Actualities of Hungarian pharmaceutical financing market

Newsletter
No. 4 Issue XIII. 2025
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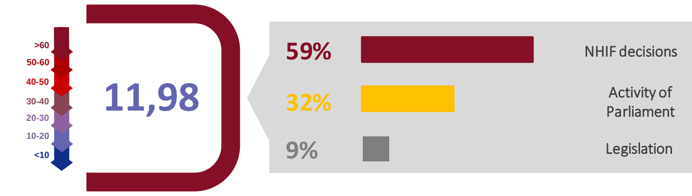
News, current issues

News Hungarians are frustrated by the state of the healthcare system >>

News Champagne was opened at the NEAK – a new era in healthcare financing begins >>

News A new waiting list protocol has been introduced >>

Decision-making index, February 2025



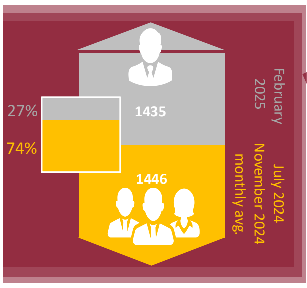
Macro approach to financing healthcare and medicinal products

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

Standard	7 594 M	-2,3%
Indication based	14 872 M	-4,2%
Indication b. 100%	19 453 M	-2,0%
NPP	4 315 M	7,5%
Pharmacy	46 234 M	-1,9%
High value	15 331 M	-53,9%
Total	**61 565 M**	-23,4%

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

-12,03M HUF

95 020M HUF	25 931M HUF
outturn (expenditure)	outturn (revenue)

Source: Healthware analysis based on NHIFA data

Product offering

Legislation follow up

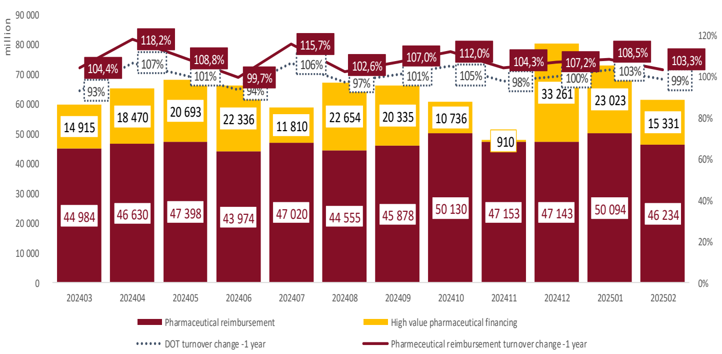
In the recent years Hungarian pharmaceutical market is characterized by rapidly changing and growing number of regulation instruments, as well as constant system transformations. Healthware Regulatory Compliance is a service in order to support companies with up-to date and comprehensive information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

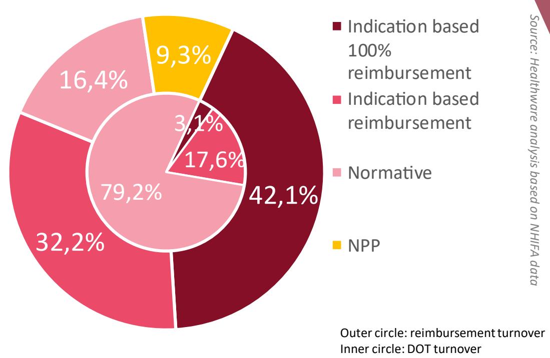
Dynamics of the sales/circulation of prescription-only-medicine

Pharmacy DOT turnover



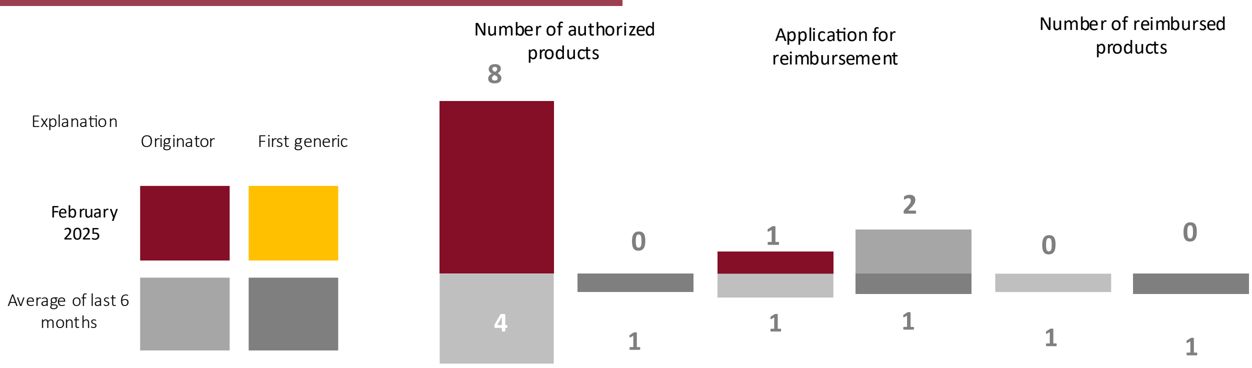
Source: Healthware analysis based on NHIFA data

