



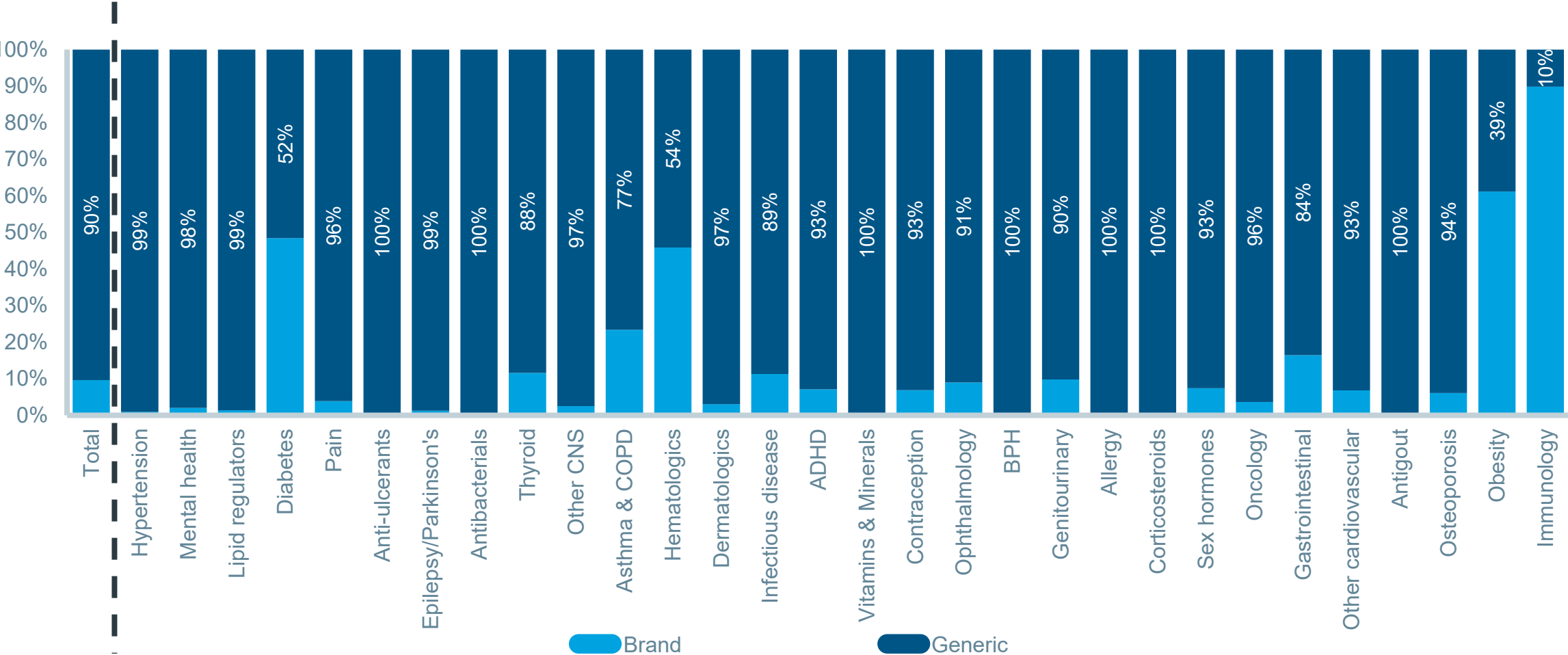
NASEM Panel

Supply Chain Vulnerabilities Through a National Security Lens

Scott Biggs, Director Supplier Services, IQVIA
October 22, 2025

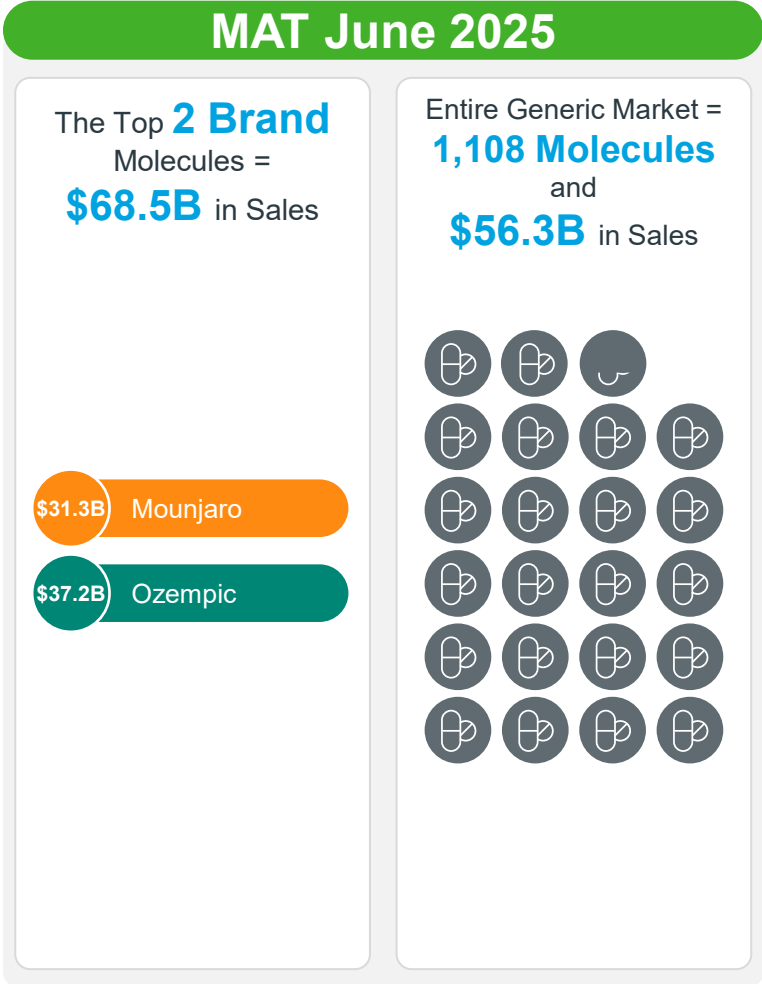
