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PRESIDENT'S MESSAGE

THE RIPPLE EFFECT: HOW TARIFFS ARE RESHAPING US HEALTHCARE

Kham Ali, MD, MBA, MPH, FACEP, President

Introduction

Have you heard about these tariffs? It's as if every conversation, policy discussion, and news headline can't resist the allure of this term. Tariffs are the new kale—ubiquitous, polarizing, and, depending on whom you ask, either a superfood for the economy or a bitter pill to swallow.

As I pen this article, I can't help but feel that the information might be outdated by the time you read it. The tariff landscape is shifting faster than a patient's vitals in the ER. One moment, a new policy is announced; the next, it's revised, challenged, or reversed. It's a dynamic environment that keeps healthcare professionals, policymakers, and patients on their toes.

But amidst the dark twisted comedical situation and the headlines lies a serious issue: the profound impact tariffs are having on hospitals, medical practices, and the healthcare system as a whole. From supply chain disruptions to increased operational costs, the ripple effects are being felt across the board. In this article, we'll delve into the multifaceted ways tariffs are reshaping U.S. healthcare, drawing on insights from various sectors to provide a comprehensive analysis.

Tariffs and the Pharmaceutical Industry

In April 2025, the Trump administration initiated a Section 232 investigation into the importation of pharmaceuticals and pharmaceutical ingredients, signaling a potential shift towards imposing tariffs on these essential goods. This move has raised concerns among healthcare providers and industry stakeholders about the potential for increased drug prices and supply chain disruptions.

Pharmaceutical companies are responding in varied ways. AstraZeneca, for instance, announced plans to shift some of its production from Europe to the U.S., investing \$3.5 billion in domestic manufacturing facilities. Similarly, GSK has emphasized its preparedness to cope with U.S. pharmaceutical tariffs, highlighting its strategic focus on the American market, which accounts for over 50% of its annual revenue.

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**KHAM ALI, MD, MBA,
MPH, FACEP**
President, WCMS

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Upcoming Events:

WCMS/WAM
Annual Meeting
Thursday, June 19, 2025
Westchester Country Club
Rye, NY
Details to follow...

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FROM THE EDITOR...***THE WHITE BLOTUS*****PETER ACKER, MD**

After a long winter of dealing with influenza, RSV, etc, I was relieved and grateful to be on jet flying south to Dominican Republic. It had been planned almost a year in advance by my middle daughter and included all three of my daughters, their partners, and four grandkids. Advance planning was key, since this the much coveted time was the Easter/Passover spring break when everyone wants to shake off the winter rigors by heading to the Caribbean.

It didn't go smoothly. I had not seen an email from the week before announcing a flight change announcing an earlier departure time. It was only while waiting for the taxi to pick us up at 5 AM that noticed the change and what followed was a tense ride to the airport, while my wife fixed me with a steely look, looking for an explanation. I tried the usual, how hard I worked, taking care of sick kids, etc, but she was having none of it. We arrived and immediately sprinted toward the check-in counter. I frantically struggled at the kiosk grabbing my documents, which included a new requirement for a so called eticket instituted by the Dominican government probably in order to get an additional fee. Sweat was pouring down my brow as I contemplated missing the flight and improbably was reminded about the Freudian trope about the psychological meaning on missing a train. Then, a miracle! An airline employee spotted us, and took us under her wing and then hustled us to the front of security line and we made the flight!

We arrived early afternoon at Miches, a small town on the northern coast of the island, a good two hours away from the Punta Cana Airport. It was rural and beautiful with lots of rice fields, and jungle like lands. We entered the gates of the Club Med and I was bit chagrined as I thought about the surrounding poverty in contrast to the plush resort. We then got together with the rest of the family who had wisely made their own travel arrangements. We sat around sipping on our tropical drinks, surrounded by guests dressed to the nines, many speaking French and other European languages. Also there were numerous resort employees, scrambling around to serve us. It was hard not to feel a sense of disquiet about the contrast between the wealthy guests, dressed to the nines, sipping their drinks. I looked at one of my son-in-law's and remarked "The vibe here reminds very much of a popular show that just completed it's 3rd season." Then my 7 year grandson, grabbed me, asking for a drink – a virgin pina colada. He drank it and promptly asked for another. "OK, kid, I'm at your service." He promptly drank it down and sighed with satisfaction.

