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GLOBAL SUMMIT

BUILDING A RESILIENT PHARMA SUPPLY CHAIN: STRATEGY, RISK & INNOVATION FOR THE FUTURE

Abhay Bhutkar
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Manufacturing sites

Map

Show latest disasters ROADMAP SATELLITE

API FDF API + FDF

Locations

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Site name ↑	Known operations	Country
1 A PHARMA GMBH (INDUSTRIESTRASSE 18, HOLZKIRCHEN)	FDF	Germany
3D IMAGING DRUG DESIGN AND DEVELOPMENT LLC (LITTLE ROCK)	FDF	United States of America (USA)
3M (COLUMBIA)	FDF	United States of America (USA)

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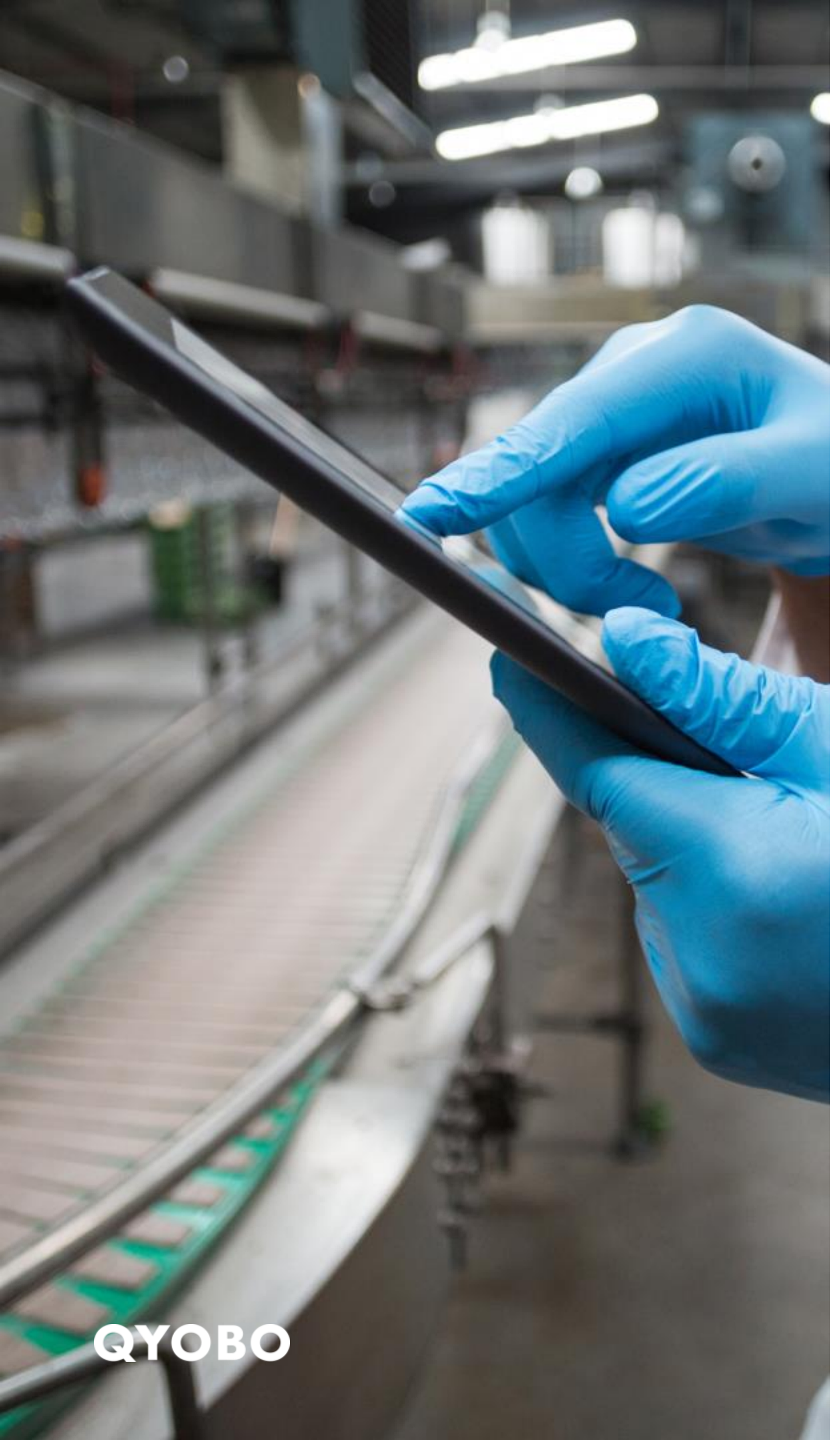


Agenda

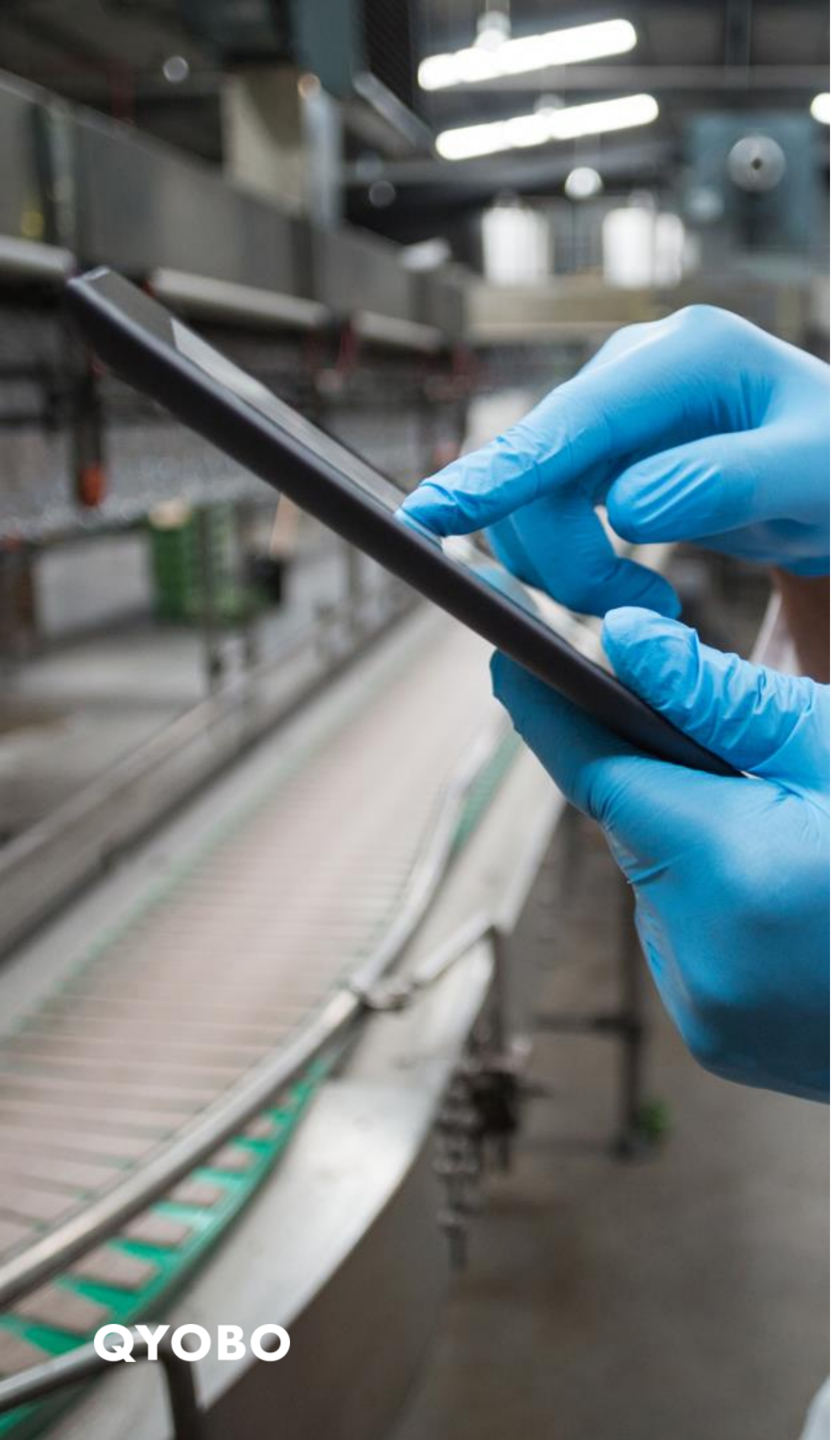
1. Approach by Governments

1.1. Manufacturing Footprint

1.2. 86 Essential Medicines (ASPR)

