WEEKLY REPORT

10/10/2026

HEALTH POLICY DEBATES IN THE NATIONAL CONGRESS ELECTED TO TAKE OFFICE IN 2027

The composition of Brazil's National Congress following the 2026 elections may shift the focus of health policy debates, with a stronger presence of right-wing parliamentarians potentially giving greater prominence to supplementary health issues. One possibility identified by analysts is renewed discussion of reforming the law governing private health plans, with greater emphasis on dialogue with the market than in the previous legislative debate. Digital health is expected to remain relevant across political groups, while discussions of health financing and the health industrial complex may take a more conservative direction. The article also identifies potential debates over public-private partnerships for technology transfer, the role of public laboratories and constitutional minimum spending requirements for health and education. Some political actors have argued for reviewing delayed Productive Development Partnerships and limiting certain agreements to private companies, while health-sector advocates warn that reducing mandatory spending floors could worsen underfunding. The article also highlights the need to maintain attention to cancer prevention and treatment policies amid changes in congressional representation. Read more.

FLÁVIO BOLSONARO'S POTENTIAL HEALTH MINISTER CALLS PANDEMIC RESPONSE A "CLOSED CHAPTER"

Ophthalmologist Claudio Lottenberg, cited as a possible health minister in a government led by Flávio Bolsonaro, has described the Jair Bolsonaro administration's handling of the Covid-19 pandemic as a "closed chapter." In an interview with Folha de S.Paulo, Lottenberg said he would maintain a technical approach based on scientific evidence, even if that created tensions with conservative or anti-vaccine elements within the political alliance. He has previously served as São Paulo's municipal health secretary, led Hospital Israelita Albert Einstein and headed UnitedHealth Brasil. Lottenberg has also advocated improvements to SUS through stronger primary care, digitalization, more efficient use of data and resources, and regionalized care supported by quality standards. His potential role is being interpreted by political allies as a way to address criticism of Jair Bolsonaro's pandemic record while engaging with a conservative political base. He also stated intention to maintain scientific principles and pursue dialogue on sensitive health issues, including vaccination and public health policy. Read more.

HEALTH MINISTER ALEXANDRE PADILHA SAYS CURRENT MODEL FOR HEALTH PARLIAMENTARY AMENDMENTS NEEDS TO CHANGE

Health Minister Alexandre Padilha has argued that the current model for parliamentary amendments allocated to health needs to be revised because these resources have grown faster than the Ministry of Health's discretionary budget. According to figures from the Institute for Health Policy Studies (IEPS) cited in the report, health-related amendments increased from R$9 billion in 2014 to R$27.9 billion in 2026. Their share of the sector's non-mandatory spending rose from approximately 20% to 40%, while the Ministry's own discretionary share fell from 80% to 60%. Padilha said that parliamentary decisions can direct funding toward political constituencies rather than municipalities with the greatest epidemiological and healthcare needs. The Ministry has introduced technical requirements intended to align funding with SUS priorities, including reducing waiting lists for surgery and examinations, vaccination, primary care, women's health and cancer screening. Read more.

"LEGAL UNCERTAINTY AND LACK OF PREDICTABILITY DISCOURAGE PHARMACEUTICAL INVESTMENT," SAYS MUSSOLINI

Nelson Mussolini, executive president of the Pharmaceutical Products Industry Union (Sindusfarma), argues that legal certainty and predictability are essential to attracting pharmaceutical research and development investment to Brazil. He says private companies should bear the main responsibility for financing clinical research, while government can contribute by establishing a stable environment for investment. In his view, companies face substantial risks because there is no guarantee that capital invested in research will generate a financial return. Mussolini identifies intellectual property protection, particularly the strength and reliability of patent protection, as a central concern. He argues that companies need to be able to plan investment over time and assess whether the rules governing returns on research will remain predictable. He also contends that, if the government has R$1 billion available for health spending, sanitation may produce a more effective public return than direct government financing of clinical research. These are the positions expressed by the Sindusfarma executive in the broader debate over how Brazil can attract pharmaceutical innovation and research investment. Read more.

