# Actualities of Hungarian pharmaceutical financing market

Newsletter
No. 1 Issue XI. 2023
Published: 09/02/2023

## News, current issues

- News — NHIF: average funding is abolished »
- News — Minister of State for Health: change of system, new financing system in the health sector »
- News — What causes the drug shortage and when will it end? »

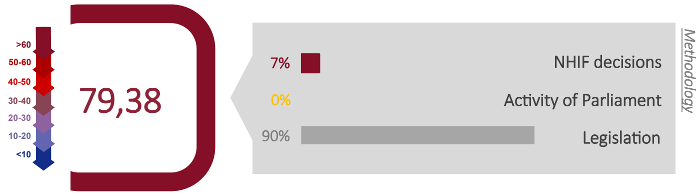
## Macro approach to financing healthcare and medicinal products

### Balance of the Health Insurance Fund, November 2022

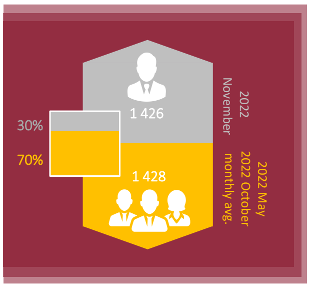
| | | |
|---|---|---|
| Standard | 7 298 M | 2,9% |
| Indication based reimb. | 13 430 M | 6,8% |
| Indication based 100% reimb. | 14 941 M | -7,3% |
| NPP | 3 119 M | 2,3% |
| High value | 12 845 M | 5,2% |
| Pharmacy | 38 787 M | 8,6% |
| Total | 51 632 M | 8,8% |

*Source: Healthware analysis based on NHIFA data*

## Decision-making index, November 2022




## Average number of medical sales reps




Share of doctors and others

*Source: NHIFA data, Healthware analysis*

| Deviation from the target | |
|---|---|
| 26 421 M | |
| 398 885 M | 110 150 M |
| outturn (expenditure) | outturn (revenue) |

*Source: Healthware analysis based on NHIFA data*

## Product offering

**Legislation follow up**

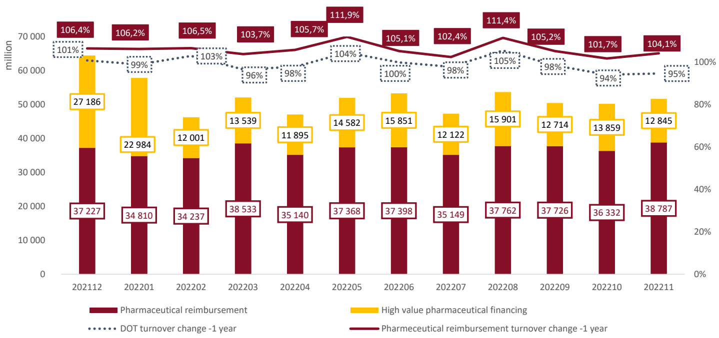
In the recent years Hungarian pharmaceutical market is characterized by rapidly changing and growing number of regulation instruments, as well as constant system transformations. Healthware Regulatory Compliance is a service in order to support companies with up-to date and comprehensive information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

In the framework of regulatory compliance service, immediate alerts may 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

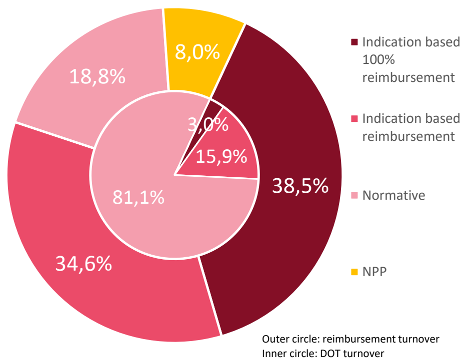
## Dynamics of the sales/circulation of prescription-only-medicine

