

# ROMANIAN PHARMA MARKET

## EXECUTIVE SUMMARY

### 2026-Q1

- 1,860.4 mn Eur, PPP\*, 1.3% Sales Growth
- 166.1 mn units, -8.3% Volume Growth
- -2.2% DOT Growth

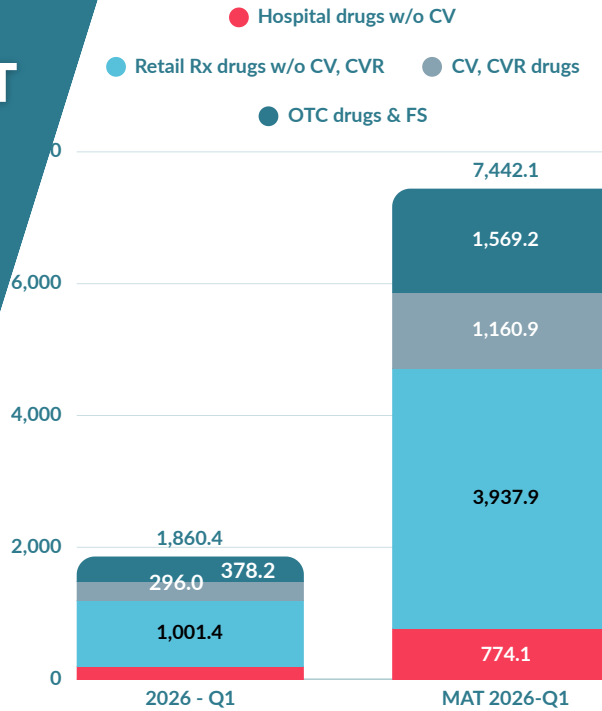
### MAT 2026-Q1

- 7,442.1 mn Eur, PPP\*, 5.9% Sales Growth
- 680.1 mn units, -3.7% Volume Growth
- 0.3% DOT Growth

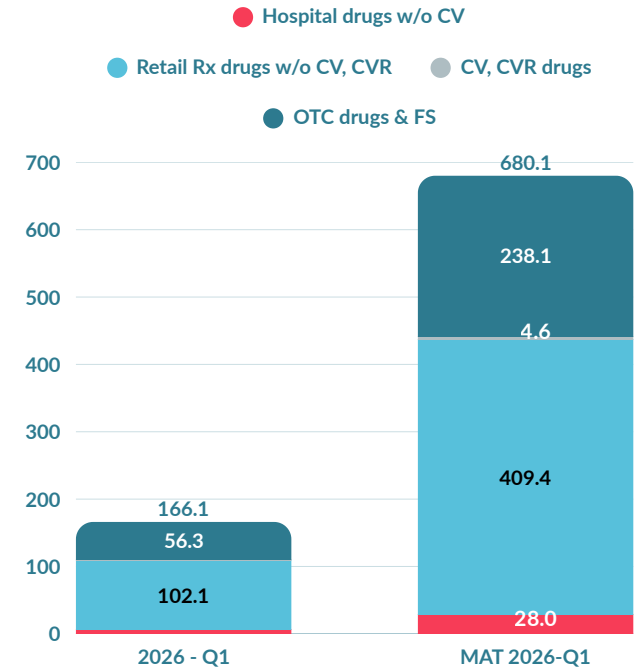
\*PPP-Pharmacy Purchase Price  
L-f-L market growth



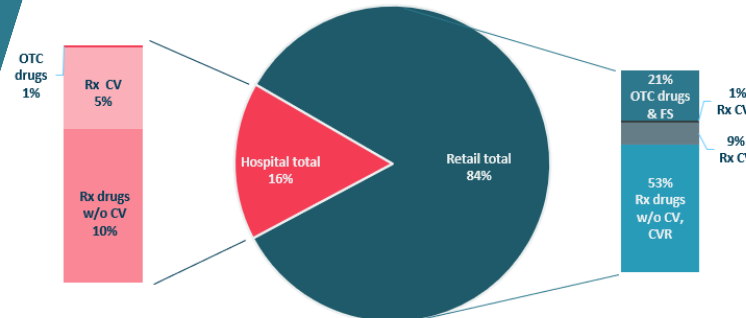
## Values (mn Eur, PPP)