"BRAZIL HAS STARTED LOOKING AHEAD AGAIN IN THE PHARMACEUTICAL INDUSTRY," SAYS ABIQUIFI'S NORBERTO PRESTES

Norberto Prestes, chief executive of the Brazilian Association of Pharmaceutical Inputs Industries (Abiquifi), says Brazil is beginning to strengthen its position in the global pharmaceutical ingredients market, citing regulatory modernization, public policies to encourage investment and the country's industrial capacity. The sector generated an estimated US$32 billion in 2024, according to Abiquifi, while Brazil accounted for approximately 60% of venture capital investment directed to biotechnology companies in Latin America, according to ApexBrasil. The industry is also seeking greater visibility in international markets through delegations and participation in global sector events. The article also highlights the structural challenges facing domestic production. After decades of weakened investment in the chemical-pharmaceutical industry, Brazil relies heavily on imported ingredients, particularly from China and India, and recorded a negative trade balance of US$12.9 billion in pharmaceutical inputs in the previous year, according to Abiquifi. Initiatives such as the Health Economic-Industrial Complex and the New Industry Brazil program are presented as opportunities to reduce external dependence and encourage innovation. The association is also promoting Brazilian companies and research capabilities at international events and exploring markets including Italy, Mexico and China. Read more.

BRAZIL PREPARES A PRIORITY LIST OF PHARMACEUTICAL INGREDIENTS TO STIMULATE DOMESTIC PRODUCTION

The Ministry of Health, in partnership with the Pan American Health Organization (PAHO) and industry associations, is developing a list of active pharmaceutical ingredients (APIs) considered priorities for Brazil. An initial selection identified 140 ingredients for further assessment, with the aim of concentrating investment and technological development on substances that are particularly relevant to public health and the country's medicine supply. The project seeks to reduce external vulnerabilities and strengthen domestic capacity to produce pharmaceutical ingredients. Brazil's domestic API production currently accounts for only a small share of national demand: estimates cited in the report indicate that domestic output in 2025 represented approximately 6% of the country's needs, while around 95% of ingredients used in medicine manufacturing are imported. The priority list is expected to help guide investment, financing, research and industrial policy, while signaling to manufacturers which products the government intends to prioritize. The project may also support coordination among the pharmaceutical industry, universities, research institutions and Anvisa, with a longer-term possibility of applying the methodology in other Latin American countries. Read more.

GENERICS ARE DOMINATED BY DOMESTIC INDUSTRY AND ACCOUNT FOR 46% OF MEDICINE PACKAGES SOLD IN 2025

Brazil's pharmaceutical market generated R$182.8 billion in revenue in 2025, a nominal increase of 13.7%, according to the Statistical Yearbook of the Pharmaceutical Market published by the Drug Market Regulation Chamber (CMED). Generic medicines accounted for R$25.2 billion, or 13.8% of total market revenue, with sales rising 16.7% year on year. In volume terms, 2.9 billion generic medicine packages were sold, representing 46.1% of the 6.3 billion packages commercialized in the country. The data show the importance of domestically controlled companies in the generic segment: Brazilian companies accounted for 65.7% of the sector, and four of the five leading economic groups by generic-medicine revenue were domestic. Generics had an average price of R$8.67 per package, below the market-wide average of R$29.02, helping explain why they account for a much larger share of sales volume than of revenue. The yearbook also notes that the 2025 results reflect the previous pricing framework, with a new CMED resolution in force since June 2025 expected to provide a different basis for future market analyses. Read more.

DRUGSTORE CHAINS LOSE R$1.6 BILLION IN MARKET VALUE IN ONE WEEK

Brazil's three publicly traded pharmacy chains, RD Saúde, Pague Menos and Panvel, collectively lost R$1.6 billion in market value in the week following Mercado Livre's announcement that it would sell medicines through its platform. The share-price decline reflected concerns among investors about increased competition from e-commerce in the pharmaceutical retail market. The companies' shares subsequently recovered in a broader market rebound, with all three closing higher on the reported trading day. The announcement has raised questions about how online platforms will operate in a market subject to specific sanitary and professional requirements. Traditional pharmacy chains have established store networks, relationships with manufacturers and broad product assortments, while digital platforms may compete through convenience and delivery. The report describes the market reaction as a response to the prospect of stronger competition, while the regulatory conditions for the expansion of medicine sales through online marketplaces remain relevant to the sector's outlook. Read more.

