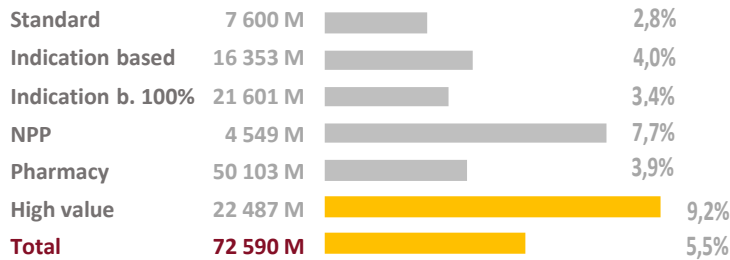


News, current issues

- News** Trump has decided: a 100 percent tariff will be imposed on medicines >>
- News** Hungarians hold a bleak view of mental illness and its perception >>
- News** According to Péter Takács, the wording of the government decree is misleading — from October, patients will not need to request a referral twice >>

Macro approach to financing healthcare and medicinal products

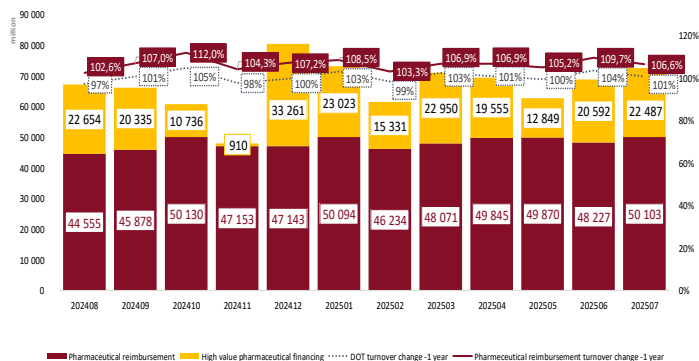
Balance of the Health Insurance Fund (HUF), July 2025



Source: Healthware analysis based on NHIFA data

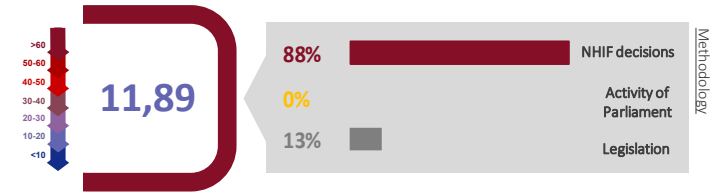
Dynamics of the sales/circulation of prescription-only-medicine

Pharmacy DOT turnover

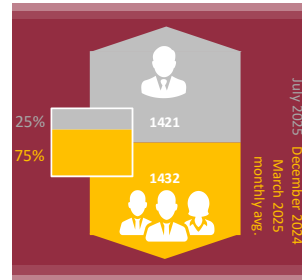


Source: Healthware analysis based on NHIFA data

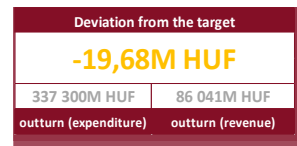
Decision-making index, July 2025



Average number of medical sales reps



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



Source: Healthware analysis based on NHIFA data

Product offering

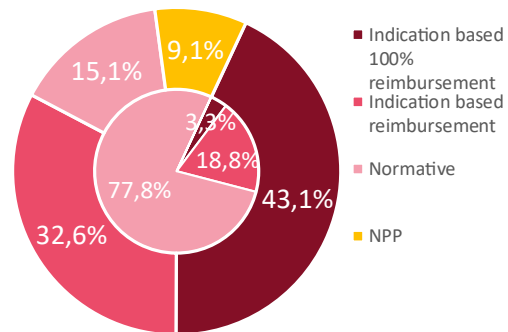
Legislation follow up

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](#)

