HEALTHWARE

Actualities of Hungarian pharmaceutical financing market

Newsletter
No. 5 Issue XIII. 2025
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News, current issues

- News The Data Guru Speaks: The Course of Hungarian Healthcare Will Soon Be Decided >>
- News Nearly Half of Hungarians Over 65 Take at Least Five Medications >>
- News Molecular Pathology Diagnostic Center Inaugurated in Szeged >>

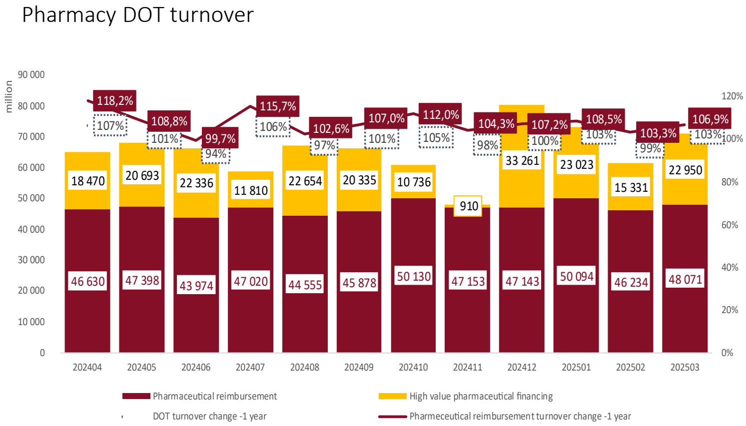
Macro approach to financing healthcare and medicinal products

Balance of the Health Insurance Fund (HUF), March 2025

Standard	7 747 M	-0,3%
Indication based	15 197 M	-2,1%
Indication b. 100%	20 594 M	3,8%
NPP	4 533 M	12,9%
Pharmacy	48 071 M	2,0%
High value	22 950 M	-31,0%
Total	**71 021 M**	-11,7%

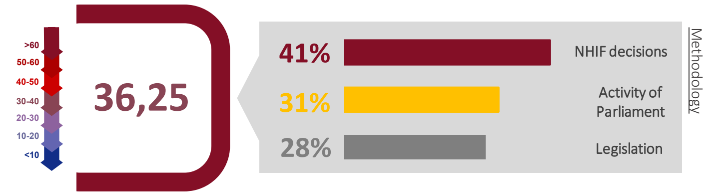
Source: Healthware analysis based on NHIFA data

Dynamics of the sales/circulation of prescription-only-medicine

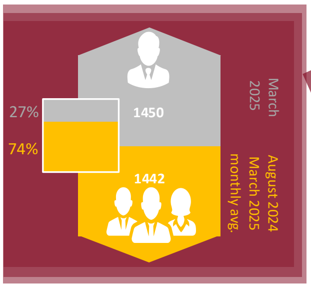


Source: Healthware analysis based on NHIFA data

Decision-making index, March 2025



Average number of medical sales reps

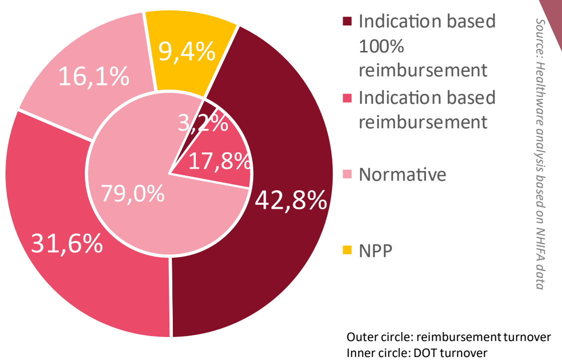


Share of doctors and others
Source: NHIFA data, Healthware analysis

Deviation from the target	
3,18M HUF	
140 520M HUF	42 394M HUF
outturn (expenditure)	outturn (revenue)