Pharmacy reimbursement turnover



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

Changes to subsidized medicinal product categories, February 2025



Source: Healthware analysis based on NHIFA data

HEALTHWARE

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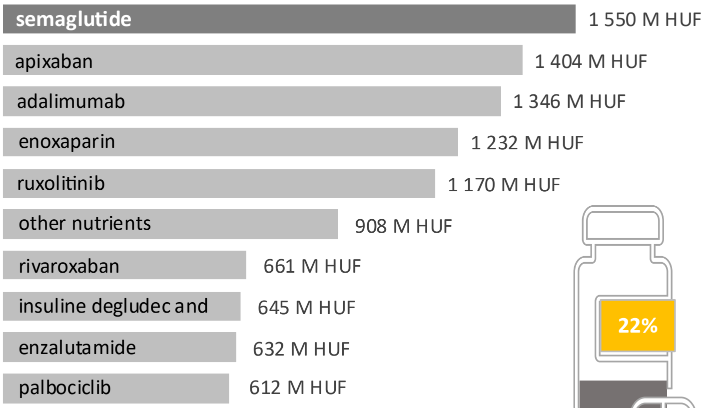
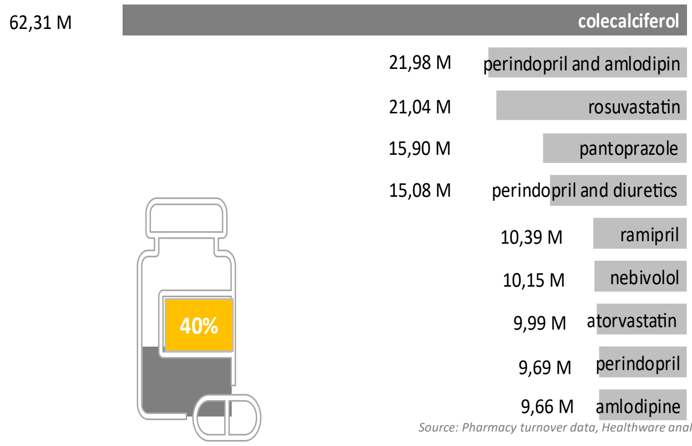
Toplists of reimbursement and number of patients, February 2025

TOP 10 ATCs by all reimbursement paid



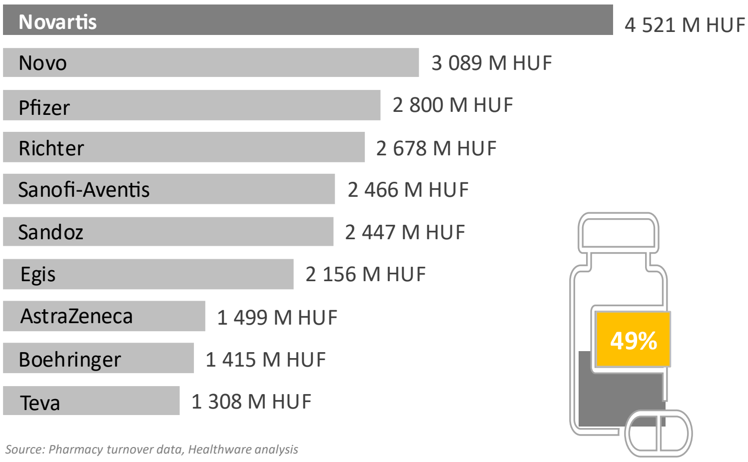
Source: Pharmacy turnover data, Healthware analysis