### Pharmacy DOT turnover




*Source: Healthware analysis based on NHIFA data*

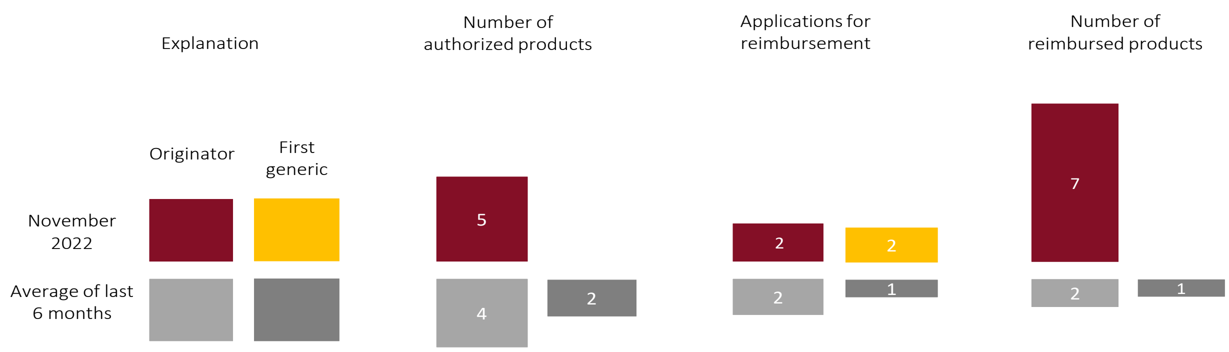
### Pharmacy reimbursement turnover




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

*Source: Healthware analysis based on NHIFA data*

## Changes to subsidized medicinal product categories, November 2022




*Source: Healthware analysis based on NHIFA data*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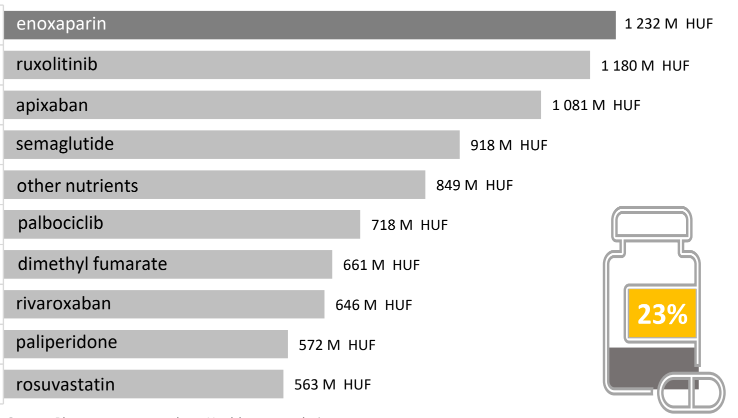
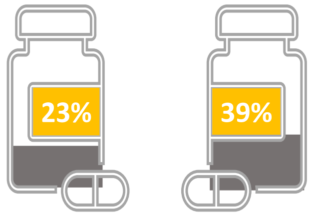
## Toplists of reimbursement and number of patients, November 2022

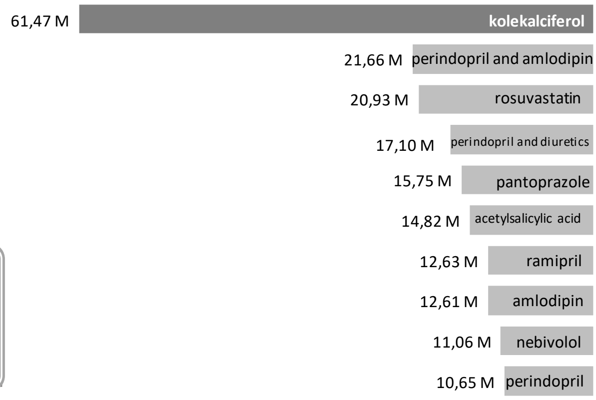
### TOP 10 ATCs by all reimbursement paid