1.3. Deep Dive Examples

2. Approach by Companies



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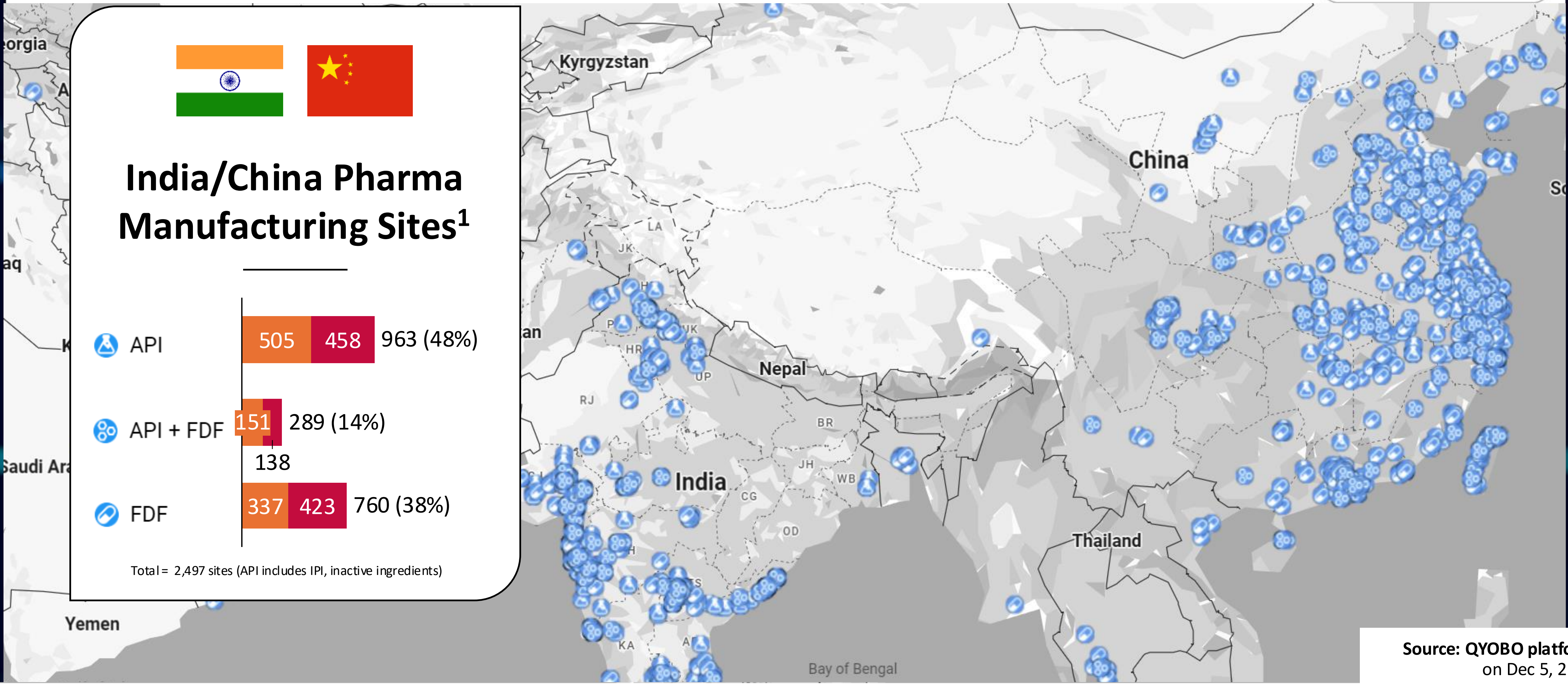
India and China combined have roughly 1,000 pure API sites, roughly double the number of U.S. and EU combined



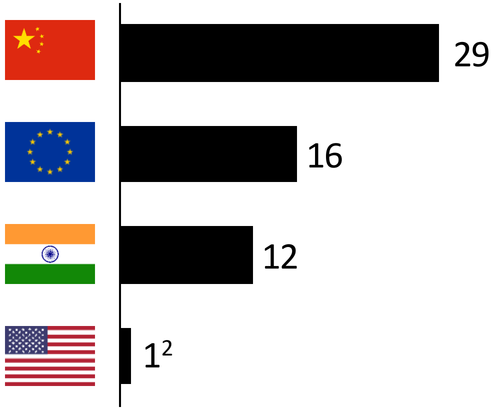
API FDF API + FDF

Source: QYOBO platform on Dec 5, 2025

[1] Major sites active in international trade, i.e. excluding sites for domestic demand only

In some therapeutic areas, such as beta-lactam antibacterials, the U.S. is soon 100% dependent on foreign API manufacturing

Beta-lactam API Manufacturing Sites[1]



API

Source: QYOBO platform on Dec 5, 2025

[1] Large, international sites suitable for international, not only domestic, supply
[2] CHEROKEE PHARMACEUTICALS LLC (RIVERSIDE) which is set to be closed

- **In some therapeutic areas, such as beta-lactam antibacterials, the U.S. is soon 100% dependent on foreign API manufacturing**

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QYOBO News
To: Markus Felgenhauer >

Merck plans phased layoffs starting May as it winds down Cherokee (Riverside) plant

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Site closure

2025-03-15
Merck & Co. confirmed that approximately 163 workers will be laid off by July as part of a gradual shutdown of its **Cherokee manufacturing plant** in Riverside, Pennsylvania. The full facility closure is expected in 2026. The site is the last active manufacturing site for beta-lactam APIs in the USA.