HEALTH SECTOR CREATES 100,000 FORMAL JOBS IN 2026, WITH AUGUST AT A FIVE-YEAR HIGH

Brazil's health sector generated approximately 100,000 formal jobs in 2026, according to a survey by the National Confederation of Health (CNSaúde) based on New Caged employment data. August was the strongest month in five years, with 19,142 positions created, a 44.57% increase compared with August 2025. The sector reached approximately 3.3 million formal employment relationships, up 4.06% over 12 months. São Paulo led job creation with 30,074 positions, followed by Minas Gerais with 11,841 and Bahia with 11,305. Women accounted for 83% of new jobs, while people aged 18 to 24 represented the largest group of hires, with 51,365 positions. Despite the strong August result, job creation accumulated during the year remained below the same period in 2025: 117,000 positions compared with 120,000. The data point to continued employment growth in the sector, alongside a slower year-to-date pace than the previous year. Read more.

HEALTH OPERATORS AND HOSPITALS DEVELOP STRATEGIES TO CUT COSTS

Health operators and hospitals are adopting joint and centralized purchasing strategies to reduce the cost of medicines, medical supplies and equipment. By consolidating demand and negotiating larger volumes with suppliers, participating institutions can strengthen their bargaining power and, in some cases, achieve savings of up to 40%. These arrangements can be particularly relevant to smaller operators and philanthropic hospitals that may have less leverage when negotiating individually with manufacturers and distributors. The article cites centralized purchasing platforms as an example of how institutions are organizing procurement. The Unimed Central de Serviços marketplace reportedly handled approximately R$400 million in transactions in 2025, connecting buyers and distributors to support purchasing efficiency and transparency. Another potential development is direct importing: Unimed Serra Gaúcha has

been working to import hospital beds from China. These initiatives show how healthcare providers are using scale, shared infrastructure and alternative sourcing strategies to manage cost pressures. Read more.

"CLINICAL TRIALS CANNOT BE CONCENTRATED IN JUST A FEW CITIES," SAYS ONCOLOGIST

Oncologist Fernando Maluf argues that clinical trials in Brazil need to be distributed more broadly across the country rather than concentrated in a limited number of cities. The discussion forms part of a series in which physicians were asked to identify major health challenges facing the next Brazilian president. Maluf's contribution focuses on clinical research and innovation, emphasizing the geographic distribution of research activity as a policy issue. The concern is relevant to the ability of patients and institutions outside established research hubs to participate in clinical studies. A more geographically distributed research network could broaden access to studies and strengthen the involvement of different regions in generating clinical evidence. The available report identifies the central issue as the concentration of clinical research and the need to consider how Brazil can expand research activity beyond a small number of cities. Read more.

INAEP EXPANDS DIALOGUE WITH RESEARCH ETHICS COMMITTEES

Brazil's National Research Ethics Authority (Inaep), linked to the Ministry of Health, has conducted technical visits to the country's eight accredited Research Ethics Committees authorized to assess studies considered high risk for participants. The visits took place in São Paulo state from September 28 to October 2 and were intended to review committee operations, promote the exchange of experience and strengthen the National System of Ethics in Research Involving Human Participants (Sinep). Read more.

ANVISA MAKES AVAILABLE NEW OPINION TEMPLATES FOR THE REGISTRATION OF BIOLOGICAL PRODUCTS

Brazil's National Health Surveillance Agency (Anvisa) has replaced its previous opinion template for the registration of biological products with three documents tailored to specific categories: vaccines, biosimilars and other biological products. The agency also updated its post-registration opinion template to reflect changes in the legislation cited. The new documents are intended to better accommodate the characteristics of each product category and standardize the technical information submitted by applicants. Read more.

