Gordon Bates – Head of Integrated Biologics, Lonza

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10.12.2025

Tags: USA, Lonza, CDMO, Manufacturing, Biologics, Strategy

Lonza's transformation under the One Lonza Strategy comes at a moment of significant change for the global biologics and CDMO sectors. Gordon Bates, Head of Integrated Biologics, reflects on the rationale behind the company's new organisational model, and how a more unified structure is designed to accelerate decision-making and strengthen client delivery. He also discusses Lonza's expanding US footprint, which includes a recent acquisition of a major manufacturing site in Vacaville, California. As an industry veteran, Bates goes on to give his expert insights on the evolving customer needs across the biotech and pharma landscape, and the key trends shaping capacity, productivity, and technology adoption in the future of the CDMO sector.

Could you begin by outlining the two-decade-long career journey that has led to your current role as Head of Integrated Biologics at Lonza?

This coming January will mark 23 years since I joined Lonza. I first came in as part of the corporate quality team, where my role was to deploy Lean and Six Sigma processes across the organisation. Interestingly, I did not follow a traditional pharma path, as my background was actually in the textile industry. However, since I joined the company so many years ago, I am what you would call a master black belt today.

From there, I moved into operations and spent about seven years managing our clinical and niche commercial mammalian development and manufacturing site in Slough in the UK. After that, I

made what many people viewed as a surprising shift, and I moved from operations into the role of Global Head of Sales. It was a big change in perspective, but one that gave me a very different understanding of our customers and the market.

Eventually, I returned to operations and took over one of our business units, running Lonza's small molecule division for the past 10 years. On 1 April this year, I finally "came home" to biologics, where I had spent my first 12 years at Lonza. Today in Integrated Biologics, I am responsible for our global mammalian drug substance and drug product business.

Lonza announced the One Lonza Strategy at the end of 2024, with implementation beginning in April this year. What was the rationale behind this reorganisation, and how is it designed to strengthen execution and client delivery?

At an organisation like Lonza, which has evolved many times over the past two decades, it is natural to revisit the structure as the external environment and the company's own priorities change. With our new chairman, Jean-Marc Huët, arriving in May 2024 and Wolfgang Wienand as our new CEO in July of the same year, we took the opportunity as an Executive Committee to reflect on how we were operating and where we needed to be stronger.

The rationale behind the One Lonza Strategy was really quite simple. We needed a structure that is easier to understand, faster in its decision-making, and clearer for customers to navigate. The previous model was built around autonomous divisions, which sometimes resulted in programmes being run in isolation. Under One Lonza, we aim to bring the best of the entire company together, ensuring that cross-company programmes and capabilities support every part of the business.

Six months in, those principles are already taking shape. We now have fewer organisational layers, more harmonised ways of working, and clearer pathways for customers. Most importantly, this structure positions us to scale effectively. We have a strong growth trajectory ahead of us, and to reach the next level, we need an operating model that can support significantly larger volumes while maintaining quality, consistency, and delivery. The One Lonza Strategy is designed exactly for that purpose.

How does the Integrated Biologics platform fit within this new organisational model, and could you provide an overview of its key capabilities and offerings?

Integrated Biologics today accounts for roughly half of Lonza's total sales, and it sits at the core of the new organisational model. Within this Business Platform, we bring together our global mammalian drug substance network, which spans Singapore to Switzerland, Spain, the UK, our New Hampshire site on the US East Coast, and our most recent addition in Vacaville on the West Coast. Alongside this, we operate our drug product facilities in Switzerland, including major ongoing investments near Basel.

Our offering spans the full value chain. We support late-stage discovery, develop high-performing and stable cell lines, run clinical-stage manufacturing, and deliver commercial supply and in-market production. This allows customers to enter into a partnership with us at any stage and remain with us as their programmes progress. This applies to early biotech innovators as well as the world's largest pharmaceutical companies.

What ties all of this together under the One Lonza model is the ability to provide a seamless, end-to-end service. Strong science, robust quality systems, and secure, reliable supply are essential, especially for late-stage and commercial programmes.

As the largest pharma market globally, could you give us an overview of Lonza's footprint in the US and share the strategic significance of last year's USD 1.2 billion site acquisition in Vacaville?

The US is central to Lonza's global footprint, both because of its market size and because roughly half of the world's development-stage molecules originate from US-based companies. It would be impossible to serve the sector effectively without a strong and established presence here, and Lonza has built that presence over more than two decades.

Our Portsmouth, New Hampshire, site has been a cornerstone of our mammalian manufacturing network for over 20 years. Houston is home to our growing cell & gene and viral vector manufacturing operations, which have expanded significantly through continued investment. In Walkersville, we produce media that supports both Lonza and external customers. These are complemented by several satellite offices and facilities across the country.

The most recent and strategically important addition is our Vacaville facility, acquired just over a year ago in March 2024. Vacaville adds roughly 330,000 litres of large-scale mammalian capacity, significantly increasing Lonza's global network and strengthening our ability to meet customer demand within the world's largest biologics market. For a CDMO focused on cell culture

manufacturing, this expansion is both a natural progression and a critical enabler of our long-term growth.

In the US, recent policy discussions are intensifying the call to onshore manufacturing across industries, especially biopharma. As many large industry players have announced ambitions to expand their own domestic presence, to what extent do you expect this shift to influence local demand for CDMO services?

If you look at long-term demand projections for cell-culture-based biopharmaceuticals, it is clear that significant new capacity will be needed – regardless of policy shifts. The market is growing, more patients are being treated, and the volume of products moving through development continues to rise. In that context, the additional investments from both large pharma building internally and from CDMOs expanding their networks were always inevitable.