QYOBO GmbH, Jahnstr. 23, 85521 Ottobrunn

Source: QYOBO platform on Dec 5, 2025

API

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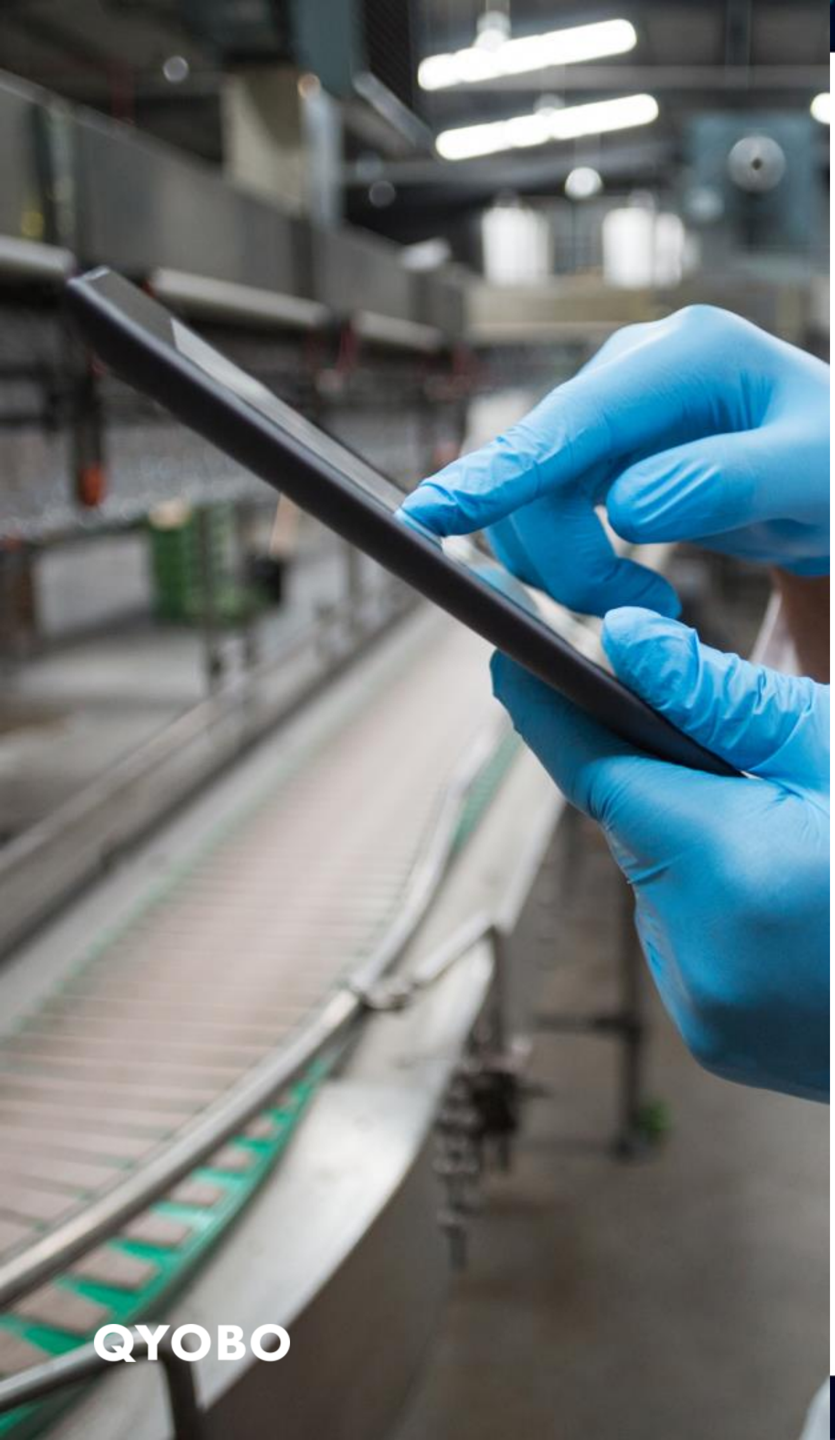
[2] CHEROKEE PHARMACEUTICALS LLC (RIVERSIDE) which is set to be closed



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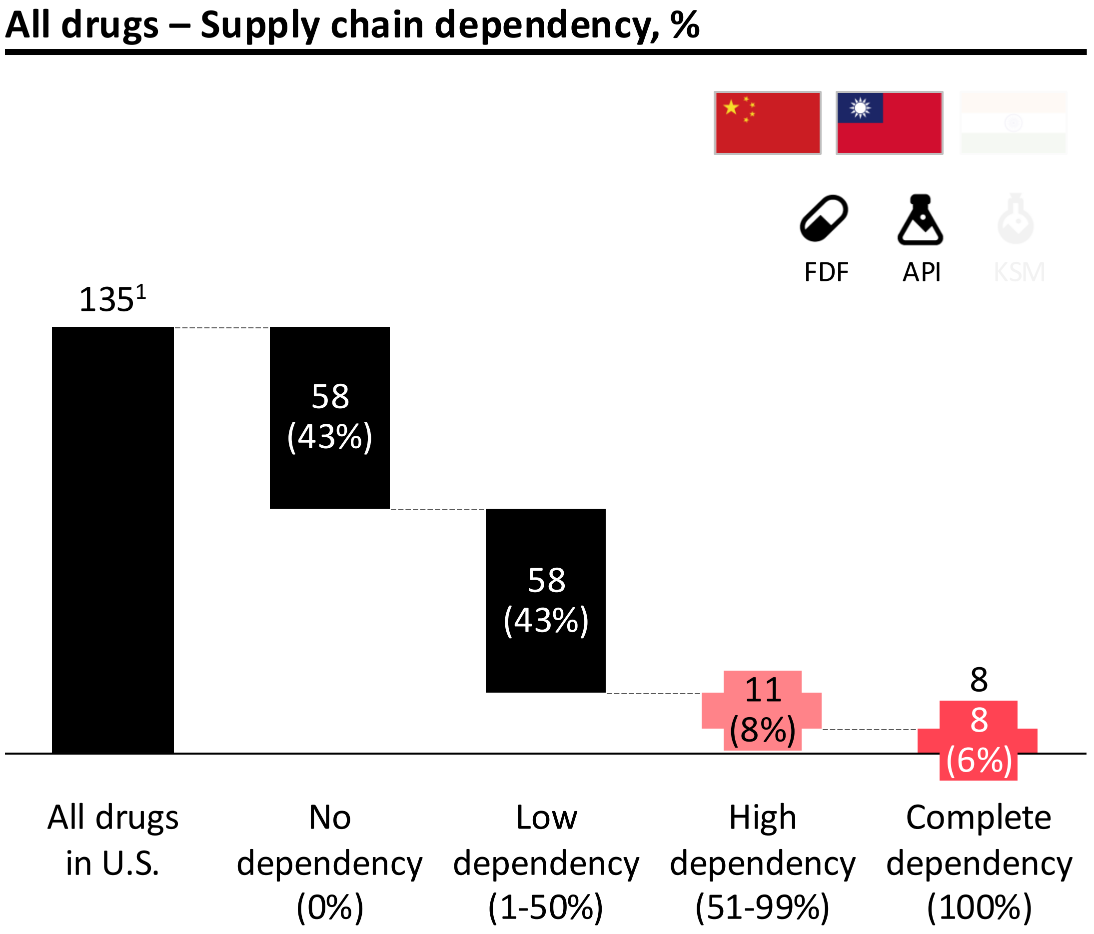
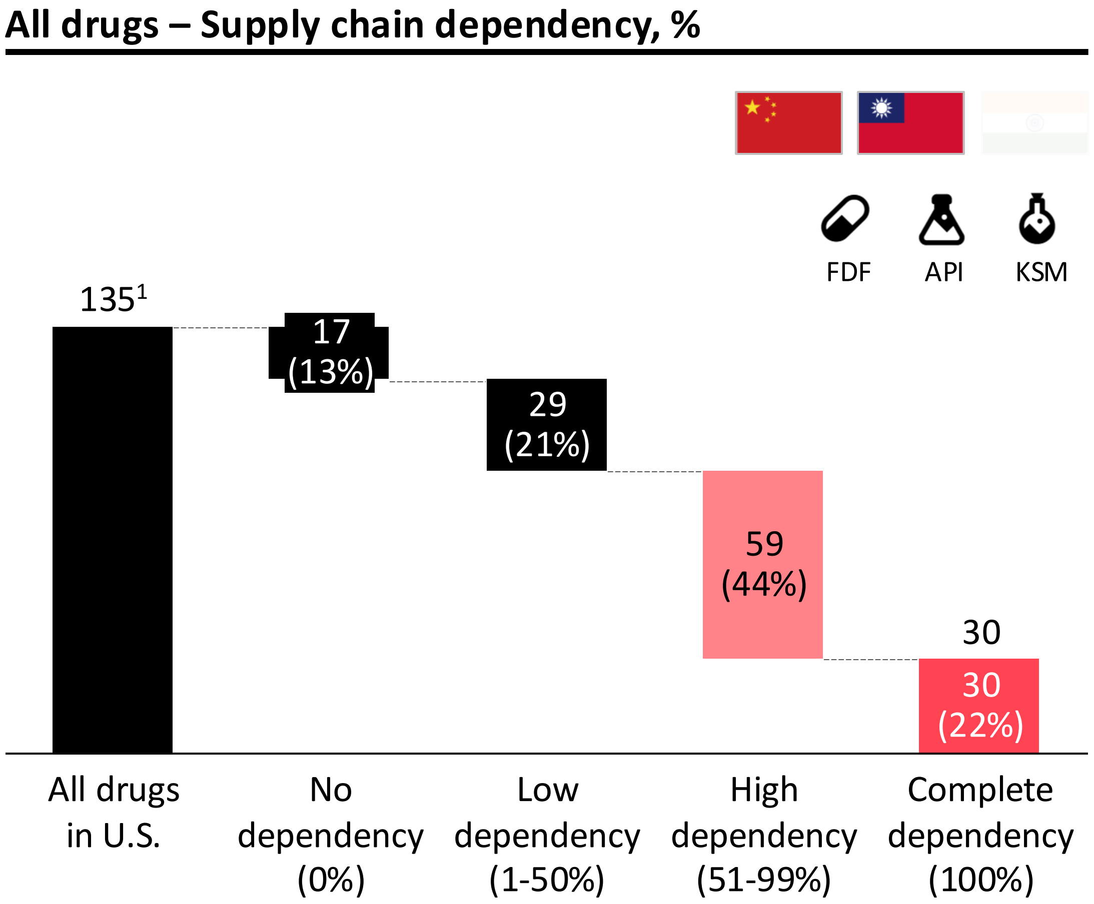
86 Essentials – 6% depend entirely on FDF/API from China and Taiwan, which increases to 22% if KSMs are considered





