Actualities of Hungarian pharmaceutical financing market

News, current issues

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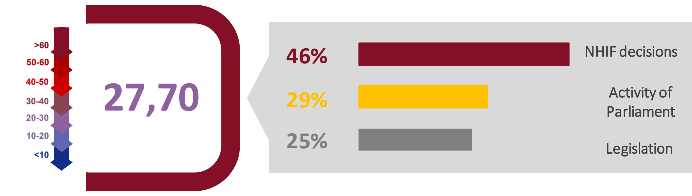
- News — Most doctors agree that cooperation between private and public healthcare should be regulated >>
- News — Hungary's cancer statistics have been rewritten, but the data are still alarmingly poor >>

Decision-making index, October 2025



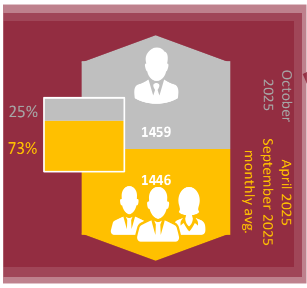
Macro approach to financing healthcare and medicinal products

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

Standard	7 983 M	3,2%
Indication based	16 890 M	1,9%
Indication b. 100%	22 231 M	1,7%
NPP	4 404 M	3,2%
Pharmacy	51 508 M	2,1%
High value	5 459 M	-71,4%
Total	**56 967 M**	-18,1%

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	
-40,59M HUF	
487 609M HUF	114 317M HUF
outturn (expenditure)	outturn (revenue)

Source: Healthware analysis based on NHIFA data

Product offering

Legislation follow up

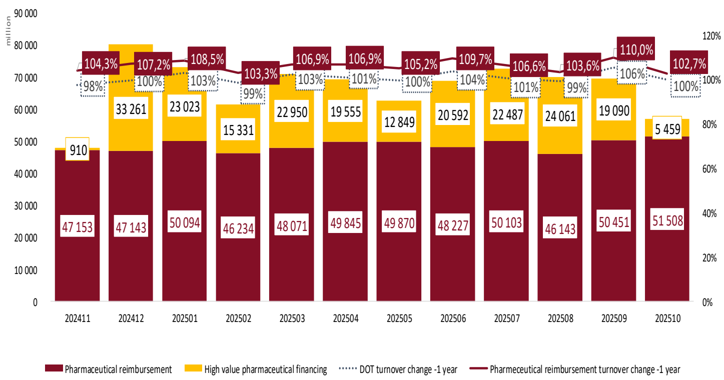
In the recent years Hungarian pharmaceutical market is characterized by rapidly changing and growing number of regulation instruments, as well as constant system transformations. Healthware Regulatory Compliance is a service in order to support companies with up-to date and comprehensive information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

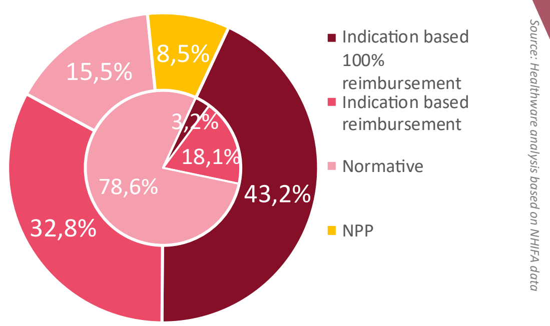
Dynamics of the sales/circulation of prescription-only-medicine

