Newsletter
No. 6 Issue XII. 2024
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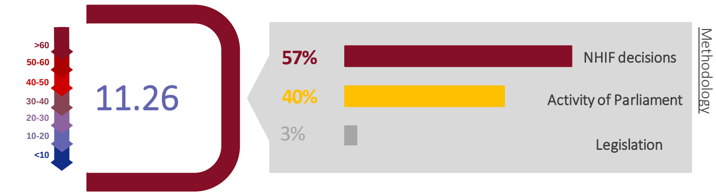
Actualities of Hungarian pharmaceutical financing market

News, current issues

- News — NPP: Judit Bidló about the new system >>
- News — The Court has decided that the Ministry of the Interior does not have to publish the study on the transformation of the health sector >>
- News — Data revolution in health care – the Hungarian health database is open to AI developers >>

Decision-making index, April 2024



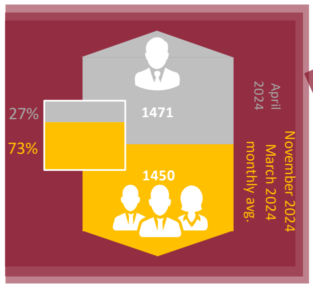
Macro approach to financing healthcare and medicinal products

Balance of the Health Insurance Fund (HUF), April 2024

Standard	7 489 M	
Indication based reimb.	15 007 M	2,9%
Indication based 100% reimb.	20 398 M	4,1%
		6,9%
NPP	3 736 M	-11,0%
Pharmacy	46 630 M	3,7%
High value	18 470 M	23,8%
Total	**65 100 M**	8,7%

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	
-1,14 M	
175 814 M	60 533 M
outturn (expenditure)	outturn (revenue)

Source: Healthware analysis based on NHIFA data

Product offering

Legislation follow up

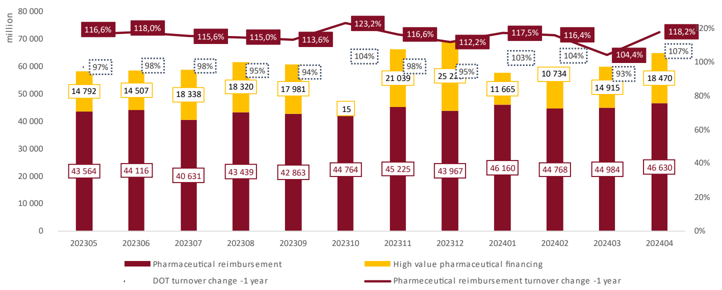
In the recent years Hungarian pharmaceutical market is characterized by rapidly changing and growing number of regulation instruments, as well as constant system transformations. Healthware Regulatory Compliance is a service in order to support companies with up-to date and comprehensive information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

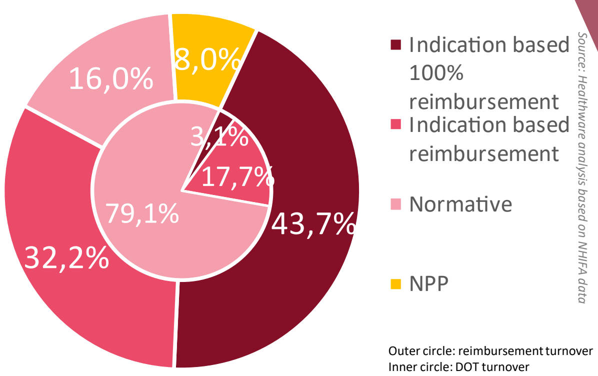
Dynamics of the sales/circulation of prescription-only-medicine

Pharmacy DOT turnover



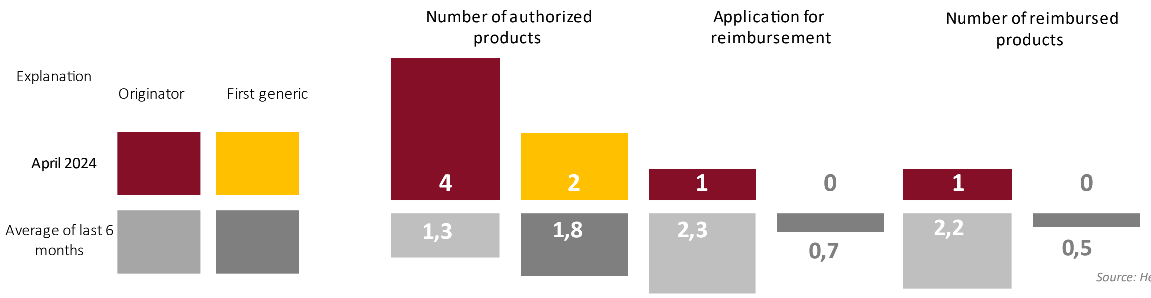
Source: Healthware analysis based on NHIFA data