Pharmacy reimbursement turnover

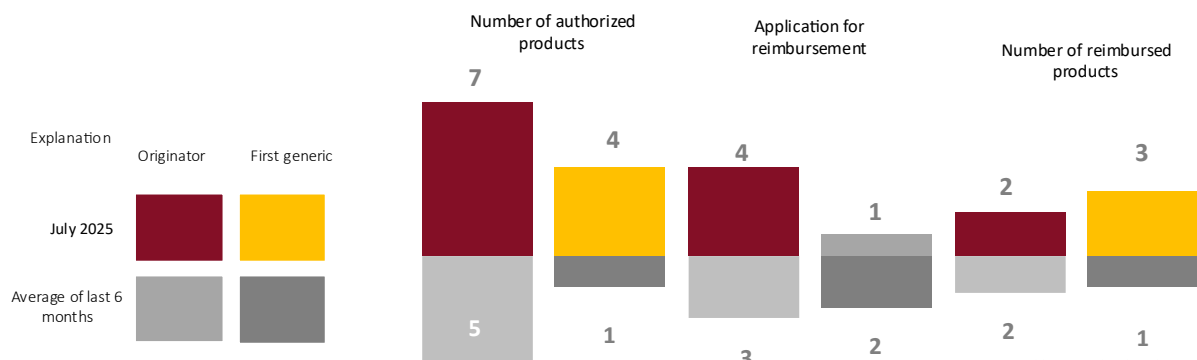


Source: Healthware analysis based on NHIFA data

Outer circle: reimbursement turnover
Inner circle: DOT turnover

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

Changes to subsidized medicinal product categories, July 2025

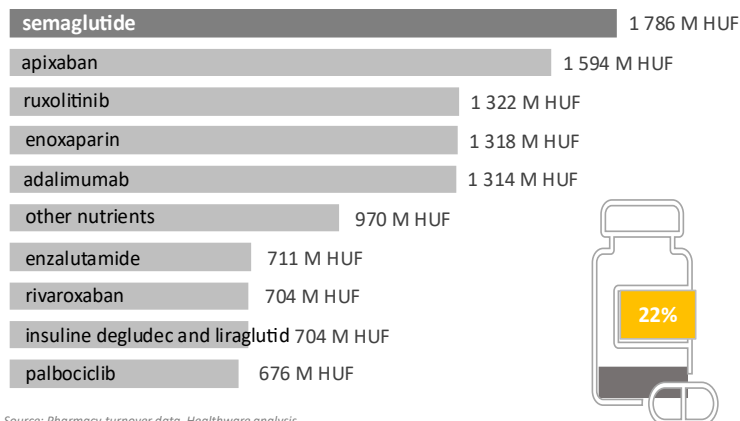


Source: Healthware analysis based on NHIFA data



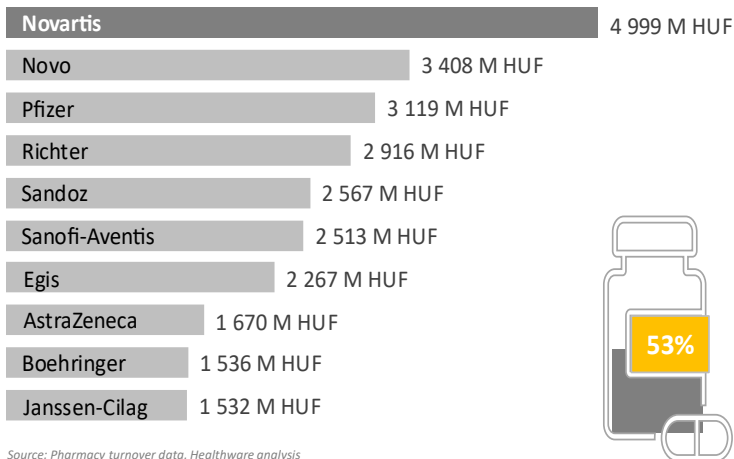
Toplists of reimbursement and number of patients, July 2025

TOP 10 ATCs by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

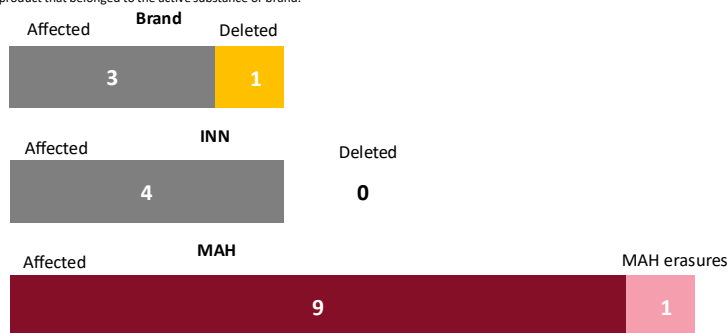
TOP 10 distributors by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

