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PRESS RELEASE

The Romanian pharmaceutical market in the 2nd Quarter of 2026

Bucharest, July 28th, 2026

Based on the findings of the Pharma & Hospital Report, Cegedim Customer Information estimates that between July 2025 and June 2026 the volume of medicines dispensed to patients in Romania totaled 665.2 million units, 5.3% less than the dispensed volumes between July 2024 and June 2025.

The total number of treatment days marginally declined by 0.6, driven by the retail channel (-0.6%), while the number of hospital treatment days decreased even more (-2.5%).

At the same time, the value of medicines dispensed to patients in Romania increased by 6,5%, reaching RON 38.14 billion (EUR 7.46 billion) at the wholesale price level. Isolating the impact of the CVR and CV programs, the value of prescription medicines in retail pharmacies increased by 10.2% compared to the reference period, amounting to RON 20.35 billion (EUR 3.98 billion).

The Pharma & Hospital Report, a benchmark study for pharmaceutical market research, has been conducted in Romania since 1996.

Market evolution in Volume

Channel/ Segment/ Contract	2nd Quarter 2026			MAT 2026 – Q2		
	Total Units	Market Share	Variation*	Total Units	Market Share	Variation
	mn	*(%)*	*(+/- %)*	*mn*	*(%)*	*(+/- %)*
Total market	**157.3**	**100.0%**	**-6.4%**	**665.2**	**100.0%**	**-5.3%**
Retail	***149.2***	***94.8%***	***-6.9%***	***634.6***	***95.4%***	***-5.4%***
- Rx	**100.1**	**63.7%**	**-2.0%**	**410.8**	**61.7%**	**-1.7%**
Rx – w/o contract	*99.0*	*62.9%*	*-1.9%*	*406.4*	*61.1%*	*-1.7%*
Rx – CVR contract	*0.002*	*0.0%*	*24.0%*	*0.01*	*0.0%*	*-13.6%*
Rx – CV contract	*1.1*	*0.7%*	*-7.7%*	*4.4*	*0.7%*	*-3.8%*
- OTC	**49.1**	**31.2%**	**-15.5%**	**223.8**	**33.6%**	**-11.6%**
Hospital	***8.1***	***5.2%***	***5.0%***	***30.7***	***4.6%***	***-1.9%***

** like-for-like; the variation calculated for CVR and CV contracts considered the composition of these categories for the reporting period (2nd quarter 2026), respectively the reference period (2nd quarter 2025)*

In the 2nd quarter of 2026, the total volume of medicines dispensed to patients reached 157.3 million units, marking a 6.4% decrease compared to the same quarter in 2025 (like-for-like market definition). This negative growth was mainly driven by a 6.9% fall in the retail channel, while hospital dispensations increased by 5.0%. Analyzing the segments, prescription medications in pharmacies decreased by 2.0%, whereas over-the-counter (OTC) products, which include both OTC drugs and nutritional supplements, fell severely by 15.5%.

Between July 2025 and June 2026, the total volume of medicines and food supplements dispensed to Romanian patients amounted to 665.2 million units, 5.3% less than the dispensing volume between July 2024 and June 2025. Prescription-based medicines (Rx) from pharmacies decreased to 410.8 million units (-1.7%), while over-the-counter (OTC) products in pharmacies totaled 223.8 million units, a sharp decrease of 11.6% from the reference period. Also, the hospital segment decreased by 1.9%, accounting for 30.7 million units.