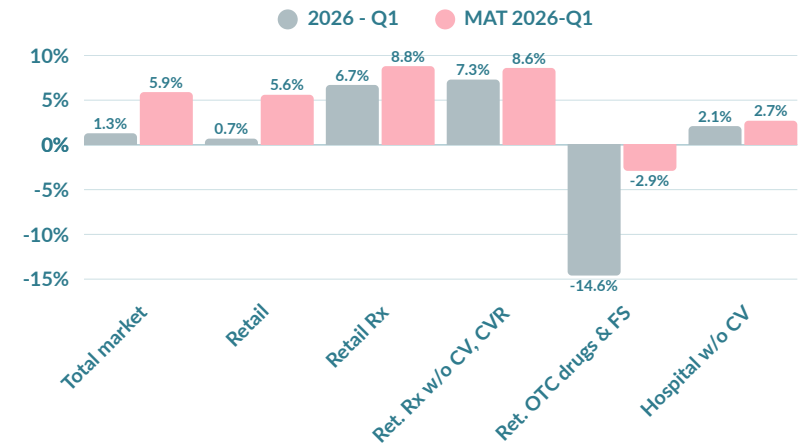
## Volume (mn units)



## Market by channel and product type (PPP values, MAT 2026-Q1)



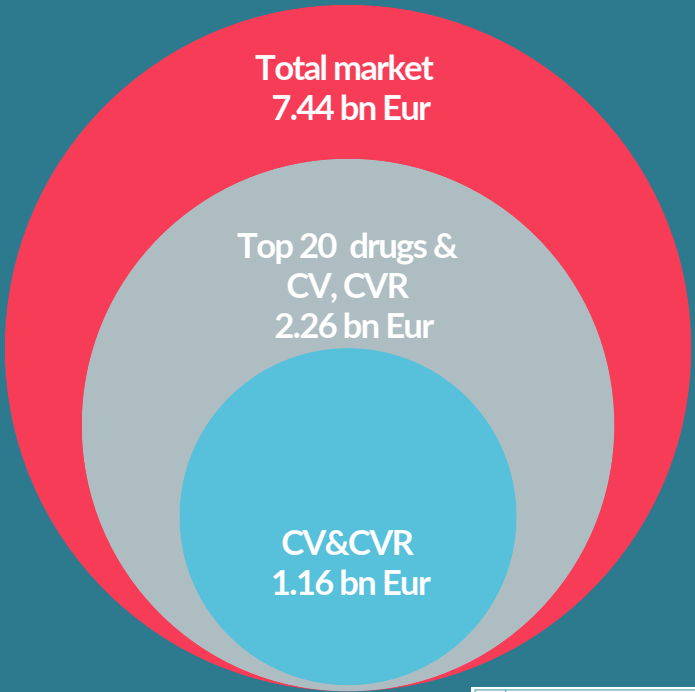
## Market growth (PPP values %)