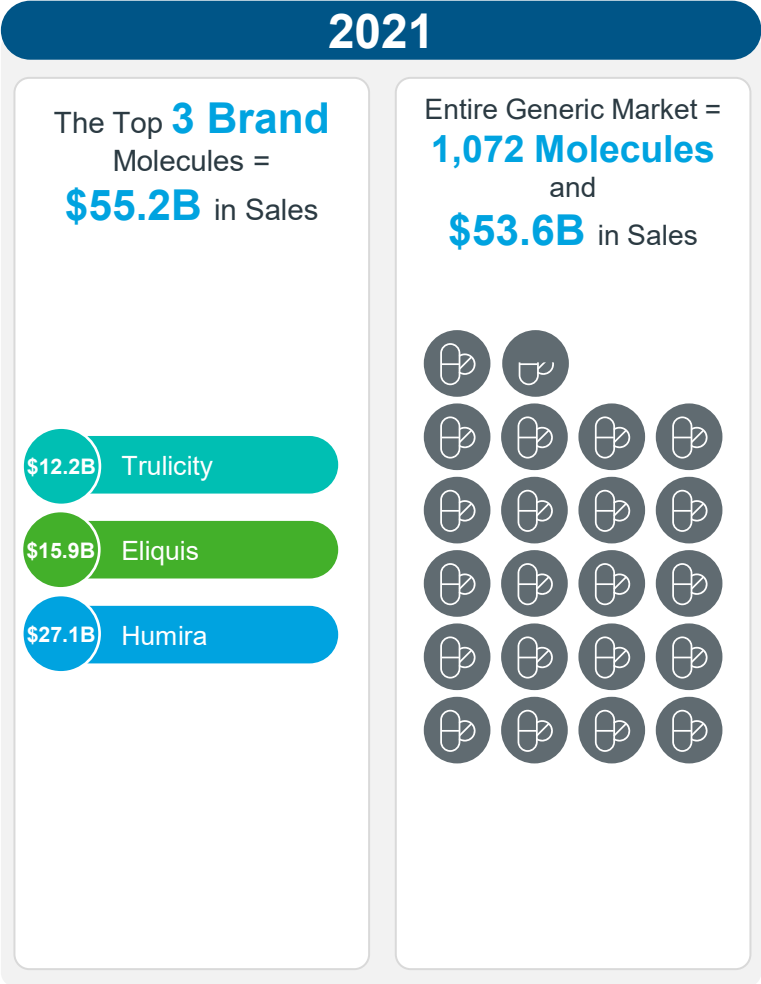
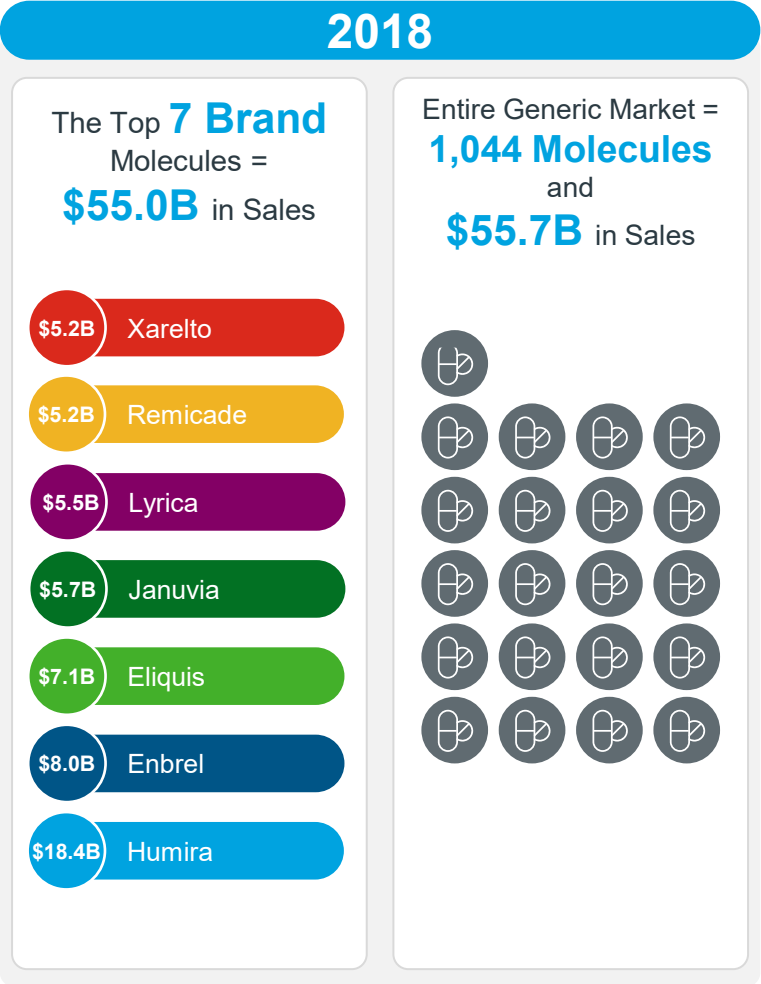
Across all therapy areas, 90% of prescriptions are generics while immunology, obesity, and diabetes have more brand prescriptions

