

## News, current issues

- News How much do Hungarians pay out of pocket for their healthcare? >>
- News The foundation supporting access to high-cost medicines has caught up with the backlog; applications are now assessed within 60 days >>
- News Péter Álmos on the current challenges of physicians' mental health >>

## Macro approach to financing healthcare and medicinal products

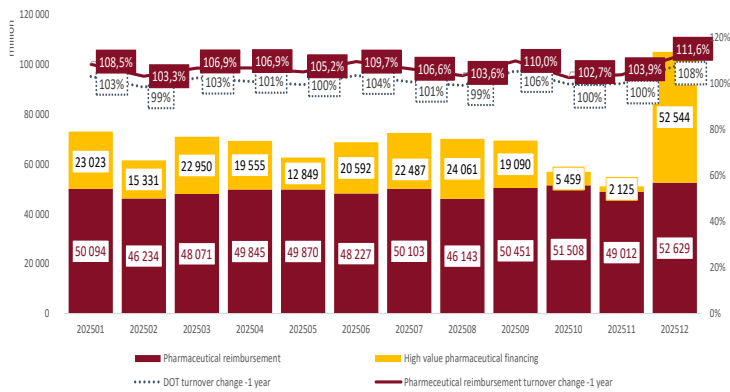
### Balance of the Health Insurance Fund (HUF), December 2025

Standard	8 311 M	8,8%
Indication based	17 584 M	8,4%
Indication b. 100%	22 054 M	5,4%
NPP	4 680 M	10,7%
Pharmacy	52 629 M	7,4%
High value	52 544 M	2373,2%
<b>Total</b>	<b>105 173 M</b>	<b>105,7%</b>

Source: Healthware analysis based on NHIFA data

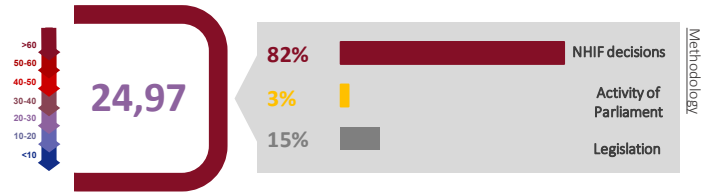
## Dynamics of the sales/circulation of prescription-only-medicine

### Pharmacy DOT turnover

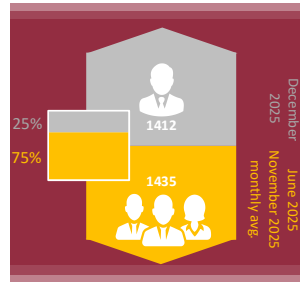


Source: Healthware analysis based on NHIFA data

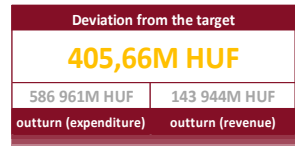
## Decision-making index, December 2025



## Average number of medical sales reps

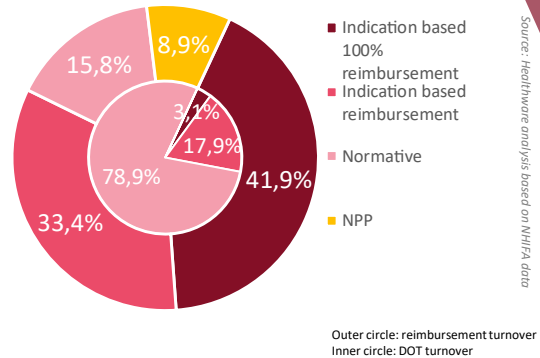


Share of doctors and others  
Source: NHIFA data, Healthware analysis



Source: Healthware analysis based on NHIFA data

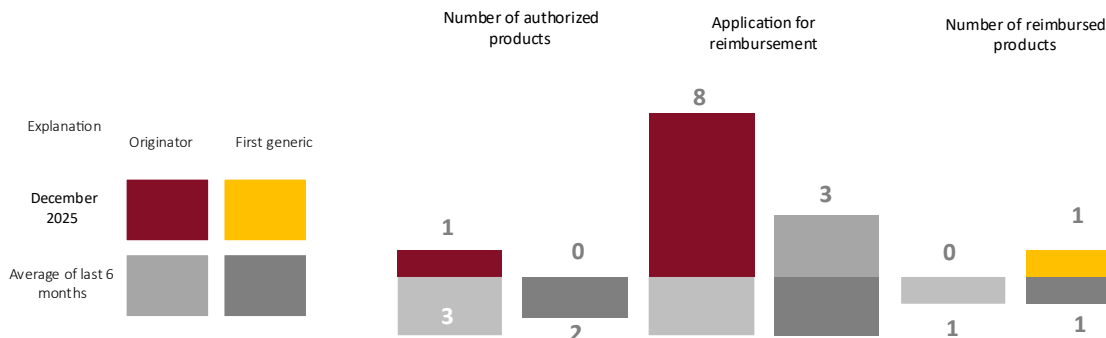
## Pharmacy reimbursement turnover



Source: Healthware analysis based on NHIFA data

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

## Changes to subsidized medicinal product categories, December 2025



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.

