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Biomanufacturing stands at the core of France's industrial and healthcare transformation

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France is undergoing a quiet industrial renaissance in biomanufacturing, driven by a growing alignment between science, innovation, and policy. At the centre of this movement stands Laurent Lafferrère, CEO of France BioLead, who is leading efforts to structure the country's ecosystem, foster collaboration, and attract sustainable investment. In this conversation, he outlines how France can turn its scientific excellence into industrial strength.

What has been your professional journey, and what inspired the creation of France BioLead?

I have spent more than 25 years in the pharmaceutical industry, working across large multinationals, CROs, CDMOs, and start-ups. With a PhD and an Executive MBA from HEC Paris, I have been fortunate to experience both the scientific and business dimensions of the sector, including time with American companies that broadened my international outlook. These experiences have shaped a conviction that we must think beyond traditional frameworks and foster closer links between research, innovation, and industry. When I took on the role of CEO in October 2022, coinciding with the creation of France BioLead, our goal was to connect and structure the national biomanufacturing ecosystem. In just three years, we have built a more visible, collaborative, and globally engaged network; one that brings together academic, industrial, and institutional actors around a shared ambition to position France as a leader in biomanufacturing.

How does the France 2030 strategy reflect the country's ambitions to strengthen its biomanufacturing and innovation landscape?

Biomanufacturing stands at the core of France's industrial and healthcare transformation. Under the France 2030 programme, EUR 800 million have been dedicated to strengthening national capabilities in biotherapies and biomanufacturing as part of the wider *Santé 2030* strategy to accelerate innovation and local production. This investment reflects a clear recognition that biomedicines now shape the future of healthcare: they already account for around 30 percent of the global pharmaceutical market, 40 percent of newly approved drugs, and nearly 60 percent of those in development. In France alone, more than ten million people live with cancer, autoimmune, or rare diseases; conditions increasingly treated through biotherapies.

Yet these advances also bring new challenges. Biomedicines remain costly, and without a strong domestic manufacturing base, countries lose control over supply, pricing, and patient access, as well as the broader economic value generated by innovation and skilled employment. Today, only around ten percent of the biomedicines used in France are produced locally – 47 products in total, including 23 blood-derived therapies, 12 vaccines, eight antibodies, and four microbiota-based treatments – within an ecosystem that already supports over 76,000 jobs.

France's research output is among Europe's strongest, with institutions such as CNRS, INSERM, Université Paris Cité, and Sanofi placing the country in the continent's top four patent holders. The remaining challenge lies in translating this scientific strength into industrial capacity. France BioLead plays a pivotal role in this transition by bringing together academia, industry, and suppliers to identify shared priorities, map national capabilities, and align innovation with industrial needs across key fields such as cell and gene therapy, antibodies, and viral vectors.

To reinforce collaboration and visibility, we also created the National Day for the Bioproduction of Biopharmaceuticals (JNBB), now a major annual gathering for the sector. The most recent edition united more than 200 organisations across 12 regions through 40 events, generating over one million online impressions, a clear reflection of the collective energy now driving France's biomanufacturing ecosystem forward.

Where does France stand today in terms of investment priorities and future opportunities in biomanufacturing?

France's biomanufacturing landscape is both extensive and full of promise. Our patent analysis shows that innovation spans almost every therapeutic domain, from antibodies to cell and gene therapies, reflecting a remarkable scientific breadth, but also a need for greater coordination to channel these efforts effectively. Over the past three years, our work at France BioLead has focused on mapping the ecosystem in detail – understanding who does what, where, and how – to build a structured, interconnected framework that can transform research excellence into industrial strength. The next stage, now being defined and validated at a national level, will concentrate resources on the most strategic areas to reinforce France's competitiveness and ensure long-term sustainability.

From an investment standpoint, France 2030 has allocated EUR 800 million to biotherapies and biomanufacturing. While this is a strong signal of political commitment, it must be viewed within a global context, Canada for example, has announced investments of around EUR 2.3 billion in the same field. Even so, France's momentum is undeniable. Over the past five years, industrial

players have invested approximately EUR 6.3 billion in biomanufacturing, underscoring growing confidence in the country's ecosystem. The priority now is to sustain this trajectory and accelerate the transition from innovation to production. France has the scientific excellence, the industrial capacity, and the ambition. The challenge lies in aligning these strengths to translate potential into tangible results.

What factors are driving France's growing momentum and attractiveness in biomanufacturing?

The current momentum is the result of multiple forces working in alignment. Beyond the government's financial commitment, France has succeeded in building a coherent ecosystem that combines scientific excellence, industrial capability, and a highly skilled talent base. In recent years, global players have renewed their confidence through substantial new investments, reflecting growing recognition of France's potential as a hub for advanced biomanufacturing. While private investment has become more cautious in the current economic climate, this is a global trend rather than a reflection of local weakness, and France's fundamentals remain strong.

