

News, current issues

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- News** The government has taken a drastic step: tens of billions are being allocated to settle hospital debts >>

Macro approach to financing healthcare and medicinal products

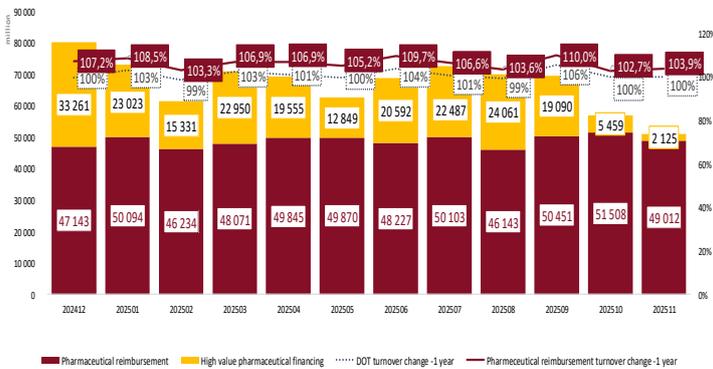
Balance of the Health Insurance Fund (HUF), November 2025

Standard	7 637 M	-4,3%	
Indication based	16 216 M	-4,0%	
Indication b. 100%	20 930 M	-5,9%	
NPP	4 229 M	-4,0%	
Pharmacy	49 012 M	-4,8%	
High value	2 125 M	-61,1%	
Total	51 137 M	-10,2%	

Source: Healthware analysis based on NHIFA data

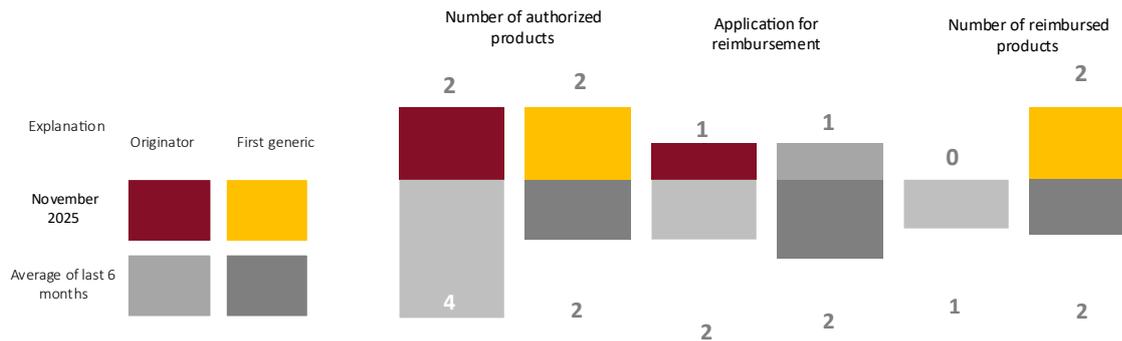
Dynamics of the sales/circulation of prescription-only-medicine

Pharmacy DOT turnover



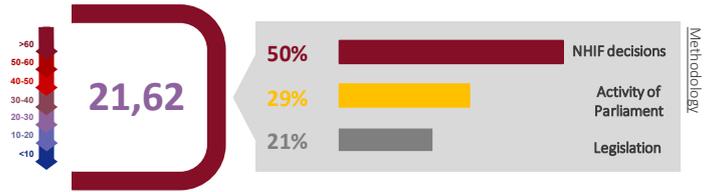
Source: Healthware analysis based on NHIFA data

Changes to subsidized medicinal product categories, November 2025



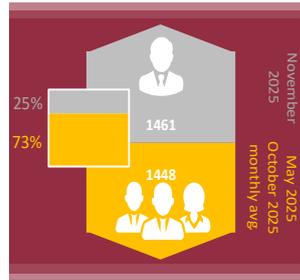
Source: Healthware analysis based on NHIFA data