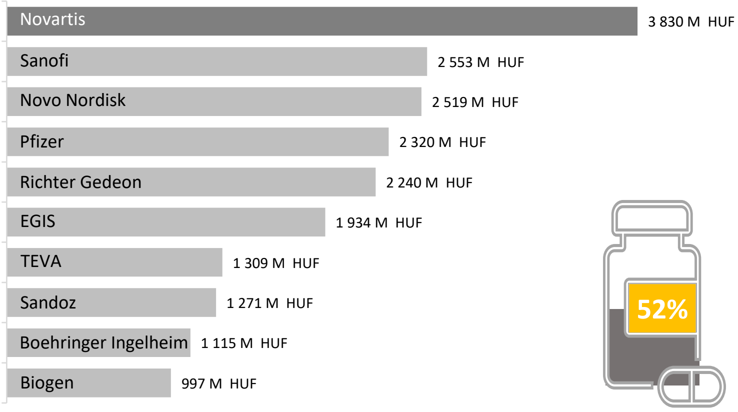

*Source: Pharmacy turnover data, Healthware analysis*

### TOP 10 DOT by all reimbursement paid



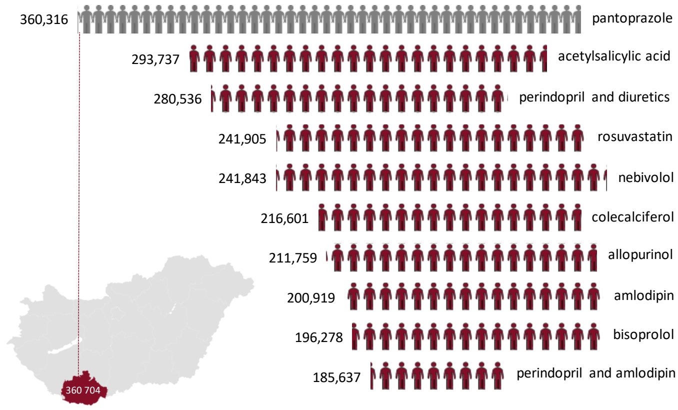

*Source: Pharmacy turnover data, Healthware analysis*

### TOP 10 distributors by all reimbursement paid




*Source: Pharmacy turnover data, Healthware analysis*

### TOP 10 patient turnover by all reimbursement paid

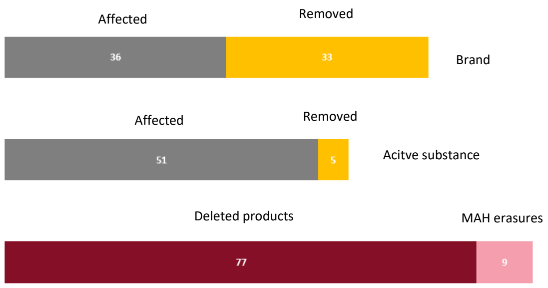



*Source: Pharmacy turnover data, Healthware analysis*

## Deleted products, November 2022

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.

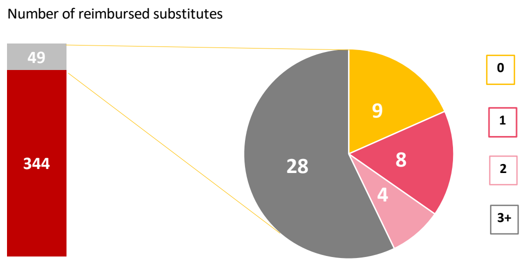



*Source: Pharmacy turnover data, Healthware analysis*

## Product shortages

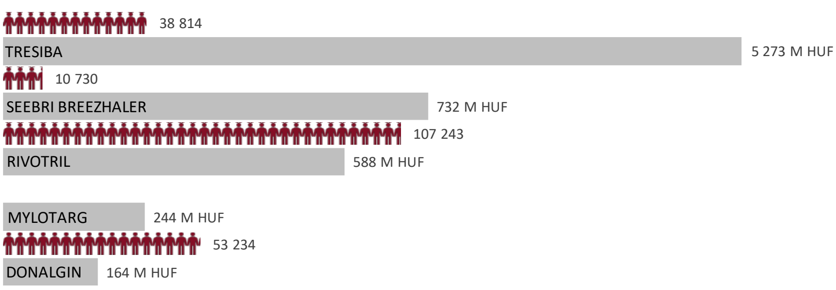
The graph shows the distribution of the reimbursed product shortage list. 344 products had been on the list before November 2022, compared to 49 new product added to the list in the month under review.

The 49 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 a substitute*




**Turnover in the 12 months preceding the product shortage*
*Source: Pharmacy turnover data, Healthware analysis*

## Highest growth, November 2022 vs. 6-month average

| Ranking | Brand | Reimbursement |
|---|---|---|
| 1 | RYBELSUS | 122 661 187 HUF |
| 2 | JAKAVI | 101 238 904 HUF |
| 3 | ELIQUIS | 88 347 411 HUF |
| 4 | KOSELUGO | 49 365 153 HUF |
| 5 | KISQALI | 49 335 358 HUF |
| 6 | POLIVY | 45 520 834 HUF |
| 7 | ZARZIO | 45 290 093 HUF |
| 8 | VITAMIN D3 | 43 160 539 HUF |
| 9 | XULTOPHY | 38 099 796 HUF |
| 10 | MILUMIL | 37 172 458 HUF |

*Source: Pharmacy turnover data, Healthware analysis*