HEALTHWARE

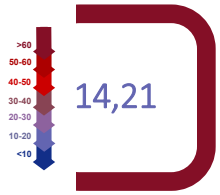
Actualities of Hungarian pharmaceutical financing market

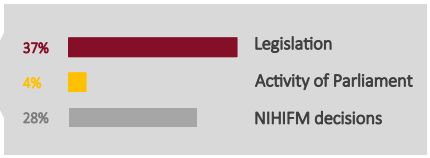
Newsletter
No. 7, Issue VII. 2019
Published: 08/08/2019

News, current issues

- News: More severe shortage of medicines than it appears from the official list »
- News: First innovative pharmaceutical overview: good at professionals but reimbursement system should be changed »
- News: New deputy secretary of state at EMMI »

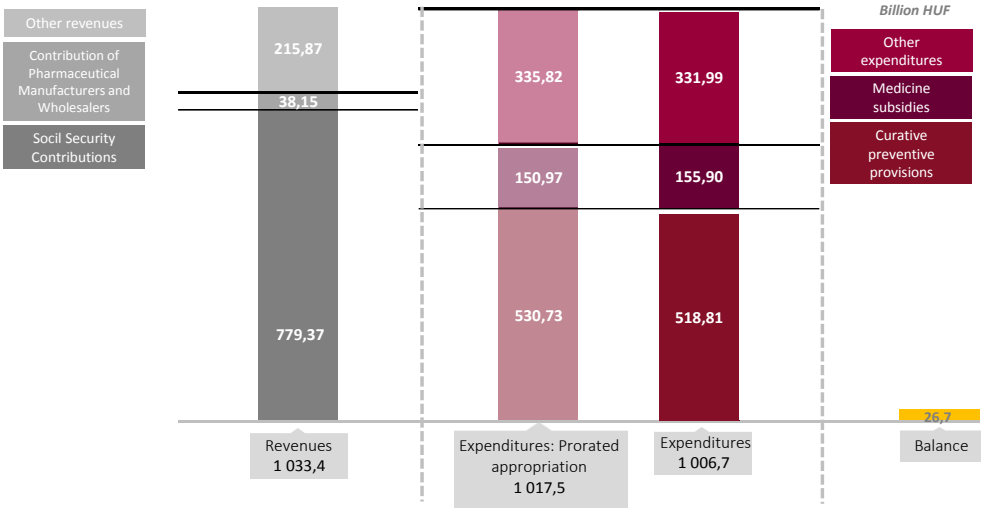
Decision-making index, May 2019





Macro approach to financing healthcare and medicinal products

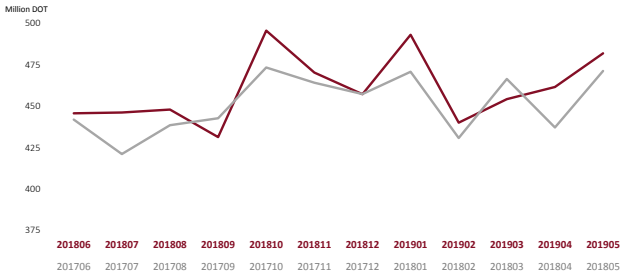
Balance of the Health Insurance Fund, May 2019



Source: Healthware analysis based on NHIFA data

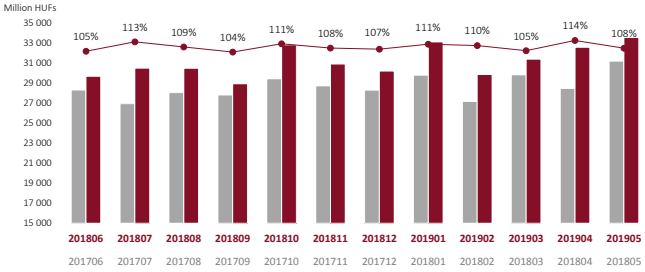
Dynamics of the sales/circulation of prescription-only-medicine

