HEALTHWARE

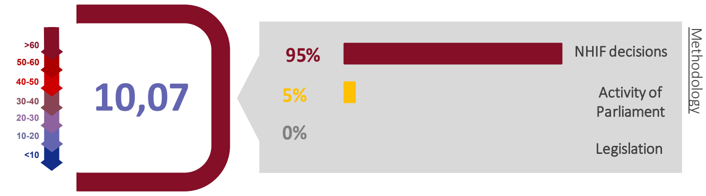
Actualities of Hungarian pharmaceutical financing market

Newsletter
No. 7 Issue XIII. 2025
Published: 02/09/2025

News, current issues

- **News** Unexpected announcement: Sándor Pintér has dismissed one of the key figures of Hungarian healthcare – here is the successor >>
- **News** What makes a drug development successful? >>
- **News** The first guide dog in Hungary that works in a hospital >>

Decision-making index, May 2025



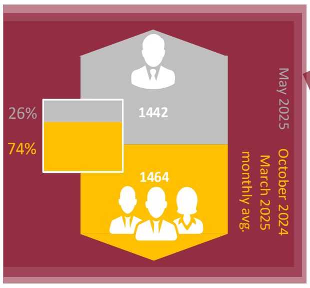
Macro approach to financing healthcare and medicinal products

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

Standard	7 642 M	-1,5%
Indication based	16 489 M	2,2%
Indication b. 100%	21 312 M	-0,5%
NPP	4 427 M	-2,6%
Pharmacy	49 870 M	0,1%
High value	12 849 M	-34,3%
Total	**62 719 M**	-9,6%

Source: Healthware analysis based on NHIFA data

Average number of medical sales reps



Share of doctors and others

Source: NHIFA data, Healthware analysis

Deviation from the target	
-8,29M HUF	
238 471M HUF	61 339M HUF
outturn (expenditure)	outturn (revenue)

Source: Healthware analysis based on NHIFA data

Product offering

Legislation follow up

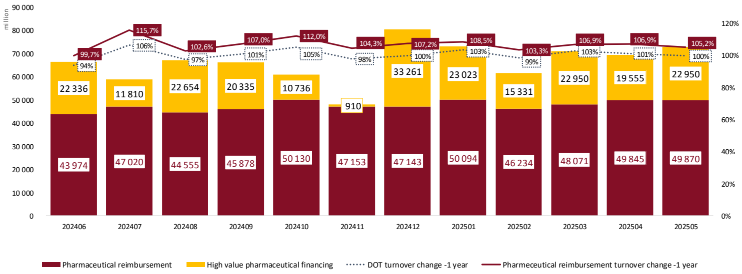
In the recent years Hungarian pharmaceutical market is characterized by rapidly changing and growing number of regulation instruments, as well as constant system transformations. Healthware Regulatory Compliance is a service in order to support companies with up-to date and comprehensive information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

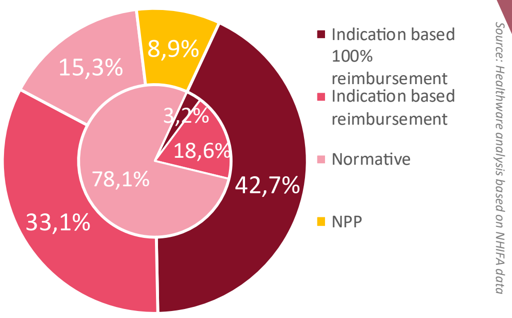
Dynamics of the sales/circulation of prescription-only-medicine