ANVISA OPENS TARGETED CONSULTATION ON THE SHARING OF PRODUCTION AREAS

Anvisa has opened a targeted consultation to gather information on the sharing of production areas, inviting sanitary surveillance authorities, companies and industry associations to contribute. The initiative seeks to document current practices, operational difficulties and the sanitary, technical and economic aspects of this arrangement. Contributions are intended to inform the agency's Regulatory Impact Analysis (RIA) on the subject, which is included in its 2026–2027 Regulatory Agenda. The consultation is open until October 26, 2026. Read more.

ANVISA APPROVES RIA REPORT ON REGULATORY SANDBOX AND OPENS PUBLIC CONSULTATION

Anvisa's Collegiate Board has approved a Regulatory Impact Analysis report recommending a model for establishing a regulatory sandbox within the agency. Following the approval, Anvisa published a draft resolution for public consultation on October 6. The proposal is part of the agency's 2026–2027 Regulatory Agenda and is intended to create a controlled environment in which innovative products, services, technologies or business models subject to health surveillance can be tested when existing rules create barriers to experimentation. Under the proposed model, participating legal entities could receive temporary authorization to develop, produce or commercialize selected innovations under specific conditions. Certain regulatory requirements could be temporarily adjusted, subject to defined criteria, risk management, safeguards and Anvisa monitoring. Read more.

TIRZEPATIDE POWDER FOR HOME PREPARATION: A NEW WEIGHT-LOSS PRACTICE RAISES ANVISA'S CONCERNS

Products marketed online as tirzepatide powder are being sold alongside tutorials that instruct consumers on how to dilute and inject the substance themselves. The practice prompted Anvisa to issue a specific warning on September 23, highlighting that products offered in this form have not undergone the agency's evaluation and may not contain the active ingredient, concentration or purity claimed by sellers. The lack of reliable information about the product's origin and composition creates risks that cannot be resolved by following online preparation instructions. The preparation of injectable medicines outside controlled manufacturing and handling conditions also raises concerns about contamination and dosing errors. Read more.

REGULATION OF GLP-1 IMPORTS AND COMPOUNDING REMAINS UNDER REVIEW, WITH INTERNATIONAL PRACTICES OFFERING GUIDANCE

Anvisa is reviewing rules on the importation of active pharmaceutical ingredients and the compounding of GLP-1 medicines amid concerns about the growth of non-conventional supply channels. The agency's assessment identified weaknesses in quality control and sterilization, as well as the use of ingredients whose origin and composition were not adequately identified. The review comes amid a substantial increase in compounded production: more than 100 kilograms of tirzepatide were imported between late 2025 and early 2026, an amount estimated to be sufficient for approximately 20 million 5-milligram doses. Read more.

EPILEPSY MEDICINE TO BE DISCONTINUED IN BRAZIL, DOCTORS WARN OF LACK OF A SUBSTITUTE

The planned discontinuation of Depakote Sprinkle 125 mg, a divalproate sodium medicine, has raised concerns among physicians and patients in Brazil. Abbott has indicated that it will stop producing the formulation in December, as part of a worldwide discontinuation. Medical organizations have warned that there is no equivalent medicine available in the country with the same dosage and method of administration. The formulation contains microbeads that facilitate administration, particularly for children and patients who have difficulty swallowing conventional tablets. The Brazilian Society of Child Neurology and the Brazilian League of Epilepsy have highlighted the absence of a direct substitute, raising concerns about treatment continuity for patients who rely on this specific presentation. The issue is not only the loss of a brand but also the availability of an equivalent formulation suitable for patients with particular administration needs. Read more.

SÃO PAULO TO SCREEN FOR SPINAL MUSCULAR ATROPHY THROUGH THE SUS NEWBORN SCREENING TEST

The state of São Paulo has added spinal muscular atrophy (SMA) to the conditions screened through its public newborn screening program. The initiative is scheduled to begin on October 12 and will cover babies born across all 645 municipalities in the state, potentially reaching approximately 475,000 newborns each year. The state government estimates an investment of around R$20 million to expand the screening program. By including the condition in the heel-prick test, the state aims to detect cases before clinical progression makes the disease more difficult to manage. The measure expands the scope of newborn screening in the public health network and applies statewide rather than being restricted to some municipalities. Read more.