Source: QYOBO Platform as of January 18, 2026

[1] The public list of 86 essential medicines contains API and administration route, but does not specify the dosage. Hence e.g. “Oral” is interpreted as “oral solids and solutions”, resulting in a higher number of drugs overall since capsules, tablets, oral films as well as syrups and solutions are counted separately.

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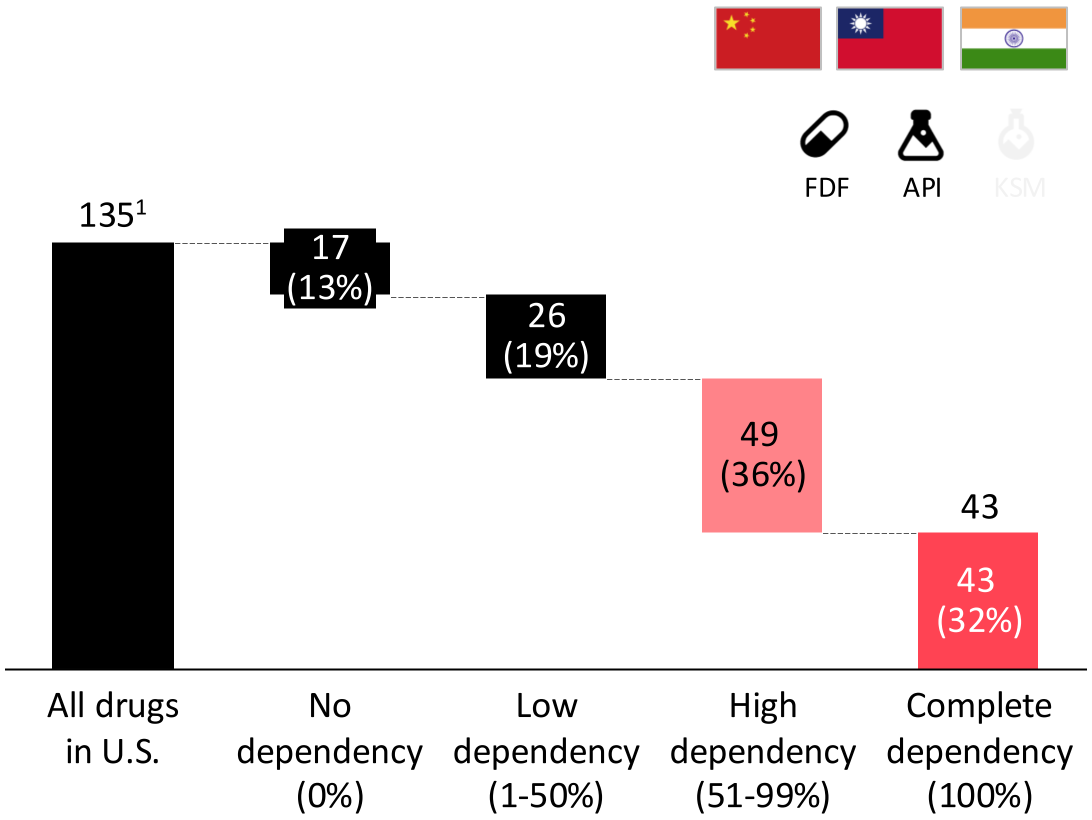
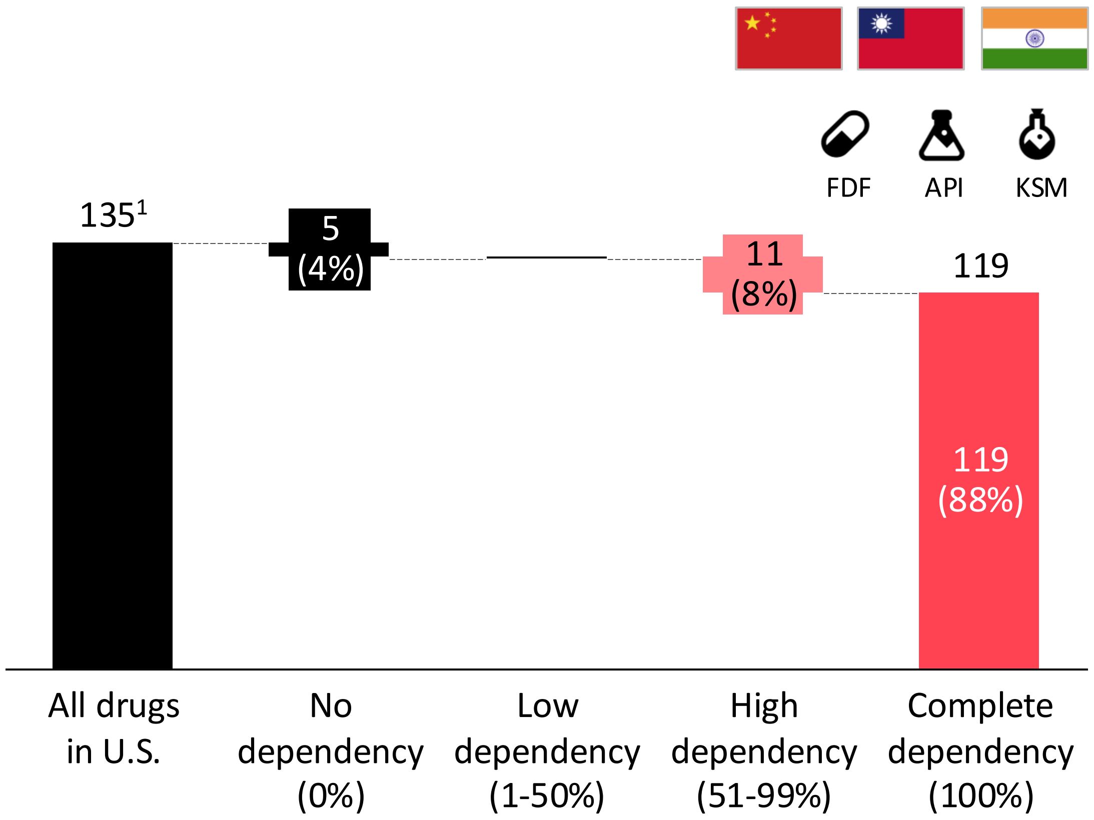
86 Essentials – 32% depend entirely on FDF/API from China, Taiwan and India, which increases to 88% if KSMs are considered