What continues to set France apart is the quality of its people and infrastructure. The country hosts numerous Centres of Excellence dedicated to training the next generation of biomanufacturing professionals, ensuring a highly skilled workforce whose competence is recognised by peers in countries such as Germany, Canada, and Belgium. This concentration of expertise, combined with France's strong scientific base and maturing industrial network, creates an ecosystem uniquely positioned for sustainable growth.

The challenge now lies not in generating innovation but in scaling it. With science, talent, and industrial capacity increasingly aligned, France is well placed to transform discovery into production, turning intellectual capital into real value and strengthening its role as a global biomanufacturing leader.

How would you describe the broader ecosystem supporting France's biomanufacturing industry?

France's biomanufacturing strength rests on the depth and diversity of its supporting ecosystem. Beyond major pharmaceutical players, the country has built a dynamic network of CDMOs and specialised suppliers that form the backbone of industrial production. Although the current funding climate has challenged many biotech companies and by extension, their CDMO partners this period has also prompted these organisations to innovate, rethink their models, and integrate new technologies into future offerings, which speaks to the sector's resilience and capacity for renewal.

Equally vital is the network of suppliers and engineering firms that underpin the entire value chain. French companies such as Verdot and Pierre Guérin, renowned for their bioreactor technologies used by leading global manufacturers like Samsung, exemplify the country's industrial expertise. At the same time, international groups such as Merck and Sartorius have expanded their footprint in France, reinforcing the country's technological base and contributing to a fully integrated biomanufacturing landscape.

To ensure long-term resilience and sovereignty, it is essential that this entire value chain, from equipment and consumables to production and services, remains firmly rooted in France or at least

within Europe. Competitiveness depends not only on the ability to produce medicines but on safeguarding the full spectrum of expertise that sustains production. This comprehensive approach lies at the heart of France BioLead's mission and underpins France's ambition to establish itself as a true European leader in biomanufacturing.

What actions is France BioLead taking to sustain this momentum and foster continued collaboration and investment across the ecosystem?

Maintaining momentum relies on keeping collaboration at the heart of everything we do. At France BioLead, our focus is on generating collective projects that unite academia, industry, and service providers around shared objectives, whether developing new services, advancing innovation, or translating ideas into industrial applications. A recent example is a partnership between two of our CDMO members, who launched a joint service offer for their clients thanks to the connections and support facilitated through our network. This is precisely the kind of collaborative energy we aim to nurture across the ecosystem.

To sustain this dynamic, we have built a digital community platform that serves as a central hub for our members. It provides access to industry news, an interactive map of national capabilities, and a space for identifying collaboration and investment opportunities. The goal is to create visibility, strengthen ties across the value chain, and make partnership building more intuitive and impactful.

Engaging with investors is equally important. We work to give them a clearer understanding of how value is created within biomanufacturing, thereby reducing perceived risk and improving access to capital. Last year, for instance, I led a training session for investors to illustrate how CDMOs contribute to the sector's overall value chain. When investors understand where and how value is generated, they invest with greater confidence, and in doing so, they help secure the long-term sustainability of the ecosystem.

From a regulatory and strategic standpoint, what changes are still needed to strengthen France's position as a biomanufacturing leader by 2030?

Regulation is a central focus for us, as simplifying the national framework is essential to maintaining France's competitiveness in biomanufacturing. We have established a dedicated committee to identify and address key bottlenecks specific to the French context, which often diverge from the broader European framework. One of the recurring challenges is France's tendency to over-implement EU directives, adding administrative layers that do not exist elsewhere and ultimately slowing innovation and industrial agility.

A clear example is the regulation governing micro-organisms and toxins (MOT), which requires prior authorisation for all related activities – production, transport, use, or transfer – under Article L5139-1 of the Public Health Code. The process can take up to six months, creating a real competitive handicap compared with countries such as Belgium or Germany, where similar procedures are far lighter. This complexity affects not only companies but also academic research. We have therefore submitted pragmatic proposals to simplify and accelerate these procedures, which are now under review by the relevant ministries. Their implementation would make a notable difference to both industry and academia, helping to reinforce France's position as an attractive hub for innovation.

Looking ahead to 2030, our ambition is to see a biomanufacturing ecosystem that is competitive, innovative, and sovereign, recognised across Europe and globally for its excellence. Achieving this

will require sustained collaboration between science, industry, and government, ensuring that France remains a place where innovation is not only conceived but produced, scaled, and shared with the world.

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