Pharmacy DOT turnover



Source: Healthware analysis based on NHIFA data

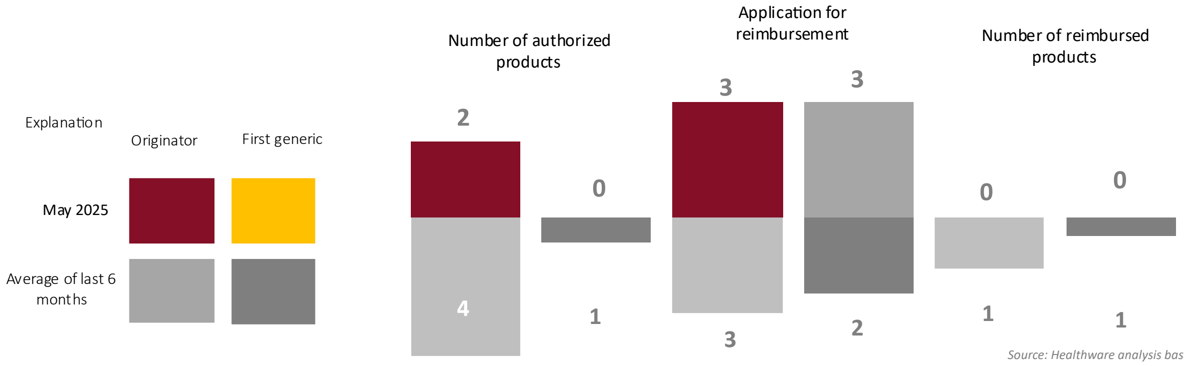
Pharmacy reimbursement turnover



Outer circle: reimbursement turnover
Inner circle: DOT turnover

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

Changes to subsidized medicinal product categories, May 2025



Source: Healthware analysis based on NHIFA data

Subscribe

You can unsubscribe from the newsletter by sending an e-mail to iroda@healthware.hu

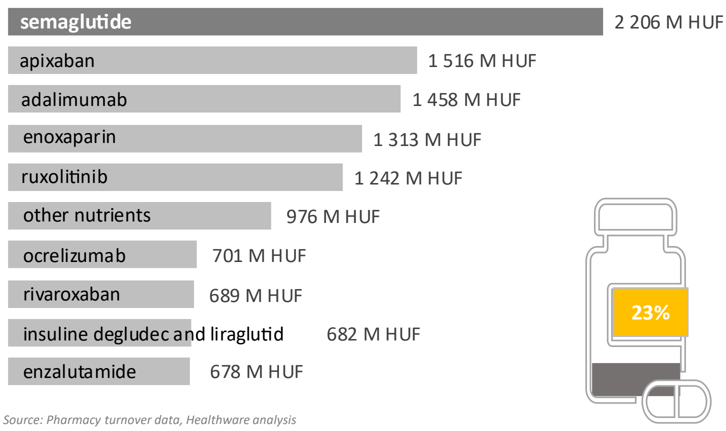
HEALTHWARE

Actualities of Hungarian pharmaceutical financing market

Newsletter
No. 7 Issue XIII. 2025
Published: 02/09/2025

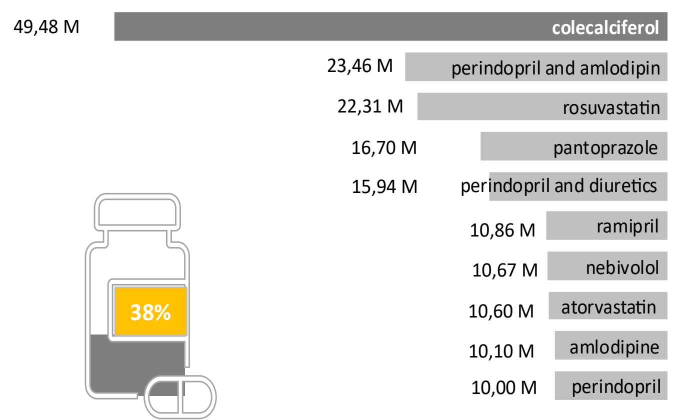
Toplists of reimbursement and number of patients, May 2025

TOP 10 ATCs by all reimbursement paid



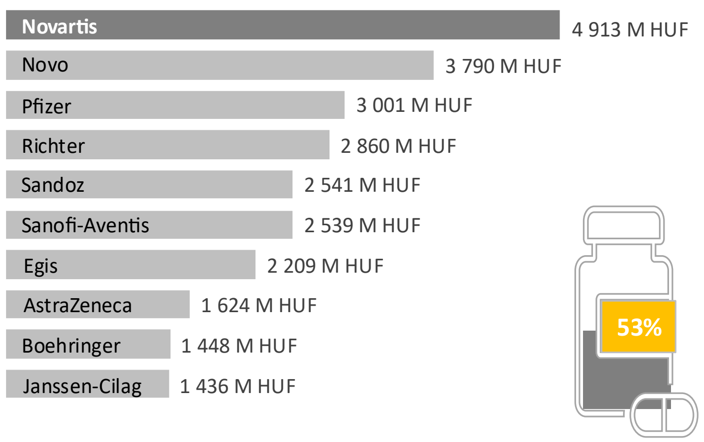
Source: Pharmacy turnover data, Healthware analysis

