

Actualities of Hungarian pharmaceutical financing market

Newsletter

HEALTHWARE
CONSULTING LTD.

News, current issues

- **Legislations** come into force from October 2013: ESzCsM Decree No.53/2004. (2013.11.20.); EüM Decree No.14/2007. (2013.11.16.); Gov. Decree No.284/19947. (2013.11.20.); Gov. Decree No.43/1999. (2013.11.20.)
- **NEWS:** "Possible ways of easing blind bidding rules" [link](#)
- **NEWS:** "Minister of State Szócska on the recent shift in healthcare" [link](#)
- **NEWS:** "Drugs vanishing from pharmacies" [link](#)
- **NEWS:** "Parliament debates healthcare bill" [link](#)
- **STUDY:** "Nielsen: OTC's retail sales increased by 10 percent" [link](#)

Macro approach to financing healthcare and medicinal products

Balance of the Health Insurance Fund

Health Security Fund	2012. I-XII.	2013 original appropriation	2013		
			I-X.	% of appropriation	% of last year
Total of Budgetary Expenditures	1 791,3	1 804,3	1 486,3	98,9%	100,3%
Curative preventive provisions	842,1	880,6	707,7	96,4%	101,9%
Medicine subsidies	315,1	280,0	243,8	104,5%	93,1%
Total Of Budgetary Revenues	1 744,3	1 804,3	1 542,8	102,6%	106,6%
Social Security Contributions	854,2	727,0	635,4	104,9%	89,8%
Contribution of Pharmaceutical Manufacturers and Wholesalers	75,0	49,0	50,7	124,2%	76,7%
Balance	-47,0	0,0	56,5		-163,6%

Billion HUF

The 2013 budget counts with 0,7% increase in the expenditure and 3,4% increase in the revenues, while the balance is nil. The social security contribution is planned to be less with 15% than last year fulfilment, and this gap is filled with central budget contribution. The medicine subsidies plan are lower with 11% than last year expenses but higher with 2 billion HUF than last year budget plan.

In the first ten months of 2013 the Health Security Fund produced a significant surplus thanks to the higher revenues (+2,6%) and the lower expenses (-1,1%) compared to the original budget appropriation.

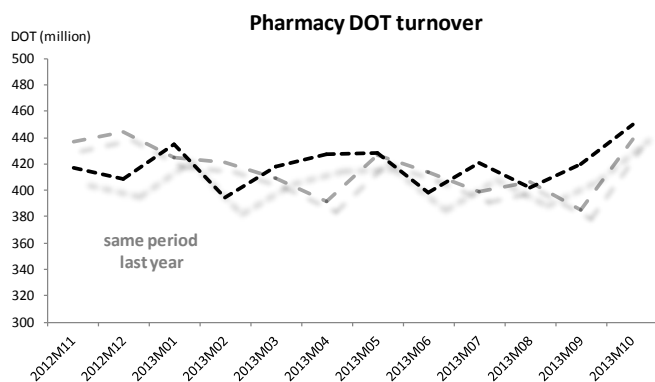
Changes to subsidised medicinal product categories

	Changes in the public drug list						
	2013 July	2013 Aug.	2013 Sep.	2013 Oct.	2013 Nov.	2013 Dec.	2013
Number of new products	11	15	23	18	37	42	348
Number of new AI	1	0	0	1	1	0	14
Number of delisted products	42	7	6	34	28	41	446
Prices							
Decrease	71	8	2	686	6	4	1 590
Increase	0	0	0	0	0	0	2