Market evolution in Value*

Channel/ Segment/ Contract	2nd Quarter 2026				MAT 2026 – Q2			
	RON			EUR	RON			EUR
	Value	Market Share	*Variation ***	*Value*	*Value*	Market Share	*Variation ***	*Value*
	mn	*(%)*	*(%)*	*mn*	*mn*	*(%)*	*(%)*	*mn*
Total market	**9,599.4**	**100.0%**	**5.5%**	**1,849.5**	**38,140.2**	**100.0%**	**6.5%**	**7,462.4**
Retail	***7,960.6***	***82.9%***	***4.5%***	***1,533.9***	***31,892.8***	***83.6%***	***5.9%***	***6,240.4***
- Rx	**6,234.3**	**64.9%**	**9.5%**	**1,201.1**	**24,283.7**	**63.7%**	**10.1%**	**4,750.7**
Rx – w/o contract	*5,187.6*	*54.0%*	*9.4%*	*999.5*	*20,345.1*	*53.3%*	*10.2%*	*3,980.4*
Rx – CVR contract	*84.8*	*0.9%*	*22.9%*	*16.3*	*330.8*	*0.9%*	*-13.6%*	*64.7*
Rx – CV contract	*961.9*	*10.0%*	*8.8%*	*185.3*	*3,607.9*	*9.5%*	*12.8%*	*705.6*
- OTC	**1,726.3**	**18.0%**	**-10.4%**	**332.7**	**7,609.1**	**20.0%**	**-5.6%**	**1,489.7**
Hospital	***1,638.9***	***17.1%***	***11.1%***	***315.7***	***6,247.4***	***16.4%***	***9.3%***	***1,222.0***

**values calculated at PPP (Pharmacy Purchase Price) level; ** like-for-like*

Despite the negative performance in volume, the total value of medicines dispensed to patients amounted to RON 9.60 billion lei, in the 2nd quarter of 2026, 5.5% up compared to the 2nd quarter of 2025. This growth was driven by a 4.5% increase in the retail sector and an 11.1% increase in hospital dispensations. Within the retail channel, the value of prescription (Rx) medicines rose by 9.5%, while over-the-counter (OTC) products decreased by 10.4%. The Rx medicines in retail, other than those assigned to cost-volume and cost-volume-result contracts, advanced by 9.4% compared to the 2nd quarter of 2025.

Between July 2025 and June 2026, the total market value reached RON 38.14 billion, reflecting a 6.5% increase compared to the period from July 2024 to June 2025. Prescription-based medicines (Rx) from pharmacies generated RON 24.28 billion, marking a 10.1% rise, the over-the-counter (OTC) products totaled RON 7.61 billion, marking a 5.6% decrease, while the hospital segment contributed RON 6.25 billion, demonstrating an important rise of 9.3%.
When isolating the substantial effects of the CVR and CV programs, which amounted to RON 3.94 billion, the value of prescription medicines in retail pharmacies increased by 10.2% from the reference period, reaching RON 20.35 billion (EUR 3.98 billion).

Evolution of Main Therapeutic Groups in MAT 2026 – Q2

ATC1 Groups	VOLUME			AVG. PRICE	PPP VALUE		
	mn units	Market Share *(%)*	Variation *(+/- %)*	RON	mn RON	Market Share *(%)*	Variation *(+/- %)*
Total	**665.2**	**100.0%**	**-5.3%**	**57.3**	**38,140.2**	**100.0%**	**6.5%**
Top ATC1 groups	**561.9**	**84.5%**	**-5.5%**	**56.5**	**31,772.8**	**83.3%**	**6.8%**
L (ANTINEOPLASTIC AND IMMUNOMOD. AG.)	5.4	1.0%	2.5%	1,730.0	9,406.0	29.6%	13.7%
A (ALIMENTARY TRACT AND METABOLISM)	140.1	24.9%	-4.9%	54.1	7,578.7	23.9%	9.1%
C (CARDIOVASCULAR SYSTEM)	163.8	29.2%	0.4%	26.9	4,406.8	13.9%	7.2%
N (NERVOUS SYSTEM)	100.5	17.9%	-5.0%	32.0	3,214.4	10.1%	2.2%
J (GENERAL ANTI-INFECTIVES SYSTEMIC)	35.1	6.2%	-10.6%	79.7	2,796.2	8.8%	4.8%
R (RESPIRATORY SYSTEM)	68.3	12.2%	-16.6%	38.9	2,655.6	8.4%	-6.5%
M (MUSCULOSKELETAL SYSTEM)	48.8	8.7%	-6.3%	35.1	1,715.1	5.4%	-2.3%
Other ATC1 groups	**103.3**	**15.5%**	**-4.1%**	**61.7**	**6,367.4**	**16.7%**	**4.6%**

