

## News, current issues

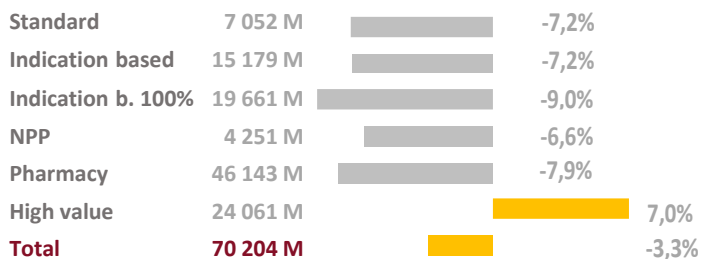
**News** Certain regulations affecting the operation of pharmacies are changing >>

**News** A new head has been appointed to the National Health Insurance Fund of Hungary >>

**News** Why is it so difficult to find a place for loved ones who require constant care? >>

## Macro approach to financing healthcare and medicinal products

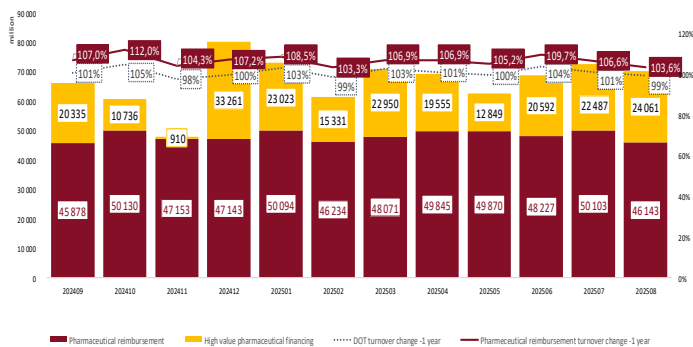
### Balance of the Health Insurance Fund (HUF), August 2025



Source: Healthware analysis based on NHIFA data

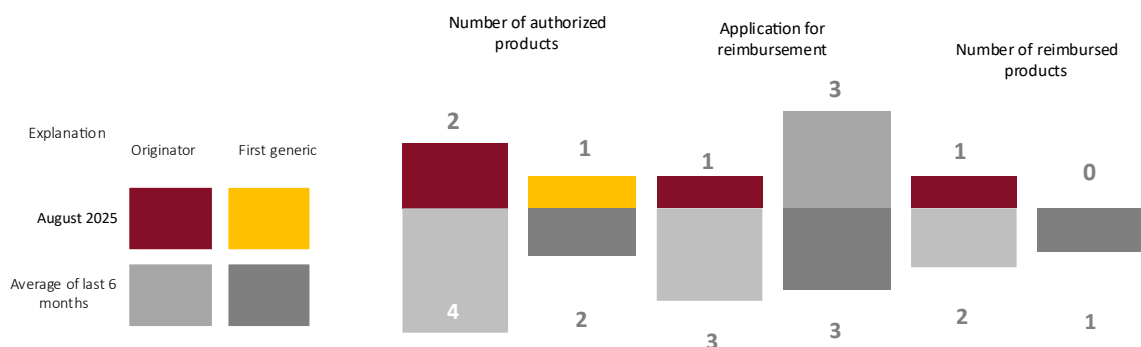
## Dynamics of the sales/circulation of prescription-only-medicine

### Pharmacy DOT turnover



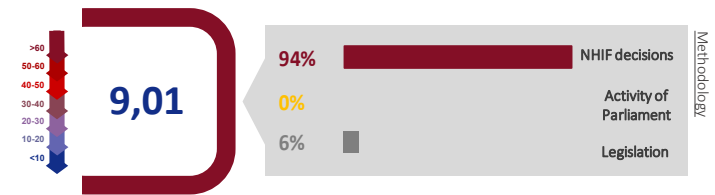
Source: Healthware analysis based on NHIFA data

## Changes to subsidized medicinal product categories, August 2025



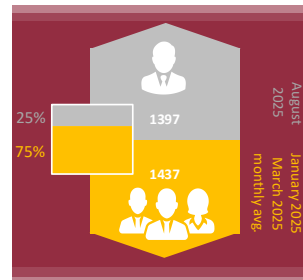
Source: Healthware analysis based on NHIFA data