Pharmacy DOT turnover



Source: Healthware analysis based on NHIFA data

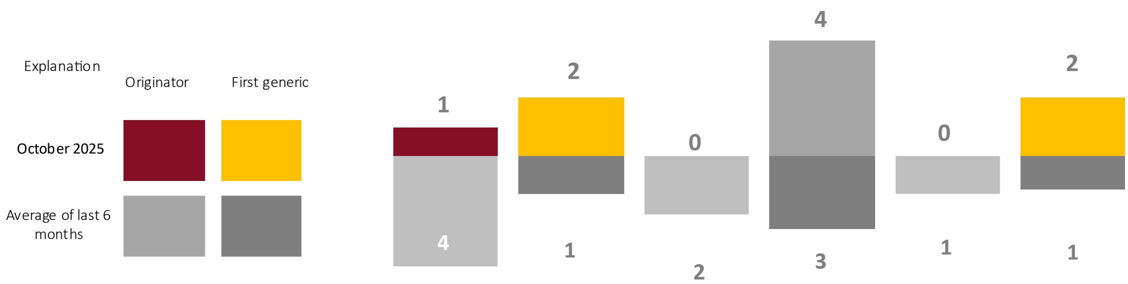
Pharmacy reimbursement turnover



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, October 2025

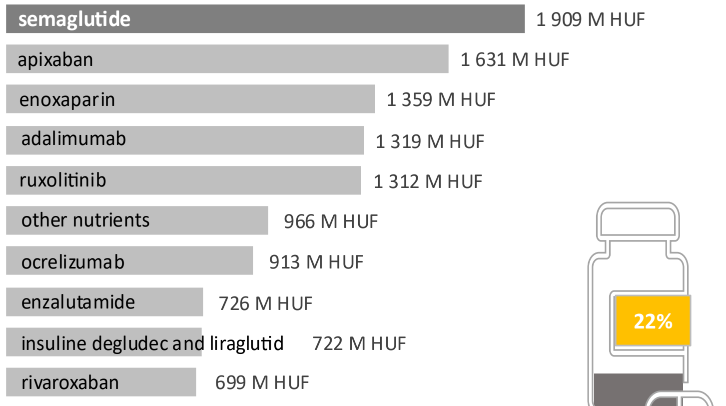


Source: Healthware analysis based on NHIFA data

Healthware Consulting Ltd.
H-1133 Budapest, Váci út 76. 7.em. 2. tor. + 36-1-324-2050

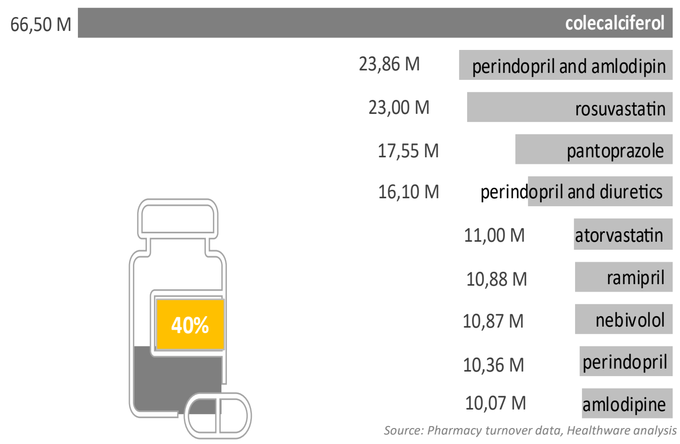
Toplists of reimbursement and number of patients, October 2025

TOP 10 ATCs by all reimbursement paid



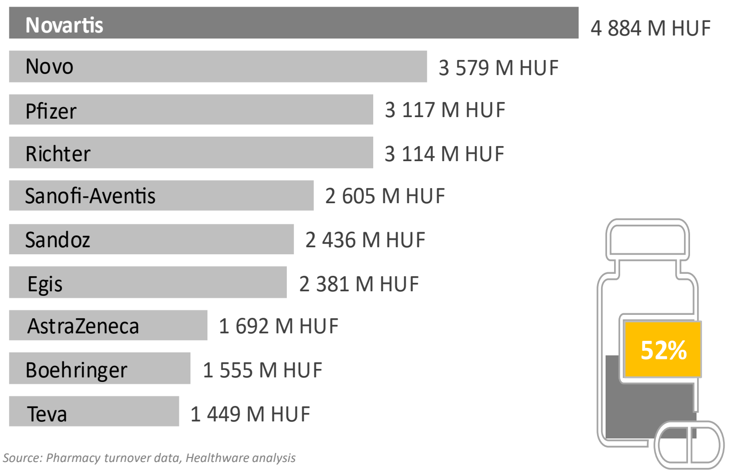
Source: Pharmacy turnover data, Healthware analysis