20 Modrogan St. 3rd foor Bucarest 1st district Tel: +40 372139590 Fax: +40 372139591 www.cegedim-healthcare.ro
Cegedim Customer Information s.r.l. – Trade Registry no. **J2014013603408**– VAT RO **33826778**

The top seven therapeutic groups accounted for 84.5% of the market volume and 83.3% of its overall value. In terms of evolution, there are increases in volume above the market average of -5.3% in the case of antineoplastics and immunomodulators (+2.5%), drugs for the cardiovascular system (+0.4%), the alimentary tract and metabolism (-4.9%) and the nervous system (-5.0%). On the other hand, treatments for respiratory system decreased by 16.6%, systemic anti-infectives fell by 10.6% while the musculoskeletal system decreased in volume by 6.3%.

In value, there are increases above the market average of 6.5%, for antineoplastics and immunomodulators (+13.7%), digestive system and metabolism (+9.1%), and cardiovascular system medicines (+7.2%). Other therapeutic groups were below the market average, thus systemic anti-infectives increased by 4.8% and medicines for nervous system disorders by 2.2%. Only medicines for the respiratory system fell by 6.5% and the musculoskeletal system by 2.3%.

Top 20 Corporations by volume

In the second quarter of 2026, the ranking of the top 3 corporations by volume remained unchanged compared to the previous edition. Sun Pharma (including Terapia) maintained its lead with 17.1 million units, followed by Zentiva (including Labormed and Alvogen) with 14.0 million units, and Servier (including Egis) with 11.2 million units.
Also, the composition of the top 10 corporations in the last 12 months, ending June 2026, didn't change. Thus, the first place is occupied by Sun Pharma Corporation with 70.3 million units followed by Zentiva with sales of 59.8 million units and Servier with 45.2 million units.
The top 10 players is completed by Viatris (32.5 million units), Krka (31.0 million units), Antibiotice (24.6 million units), Menarini (22.5 million units), Gedeon Richter (18,8 million units), Biofarm (17.5 million units), and CD&R (16.0 million units).

Crt. No.	Corporation	2nd Quarter 2026	MAT 2026 – Q2	
		(mn units)	*(mn units)*	*(%)*
Total market		**157.3**	**665.2**	**100.0%**
1	SUN PHARMA[1]	17.1	70.3	10.6%
2	ZENTIVA[2]	14.0	59.8	9.0%
3	SERVIER[3]	11.2	45.2	6.8%
4	VIATRIS	8.0	32.5	4.9%
5	KRKA D.D.	7.7	31.0	4.7%
6	ANTIBIOTICE	5.9	24.6	3.7%
7	MENARINI	5.7	22.5	3.4%
8	GEDEON RICHTER	4.5	18.8	2.8%
9	BIOFARM	3.7	17.5	2.6%
10	CD&R	3.9	16.0	2.4%
Top 10 Subtotal		**81.5**	**338.2**	**50.8%**
11	HALEON	2.9	15.3	2.3%
12	RECKITT BENCKISER	3.1	15.2	2.3%
13	MERCK KGaA	3.6	14.6	2.2%
14	SANDOZ	3.2	14.3	2.2%
15	SANOFI	2.7	11.8	1.8%
16	TEVA	2.6	11.2	1.7%
17	NATUR PRODUKT ZDROVIT	1.7	8.7	1.3%
18	GLAXOSMITHKLINE	2.1	8.4	1.3%
19	ANGELINI	1.8	8.3	1.2%
20	ORGANON	2.0	7.9	1.2%
Top 20 Subtotal		**107.1**	**453.9**	**68.2%**

Top 20 Corporations by Value*

In the second quarter of 2026, the top three hierarchy by value hasn't changed vs the previous one. AstraZeneca maintained the leading position with RON 578.8 million, followed by Sun Pharma (RON 432.2 million, including Terapia) and Zentiva (including Labormed and Alvogen) with RON 377.1 million.