So while there is increased public discussion about onshoring, I would not overinterpret it in terms of its impact on CDMO demand. Some capacity will come from large biopharma companies, and some will continue to come from CDMOs. Both models will remain important, and in my view, the sector will continue to operate in balance.

At Lonza, we consistently monitor external market developments, including shifts in investment and policy, but our strategic position remains strong. We already have a substantial and longstanding footprint in the US, and being geographically present in key markets ensures that we can continue to support customers effectively as demand grows.

As one of the leading names in the CDMO sector, how would you describe Lonza's customer profile in the US market today?

It is interesting because there is sometimes a perception that Lonza primarily works with large pharmaceutical companies, but that is not the full picture. In the US, the majority of our customers are actually small and medium-sized biotech companies. In fact, if you look at the overall percentages, smaller companies dominate our customer base.

What matters most to us is creating an environment where every customer, regardless of size, can access our expertise. We actively invite smaller clients to engage with our leadership teams, provide feedback, and participate in discussions that help shape how we support them. Whether it

is solving scientific challenges early in development or addressing supply chain needs later in the product lifecycle, we work with companies at every stage.

For me, the opportunity to support both emerging biotechs and large multinationals is one of the most rewarding aspects of what we do, and we are truly committed to partnering with both.

How do you position the Integrated Biologics organisation to be a partner across such diverse customer needs and development stages?

There is no doubt that the needs of our customers vary widely. Larger, more mature organisations typically have deep in-house expertise. They may have full teams dedicated to cell culture, purification, CMC, and every other specialist function. Smaller biotechs, on the other hand, often have people wearing three or four hats at once. In such cases, our role is to help guide them through the complexities and potential pitfalls of progressing a molecule through development to market. Being able to share our experience is a real advantage for them.

When we work with more established companies, they may not require the same level of end-to-end support, so the nature of the engagement tends to be more scientifically focused and driven by specific technical challenges.

The key is flexibility. Every customer is different, with a different starting point, different levels of experience, and different priorities. After many years in this industry, what Lonza brings is a broad base of knowledge and learning that we can apply effectively for each partner. Ultimately, our goal is to help customers succeed, because their success directly enables ours.

It is not about treating customers differently, but about adapting our support to meet their needs, whether they are a small emerging biotech or a large multinational.

Drawing on your extensive experience in the sector, what do you see as the most pressing trends shaping the CDMO landscape in the coming years?

There are a few areas that stand out to me right away. First is the future of global supply chains. We need to understand where products will be made, where patients will be treated, and how regional supply chains will evolve. This does not just pertain to the US but is worldwide. Determining the right geographic footprint for reliable, resilient supply will be a major strategic question for the industry going forward.

Second is the need to help our customers reach more patients. Ultimately, that comes down to a combination of capacity and productivity. On the productivity side, there are several levers we can pull. Automation will play a significant role, as will new technologies that can streamline operations or reduce transactional work, whether that involves data handling or repetitive tasks on the manufacturing floor. If we can introduce advanced technologies, including AI, that take on some of this transactional burden, we free up our teams to focus their expertise where it matters most. Pairing that with investments that maximise capacity means we can increase output and help our customers serve more patients.

Finally, with potential pricing pressures ahead, CDMOs will need to position themselves as highly competitive partners. That means continually improving efficiency, optimising resource use, and ensuring that the combination of people, technology, and capacity delivers the strongest possible value for customers.

Having been with Lonza for two decades, what excites you most about this moment of transformation under the One Lonza Strategy and the company's new leadership?

What excites me most is that we work in an industry where our work genuinely improves people's lives. That is a powerful motivation, whether you are in big pharma, a small biotech, or a CDMO like Lonza. On top of that, we are in a sector that is growing and will continue to grow, which creates a tremendous sense of opportunity.

When you pair that overall growth with Lonza's ambitions to double sales every five years, the importance of the One Lonza Strategy really clicks. To grow at that pace, we need a truly scalable company. Much of our focus over the coming years is about putting the right foundations in place so that we can support that growth without compromising execution, quality, or reliability. Our customers depend on us, and we cannot let them down as demand increases and more medicines need to reach more patients.

We also never take customer trust for granted. Many of our relationships last for years, and for our customers to grow, we need to grow with them. That means operating as a real partner that understands their drivers, their pressures, and how we can help them succeed.

What final message would you like to share with your customers and the wider life sciences community as Lonza advances on this harmonisation journey?

I want first to emphasise that trust is the foundation of our relationships. Many of our partnerships have developed into long-lasting relationships, and we do not take that responsibility lightly.

The second point I want to highlight is the breadth of Lonza’s capabilities. Across Lonza Group, we support virtually every major modality with decades of experience and a long track record of bringing new technologies into the market. That combination of breadth and proven execution is rare, and it is something we will continue to build on.

In the early-phase space, we are committed to helping customers move as quickly as possible toward their next milestone or decision point, while ensuring they have the CMC foundation needed to enter the clinic with confidence rather than risk avoidable setbacks. We continue to invest in technologies that enable both greater speed and CMC readiness. In late-stage and commercial programmes, our priority is to deliver more volume by driving asset productivity and investing in new capacity. These goals will help support both our customers’ growth and our own ambition of doubling sales every five years.

Finally, everything comes back to partnership and trust. Lonza will continue to evolve, invest, and scale, enabling us to support our customers at every stage of their journey.

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