Source: Healthware analysis based on NHIFA data

Pharmacy reimbursement turnover



* The value of social welfare prescriptions is shown under the relevant title

Product offering

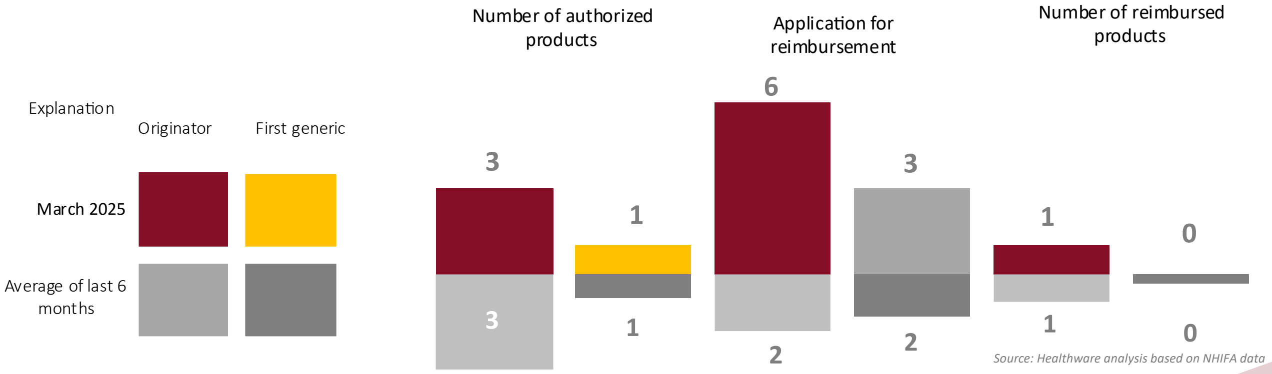
Legislation follow up

In the recent years Hungarian pharmaceutical market is characterized by rapidly changing and growing number of regulation instruments, as well as constant system transformations. Healthware Regulatory Compliance is a service in order to support companies with up-to date and comprehensive information in this complex legal environment.

In the framework of regulatory compliance service, immediate alerts December be sent in the form of e-mails about the relevant legal changes along with a report in order to compare the previous state with the amended one and an interpretation, in an intelligible form.

More about the services: link

Changes to subsidized medicinal product categories, March 2025



Source: Healthware analysis based on NHIFA data

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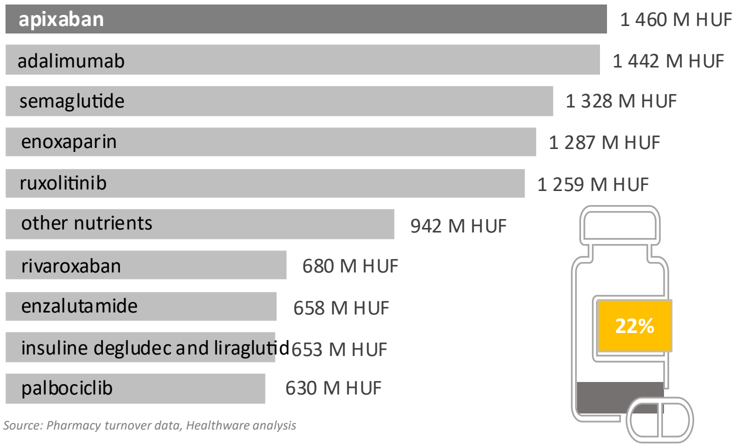
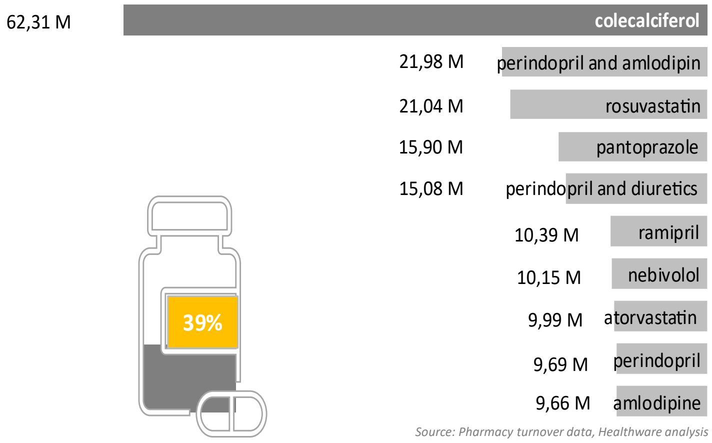
Toplists of reimbursement and number of patients, March 2025

TOP 10 ATCs by all reimbursement paid



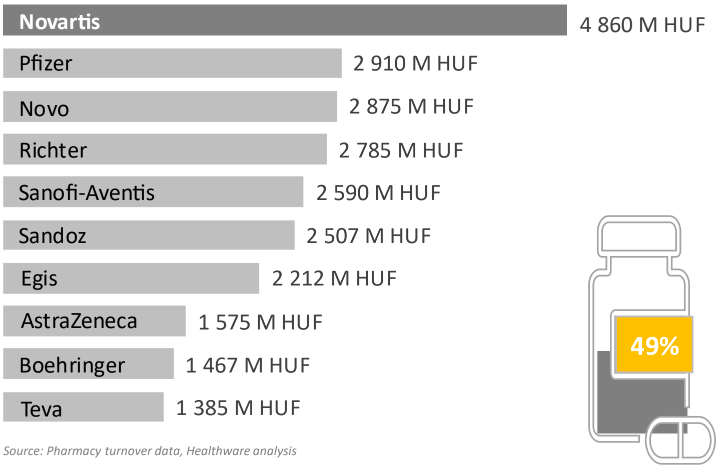
Source: Pharmacy turnover data, Healthware analysis