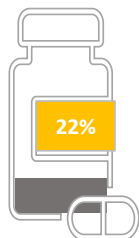
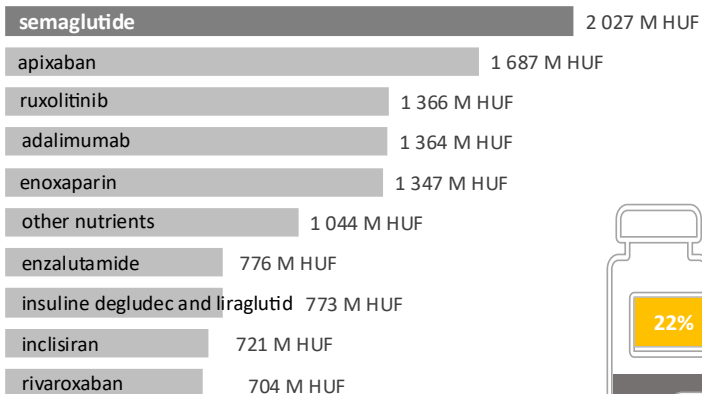
In the framework of regulatory compliance service, immediate alerts December be sent in the form of e-mails about the relevant legal changes along with a report in order to compare the previous state with the amended one and an interpretation, in an intelligible form.

More about the services: [link](#)



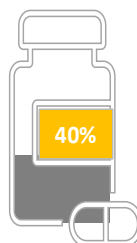
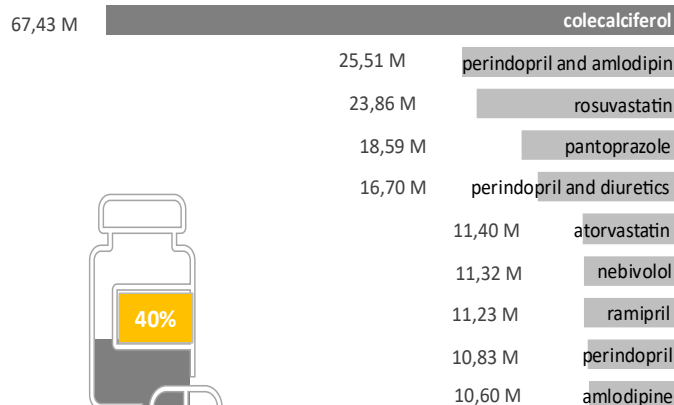
## Toplists of reimbursement and number of patients, December 2025

### TOP 10 ATCs by all reimbursement paid



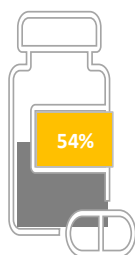
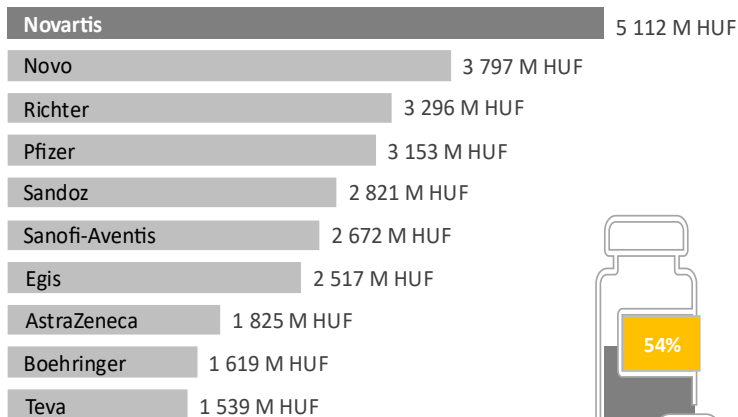
Source: Pharmacy turnover data, Healthware analysis

