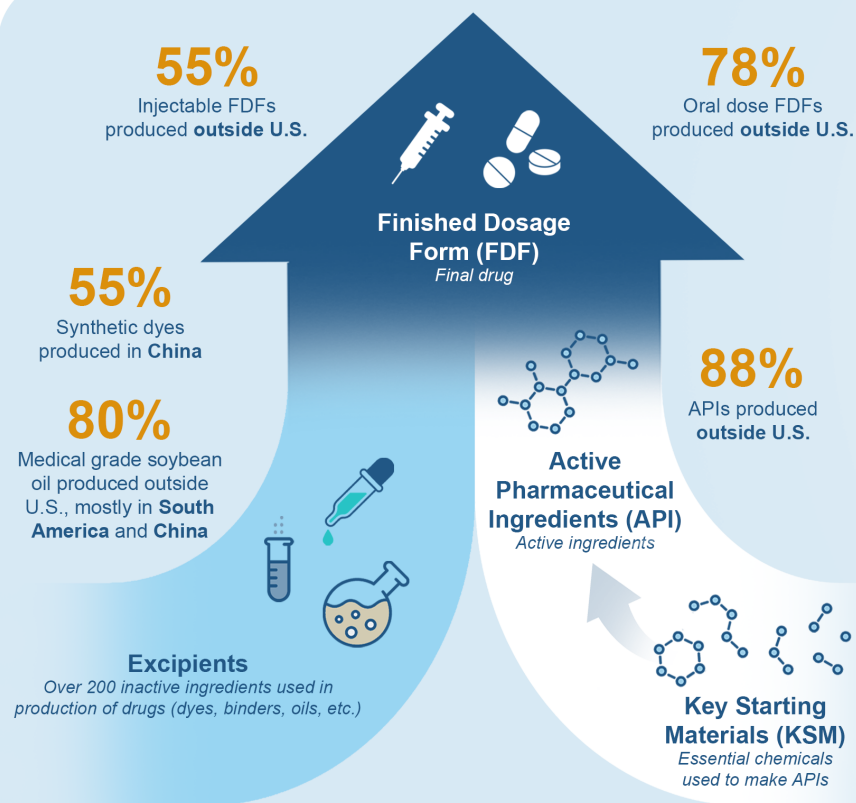




Global Supply Chain Dependence of U.S. Pharmaceuticals



Pharmaceutical Manufacturing Supply Chain

Percentages shown are based on production volumes.

Sources: DrugPatentWatch, IHSM Dyes CEH Report, IHSM Directory of Chemical Producers, McKinsey & Company, United States Pharmacopeial Convention

The United States imports the majority of components required to produce medicines prescribed domestically



EUROPE

- High-quality KSMs and specialty chemicals
- Tightly regulated, often in premium/niche products



CHINA

- Largest global supplier of KSMs and APIs
- Low cost, high volume, mature chemical manufacturing base



UNITED STATES

- KSM production limited due to high costs and environmental regulations
- Most producers import KSMs and focus on APIs and FDFs



INDIA

- Major U.S. supplier of KSMs and APIs
- Strong export player in generics and affordable drugs

Key Players in Global Supply Chain

"With ~80% of KSMs for U.S. medications sourced from China and India, the industry witnessed how geopolitical tensions, export restrictions, and logistics disruptions could threaten global medication supply."

– DrugPatentWatch (May 2025)

BRYCE
TECH

1737 King Street, Suite 601
Alexandria, VA 22314

703.647.8078

brycetek.com

A Product of BryceTech Biosecurity & Emerging Threats Division