# EXECUTIVE SUMMARY

## MAT 2026-Q1

### TOP 20 BRANDS



Crt. No.	Top 20 brands PRODUCT NAME	Values PPP 2026 - Q1		Values PPP MAT (2026 - Q1)	
		EUR, mn	+/- %	EUR, mn	+/- %
	Total market	1,860.4	1.3%	7,442.1	5.9%
	Top 20 Rx and OTC drugs	284.2	18.1%	1,101.4	21.0%
1	NUROFEN	23.2	-8.4%	93.7	0.2%
2	RYBELSUS	20.6	0.2%	91.0	24.8%
3	DARZALEX	22.2	20.1%	86.3	16.6%
4	FORXIGA	19.8	31.5%	73.2	29.4%
5	IMBRUVICA	18.2	0.4%	72.5	0.6%
6	MOUNJARO	24.3	>1000%	67.6	>3000%
7	TAGRISSO	14.7	3.6%	59.7	3.0%
8	HEPCLUDEX	14.8	48.6%	53.9	128.1%
9	ASPENTER	12.5	4.4%	50.0	15.8%
10	LYNPARZA	11.7	9.1%	46.1	9.8%
11	DETRALEX	10.5	0.2%	44.3	4.2%
12	ERLEADA	11.7	28.8%	43.1	41.1%
13	IBRANCE	10.7	5.0%	43.0	-0.9%
14	VESSEL DUE F	9.8	-8.5%	41.9	-2.9%
15	XIGDUO	10.2	-3.3%	41.9	5.0%
16	VERZENIOS	9.8	-4.6%	41.8	7.9%
17	CALQUENCE	10.5	39.9%	38.2	47.5%
18	TRULICITY	10.1	20.0%	38.2	4.7%
19	PHESGO	9.2	10.0%	37.5	-5.4%
20	JARDIANCE	9.7	12.5%	37.4	17.7%
	CVR drugs	14.4	-19.4%	62.2	-15.2%
	CV drugs	281.7	7.9%	1,098.7	14.9%

Crt. No.	CORPORATION	Values PPP 2026 - Q1		Values PPP 2025	
		EUR, mn	+/- %	EUR, mn	+/- %
	Total	1,860.4	1.3%	7,442.1	5.9%
1	ASTRAZENECA	108.8	12.6%	418.8	14.8%
2	SUN PHARMA <sup>1</sup>	88.7	4.5%	337.7	6.5%
3	ZENTIVA <sup>2</sup>	74.9	-3.8%	304.5	0.2%
4	JOHNSON & JOHNSON	72.5	10.1%	284.5	9.5%
5	SERVIER <sup>3</sup>	65.3	3.4%	261.9	4.5%
6	PFIZER	60.1	2.3%	244.3	3.5%
7	MERCK & CO	64.3	27.4%	242.1	23.5%
8	SANOFI	55.0	3.2%	230.6	5.3%
9	NOVARTIS	57.4	6.6%	225.4	7.7%
10	HOFFMANN LA ROCHE	55.1	-2.2%	221.6	4.1%
11	NOVO NORDISK	52.7	12.3%	207.1	7.7%
12	ELI LILLY	56.7	62.7%	201.8	50.4%
13	VIATRIS	40.8	-4.7%	171.0	0.3%
14	BRISTOL MYERS SQUIBB	35.8	11.9%	138.0	12.2%
15	BAYER AG	32.3	-4.2%	135.6	-1.7%
16	MENARINI	31.9	-3.3%	130.7	3.8%
17	ABBVIE	31.1	-6.6%	130.6	1.6%
18	GILEAD SCIENCE INC.	32.7	16.9%	124.6	35.4%
19	SANDOZ	29.9	-13.8%	120.3	-7.3%
20	RECKITT BENCKISER	27.7	-11.8%	111.0	-2.5%
	Total Altele	786.7	-4.5%	3,200.2	3.0%

<sup>1</sup> including Terapia  
<sup>2</sup> including Alvogen and Labomed  
<sup>3</sup> including Egis

### TOP 20 CORPORATIONS

- ASTRAZENECA
- SUN PHARMA1
- ZENTIVA2
- JOHNSON & JOHNSON
- SERVIERS
- PFIZER
- MERCK & CO
- SANOFI
- NOVARTIS
- HOFFMANN LA ROCHE
- NOVO NORDISK
- ELI LILLY
- VIATRIS
- BRISTOL MYERS SQUIBB
- BAYER AG
- MENARINI
- ABBVIE
- GILEAD SCIENCE INC.
- SANDOZ
- RECKITT BENCKISER
- Total Altele

