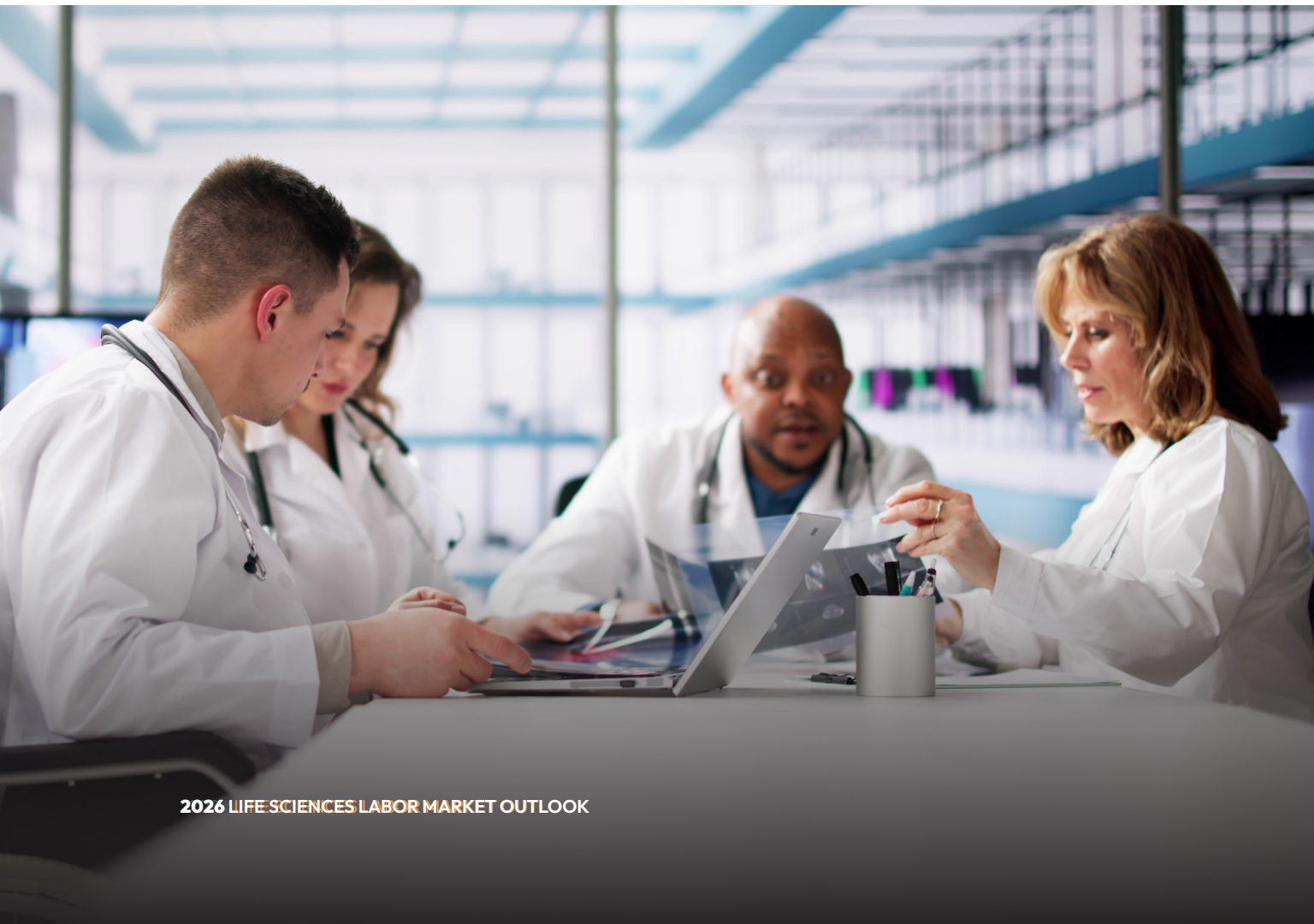
STRATEGIC WORKFORCE ACTIONS FOR 2026

1. Align geographic workforce planning with global capability hubs.
2. Build blended, flexible workforce architectures that support variable scientific and operational demands.
3. Invest in digital and AI-enabled workforce readiness to support emerging modalities and automated systems.
4. Strengthen workforce analytics and scenario planning to anticipate 2026–2027 talent bottlenecks.



AGILEONE'S PARTNERSHIP IN SUPPORTING WORKFORCE STRATEGY

As scientific, operational, and digital demands evolve through 2026, life sciences organizations will require workforce models that balance flexibility, capability, and global reach. AgileOne partners with companies across pharma, biotech, medtech, and diagnostics to operationalize these strategies, anticipating labor trends, building resilient talent architectures, and supporting long-term scientific and commercial outcomes.



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