Pharmacy DOT turnover



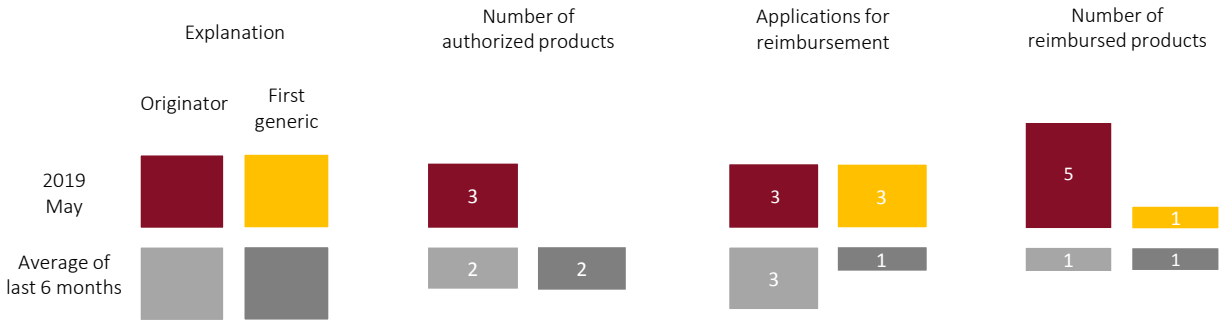
Source: Healthware analysis based on NHIFA data

Pharmacy reimbursement turnover



Source: Healthware analysis based on NHIFA data

Changes to subsidized medicinal product categories, May 2019



Source: Healthware analysis based on NHIFA data

Product offering

Budget impact simulation models

Illness/subgroup-specific budget impact analysis that reflect the actual uses, and simulation platforms built upon these analysis are becoming more important role in domestic acceptance mechanism.

The simulation models built on National Health Insurance data offer well understood and controllable dimension for the expected budget impact calculations for the decision maker.

More about the service: **link**

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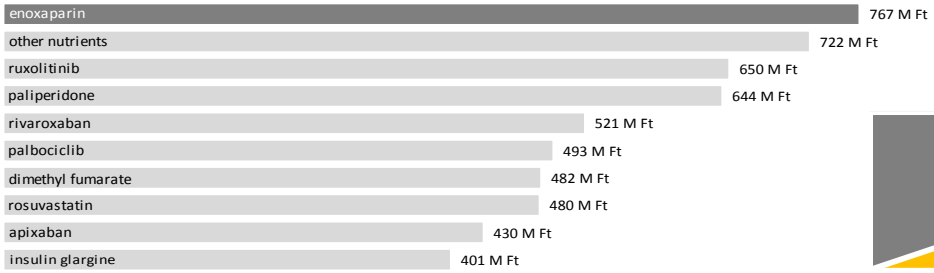
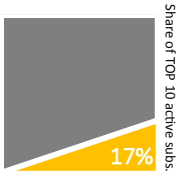
Market data

Toplists of reimbursement and number of patients, May 2019

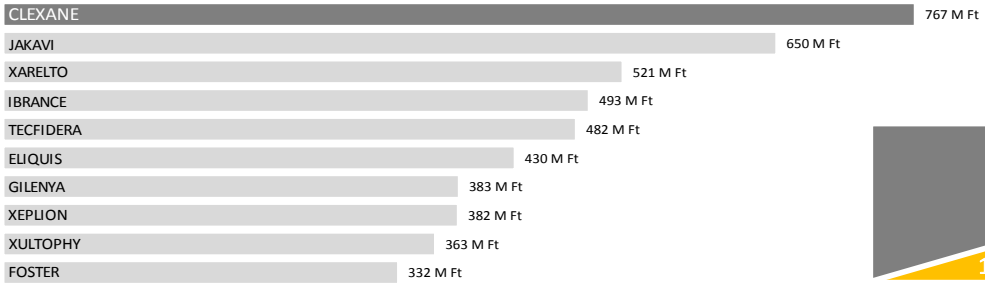
TOP 10 ATCs by all reimbursement paid





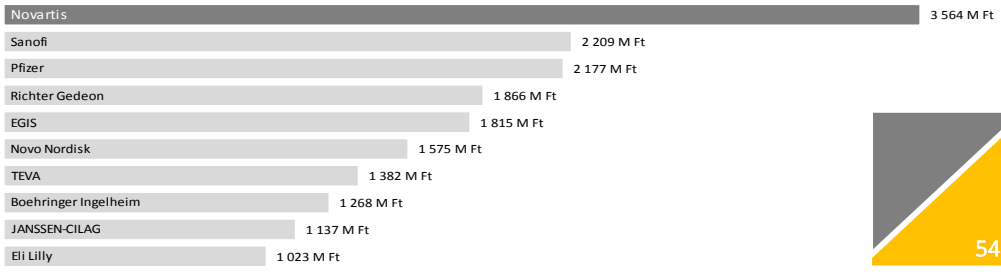
Source: Pharmacy turnover data, Healthware analysis

