

Navigating Resilience

Key Insights for the Life Sciences C-suite

Life Sciences Leaders: What to Know About New U.S. Policies

Risks for supply chain disruptions, higher COGS, turmoil in FDA and potential PBM reform underway.

20%+

increase in cost of Life Sciences industry foreign inputs is expected.

25%+

of US Life Sciences imported goods inputs are dependent on foreign sources in regions potentially subject to tariff volatility.

15%+

of the FDA workforce has been cut. Industry experts are highlighting the importance of maintaining the gold standard regulatory review.

80%

of prescriptions are controlled by three pharmacy benefit managers (PBMs). The U.S. administration likely to pursue a PBM reform.

Sources: Accenture Ready for resilience: how to navigate the new tariff landscape, April 2025

As a result, here are the challenges you should expect...

Top CEO challenges

Supply chain disruptions & COGS increase for raw materials, active pharmaceutical ingredients and finished goods due to potential tariffs.

Downstream cost impact to the enterprise due to internal trade-offs, with enabling functions and R&D likely to face cuts.

Uncertainty of FDA Reviews and Approvals due to the reduction of agency resources and new conflict-of-interest policy.

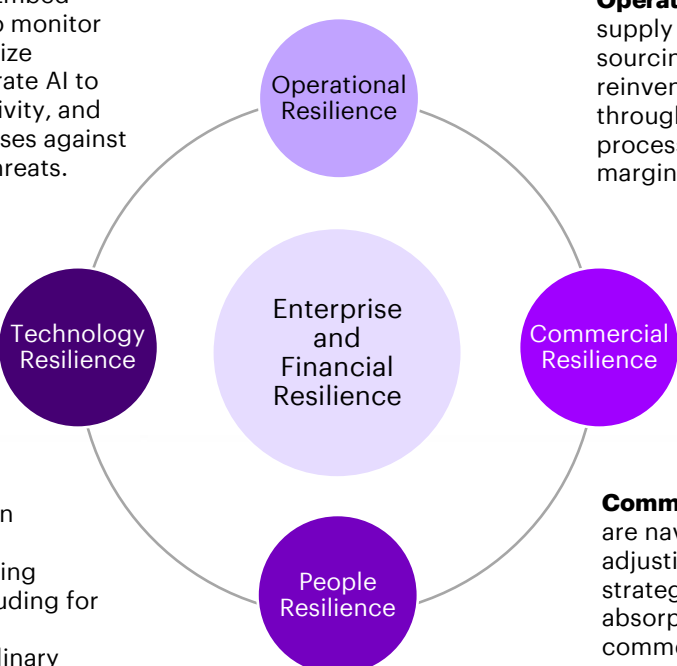
Potential PBM reform, but the extent is unclear. Brace for volatile negotiation dynamics.

To address these challenges, building resilience is key

Resiliency will be the key differentiator for companies who can navigate this uncertain economic and policy environment – this covers commercials, operations, people, and technology. Scenario planning is critical to building enterprise and financial resilience.

Technology Resilience: Embed autonomous AI agents to monitor real-time data and optimize decision making, accelerate AI to drive enterprise productivity, and enhance security processes against geopolitical and cyber threats.

People Resilience: Shift in organizational structure: Organizations are upskilling individuals globally (including for re-industrialization) and empowering multidisciplinary resilience teams (e.g., finance, legal, ops).



Operational Resilience: Enhance supply chain resilience for strategic sourcing and network changes and reinvent cost and productivity through spend optimization and process enhancements to protect margins and boost efficiency.

Commercial Resilience: Companies are navigating tariff uncertainties by adjusting pricing and commercial strategies, considering cost absorption, price passing, and commercial structures, while also pursuing growth and M&A opportunities in a slower economy.

Here is what to do now – and how to prepare for what's next

Resilience across these dimensions is the key to responding to the uncertain economic and policy environment ahead. Consider no regret moves that will yield value regardless of how the tariff environment evolves.

	What to do Now	What to do Next
Enterprise & Financial Resilience	Build capability for automated AI-enabled scenario planning	Establish dynamic value management + resource allocation
Operational Resilience	Run AI models and sensitivity analyses to find the optimal tax/tariff scenario, making it dynamic vs static	Drive continuous productivity improvement through agentic approaches.
Commercial Resilience	Use technology to plan PBM reforms and govt. pricing changes for agile contracting, and speed up FDA submissions for new products.	Automate marketing and sales operations while evaluating direct-to-customer options
People Resilience	Leverage ecosystem and new workforce models to add people capacity and skills	Ongoing workforce planning to optimize work/ roles for an organization with onsite and offshore humans, agents and robots
Technology Resilience	Leverage and integrate AI where possible, specially for talent or workforce shortages enterprise and value chain	Use AI agents to dynamically adjust ops based on trade policy changes

To learn more about how to turn resilience into a competitive edge visit:

<https://www.accenture.com/us-en/insights/strategy/navigating-new-tariff-landscape-economic-impact>