

News, current issues

- News** E-healthcare in Hungary has entered a new phase: millions are already using EgészségAblak — this is now at a European level >>
- News** Hungary's first robot-assisted spinal surgery has been performed >>
- News** There are plenty of hospital beds in Hungary — but no doctors or nurses to staff them: alarming data from the OECD's health report >>

Macro approach to financing healthcare and medicinal products

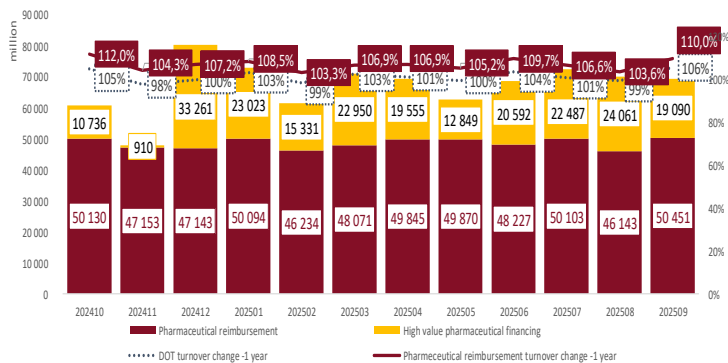
Balance of the Health Insurance Fund (HUF), September 2025

Standard	7 733 M	9,7%	
Indication based	16 582 M	9,2%	
Indication b. 100%	21 868 M	11,2%	
NPP	4 268 M	0,4%	
Pharmacy	50 451 M	9,3%	
High value	19 090 M	-20,7%	
Total	69 541 M	-0,9%	

Source: Healthware analysis based on NHIFA data

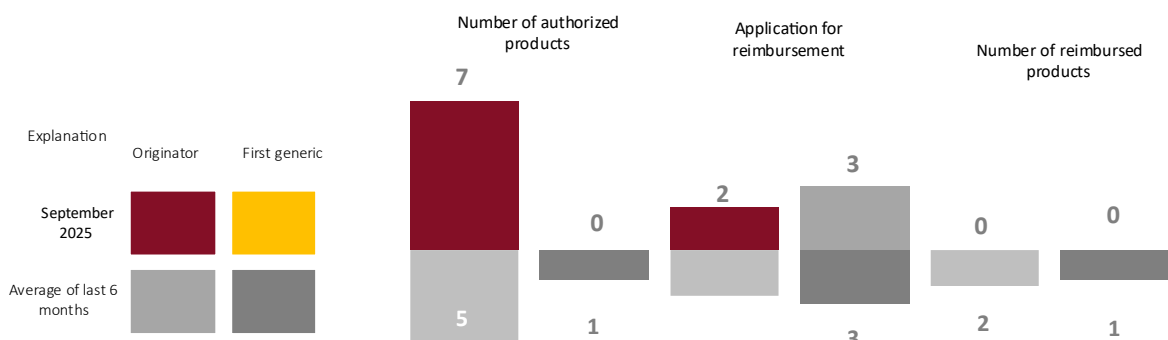
Dynamics of the sales/circulation of prescription-only-medicine

Pharmacy DOT turnover



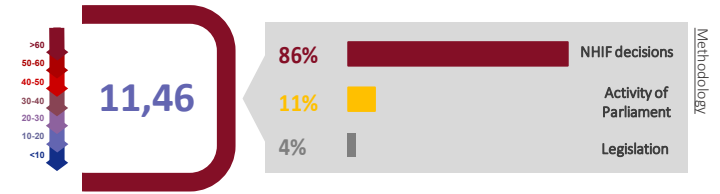
Source: Healthware analysis based on NHIFA data