All drugs – Supply chain dependency, %



All drugs – Supply chain dependency, %



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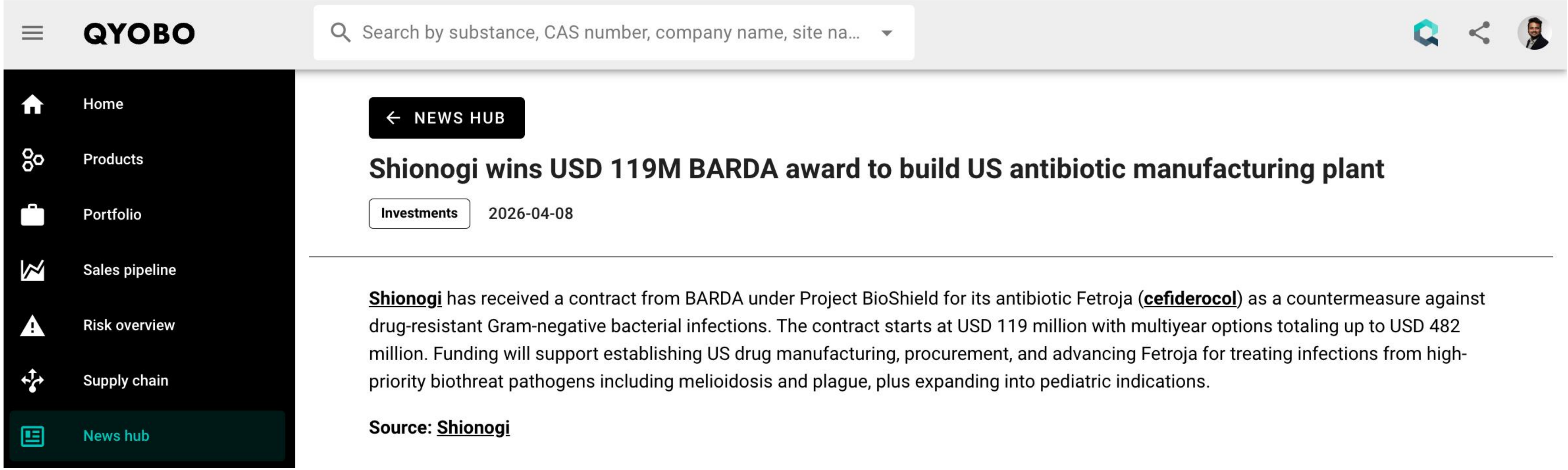
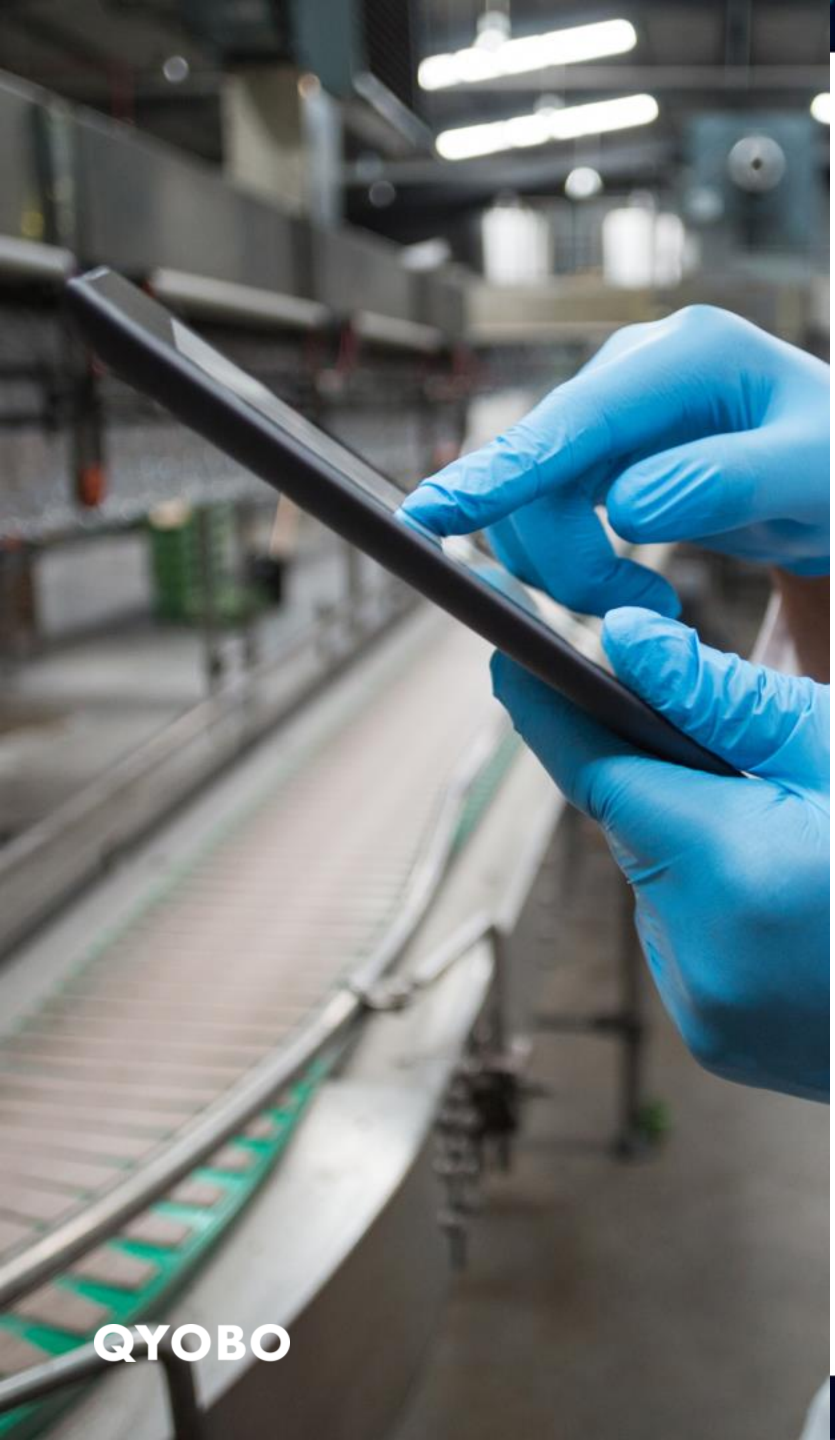
[1] The public list of 86 essential medicines contains API and administration route, but does not specify the dosage. Hence e.g. "Oral" is interpreted as "oral solids and solutions", resulting in a higher number of drugs overall since capsules, tablets, oral films as well as syrups and solutions are counted separately.

