Actualities of Hungarian pharmaceutical financing market

Newsletter
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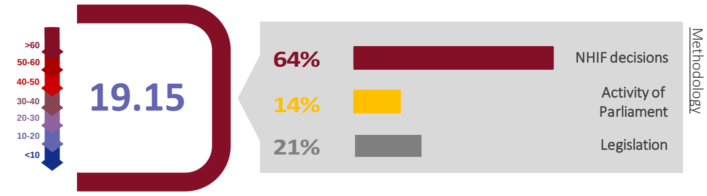
News, current issues

News — Primary care in Hungary: GP shortages, few new doctors, soaring specialist referrals >>

News — Incredible waste: hundreds of millions end up in the trash every month >>

News — Hospital debt: ten billion forints in overdue liabilities still unsettled >>

Decision-making index, January 2025



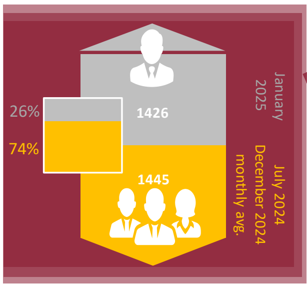
Macro approach to financing healthcare and medicinal products

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

Standard	8 100 M	4,3%
Indication based	15 916 M	2,6%
Indication b. 100%	21 675 M	9,2%
NPP	4 402 M	9,7%
Pharmacy	50 094 M	6,3%
High value	23 023 M	-30,8%
Total	**73 117 M**	-9,1%

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	
-5,10M HUF	
45 148M HUF	11 523M HUF
outturn (expenditure)	outturn (revenue)

Source: Healthware analysis based on NHIFA data

Product offering

Legislation follow up

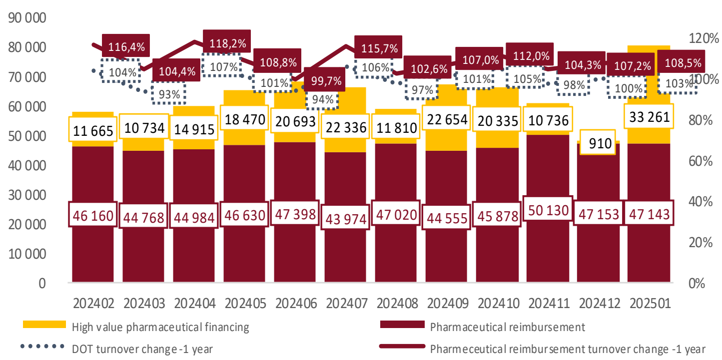
In the recent years Hungarian pharmaceutical market is characterized by rapidly changing and growing number of regulation instruments, as well as constant system transformations. Healthware Regulatory Compliance is a service in order to support companies with up-to date and comprehensive information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

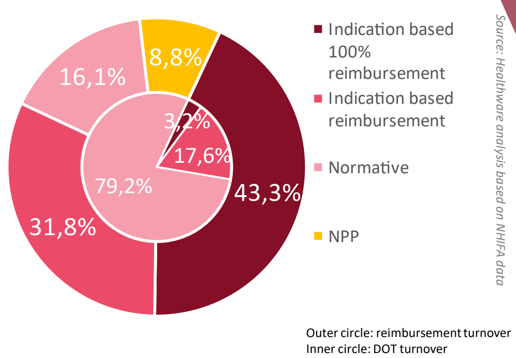
Dynamics of the sales/circulation of prescription-only-medicine

Pharmacy DOT turnover



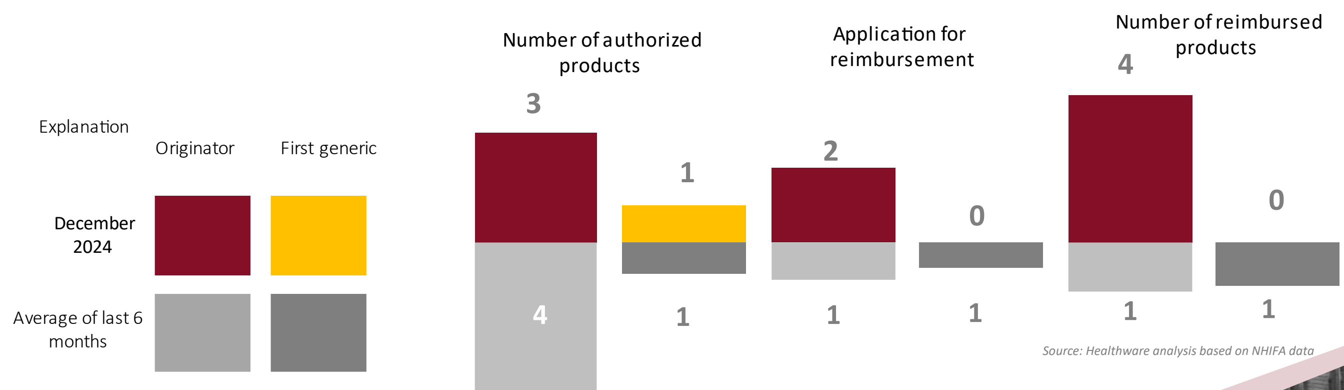
Source: Healthware analysis based on NHIFA data