Changes to subsidized medicinal product categories, September 2025

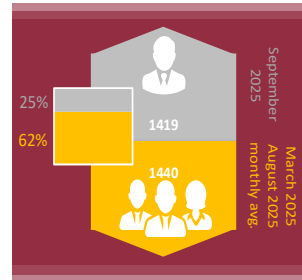


Source: Healthware analysis based on NHIFA data

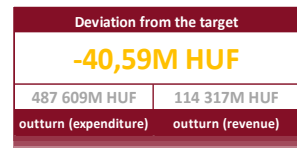
Decision-making index, September 2025



Average number of medical sales reps

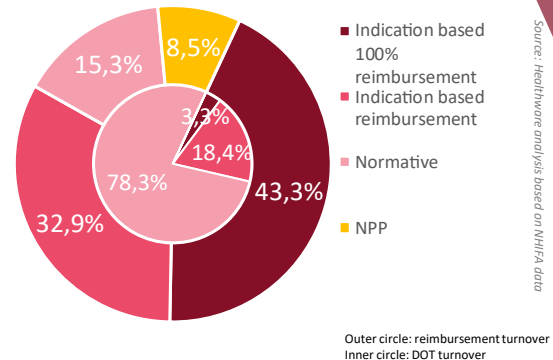


Source: NHIFA data, Healthware analysis



Source: Healthware analysis based on NHIFA data

Pharmacy reimbursement turnover



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

Source: Healthware analysis based on NHIFA data

Product offering

Legislation follow up

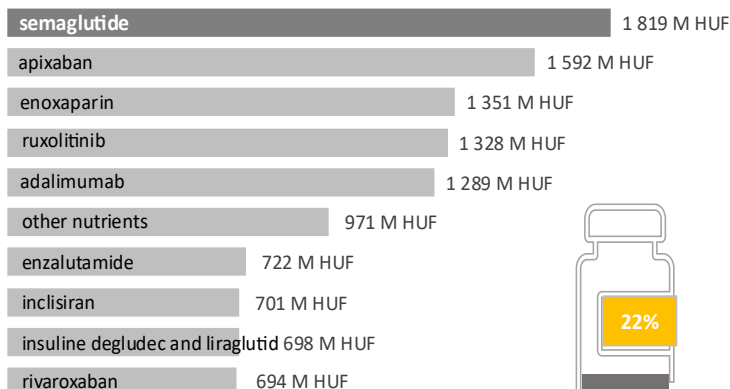
In the recent years Hungarian pharmaceutical market is characterized by rapidly changing and growing number of regulation instruments, as well as constant system transformations. Healthware Regulatory Compliance is a service in order to support companies with up-to date and comprehensive information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

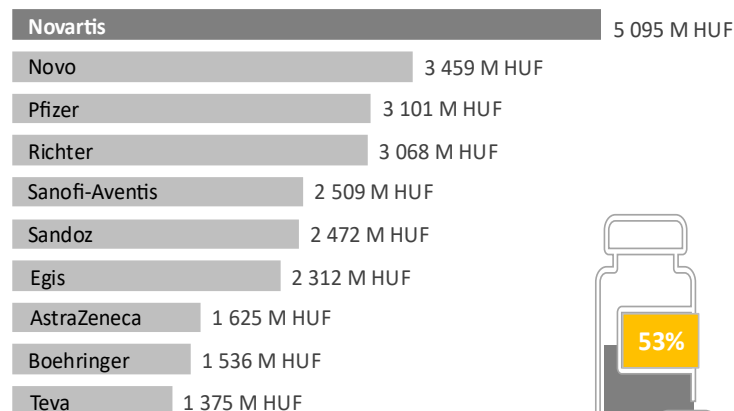
Toplists of reimbursement and number of patients, September 2025

TOP 10 ATCs by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

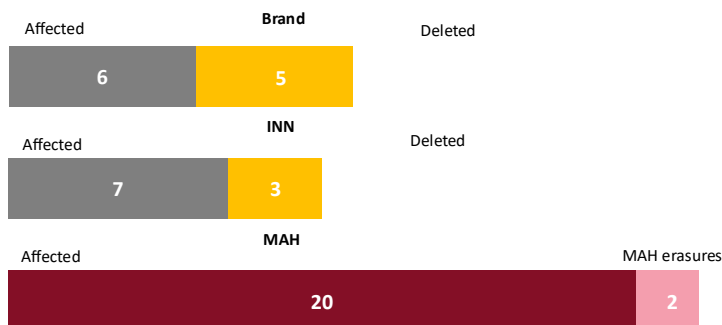
TOP 10 distributors by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