Decision-making index, November 2025



Methodology

Average number of medical sales reps

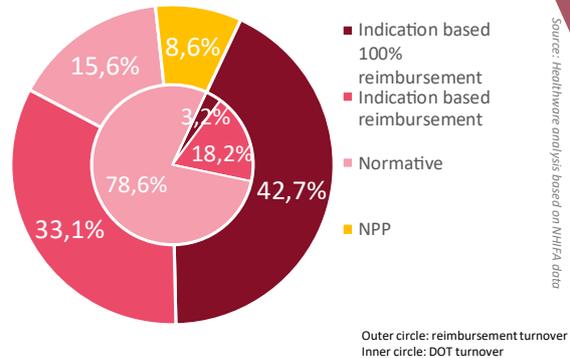


Share of doctors and others
Source: NHIFA data, Healthware analysis

Deviation from the target	
-27,09M HUF	
523 760M HUF	135 238M HUF
outturn (expenditure)	outturn (revenue)

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

More about the services: [link](#)

Product offering

Legislation follow up

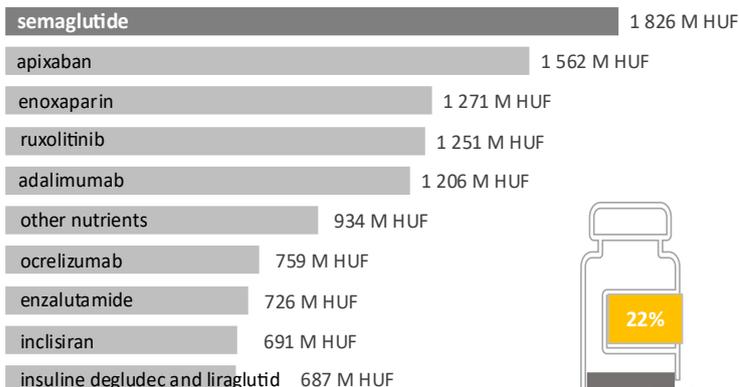
In the recent years Hungarian pharmaceutical market is characterized by rapidly changing and growing number of regulation instruments, as well as constant system transformations. Healthware Regulatory Compliance is a service in order to support companies with up-to date and comprehensive information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



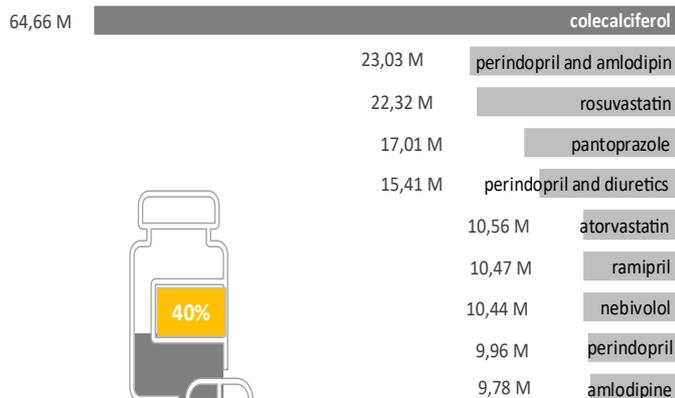
Toplists of reimbursement and number of patients, November 2025

TOP 10 ATCs by all reimbursement paid



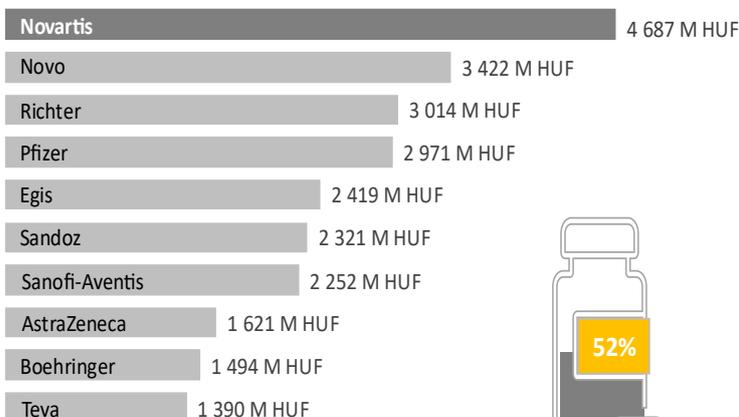
Source: Pharmacy turnover data, Healthware analysis