Pharmacy reimbursement turnover



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

Changes to subsidized medicinal product categories, April 2024



Source: Healthware analysis based on NHIFA data

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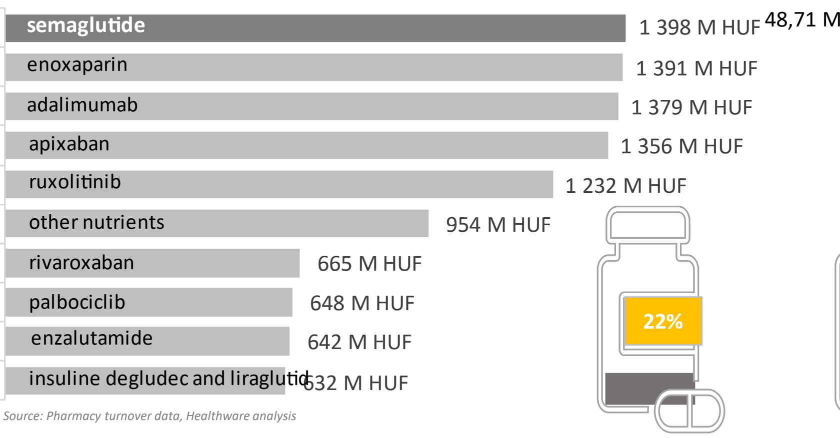
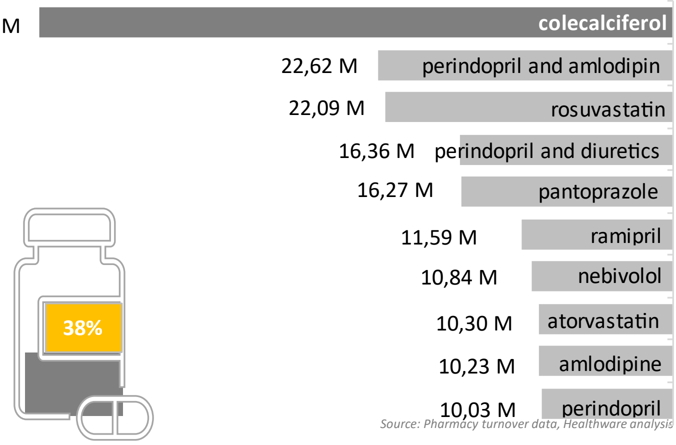
Toplists of reimbursement and number of patients, April 2024

TOP 10 ATCs by all reimbursement paid



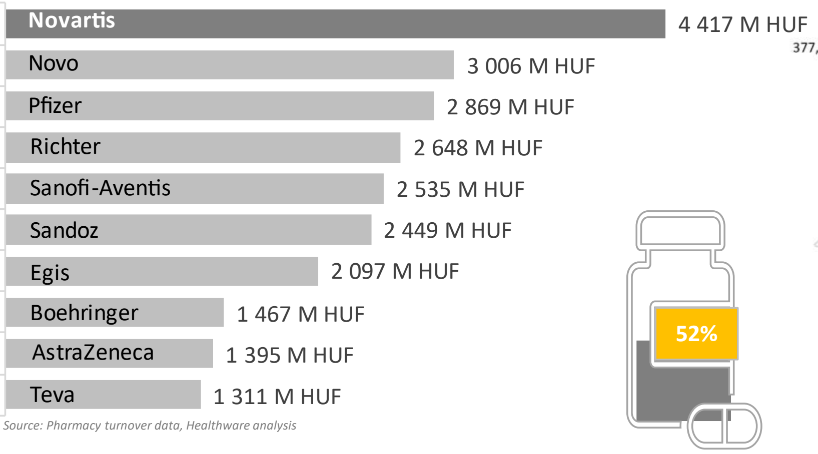
Source: Pharmacy turnover data, Healthware analysis

