

Improving Resiliency in the U.S. Pharmaceutical Supply Chain Through Make-Buy-Invest Strategic Actions

**National Academies of Science, Engineering
and Medicine Workshop
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Fresenius Kabi is committed to manufacturing in the U.S.



> 4,000
employees in
the US



6 manufacturing
sites, **3** R&D
centers



~1B USD invest
in the U.S.
since 2017 in
manufacturing and
supply capacity



**70% of the
Essential
Medicines List**



**72% of our
medicines
are filled
and
finished in
U.S.**



#1 in
Injectable
IV Drugs
in the U.S.



**90% of manual
blood collections
supported by our
products**



Domestic Manufacturing is Challenged by Unsustainably low prices that result in drug shortages and off-shoring

2023

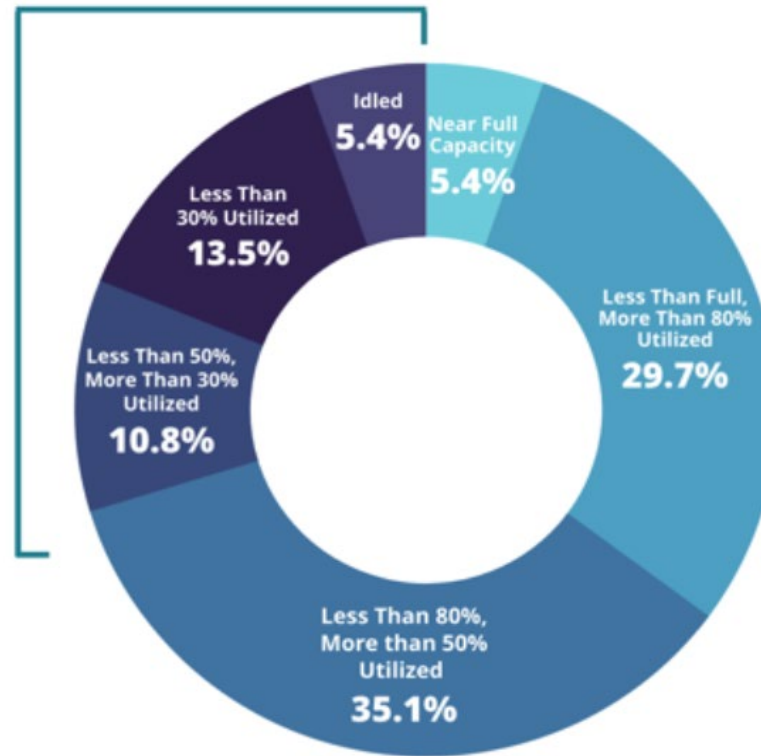
The Top 2 Brand Molecules = \$59.2B in Sales

\$25.3B Ozempic

\$33.9B Humira

Entire Generic
Market =
1,106 Molecules
and
\$56.2B in Sales

- **30% of U.S. Generic Manufacturing Sites are at less than 50% Capacity**



84%
Generics
Shortages
disproportionately
affect generic
drugs

60% of generics in shortage are priced less than \$1.00 per unit

Association for Accessible Medicines. (Sep. 2025). Annual Savings Report

Sardella, A. (Sep. 2022). "U.S. Generic pharmaceutical manufacturer available capacity research survey"

FDA Drug Shortages Database, Jun 2023; IQVIA National Sales Perspective, Jul 2023; IQVIA Institute, Jul 2023

Increasing US Pharmaceutical Resilience Requires Ensuring a Sustainable Market

1. US Government prioritization of domestically manufactured (fill/finish) essential medicines
2. Align government policies and purchasing to prioritize medicines manufactured in the U.S.
3. Create incentives in Medicare and Medicaid to reward health care providers for purchasing from domestic, resilient manufacturers
4. Include finished dose manufacturers in API stockpiling efforts to ensure qualified API that can immediately be converted into to a finished product