

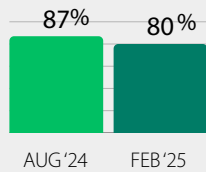
Factors Driving Location Of Medical Manufacturing

HIDA surveyed medical product manufacturers in August 2024 and February 2025 to determine the key factors driving decisions on where and how to manufacture medical products around the world.

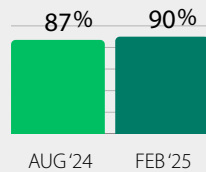
Business Considerations Are Primary Factors

Economic factor rated "Most Impactful" on locating manufacturing facility.

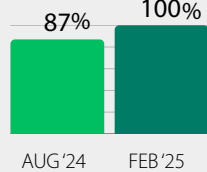
Availability of Labor



Availability of Product



Cost of Production



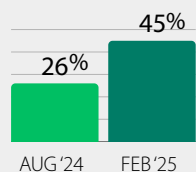
44%

of respondents manufacture the majority of their medical products in the United States

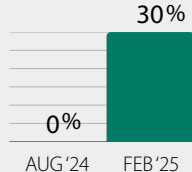
Other Policies Can Support Domestic Manufacturing

Percent of respondents rating a government policy as "Most Impactful" on locating manufacturing facility.

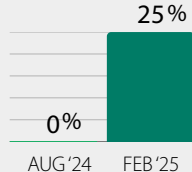
Tariffs



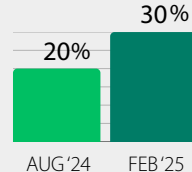
Buy American



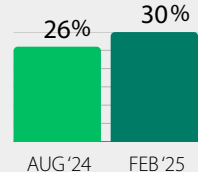
Long-Term Contracts



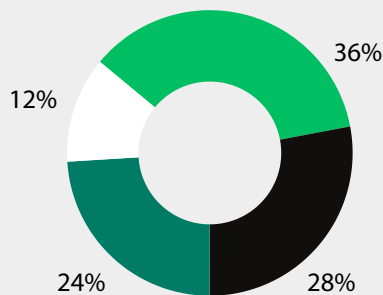
Tax Incentives



Regulatory

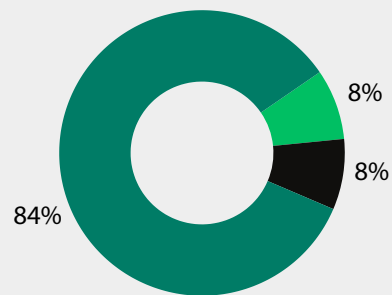


Industry Anticipates Movement Out Of China



- From China To SE Asia
- From China To U.S.
- From China To Nearshore
- Other

Sourcing Of Raw Materials Remains An Issue For U.S. Manufacturers



- U.S. Sources ONLY
- Foreign Sources ONLY
- Mix Of Domestic And Global Sources