## Decision-making index, August 2025

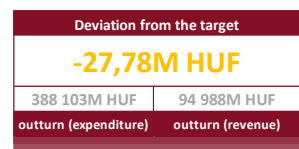


Methodology

## Average number of medical sales reps

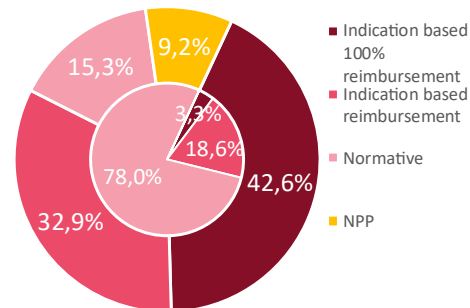


Share of doctors and others  
Source: NHIFA data, Healthware analysis



Source: Healthware analysis based on NHIFA data

## Pharmacy reimbursement turnover



Source: Healthware analysis based on NHIFA data

Outer circle: reimbursement turnover  
Inner circle: DOT 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.

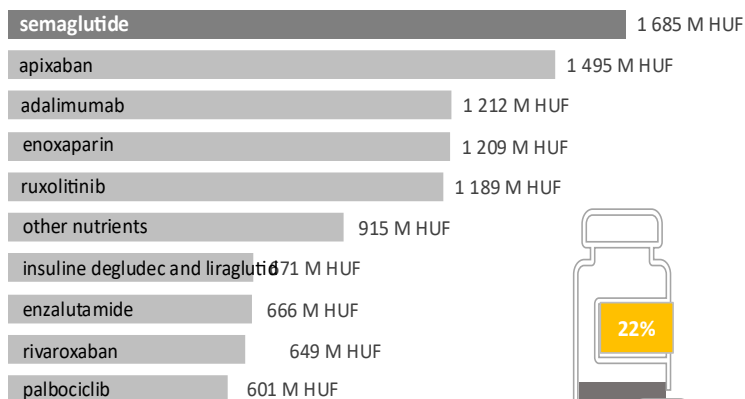
In the framework of regulatory compliance service, immediate alerts December be sent in the form of e-mails about the relevant legal changes along with a report in order to compare the previous state with the amended one and an interpretation, in an intelligible form.

More about the services: [link](#)



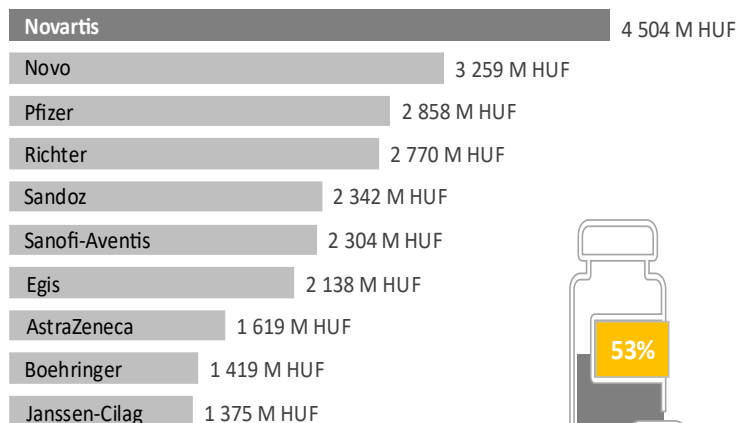
## Toplists of reimbursement and number of patients, August 2025

### TOP 10 ATCs by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

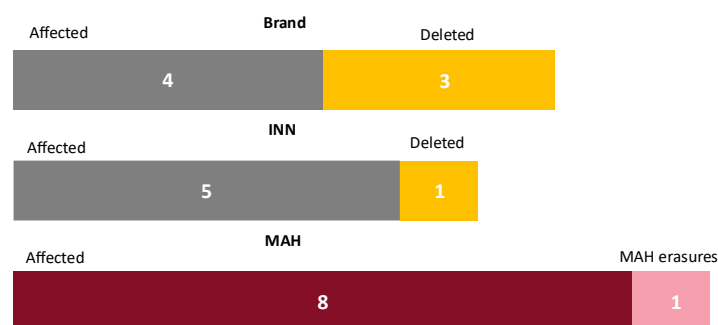
### TOP 10 distributors by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