- U.S. Government is already taking action and is engaging with friendly nations as well as prioritizing products



Source: QYOBO Platform News Hub



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   - **1.3. Deep Dive Examples**
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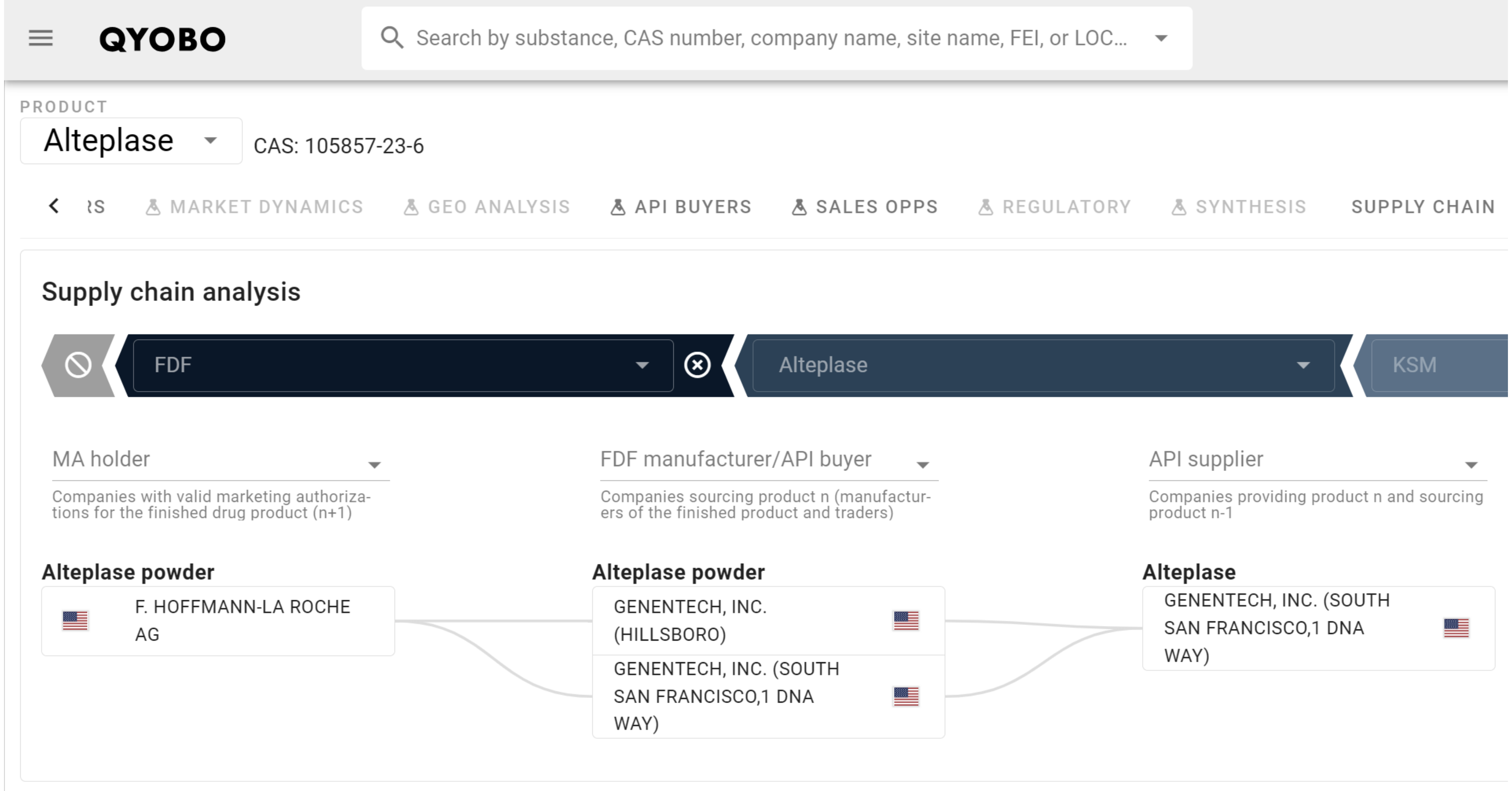
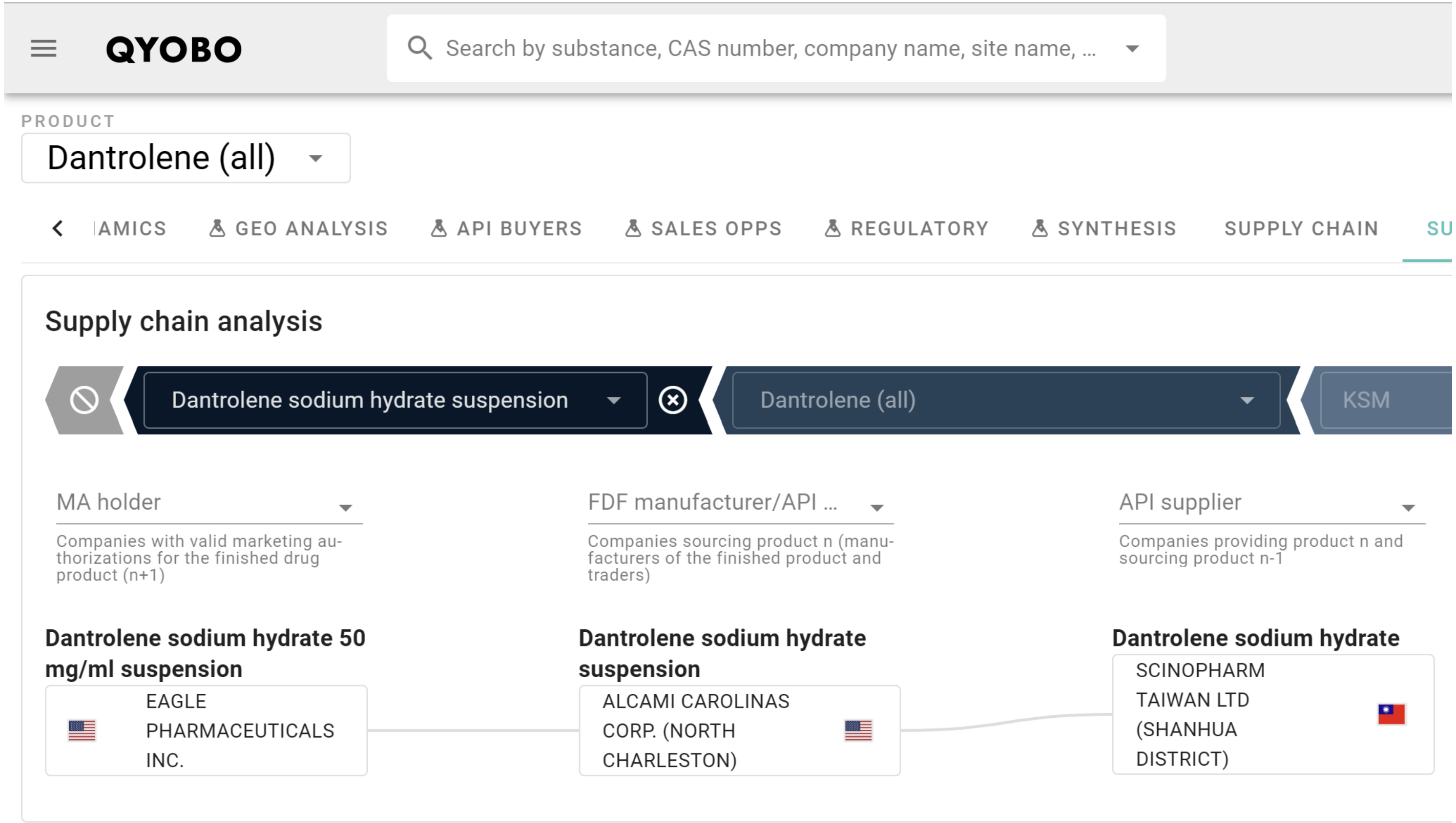
Example 1 – 0% China/Taiwan dependent supply chain Alteplase powder for injection



