

## News, current issues

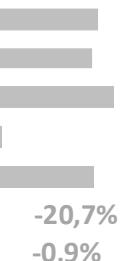
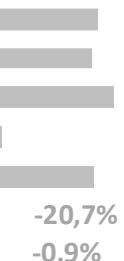
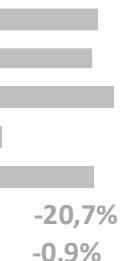
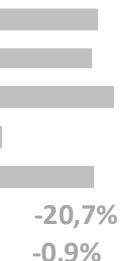
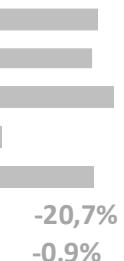
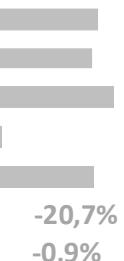
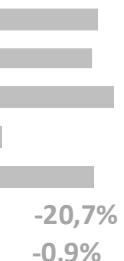
News E-healthcare in Hungary has entered a new phase: millions are already using EgészségAblak — this is now at a European level [>>](#)

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

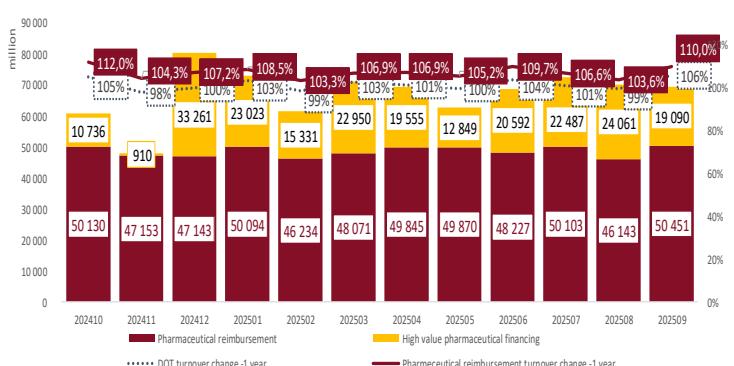
### Balance of the Health Insurance Fund (HUF), September 2025

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%	
<b>Total</b>	<b>69 541 M</b>	<b>-0,9%</b>	

Source: Healthware analysis based on NHIFA data

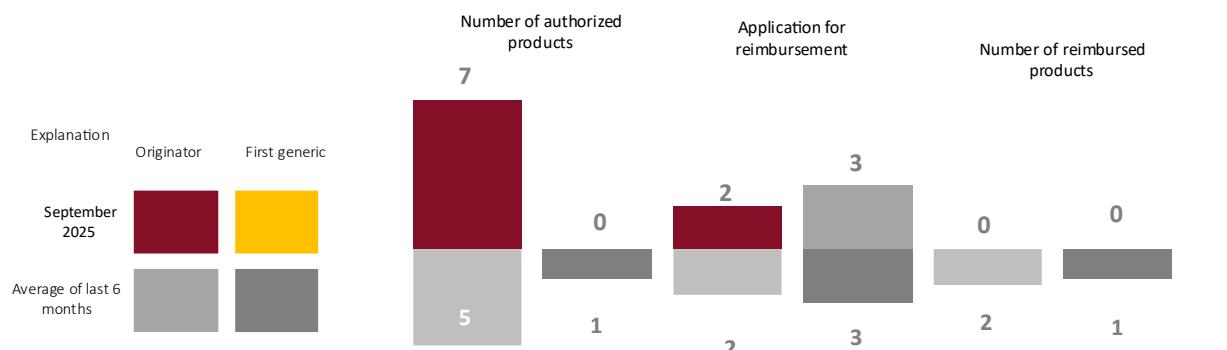
## Dynamics of the sales/circulation of prescription-only-medicine

### Pharmacy DOT turnover

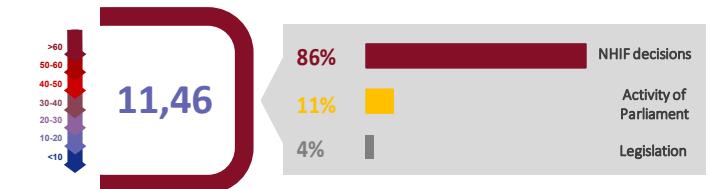


Source: Healthware analysis based on NHIFA data

## Changes to subsidized medicinal product categories, September 2025

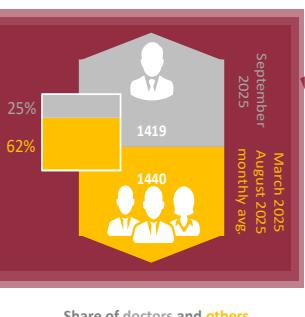


## Decision-making index, September 2025



Methodology

## Average number of medical sales reps



Share of doctors and others

Source: NHIFA data, Healthware analysis

## 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.

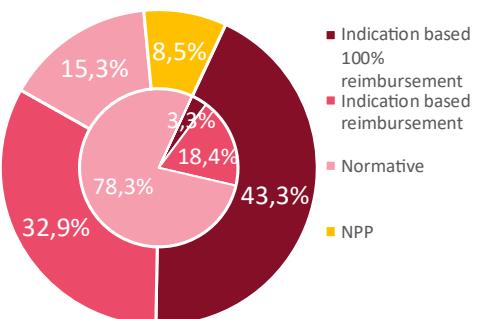
In the framework of regulatory compliance service, immediate alerts December be sent in the form of e-mails about the relevant legal changes along with a report in order to compare the previous state with the amended one and an interpretation, in an intelligible form.