Share of adjusted prescriptions for top 30 therapy areas by product type, 2024



Source: IQVIA National Prescription Audit, Dec 2024.

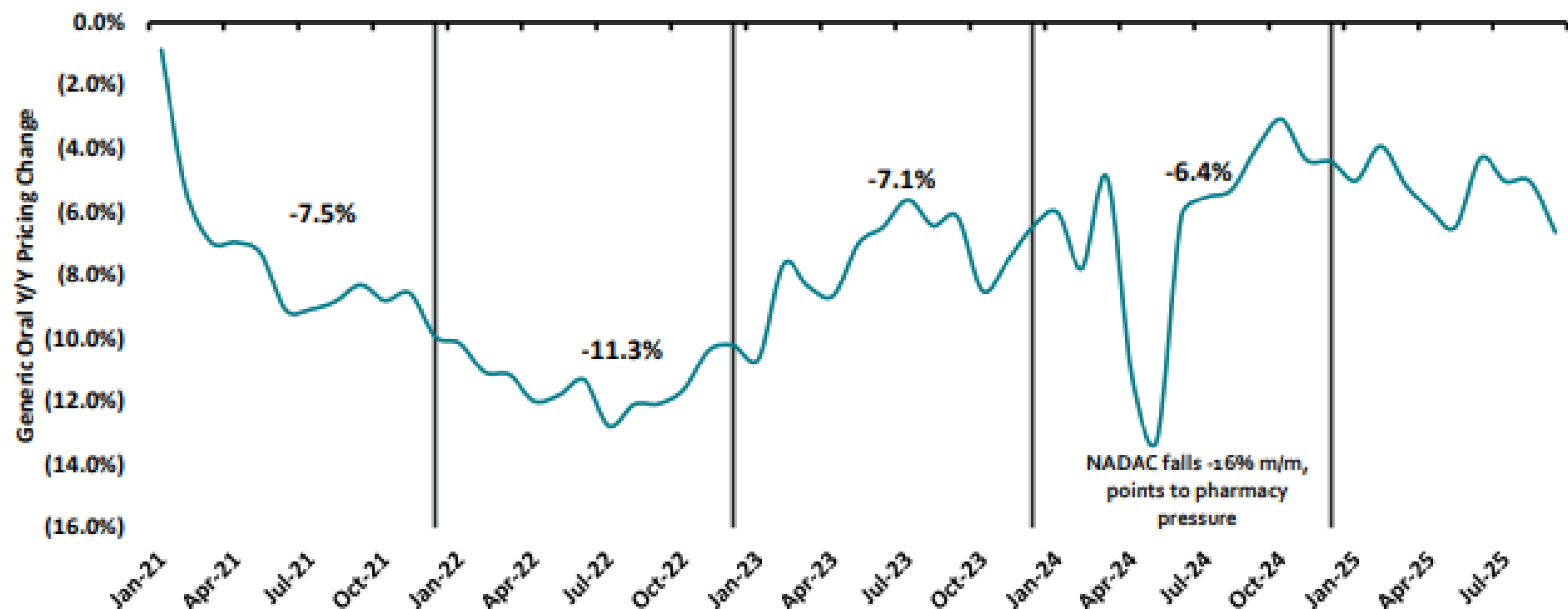
In 2018, it took seven Brand drugs to equal the total Generic business; in 2025 it only takes two