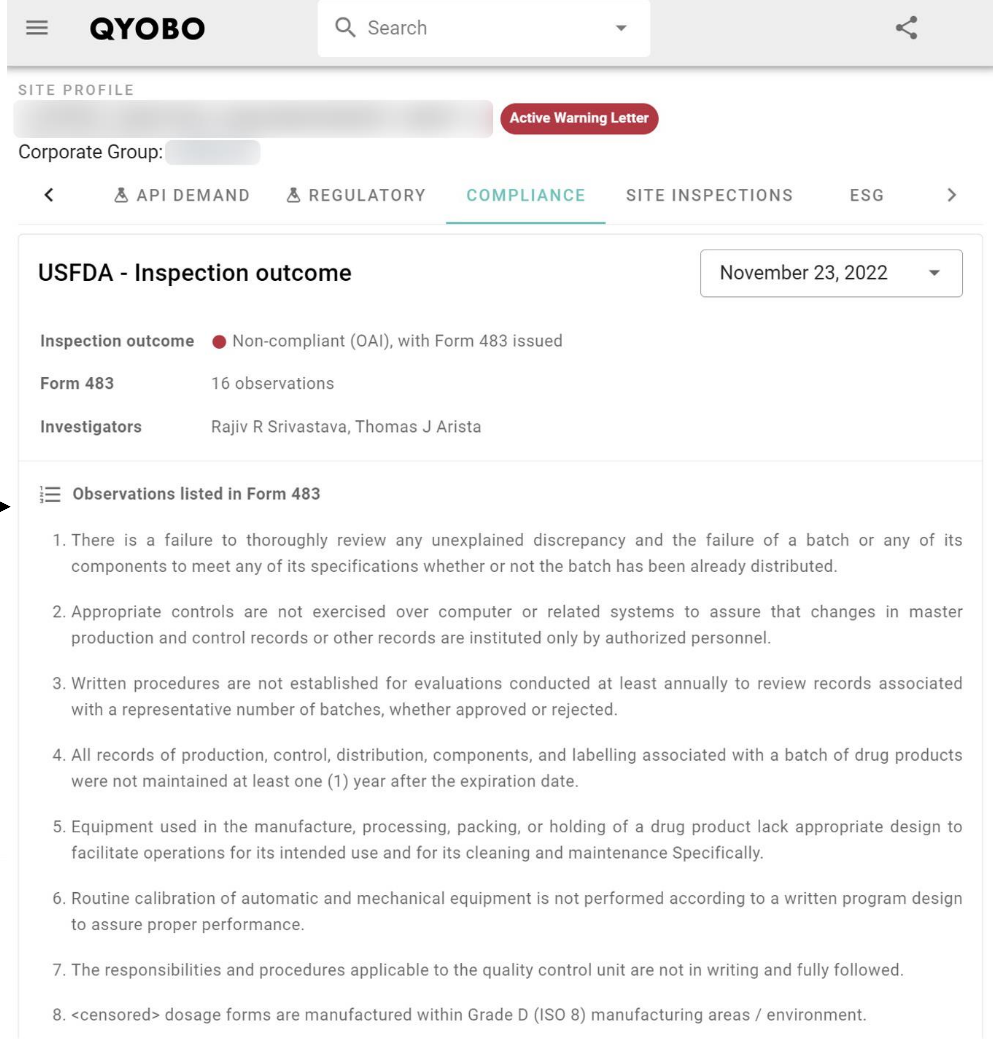
Note:
Alteplase is made by CHO cells that are fed with glucose, hence there is no classic KSM

Example 2 – 100% China/Taiwan dependent supply chain Dantrolene sodium suspension

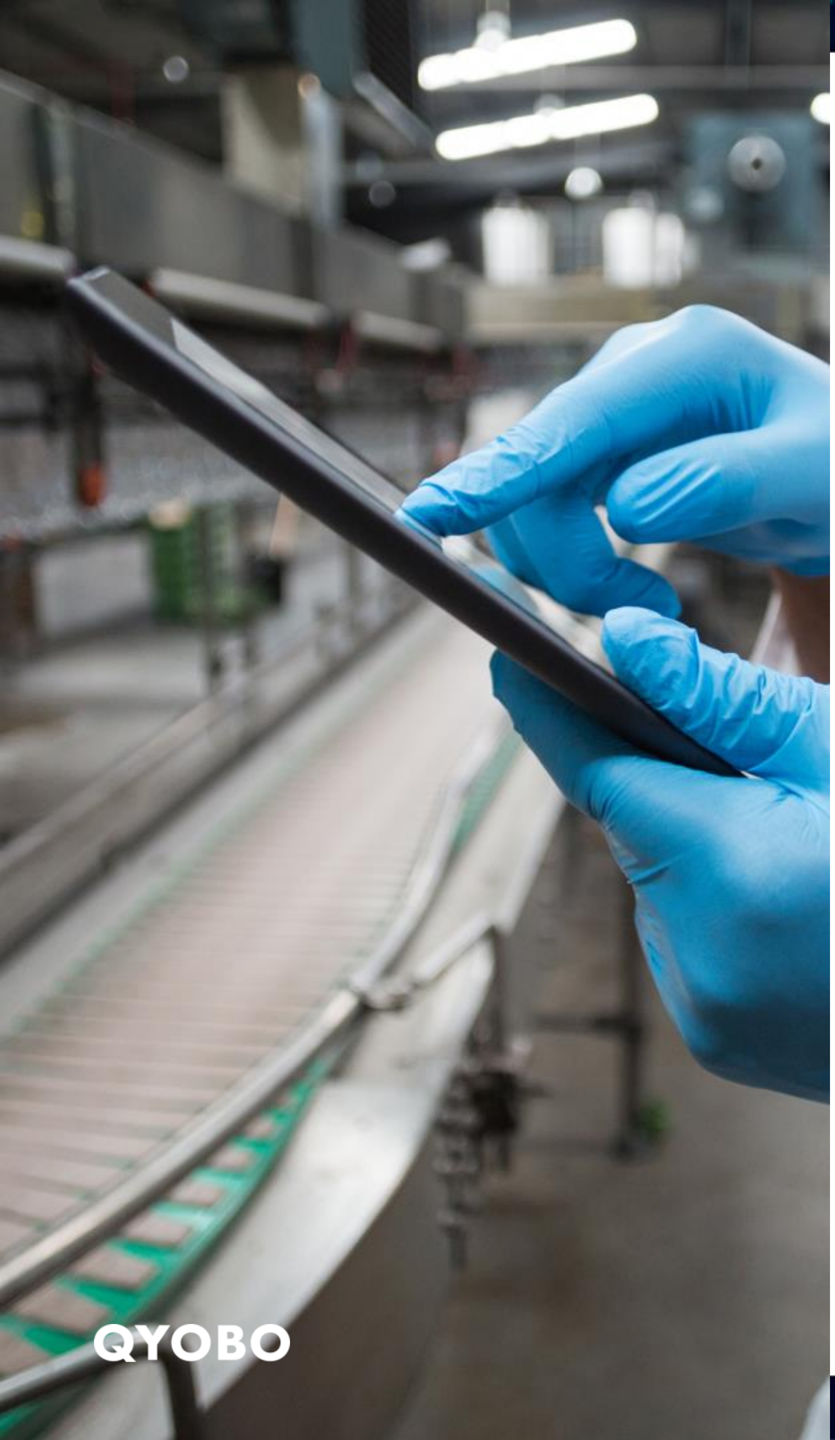


Source: QYOBO Platform as of January 18, 2026

While 21 companies sell Cefdinir capsules in the U.S., all are made at just three sites in India – one is under a warning letter since 2019