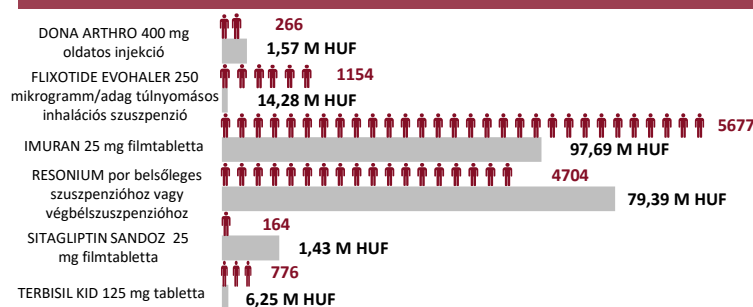
Substitutable products, September 2025

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**

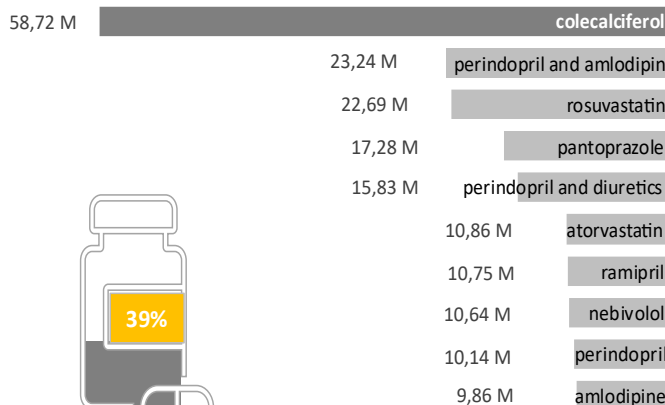


*Equivalent substitutes established by the National Centre for Public Health and Pharmacy

**Turnover in the 12 months preceding the product shortage

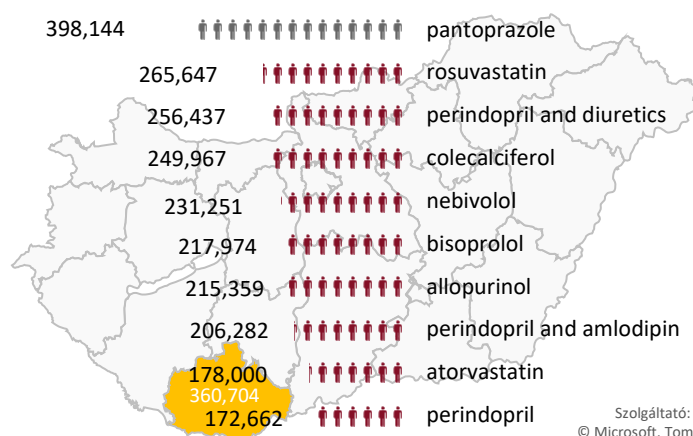
Source: Pharmacy turnover data, Healthware analysis

TOP 10 DOT by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

TOP 10 patient turnover by all reimbursement paid

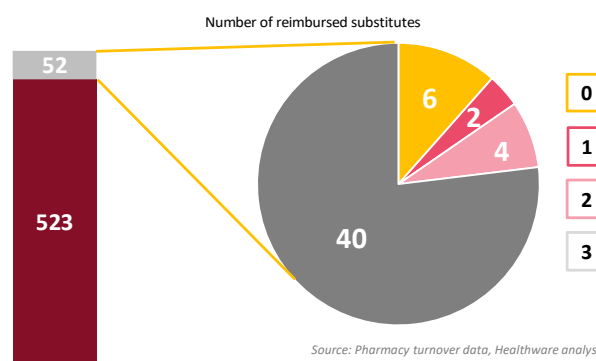


Szolgáltató: Bing
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Source: Pharmacy turnover data, Healthware analysis

Product shortages

The graph shows the distribution of the reimbursed product shortage list. 523 products had been on the list before September 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, September 2025 vs August 2025 in HUF

Ranking	Brand	Reimbursement increment	%*
1	NOVARTIS	205 620 108 HUF	121%
2	Roche	178 429 994 HUF	111%
3	NOVARTIS	138 285 651 HUF	104%
4	sanofi	120 268 295 HUF	102%
5	Roche	97 969 950 HUF	109%
6	Bristol Myers Squibb	97 623 051 HUF	104%
7	janssen Johnson & Johnson	73 400 622 HUF	120%
8	MERCK	64 606 745 HUF	95%
9	AMGEN	63 991 129 HUF	108%
10	SANDOZ	57 510 406 HUF	93%

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