Pharmacy reimbursement turnover



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

Changes to subsidized medicinal product categories, January 2025



Source: Healthware analysis based on NHIFA data

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HEALTHWARE
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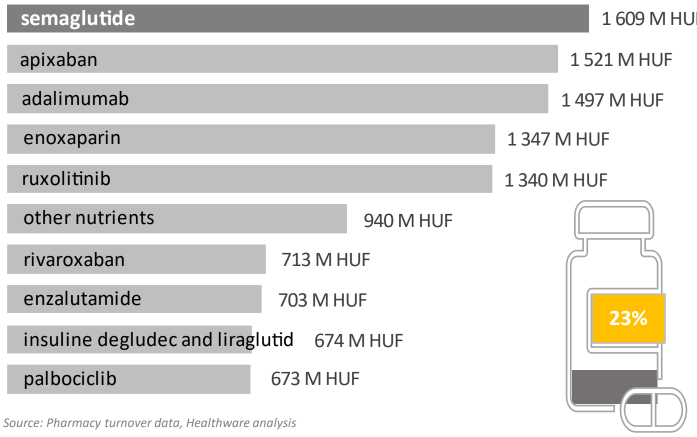
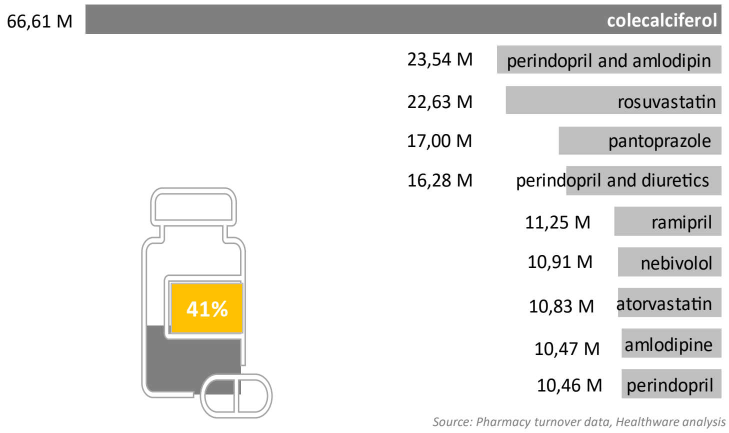
Toplists of reimbursement and number of patients, January 2025

TOP 10 ATCs by all reimbursement paid



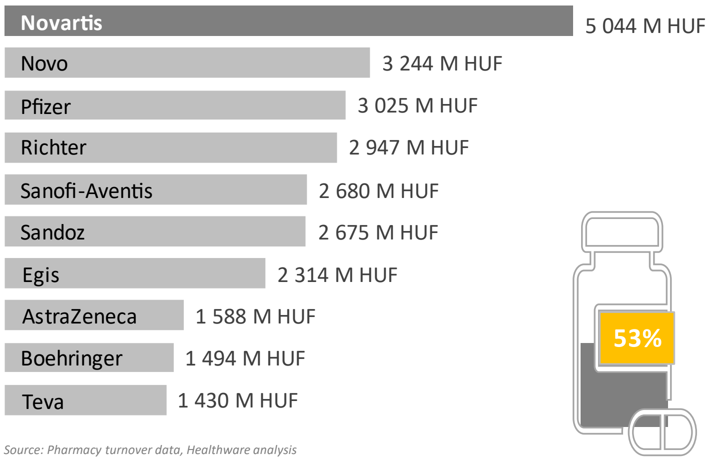
Source: Pharmacy turnover data, Healthware analysis