Source: QYOBO platform



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A single non-complaint event can easily wipe off millions of business value for a company and their customer

Non-compliance event	Date, country and company	P&L impact, mUSD	Market cap. impact, mUSD
Warning letter	12-24 VIATRIS	-500	
Form 483	02-24 AUROBINDO	-20*	-80
Form 483	12-23 Dr.Reddy's		-600
Warning letter	11-23 Cipla		-700
OAI inspection	09-23 novo nordisk		-12,000
Warning letter	02-18 BAYER	-300	

Source: QYOBO Platform; QYOBO White Paper, September 2025

Companies are "actively tracking" compliance risks for their supplier sites

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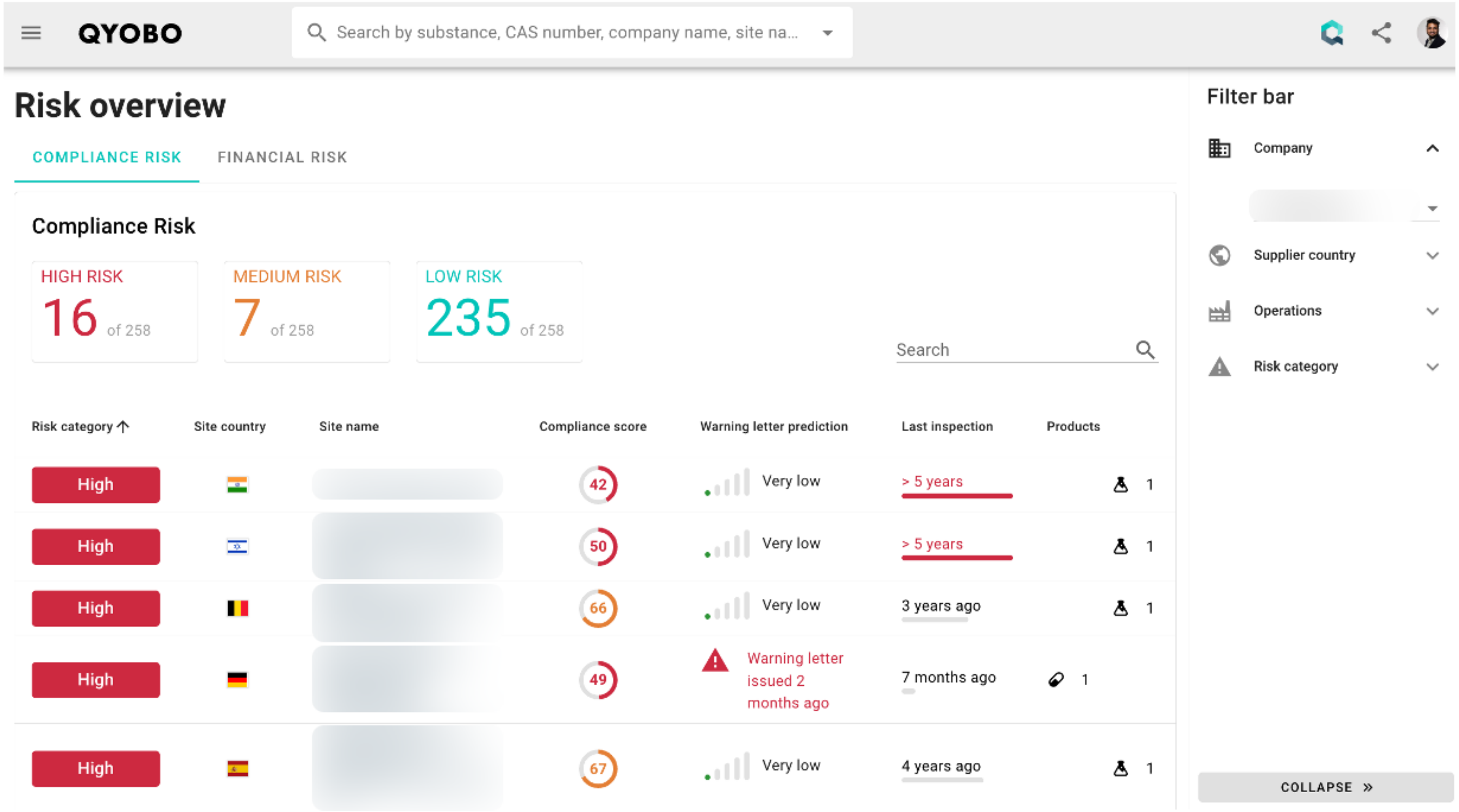
[Anonymous Example]



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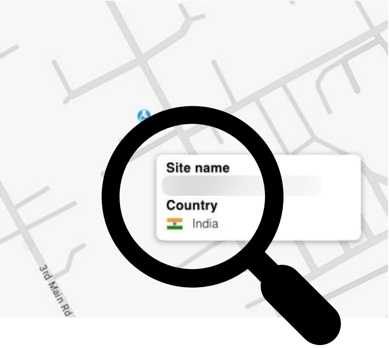
Source: QYOBO Platform, Risk Overview

A Client learned about a GMP compliance failure five months ahead of time, and even triggered an internal audit right away

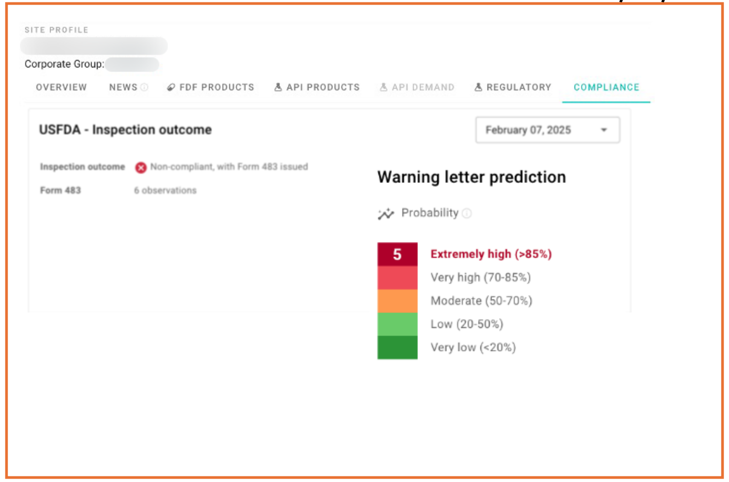
[Anonymous Example]

5 months lead time

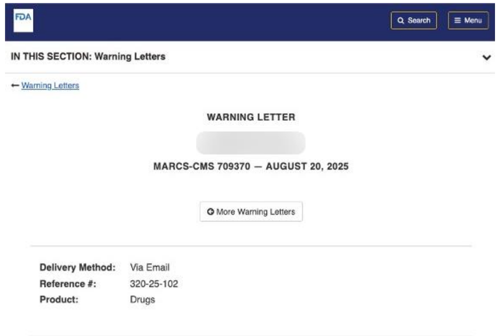
Feb 2, 2025



Mar 14, 2025



Aug 20, 2025



Sep 11, 2025

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Source: QYOBO platform

Key Takeaways

Supply chains are more transparent than ever
Mapping each supply chain is (extremely complex but) achievable.

Governments are already using this intelligence
Using intelligence to educate their decision and policy-making.

Pharma companies are going a step further
Leveraging geopolitical shits to identify opportunities and safeguarding their supply chains by eliminating risks ahead of time.