I had settled back in my lounge chair and gazed at couples dancing to Caribbean music and thought "Ok, I can relax! Not a sick kid to take care of, a worried mother to reassure, or a coding compliance person to deal with." My reverie was suddenly abruptly interrupted by a piercing moan. I sat up and saw my grandson lying back, his face pale, clutching

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and

The Westchester Academy of Medicine

Cordially Invites you to Attend our

Annual Meeting and Program

Thursday, June 19, 2025

Westchester Country Club

99 Biltmore Avenue

Rye, NY 10580

6:00 - 7:00 p.m. Networking Reception

7:00 p.m. Buffet Dinner

Installation of 2025-2026 Medical Society & Academy Officers



Remarks of Kham Ali, MD, MBA, MPH, FACEP

Outgoing WCMS President

Remarks of Anaïs Carniciu, MD

Incoming WCMS President

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PRESIDENT'S MESSAGE**THE RIPPLE EFFECT: HOW TARIFFS ARE RE-SHAPING US HEALTHCARE****Kham Ali, MD, MBA, MPH, FACEP, President**
(Continued from page 1)

However, not all companies are equally positioned. Pfizer's CEO, Albert Bourla, expressed that the current tariff environment is hindering the company's ability to make significant investments in U.S. manufacturing and R&D. The company anticipates that existing tariffs will cost it approximately \$150 million in 2025.

The broader pharmaceutical industry is grappling with the complexities introduced by these tariffs. Many active pharmaceutical ingredients (APIs) are sourced from countries like China and India, which are now subject to increased tariffs. This reliance on foreign APIs makes the industry vulnerable to supply chain disruptions and cost escalations. According to the FDA, approximately 75% of APIs used in U.S. drug manufacturing come from these two countries, underscoring the potential impact of trade restrictions on drug availability and affordability.

Impact on Hospitals and Medical Practices

Hospitals across the U.S. are beginning to feel the strain of tariffs on medical supplies, such as syringes and personal protective equipment (PPE). These tariffs are prompting some healthcare providers to freeze spending and prepare for potential shortages, raising concerns about the recurrence of supply chain disruptions similar to those experienced during the COVID-19 pandemic.

While long-term purchasing contracts may temporarily shield hospitals from immediate price surges, the domestic medical supply manufacturing boom triggered during the pandemic has since subsided, increasing the healthcare system's vulnerability. Hospitals and trade organizations are actively lobbying for exemptions on essential medical products to mitigate these risks.

Medical practices, particularly smaller ones, are also facing challenges. The increased cost of medical supplies and equipment is squeezing already tight budgets. Practices that rely heavily on imported medical devices and disposables are experiencing significant cost increases, which may lead to reduced services or increased costs for patients. For instance, the cost of sterile gloves, surgical caps, and gowns has risen sharply due to tariffs on Chinese imports, with

gloves facing tariffs set to rise to 50% in 2025 and 100% in 2026.

Supply Chain Vulnerabilities

The healthcare sector's reliance on global supply chains, particularly for active pharmaceutical ingredients (APIs), is a significant point of vulnerability. For example, heparin, a crucial anticoagulant used by millions of Americans, is predominantly sourced from China. Tariffs or export restrictions on such essential drugs could lead to increased costs and potential shortages, as the U.S. lacks sufficient domestic production capabilities for these ingredients.

Generic drug manufacturers, operating on thin margins, are particularly susceptible to the financial pressures imposed by tariffs. The inability to raise prices due to regulatory constraints may force some producers to reduce output or exit the market, exacerbating drug shortages and impacting patient care.