TOP 10 DOT by all reimbursement paid



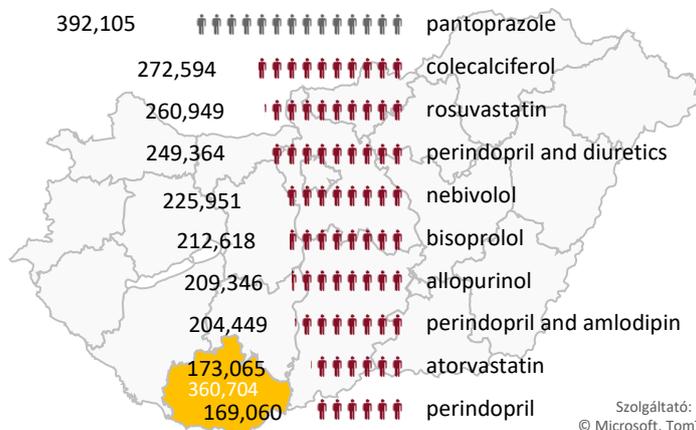
Source: Pharmacy turnover data, Healthware analysis

TOP 10 distributors by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

TOP 10 patient turnover by all reimbursement paid

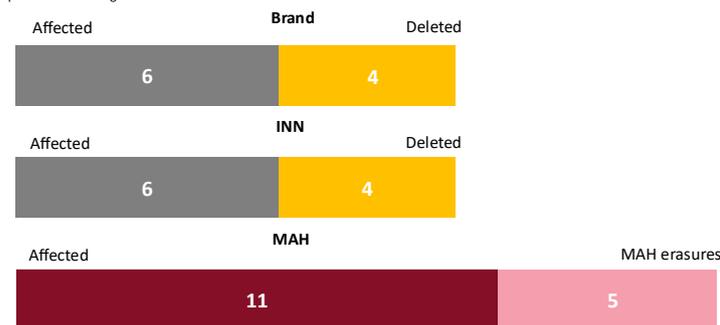


Szolgáltató: Bing
© Microsoft, TomTom

Source: Pharmacy turnover data, Healthware analysis

Substitutable products, November 2025

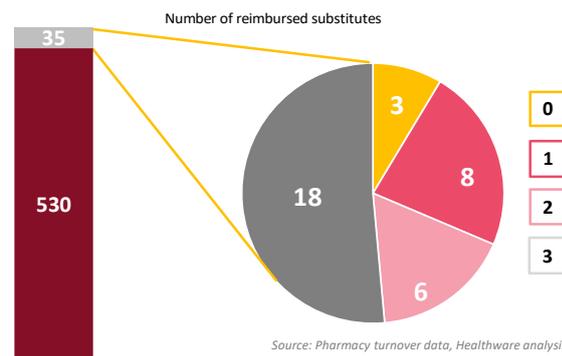
Within product deletions, marketing authorization (MAH) erasures were distinguished. We also examined the active substances and brands affected in the procedure. These were divided into two groups according to whether the brand or active substance was completely removed from the formulary or whether 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. 530 products had been on the list before November 2025, compared to 35 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, November 2025 vs October 2025 in HUF

Ranking	Brand	Reimbursement increment	%*
1	teva	ATORVASTATIN TEVA	52 190 217 HUF 414%
2	CHEW	HEPAXANE	38 135 829 HUF 280%
3	Leadiant	CHENODEOXYCHOLIC ACID LEADIANT	35 716 030 HUF 179%
4	Pfizer	MYLOTARG	34 921 026 HUF 166%
5	Lilly	JAYPIRCA	28 915 283 HUF 176%
6	NOVARTIS	RYDAPT	19 311 336 HUF 138%
7	Bristol Myers Squibb	INREBIC	19 177 473 HUF 117%
8	RICHTER GEDEON	TERROSA	19 117 890 HUF 109%
9	sanofi	LEMTRADA	18 908 720 HUF 110%
10	amb	FINTEPLA	18 764 504 HUF 107%

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