TOP 10 DOT by all reimbursement paid



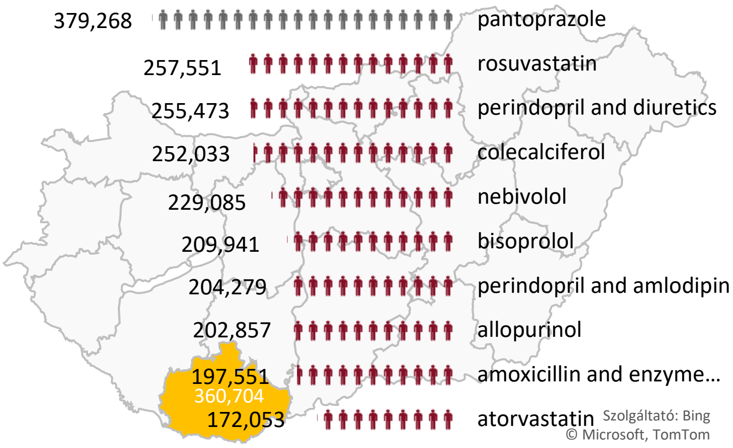
Source: Pharmacy turnover data, Healthware analysis

TOP 10 distributors by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

TOP 10 patient turnover by all reimbursement paid

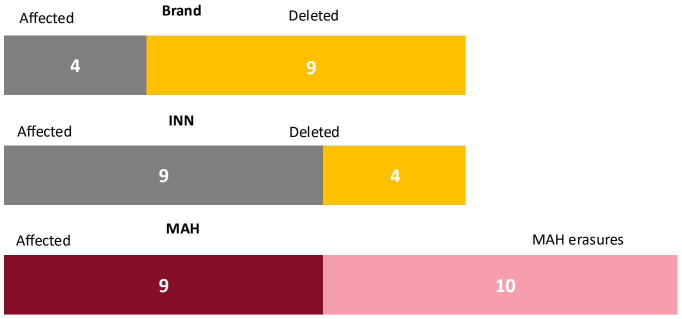


Szolgáltató: Bing
© Microsoft, TomTom

Source: Pharmacy turnover data, Healthware analysis

Substitutable products, March 2025

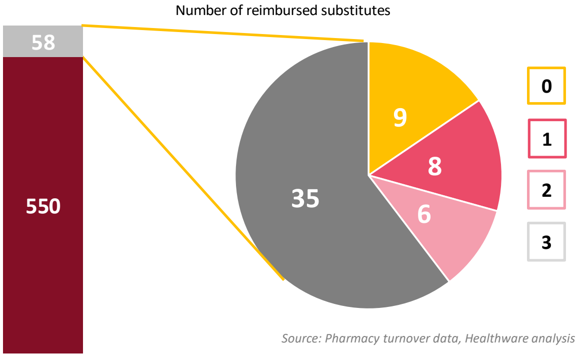
Within product deletions, marketing authorization (MAH) erasures were distinguished.
We also examined the active substances and brands affected in the procedure. These were divided into two groups according to whether the brand or active substance was completely removed from the formulary or whether there remained (affected) at least one product that belonged to the active substance or brand.



Source: Pharmacy turnover data, Healthware analysis

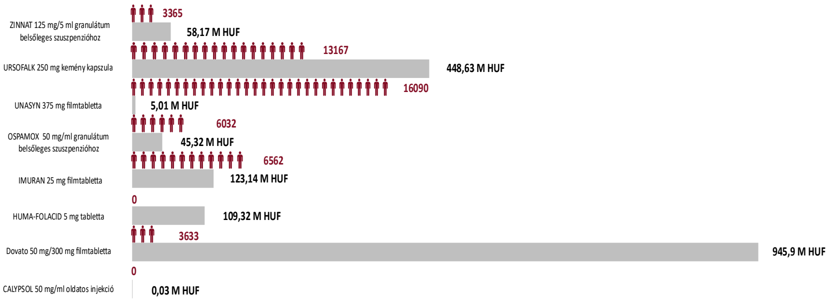
Product shortages

The graph shows the distribution of the reimbursed product shortage list. 550 products had been on the list before March 2025, compared to 58 new product added to the list in the month under review.
The newly listed products were grouped according to the number of reimbursed substitutes. Based on this criterion, **4 groups were formed**: products with 3 or more, exactly 2, exactly 1 and 0 reimbursed substitutes.



Source: Pharmacy turnover data, Healthware analysis

Product shortage – Turnover data for preparations without equivalent* substitute**



**Equivalent substitutes established by the National Centre for Public Health and Pharmacy*
***Turnover in the 12 months preceding the product shortage*
Source: Pharmacy turnover data, Healthware analysis

Highest growth, March 2025 vs February 2025 in HUF

Ranking		Brand	Reimbursement increment	%*
1	Roche	OCREVUS	173 207 063 HUF	116%
2	novo nordisk	RYBELSUS	108 755 750 HUF	112%
3	NOVARTIS	JAKAVI	89 928 793 HUF	102%
4	Bristol Myers Squibb	REBLOZYL	62 663 864 HUF	176%
5	NOVARTIS	LEQVIO	57 832 596 HUF	111%
6	SANDOZ	HYRIMOZ	57 120 789 HUF	106%
7	Bristol Myers Squibb	ELIQUIS	55 815 979 HUF	101%
8	sanofi	CLEXANE	55 031 563 HUF	99%
9	janssen Johnson&Johnson	ERLEADA	47 994 349 HUF	119%
10	MSD	PREVYMIS	46 174 121 HUF	126%

**Compared to the average of the 6 months preceding the reference month*
Source: Pharmacy turnover data, Healthware analysis