TOP 10 DOT by all reimbursement paid



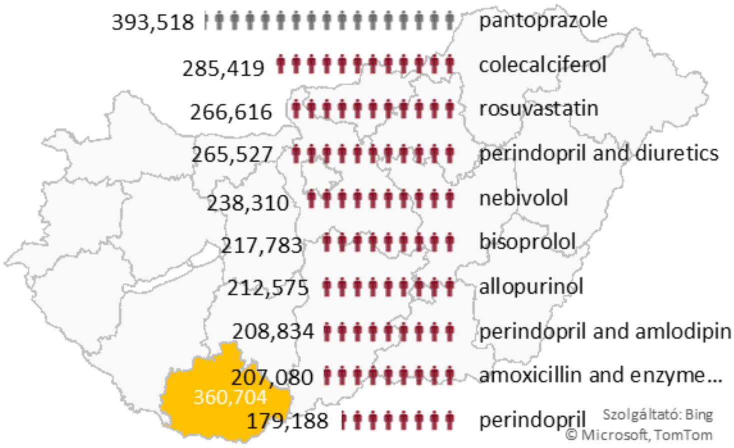
Source: Pharmacy turnover data, Healthware analysis

TOP 10 distributors by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

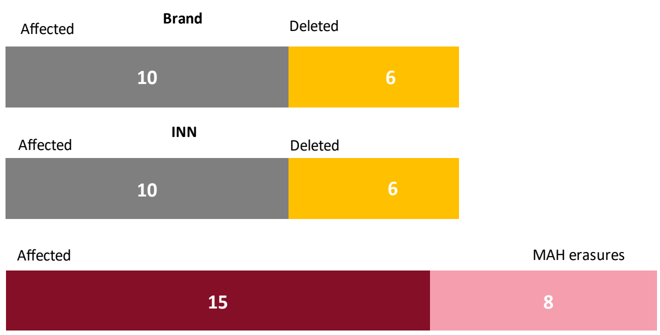
TOP 10 patient turnover by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

Substitutable products, January 2025

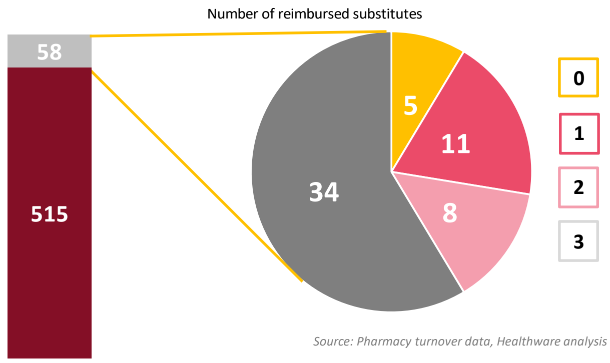
Within product deletions, marketing authorization (MAH) erasures were distinguished.
We also examined the active substances and brands affected in the procedure. These were divided into two groups according to whether the brand or active substance was completely removed from the formulary or whether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



Source: Pharmacy turnover data, Healthware analysis

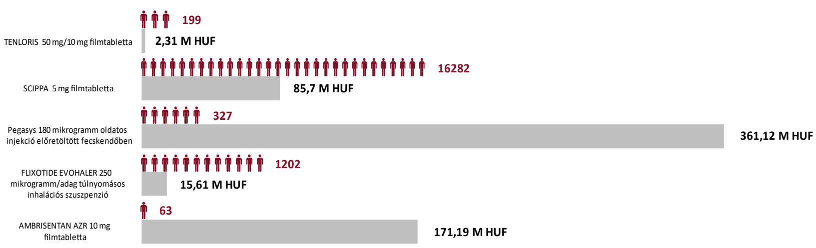
Product shortages

The graph shows the distribution of the reimbursed product shortage list. 515 products had been on the list before January 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, January 2025 vs December 2024 in HUF

Ranking		Brand	Reimbursement increment	%*
1	Roche	OCREVUS	126 673 499 HUF	134%
2	NOVARTIS	JAKAVI	88 676 730 HUF	109%
3	MEDISON	LIBTAYO	85 174 528 HUF	122%
4	sanofi	CLEXANE	78 707 044 HUF	103%
5	NOVARTIS	LEQVIO	77 109 228 HUF	129%
6	FERRING	REKOVELLE	72 236 356 HUF	117%
7	SANDOZ	HYRIMOZ	69 242 079 HUF	105%
8	Theramex	OVALEAP	68 946 844 HUF	124%
9	MERCK	PERGOVERIS	65 278 220 HUF	122%
10	Pfizer	IBRANCE	65 113 365 HUF	104%

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

Source: Pharmacy turnover data, Healthware analysis