TOP 10 DOT by all reimbursement paid



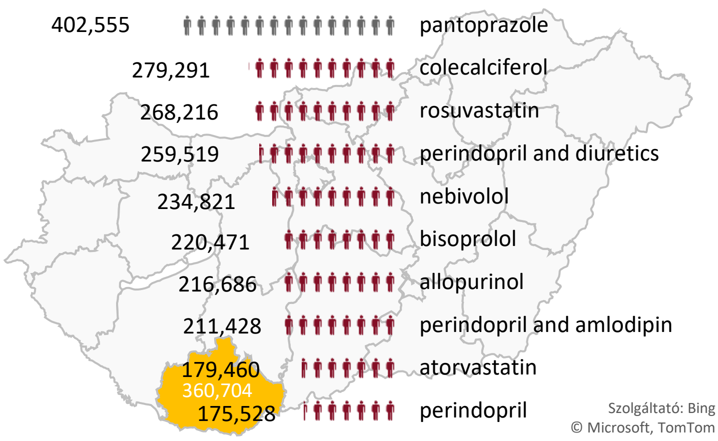
Source: Pharmacy turnover data, Healthware analysis

TOP 10 distributors by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

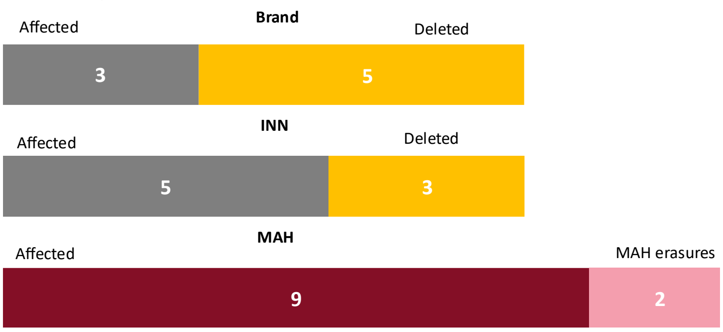
TOP 10 patient turnover by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

Substitutable products, October 2025

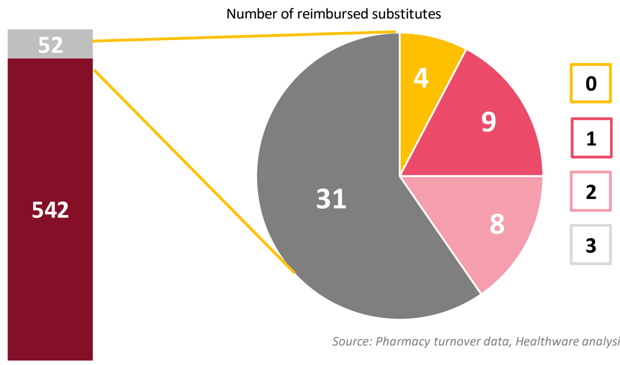
Within product deletions, marketing authorization (MAH) erasures were distinguished.
We also examined the active substances and brands affected in the procedure. These were divided into two groups according to whether the brand or active substance was completely removed from the formulary or whether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



Source: Pharmacy turnover data, Healthware analysis

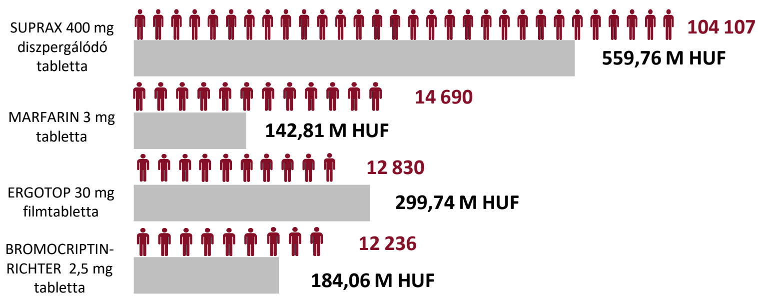
Product shortages

The graph shows the distribution of the reimbursed product shortage list. 542 products had been on the list before October 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

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, October 2025 vs September 2025 in HUF

Ranking		Brand	Reimbursement increment	%*
1	Roche	OCREVUS	227 782 117 HUF	137%
2	Merck	MAVENCLAD	90 438 207 HUF	111%
3	novo nordisk	OZEMPIC	76 354 773 HUF	107%
4	Richter Gedeon	FINGOLIMOD RICHTER	66 014 838 HUF	504%
5	AstraZeneca	KOSELUGO	43 121 831 HUF	104%
6	Bristol Myers Squibb	ELIQUIS	38 630 705 HUF	105%
7	AOP Health	TRESUVI	37 480 080 HUF	112%
8	Lilly	VERZENIOS	34 445 450 HUF	111%
9	IPSEN	CABOMETYX	33 898 370 HUF	108%
10	Janssen	ERLEADA	31 997 066 HUF	120%

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