PATIENTS WITH RARE DISEASES SPEND YEARS SEARCHING FOR A DIAGNOSIS

People living with rare diseases in Brazil can spend years seeking a definitive diagnosis, facing limited access to specialists and genetic testing, misdirected referrals and, in some cases, incorrect assumptions that their symptoms have a psychological origin. Although many rare diseases are genetic, access to genetic sequencing through SUS remains restricted, making it difficult to identify the underlying condition. The concentration of specialized centers in the South and Southeast also forces patients from other regions to travel long distances to obtain assessments. Initiatives such as the Genomas Raros project seek to expand access to genetic

testing, but implementation at scale remains limited. Specialists point to the need to strengthen primary care, improve professional training, expand access to diagnostic services and use digital tools and teleconsultations to support earlier referrals. More representative genetic databases are also important to improve diagnostic accuracy. The article frames the challenge as a combination of insufficient diagnostic capacity, geographic inequalities and delays in recognizing rare conditions. Read more.

HUNTINGTON'S DISEASE: HALF OF PATIENTS SPEND UP TO R$1,500 A MONTH ON TREATMENT

The first National Mapping of Huntington's Disease in Brazil, conducted by the Brazilian Huntington's Association with support from Teva Brasil and involving 1,437 participants, found that half of diagnosed patients spend up to R$1,500 per month out of pocket on treatment. The findings highlight the financial burden of this rare, hereditary and neurodegenerative condition, which affects motor function, behavior and cognition and can have a substantial impact on patients and their families. The survey also identifies gaps in access to care. SUS is an important source of hospital admissions, physiotherapy and neurological consultations, but many patients rely on private services for medical and neurological care, psychiatric consultations and imaging tests. The Brazilian Huntington's Association calls for less bureaucratic access to social assistance and stronger multidisciplinary support within SUS. The mapping also highlights the importance of diagnosis and follow-up in helping patients and families plan care as the disease progresses. Read more.

MORE HIGHLIGHTS

Anvisa bans the sale of irregular insulin and tirzepatide products

Anvisa changes rules and expands the possibility of home sample collection

Ministry of Health opens public consultation to update the risk classification of biological agents

Ministry of Health and Anvisa conduct survey of microbiology laboratories

Digital prescriptions for GLP-1 medicines rise 304.9% in one year

New treatment approved for graft-versus-host disease

Anvisa approves a new medicine for Fabry disease

Patients with Crohn's disease gain a new treatment option in SUS

Gallstone treatment to be covered by private health plans

Hapvida and Roche sign nearly R$2 billion agreement to modernize diagnostics

USP protocol guides the analysis of genetic variants for rare-disease diagnosis

FenaSaúde launches platform to expand access to supplementary health data

RSV vaccine production process begins in Brazil with technology transfer to Butantan Institute

Anvisa authorizes human trials of a Brazilian malaria vaccine

BRAZIL NEWS

Bolsonaro will face Lula in runoff in Brazil's presidential vote

Investor and analyst reactions to Bolsonaro lead over Lula in election

Brazil benchmark stock index soars as Bolsonaro tops first-round vote

Flavio Bolsonaro slightly ahead of Lula in Brazil runoff, Datafolha poll shows

Right-wing wave in Brazil's Congress boosts Bolsonaro camp ahead of presidential runoff

Lula campaign scrambles to rebrand before Brazil runoff

Third-place finisher in Brazil election endorses Bolsonaro for runoff against Lula

Bolsonaro wins endorsements from right-wing rivals for Brazil election runoff

Brazil's Bolsonaro pledges broad review of Lula-era taxes

Brazil ex-President Bolsonaro wins big without his name on the ballot

Brazil extends fuel-price relief, cuts gasoline taxes ahead of runoff vote

Brazil election to reshape trade with US, with tariffs and minerals at stake

Trump's remarks on Brazil election show Lula is isolated, says Bolsonaro

Relações Governamentais