 = 50 Generic Molecules

Year-over-year generic deflation expands to -6.7% in September

Mature Oral YoY Generic Price Trend



Nephron Observations

- Generic drug prices fell 6.7% year-over-year in September
- Despite early 2025 upward pressure on Gx prices from tariff announcement driven forward buying, data on pharmaceutical imports and drug distributor commentary indicates the impact of tariffs threats has been modest and easily managed year to date.
- Supply chain participant discussions indicate concerns over potential tariff driven generic input price increases and product shortages are ebbing



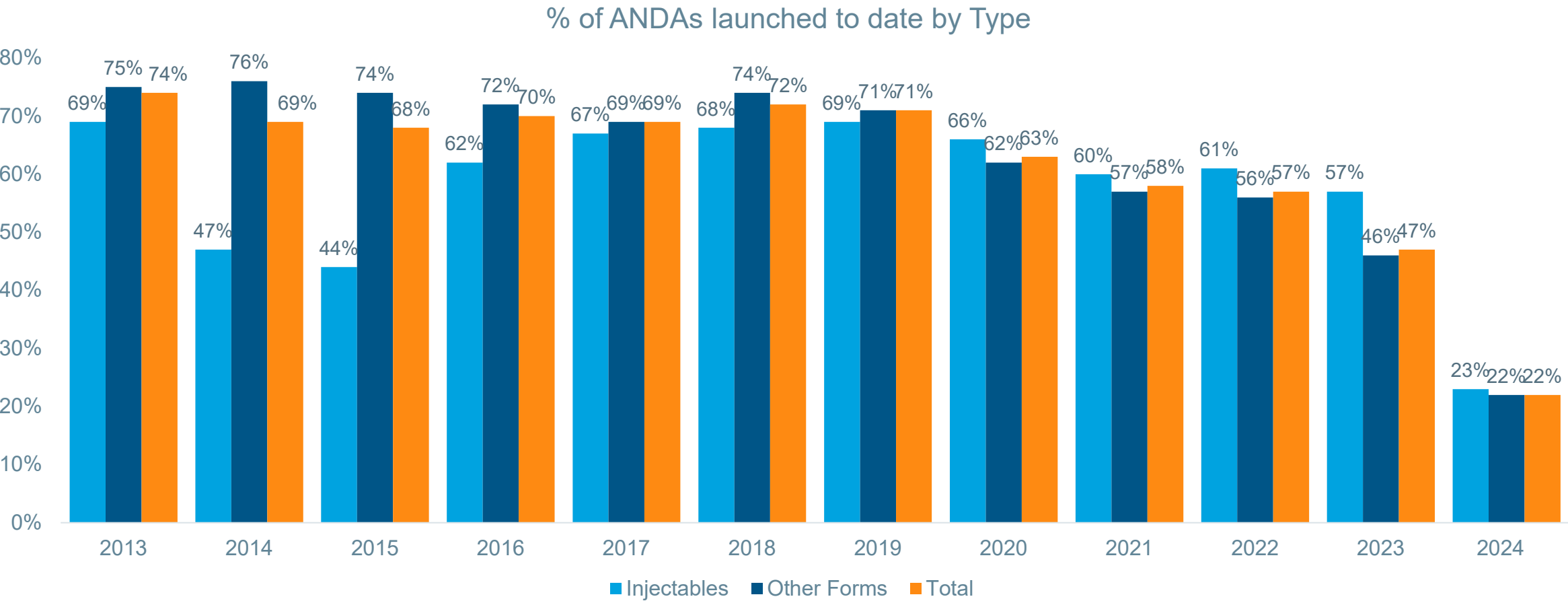
Source: Nephron Research Analysis of IQVIA and Glass Box Analytics Data