Furthermore, the increased cost of APIs and other raw materials is leading to longer lead times for drug production and clinical trials. Regulatory compliance for alternate sourcing adds 6–9% to production costs, and API import delays have extended clinical trial lead times by 11% on average. These disruptions not only affect the availability of medications but also hinder the development of new treatments.

Economic Implications and Industry Response

The broader economic impact of tariffs is evident in the cautious financial outlooks of major healthcare companies. GE Healthcare anticipates a \$500 million tariff impact in 2025, primarily due to ongoing global trade tensions, particularly with China. The company plans to mitigate these costs by shifting to localized manufacturing and diversifying supply sources.

Investors are also adjusting their strategies in response to the evolving tariff landscape. U.S.-based biotech companies with high tax rates, such as Gilead Sciences and Vertex Pharmaceuticals, are attracting investor interest due to their reduced exposure to potential tariffs and regulatory challenges.

In response to the growing tariff impact on the healthcare industry, leading corporations are modifying their operational models and future-proofing

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PRESIDENT'S MESSAGE**THE RIPPLE EFFECT: HOW TARIFFS ARE RE-SHAPING US HEALTHCARE****Kham Ali, MD, MBA, MPH, FACEP, President***(Continued from page 5)*

their supply chains. Johnson & Johnson has committed \$500 million for domestic expansions, and Abbott has launched a LATAM logistics hub, reducing tariff-exposed inputs by 7%. Additionally, ASEAN sourcing now covers 22% of displaced U.S. medical imports, indicating a strategic shift in supply chain management.

Policy Considerations and Recommendations

The imposition of tariffs on pharmaceuticals and medical supplies presents a complex challenge that requires careful policy consideration. While the goal of encouraging domestic manufacturing is commendable, it is essential to balance this objective with the need to maintain affordable and accessible healthcare.

Policymakers should consider the following recommendations:

1. **Exemptions for Essential Medical Products:** Implementing targeted exemptions for critical medical supplies and drugs can help prevent shortages and ensure continuity of care.
2. **Incentivizing Domestic Production:** Rather than relying solely on tariffs, offering tax incentives and grants to encourage domestic manufacturing can be a more effective strategy for building resilient supply chains.
3. **Strengthening Supply Chain Transparency:** Enhancing visibility into the origins and pathways of medical products can help identify vulnerabilities and inform strategic planning.
4. **Collaborative International Efforts:** Engaging in international cooperation to ensure the free flow of essential medical goods can mitigate the risks associated with protectionist policies.
5. **Investment in Infrastructure and Workforce Development:** To support domestic manufacturing, investments in infrastructure and workforce training are necessary to build a

sustainable and competitive healthcare manufacturing sector.

6. **Monitoring and Evaluation:** Establishing mechanisms to monitor the impact of tariffs on healthcare costs and access can inform future policy decisions and adjustments.

Conclusion

The intersection of trade policy and healthcare necessitates a nuanced approach that considers the intricate dynamics of global supply chains, economic pressures, and patient needs. As the U.S. navigates the implications of recent tariff policies, it is imperative to prioritize strategies that uphold the integrity of the healthcare system while fostering domestic innovation and production.

By adopting a balanced and informed policy framework, we can safeguard the health of our nation and ensure that hospitals, medical practices, and patients are not unduly burdened by the unintended consequences of trade disputes.



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We're updating our information on the impact of prior authorizations on physicians and patients and need your input! Please share the link below to our survey for physicians to share their experience with the prior authorization process and urge your physicians to take the survey. The information we get from the results will be used in advocacy materials and talking points for meetings to advance prior authorization reform legislation this session.

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FROM THE EDITOR...