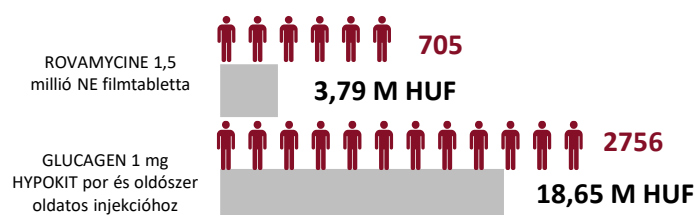
Substitutable products, July 2025

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**

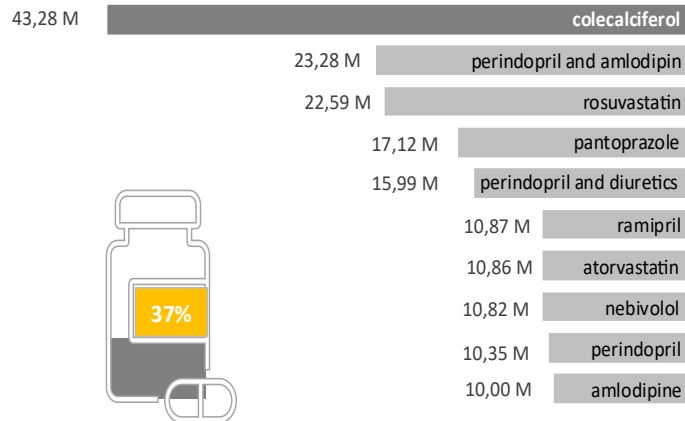


*Equivalent substitutes established by the National Centre for Public Health and Pharmacy

**Turnover in the 12 months preceding the product shortage

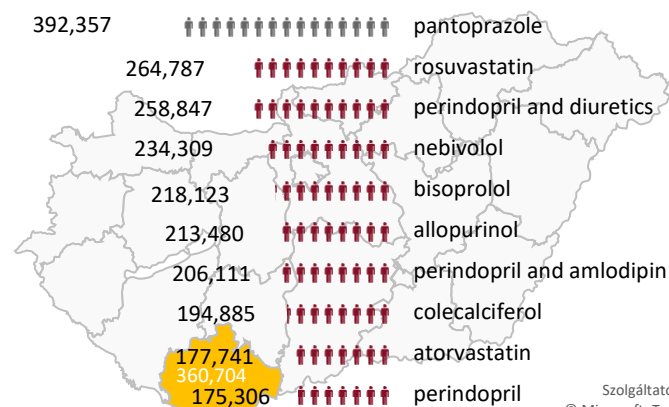
Source: Pharmacy turnover data, Healthware analysis

TOP 10 DOT by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

TOP 10 patient turnover by all reimbursement paid

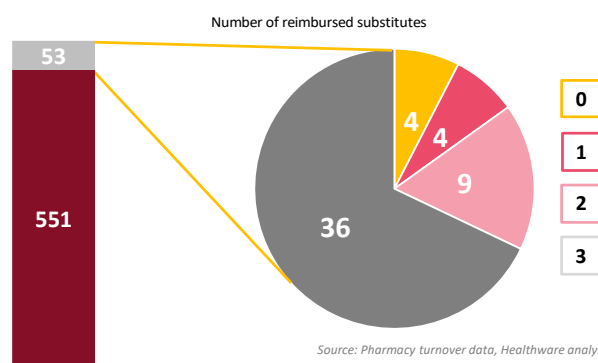


Szolgáltató: Bing
© Microsoft, TomTom

Source: Pharmacy turnover data, Healthware analysis

Product shortages

The graph shows the distribution of the reimbursed product shortage list. 551 products had been on the list before July 2025, compared to 53 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, July 2025 vs June 2025 in HUF

Ranking	Brand	Reimbursement increment	%*
1	 Bristol Myers Squibb	ELIQUIS	73 139 068 HUF 106%
2	 NOVORAPID	NOVORAPID	65 832 160 HUF 113%
3	 Pfizer	IBRANCE	61 281 440 HUF 105%
4	 AstraZeneca	KOSELUGO	56 069 077 HUF 101%
5	 NOVARTIS	KISQALI	55 199 000 HUF 108%
6	 NOVARTIS	JAKAVI	50 216 567 HUF 104%
7	 sanofi	DUPIXENT	48 508 062 HUF 105%
8	 janssen	ERLEADA	47 996 349 HUF 125%
9	 AstraZeneca	FASENRA	45 493 536 HUF 115%
10	 lect	FINTEPLA	45 468 537 HUF 124%

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