Over the past twelve months ending June 2026, the ranking of the top three corporations by market value also remained the same. AstraZeneca maintained its position as the market leader with a valuation of RON 2,197.7 million. Sun Pharma maintained second place with RON 1,735.4 million, followed by Zentiva at RON 1,545.3 million.
The top ten also featured Johnson & Johnson with RON 1,474.5 million, Servier with RON 1,341.1 million, Merck & Co with RON 1,295.2 million, Pfizer with RON 1,246.9 million, Sanofi with RON 1,190.5 million, Novartis with RON 1,157.9 million, and Hoffmann-La Roche with RON 1,136.5 million.

Crt. No.	Corporation	2nd Quarter 2026	MAT 2026 – Q2	
		(mn RON)	*(mn RON)*	*(%)*
Total market		**9,599.4**	**38,140.2**	**100.0%**
1	ASTRAZENECA	578.8	2,197.7	5.8%
2	SUN PHARMA[1]	432.2	1,735.4	4.5%
3	ZENTIVA[2]	377.1	1,545.3	4.1%
4	JOHNSON & JOHNSON	373.2	1,474.5	3.9%
5	SERVIER[3]	334.7	1,341.1	3.5%
6	MERCK & CO	348.3	1,295.2	3.4%
7	PFIZER	315.8	1,246.9	3.3%
8	SANOFI	294.6	1,190.5	3.1%
9	NOVARTIS	297.4	1,157.9	3.0%
10	HOFFMANN LA ROCHE	279.1	1,136.5	3.0%
Subtotal Top 10		**3,631.2**	**14,320.9**	**37.5%**
11	ELI LILLY	324.6	1,132.4	3.0%
12	NOVO NORDISK	294.4	1,095.5	2.9%
13	VIATRIS	210.8	860.6	2.3%
14	BRISTOL MYERS SQUIBB	193.3	734.0	1.9%
15	ABBVIE	173.3	675.0	1.8%
16	GILEAD SCIENCE INC.	178.8	667.3	1.7%
17	BAYER AG	146.8	662.4	1.7%
18	MENARINI	166.4	660.6	1.7%
19	SANDOZ	153.2	609.1	1.6%
20	RECKITT BENCKISER	113.8	552.5	1.4%
Subtotal Top 20		**5,586.5**	**21,970.3**	**57.6%**

**values calculated at PPP (Pharmacy Purchase Price) level*

[1] including TERAPIA
[2] including ALVOGEN and LABORMED
[3] including EGIS
[4] without OPELA HEALTHCARE products allocated to CD&R

NB: This data estimates pharmaceutical products dispensed from pharmacies to patients, the estimation of the above values, and market shares being made in pharmacy purchase prices. These data do not constitute information about the turnover and profit margins of drug manufacturers present in Romania, nor can they be extrapolated to this, due to the specific internal market regulatory framework.

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Founded in 1969, Cegedim is an innovative technology and services group in the field of digital data flow management for healthcare ecosystems and B2B, and a business software publisher for healthcare and insurance professionals. Cegedim employs nearly 6,500 people in more than ten countries and generated revenue of over €649 million in 2025. Cegedim SA is listed in Paris (EURONEXT GROWTH: ALCGM).To learn more, please visit www.cegedim.com.

Contacts:

Mihaela MIHAI
Cegedim Customer Information
Sr Product Manager

Tel: +40 (0)3 72 13 95 90
mihaela.mihai@cegedim.com

Aude BALLEYDIER
Cegedim
Media and Communications Manager

Tel +33 (0)1 49 09 68 81
aude.balleydier@cegedim.fr

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