TOP 10 DOT by all reimbursement paid



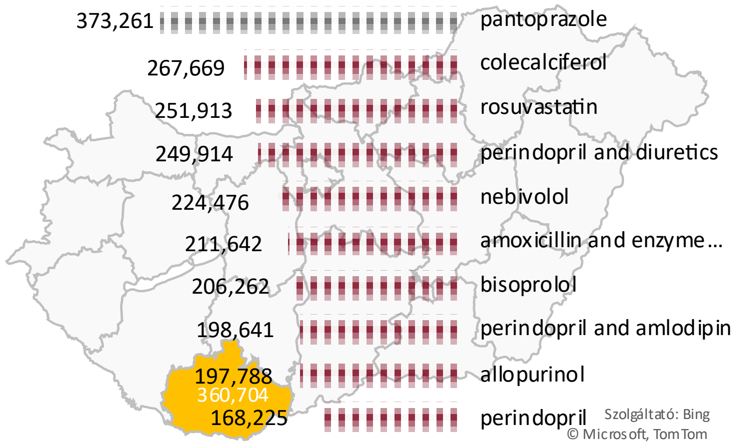
Source: Pharmacy turnover data, Healthware analysis

TOP 10 distributors by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

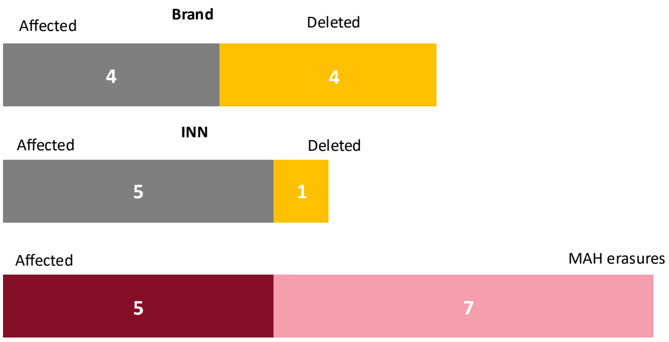
TOP 10 patient turnover by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

Substitutable products, February 2025

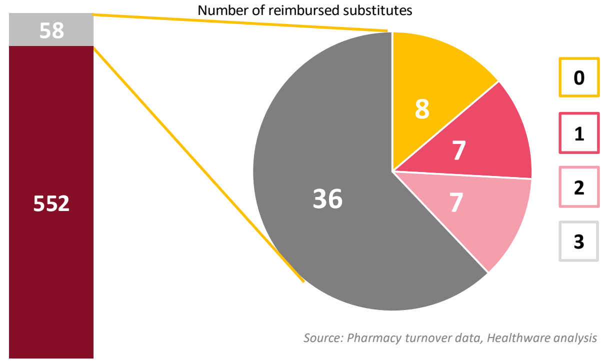
Within product deletions, marketing authorization (MAH) erasures were distinguished.
We also examined the active substances and brands affected in the procedure. These were divided into two groups according to whether the brand or active substance was completely removed from the formulary or whether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



Source: Pharmacy turnover data, Healthware analysis

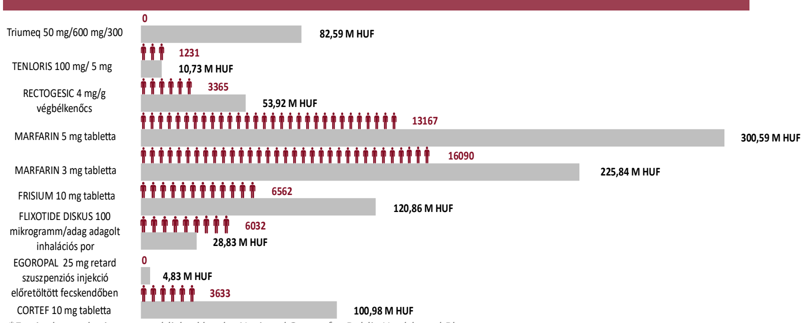
Product shortages

The graph shows the distribution of the reimbursed product shortage list. 552 products had been on the list before February 2025, compared to 58 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, February 2025 vs January 2025 in HUF

Ranking		Brand	Reimbursement increment	%*
1	Roche	ERIVEDGE	45 396 084 HUF	134%
2	sanofi	LEMTRADA	30 726 670 HUF	276%
3	CHEPLAPHARM	LOKREN	27 771 984 HUF	137%
4	Bristol Myers Squibb	CAMZYOS	27 709 817 HUF	328%
5	SANDOZ	ESOMEPRAZOL SANDOZ	26 389 035 HUF	133%
6	Jazz Pharmaceuticals	EPIDYOLEX	21 509 036 HUF	127%
7	biocryst	ORLADEYO	18 498 716 HUF	386%
8	Pfizer	VYNDAQEL	18 370 657 HUF	119%
9	Incyte	ICLUSIG	17 343 666 HUF	136%
10	NOVARTIS	SCEMBLIX	13 674 752 HUF	720%

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

Source: Pharmacy turnover data, Healthware analysis