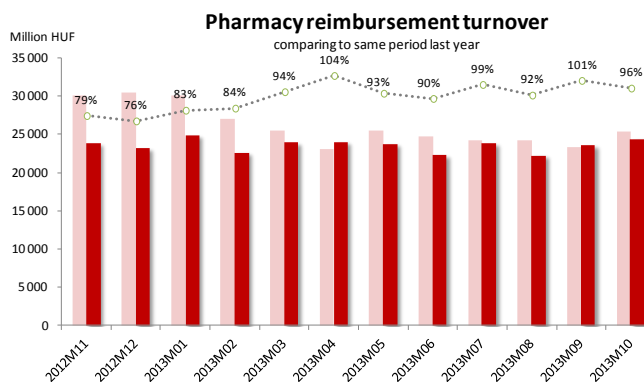
	Changes in the public drug list						
	2013 July	2013 Aug.	2013 Sep.	2013 Oct.	2013 Nov.	2013 Dec.	2013
Reimbursement							
Decrease	116	3	2	1 277	3	0	2 862
Increase	7	0	0	104	1	9	377
Co-payment							
Decrease	121	12	4	768	13	14	1 977
Increase	42	0	0	732	0	0	1 637

Source: Healthware analysis based on OEP-PUPHA data

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



Source: Healthware analysis based on OEP's data



Source: Healthware analysis based on OEP's data

While the turnover of reimbursed medicines in pharmacies decreased by 1,6% in 2012 (measured in DOT), the total medicine subsidy of Health Security Fund was lower by 17%. The main causes of this saving were the reallocation of the drug budget (expensive therapies were transferred to the hospital budget), and the new process of reference price system which lead to significant cuts in prices and reimbursements.

Drug sales in the first nine months of 2013 was 1,8% higher than the same period last year, while the average reimbursement per DOT decreased thanks to the blind bid process in February and October, thus the reimbursement turnover is 6,8% below for this period compared to last year.

Questionnaire survey

Many marketing and health economic analyzes require information beyond the data in literary publications, that correct and complete them. In our projects the more frequently planned longitudinal data collection, fact finding and new information generating researches could provide useful support in addition to ad hoc surveys. Main steps:

- Preliminary review and interpretation of the input parameters
- Establishment of questionnaire involving 1-2 local experts
- Finalization of the questionnaires and querying on larger sample
- Receiving replies, recording questionnaires, processing responses, statistical evaluation
- Validation of results with the help of a local expert
- Web Report transfer in Hungarian and English language

Downloadable document: [Cost-minimisation analysis of aripiprazole \(Abilify®\) for the treatment of acute bipolar disorder in Hungary](#)

More about the service: [link](#)

Product offering

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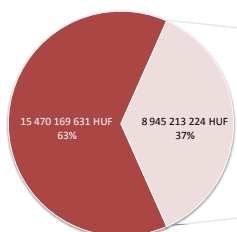
Market data

Marketing authorisation information

2012	EMA	OGYI	2013 - Q3	EMA	OGYI	October 2013	EMA	OGYI
New brands	64	427	New brands	32	41	New brands	2	18
New SKUs	798	4 230	New SKUs	226	345	New SKUs	30	175

Source: Healthware analysis based on OGYI's and EMA's data

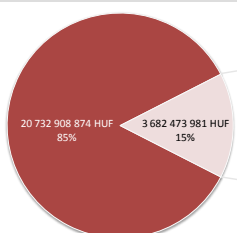
TOP10 MAH by all reimbursement paid in October 2013



TOP 10 - MAH	Reimbursement
Novartis Europharm Limited	1 318 409 807 HUF
EGIS Gyógyszergyár Nyrt.	1 131 001 583 HUF
Richter Gedeon Vegyészeti Gyár Nyrt.	1 093 633 405 HUF
Eli Lilly Nederland B. V.	964 852 747 HUF
Novo Nordisk A/S	845 963 304 HUF
GlaxoSmithKline Kft.	805 811 460 HUF
SANOFI-AVENTIS Zrt.	759 611 144 HUF
Boehringer Ingelheim International GmbH	703 078 932 HUF
AstraZeneca Kft.	669 825 250 HUF
Teva Magyarország Zrt.	653 025 592 HUF

Based on the sales turnover that pharmacies produced from POM

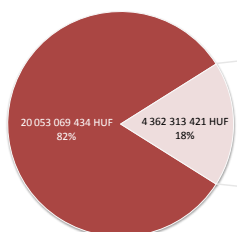
TOP10 BRAND by all reimbursement paid in October 2013