TOP 10 brands by all reimbursement paid



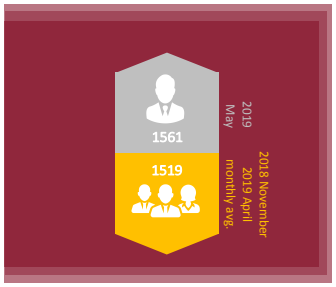
Source: Pharmacy turnover data, Healthware analysis

TOP 10 distributors by all reimbursement paid



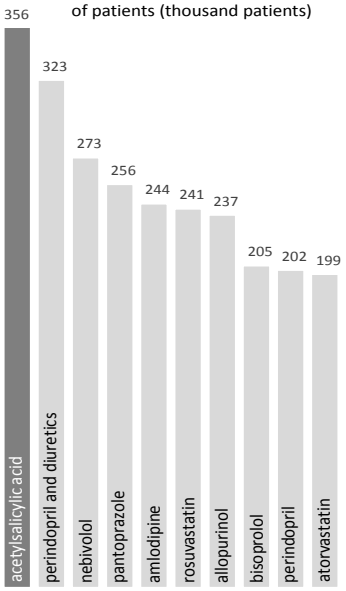
Source: Pharmacy turnover data, Healthware analysis

Average number of medical sales reps



Source: NHIFA data, Healthware analysis

TOP 10 active substances by number of patients (thousand patients)



Source: Pharmacy turnover data, Healthware analysis

Analysis of the ongoing submission procedures — case study

Our last special edition examines the new, typically innovative pharmaceutical technologies that have been submitted but do not yet make the final decision by the National Health Insurance Fund of Hungary (NHIFA) and Ministry of Human Capacities (MoHC). This analysis has been updated with the 11-month event since the previous report and focuses only on the technologies that passed the standard 90 days period and bases on the data published by the NHIFA on July 19, 2019.

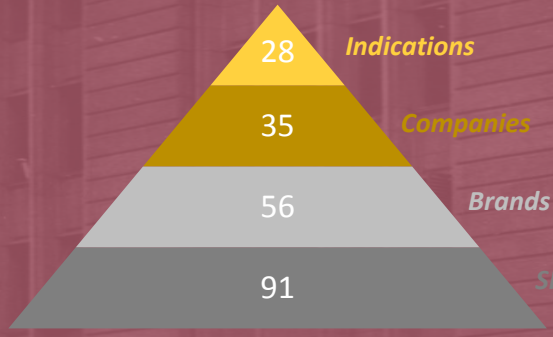
During the NHIFA co-ordinated period, the financing structure for the technology will be determined on the basis of submitted and agreed HTA, BIA and medical considerations. The final decision is taken by a Committee coordinated by the Ministry. Actual timelines of ongoing procedures are the following:

- 58% are waiting for the final decision more than 90 days.
- NHIFA made a positive preliminary decision on 60% of the submissions.
- The average procedure time of the analyzed products is 289 days (min-max: 94 and 878 days).
- The average procedure time of NHIFA is 221 days (min-max: 24 and 605 days).
- The average procedure time of MoHC is 86 days (min-max: 35 and 278 days).
- 56 brands are waiting for ministerial decision at the moment.

According to a new legislation, which has been taken effect on 01.01.2018, NHIFA has to make final decision of a submission in 365 days. Expectations are that average procedure time of NHIFA is going to decrease.

In practice, applicants usually discontinue their ongoing submission procedure around the 365th day, instead of being rejected. This can be explained by the fact that in this case patients can apply for named patients reimbursement to get the pharmaceutical technologies they need. 15 such cases were found, where applicants discontinued their ongoing procedures just before the 365th day. Negotiations of ongoing procedures of 56 brands are currently occurring. The most frequent indications are neoplastic diseases as it was found in the previous two reports, too.

For the whole analysis, please visit our LinkedIn site.



Number of indications, companies, brands and SKUs involved in submission procedures over 90 days.