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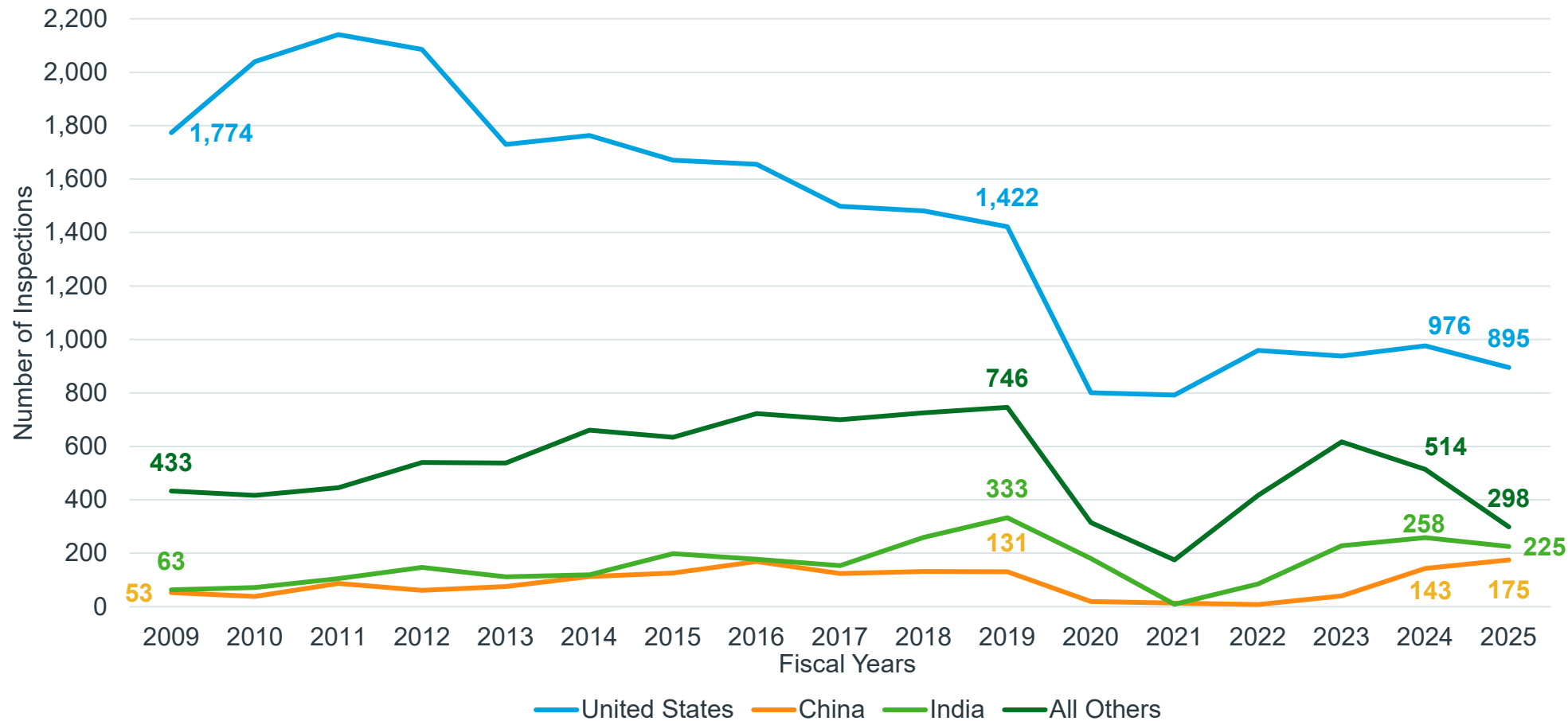
Unlaunched ANDAs account for 39% of approvals since 2013, 42% of injectables and 39% of other forms

A rise in trend of the percentage of approved injectable ANDAs launched since 2020 till 2024



Inspections of pharmaceutical manufacturing facilities were lower in fiscal year 2025 versus fiscal year 2024

FDA Drug Inspections



- Important Notes:
 - Not all inspections are included in the database. Inspections conducted by States, pre-approval inspections, mammography facility inspections, inspections waiting for a final enforcement action, and inspections of nonclinical labs are not included.
 - The results show final classifications of No Action Indicated (NAI), Voluntary Action Indicated (VAI), Official Action Indicated (OAI) for each project area within an inspection.

The U.S. Government's Fiscal Year runs October 1 through September 30
Data Source: <https://datadashboard.fda.gov/ora/cd/inspections.htm> , data pulled 10/9/2025

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