TOP 10 DOT by all reimbursement paid



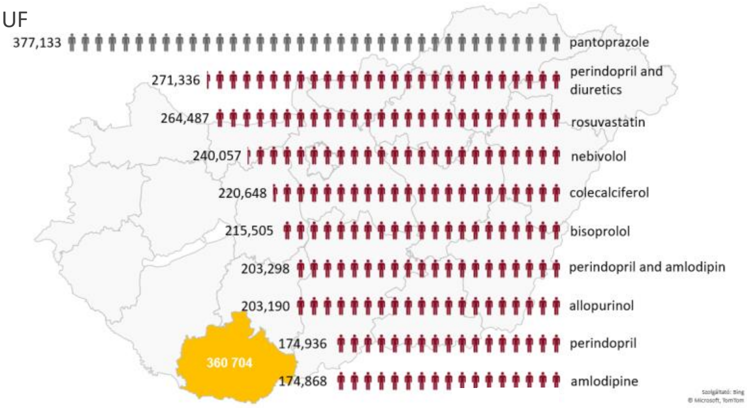
Source: Pharmacy turnover data, Healthware analysis

TOP 10 distributors by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

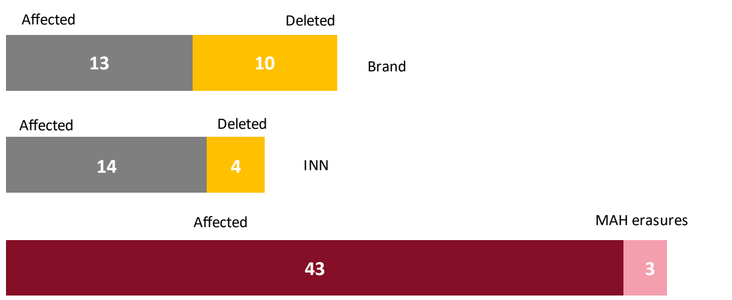
TOP 10 patient turnover by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

Substitutable products, April 2024

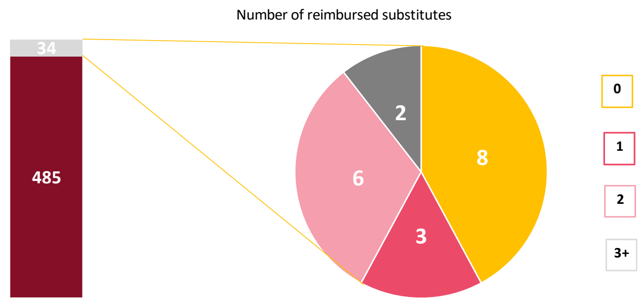
Within product deletions, marketing authorization (MAH) erasures were distinguished.
We also examined the active substances and brands affected in the procedure. These were divided into two groups according to whether the brand or active substance was completely removed from the formulary or whether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



Source: Pharmacy turnover data, Healthware analysis

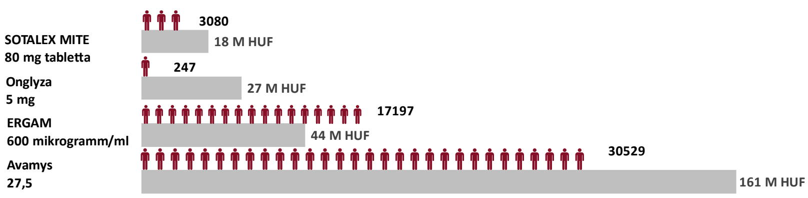
Product shortages

The graph shows the distribution of the reimbursed product shortage list. 485 products had been on the list before April 2024, compared to 34 new product added to the list in the month under review.
The 53 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, April 2024 vs March 2024 in HUF

Ranking		Brand	Reimbursement increment	%*
1	NOVARTIS	LEQVIO	143 787 447 HUF	185%
2	sanofi	LIBTAYO	129 613 206 HUF	141%
3	DANONE	NUTRICIA	99 494 335 HUF	350%
4	NOVARTIS	JAKAVI	88 749 151 HUF	104%
5	SANDOZ	HYRIMOZ	84 122 340 HUF	103%
6	Daiichi-Sankyo	LIXIANA	72 305 875 HUF	117%
7	Bristol Myers Squibb	ELIQUIS	70 442 331 HUF	106%
8	Roche	ERIVEDGE	67 073 705 HUF	134%
9	novo nordisk	RYBELSUS	60 662 985 HUF	126%
10	NOVARTIS	KISQALI	58 651 125 HUF	113%

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