PETER ACKER, MD

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his distended stomach. OK, vacation over! I leaped up to check him. Meanwhile, two of my daughters and son-in-laws, all doctors, came to his side. Slowly he improved and his sobs quieted down. "Bet it was that extra pina colada" my son-in-law intoned fixing me with a look. Then he smiled and said, "What did you put in that drink?" We all looked at each other and started to laugh. I was the patriarch of the family and had just poisoned my grandson! I then said with mock seriousness, "I have to announce I'm under indictment for massive health fraud and am completely broke!" Then I looked down at my grandson who was eyeing the rest of us, not getting the joke, but smiled anyway. "Ah," I said, "The White Blotus has recovered!"

The rest of the week was without incident and we all swam, boated, snorkeled to our hearts content. At the end of the day, we would enjoy a large family meal and recount the adventures of the day. All too

soon, we were headed to the airport, sad to leave but also relaxed and grateful to have such a wonderful family. Also, this time I had checked my email and noted the return flight time change and we arrived in plenty of time. Even old docs can learn!



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STOP THE TRAIN Elliot Barsh, MD

(Links to articles mentioned are found in the body of this piece)

"Our healing is in our humility." —Dr. Tom Lee

Hi everyone.

Welcome back.

No matter who we are or who our patients are, we come together looking for "something".

We both bring our experiences with the medical system into the exam room with us.

It may not always be comfortable.

We both want to be taken *seriously*, but may not feel that we can be our true or best selves.

In fact, when *communication* and *collaboration* are needed the most, they break down.

As *Dr. Lamas* says in her article,

"Doctors have to acknowledge the power differential between us and our patients, who are away from their homes, in many ways helpless as they face the most difficult moments of their lives. We ask our patients to trust us implicitly, to believe our diagnosis and to undergo treatments they might not understand."

We say we are doing our job.

Our patients are hoping to get well.

Under it all, we are both looking for the same thing.

A safe place to be *seen*,...*heard*,...*understood*.

A space where *compassion*, *love*, and *kindness* are welcome.

Where we go beyond *understanding* and are *moved to feel*.

Maybe, just maybe, "*the unexpected can happen*."

And if it doesn't happen today, "*we can try again next time*."

Thanks for making the time to join us.

Be safe.

E

"How many will actually change their lives as a result of your work?"

A Glimpse of Beauty in an Ugly Place

As a woman working in a men's high-security prison, I was told not to care about the incarcerated population. But my job was to love.

"Is it OK to depart from the standard practices of medicine for the sake of building trust with patients and their families?"

Every Doctor Faces This Dilemma

Some physicians agree to patients' requests for unproven treatment or altered vaccine schedules.

"It pinpoints the widespread feeling that everything now is sick and broken, from systems to people to social compacts."

The Pitt' Is Concerned About Your Health, America

The Max hospital drama, which just concluded its first season, is a TV throwback with an of-the-moment message about systems pushed to the breaking point.

"...those dreams and aspirations were uniquely mine. Nobody could take that choice away from me."

Breaking The Sacred Promise

"Humility" by Mary Oliver

Poems arrive ready to begin.

Poets are only the transportation.



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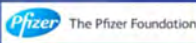

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ANNUAL STUDENT WINE TASTING

On Wednesday, April 23 the Westchester Academy of Medicine hosted our Annual Student/Physician wine tasting at Prospero Winery in Pleasantville. In all, we had 60 people in attendance with about 40 students and 20 of our WCMS members. The guests enjoyed wine made by Prospero Winery, Dr. Joseph Tartaglia, Dr. Tancredi Abenavoli, and Dr. Paul Gerardi. They learned about the wine-making process and sampled wines from all of the wine makers. This was a great opportunity for our local medical students to connect with area physicians to discuss their future plans, ask questions and get advice. We would like to thank Prospero Winery for hosting the event once again this year, and our physician wine makers for sharing the “fruits of their labor” with all of our guests. We look forward to doing it again next year!



Thank you to all of the NYMC medical students and physicians who attended this event! We hope to see more of our physicians join us again next year!

Prospero Winery Information:
<https://www.prosperowinery.com/>