### TOP 10 DOT by all reimbursement paid



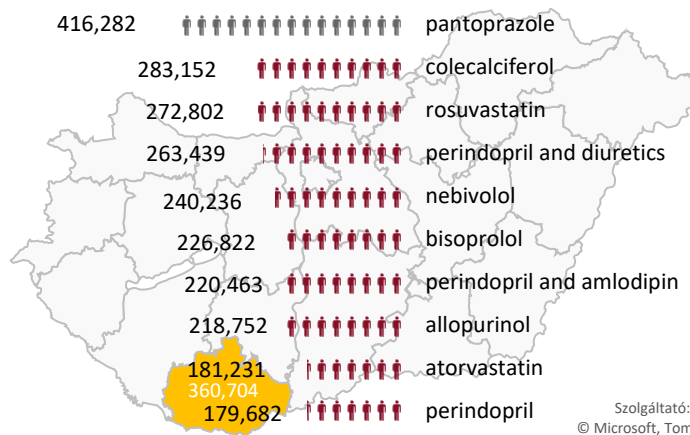
Source: Pharmacy turnover data, Healthware analysis

### TOP 10 distributors by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

### TOP 10 patient turnover by all reimbursement paid

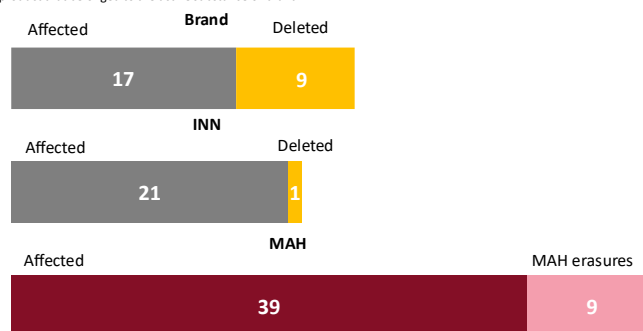


Szolgáltató: Bing  
© Microsoft, TomTom

Source: Pharmacy turnover data, Healthware analysis

## Substitutable products, December 2025

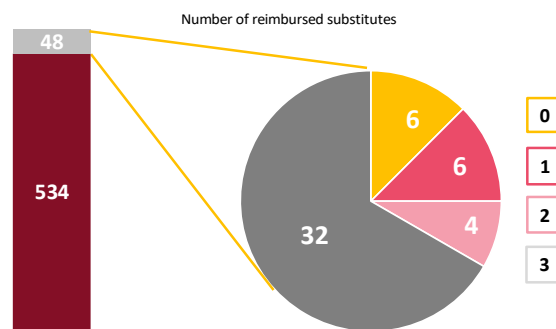
Within product deletions, marketing authorization (MAH) erasures were distinguished. We also examined the active substances and brands affected in the procedure. These were divided into two groups according to whether the brand or active substance was completely removed from the formulary or whether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



Source: Pharmacy turnover data, Healthware analysis

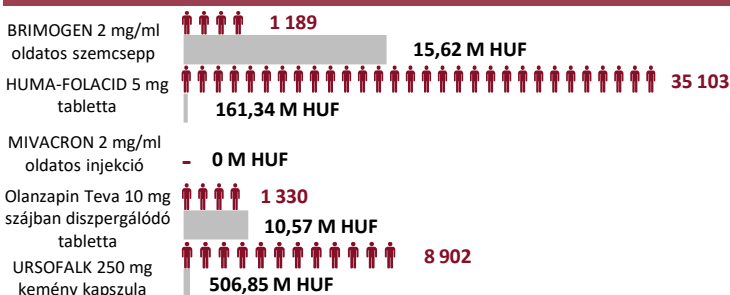
## Product shortages

The graph shows the distribution of the reimbursed product shortage list. 534 products had been on the list before December 2025, compared to 48 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, December 2025 vs November 2025 in HUF

Ranking	Brand	Reimbursement increment	%*
1	OZEMPIC	132 218 445 HUF	121%
2	Bristol Myers Squibb ELIQUIS	125 126 758 HUF	107%
3	NOVARTIS JAKAVI	115 059 089 HUF	106%
4	Janssen ERLEADA	87 520 507 HUF	121%
5	XULTOPHY	86 372 156 HUF	110%
6	AstraZeneca KOSELUGO	81 931 768 HUF	121%
7	SANDOZ HYRIMOZ	75 891 074 HUF	104%
8	Lilly VERZENIOS	69 280 765 HUF	116%
9	RYBELSUS	68 795 832 HUF	101%
10	teva ATORVASTATIN TEVA	67 333 164 HUF	376%

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