

Navigating Resilience

Key Insights for the MedTech C-suite

MedTech Leaders: What to Know About New U.S. Policies

Risks for supply chain disruptions, DOGE impact & turmoil in FDA, policy implications, margin pressures and secondary effects

20%+

increase in cost of raw materials, components, and finished MedTech goods is expected.

40%+

of US MedTech imports 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.

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

DOGE impact & Uncertainty of FDA Reviews threatens the long-standing regulatory and reimbursement leadership position of the U.S. coupled with reduction of agency resources and new conflict-of-interest policy.

Supply chain & manufacturing disruptions due to potential tariffs with subsegment-specific impacts requiring supplier diversification and more localized, resilient production and distribution

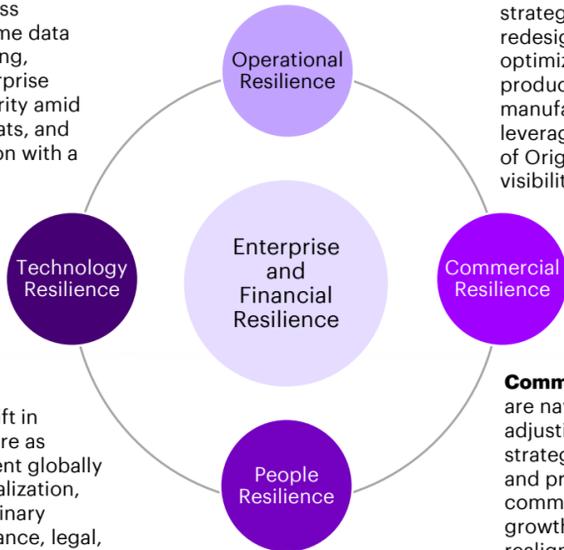
Finding new growth levers by prioritizing markets where tariffs are least impactful as MedTech looks to maintain profitability growth while responding to changing global trade dynamics

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 across functions to monitor real-time data and optimize decision making, accelerate AI to boost enterprise productivity, enhance security amid geopolitical and cyber threats, and build a clean data foundation with a composable Digital Core.

Operational Resilience: Enhance supply chain resilience through strategic sourcing and network redesign, spend and process optimization, invest in flexible production lines, realign manufacturing strategies, and leverage digital twins, and Country of Origin tracking for real-time visibility and agility.



Commercial Resilience: Companies are navigating tariff uncertainties by adjusting pricing and commercial strategies—balancing cost absorption and price passing, evolving commercial structures, pursuing growth and M&A in a slower economy, realigning to shifting demand patterns with new data, inventory and cashflow management.

People Resilience: Shift in organizational structure as companies upskill talent globally to support re-industrialization, empower multidisciplinary resilience squads (finance, legal, ops), and evolve operating models from centralized factories to decentralized, responsive hubs.

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 for agile pricing and contracting and speed up FDA submissions and bring new products to market faster	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>