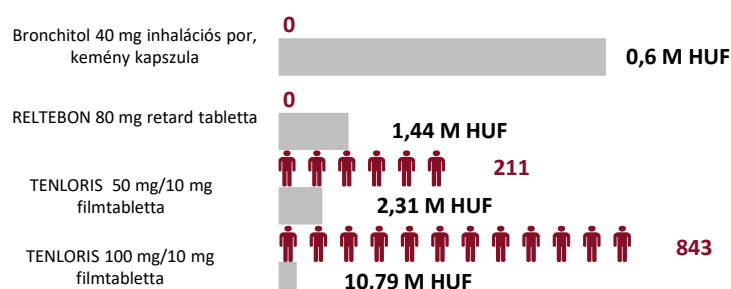
## Substitutable products, August 2025

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

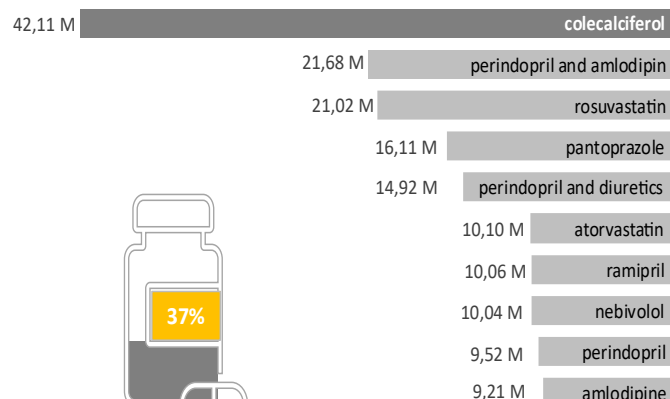


\*Equivalent substitutes established by the National Centre for Public Health and Pharmacy

\*\*Turnover in the 12 months preceding the product shortage

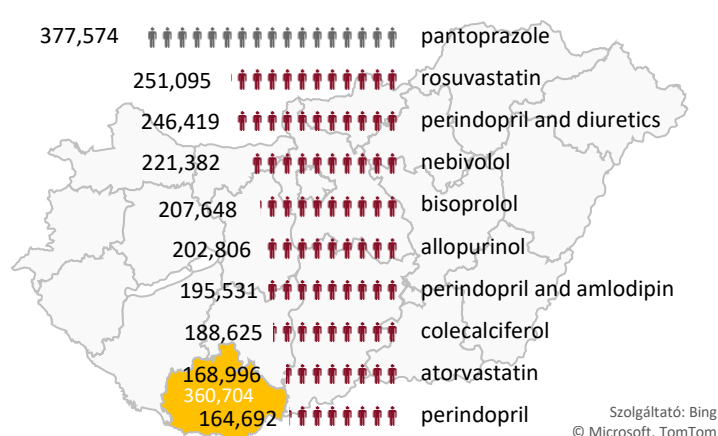
Source: Pharmacy turnover data, Healthware analysis

### TOP 10 DOT by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

### TOP 10 patient turnover by all reimbursement paid

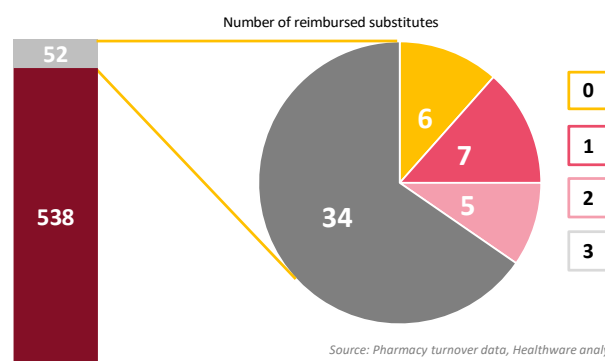


Szolgáltató: Bing  
© Microsoft, TomTom

Source: Pharmacy turnover data, Healthware analysis








## Product shortages

The graph shows the distribution of the reimbursed product shortage list. **538 products** had been on the list before August 2025, compared to 52 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

## Highest growth, August 2025 vs July 2025 in HUF

Ranking	Brand	Reimbursement increment	%*
1	 ACTRAPID	57 509 141 HUF	118%
2	 KOSLUGO	47 425 052 HUF	116%
3	 REKOVELLE	32 865 373 HUF	97%
4	 CHENODEOXYCHOLIC ACID LEADIANT	28 572 824 HUF	148%
5	 PERGOVERIS	27 020 262 HUF	97%
6	 BEMFOLA	22 318 065 HUF	108%
7	 OVALEAP	20 624 158 HUF	90%
8	 DUCILTIA	18 317 987 HUF	176%
9	 RETSEVMO	17 549 270 HUF	101%
10	 LEMTRADA	16 545 130 HUF	122%

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