More about the services: [link](#)



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

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

### TOP 10 ATCs by all reimbursement paid

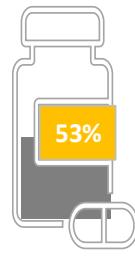
semaglutide	1 819 M HUF
apixaban	1 592 M HUF
enoxaparin	1 351 M HUF
ruxolitinib	1 328 M HUF
adalimumab	1 289 M HUF
other nutrients	971 M HUF
enzalutamide	722 M HUF
inclisiran	701 M HUF
insuline degludec and liraglutid	698 M HUF
rivaroxaban	694 M HUF



Source: Pharmacy turnover data, Healthware analysis

### TOP 10 distributors by all reimbursement paid

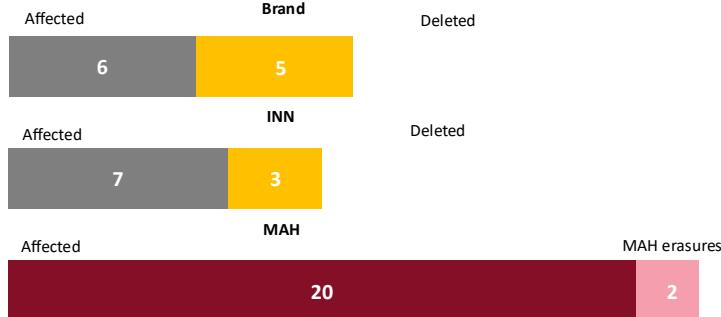
Novartis	5 095 M HUF
Novo	3 459 M HUF
Pfizer	3 101 M HUF
Richter	3 068 M HUF
Sanofi-Aventis	2 509 M HUF
Sandoz	2 472 M HUF
Egis	2 312 M HUF
AstraZeneca	1 625 M HUF
Boehringer	1 536 M HUF
Teva	1 375 M HUF



Source: Pharmacy turnover data, Healthware analysis

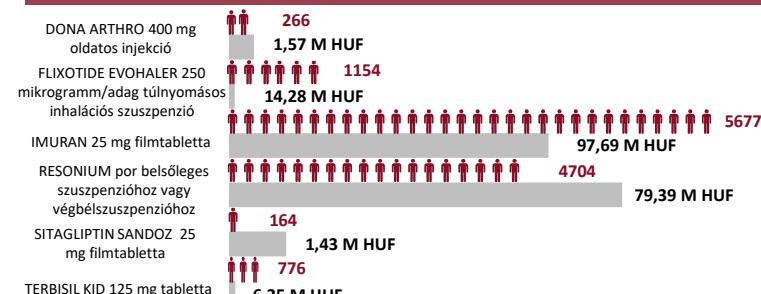
### Substitutable products, September 2025

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

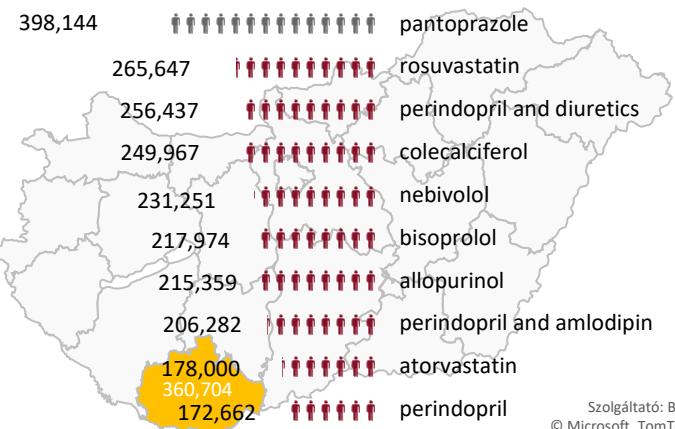
Source: Pharmacy turnover data, Healthware analysis

### TOP 10 DOT by all reimbursement paid

colecalciferol	58,72 M
perindopril and amlodipine	23,24 M
rosuvastatin	22,69 M
pantoprazole	17,28 M
perindopril and diuretics	15,83 M
atorvastatin	10,86 M
ramipril	10,75 M
nebivolol	10,64 M
perindopril	10,14 M
amlodipine	9,86 M

Source: Pharmacy turnover data, Healthware analysis

### TOP 10 patient turnover by all reimbursement paid



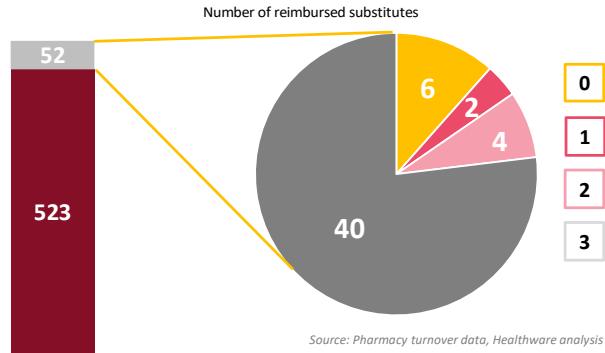
Szolgáltató: Bing

© Microsoft, TomTom

Source: Pharmacy turnover data, Healthware analysis

### Product shortages

The graph shows the distribution of the reimbursed product shortage list. 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 (Roche)	205 620 108 HUF	121%
2	OCREVUS	178 429 994 HUF	111%
3	NOVARTIS (Sanofi)	138 285 651 HUF	104%
4	CLEXANE	120 268 295 HUF	102%
5	OZEMPIC	97 969 950 HUF	109%
6	Bristol Myers Squibb	97 623 051 HUF	104%
7	ERLEADA	73 400 622 HUF	120%
8	MERCK AMGEN	64 606 745 HUF	95%
9	PROLIA	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