TOP 10 DOT by all reimbursement paid



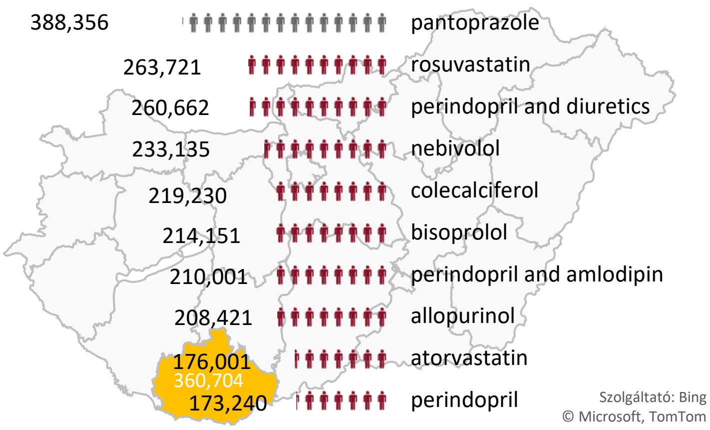
Source: Pharmacy turnover data, Healthware analysis

TOP 10 distributors by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

TOP 10 patient turnover by all reimbursement paid

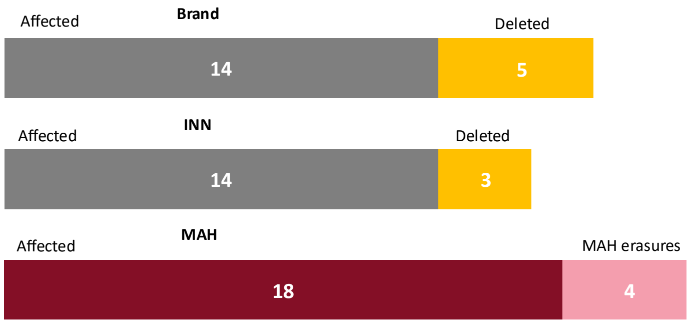


Szolgáltató: Bing
© Microsoft, TomTom

Source: Pharmacy turnover data, Healthware analysis

Substitutable products, May 2025

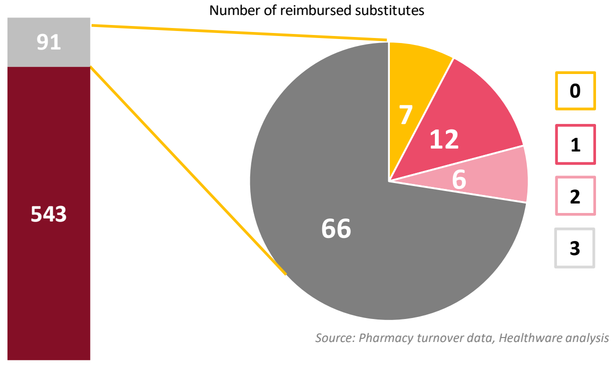
Within product deletions, marketing authorization (MAH) erasures were distinguished.
We also examined the active substances and brands affected in the procedure. These were divided into two groups according to whether the brand or active substance was completely removed from the formulary or whether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



Source: Pharmacy turnover data, Healthware analysis

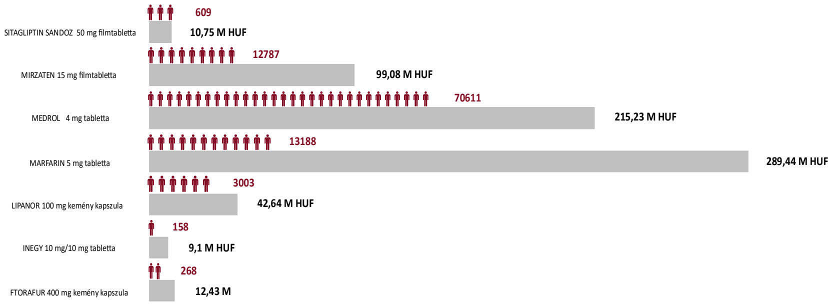
Product shortages

The graph shows the distribution of the reimbursed product shortage list. 543 products had been on the list before May 2025, compared to 91 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, May 2025 vs April 2025 in HUF

Ranking		Brand	Reimbursement increment	%*
1	novo nordisk	OZEMPIC	484 741 296 HUF	159%
2	CHEPLAPHARM	ZYPADHERA	65 892 854 HUF	96%
3	Leadiant Biosciences	CHENODEOXYCHOLIC ACID LEADIANT	64 288 854 HUF	205%
4	AstraZeneca	KOSELUGO	57 128 261 HUF	105%
5	MERCK	MAVENCLAD	46 653 896 HUF	126%
6	NOVARTIS	LEQVIO	45 782 001 HUF	114%
7	sanofi	LEMTRADA	37 817 440 HUF	157%
8	Pfizer	MYLOTARG	32 425 267 HUF	122%
9	AMGEN	PROLIA	29 519 603 HUF	112%
10	Bristol Myers Squibb	CAMZYOS	28 824 823 HUF	185%

**Compared to the average of the 6 months preceding the reference month*

Source: Pharmacy turnover data, Healthware analysis