TOP 10 - BRAND	Distributor	Reimbursement
GLIVEC	Novartis Hungária Kft.	556 957 736 HUF
SPIRIVA	Boehringer Ingelheim Pharma Gesellschaft m. b.	494 783 610 HUF
SYMBICORT	AstraZeneca Kft.	406 528 948 HUF
CLEXANE	SANOFI-AVENTIS Zrt.	377 180 936 HUF
SERETIDE	GlaxoSmithKline Kft.	336 636 849 HUF
HUMULIN	Lilly Hungaria Kft.	325 266 679 HUF
RISPERDAL	Janssen-Cilag Kft.	317 743 598 HUF
LANTUS	SANOFI-AVENTIS Zrt.	314 329 844 HUF
SUTENT	Pfizer Kft.	288 498 675 HUF
XEPLION	Janssen-Cilag Kft.	264 547 106 HUF

Source: Healthware analysis based on the sales turnover that pharmacies produced from POM

TOP10 ATC by all reimbursement paid in October 2013



TOP 10 - ATC	International non-proprietary name (INN)	Reimbursement
R03AK07	formoterol and other drugs for obs. airway disea	591 107 356 HUF
L01XE01	imatinib	556 957 736 HUF
R03BB04	tiotropium bromide	494 783 610 HUF
V06D	other nutrients	444 002 051 HUF
C10AA07	rosuvastatin	408 004 235 HUF
R03AK06	salmeterol and other drugs for obs. airway disea	398 488 982 HUF
A10AB01	insulin (human)	394 832 665 HUF
B01AB05	enoxaparin	377 180 936 HUF
N05AX13	paliperidone	354 162 522 HUF
C10AA05	atorvastatin	342 793 329 HUF

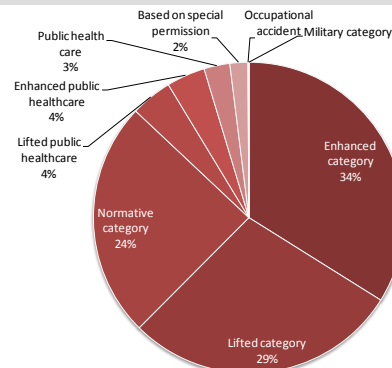
Source: Healthware analysis based on the sales turnover that pharmacies produced from POM

Average number of medical sales reps; 10/2013

All	1 808
Medicinal products	1 542
Medical aids	232
Both	34

Source: Healthware analysis based on OGYI's

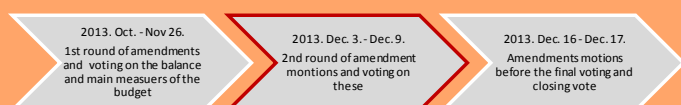
Drug reimbursement by legal title; 10/2013



Source: Healthware analysis based on the sales turnover that pharmacies produced from POM

Hungary's 2014 central budget bill, 2nd phase — Case study

The parliament reached the end of the second phase of the debating procedure of budget bill for 2014 by voting on the 2nd round of amendment motions. 3 out of the 73 new amendments are about the healthcare measures.



Dániel, Z. Kárpát MP of Jobbik (The Movement for a Better Hungary, far-right party) motioned to separate a 900 million HUF budget to ease burden of infertility couples (Number of motion: [12415/972](#)).

MPs of MSZP (Hungarian Socialist Party, left-wing) would address 1 billion HUF to the urgent renovation of health, educational and social institutions of Miskolc (Number of motion: [12415/990](#)).

At the end Mihály Babák, MP of governing Fidesz motioned a technical amendment to rearrange the separated budget of Social support service site of Fejér Megyei Szent György Egyetemi Oktató Kórház from the social budget to curative-preventive healthcare budget (Number of motion: [12415/1018](#)).

Only the last amendment, motioned by Mihály Babák (Fidesz) was supported by the parliamentary committees and the government.

In the second round of amendments Parliament's budget committee submitted a package which expresses the government's motions however these are not concerning the Health Insurance Fund's or the healthcare's budget.