Actualities of Hungarian pharmaceutical financing market

Newsletter
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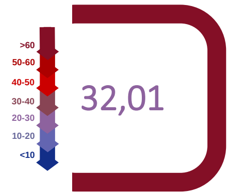
Decision-making index, March 2024



78%	NHIF decisions
13%	Activity of Parliament
9%	Legislation

Methodology

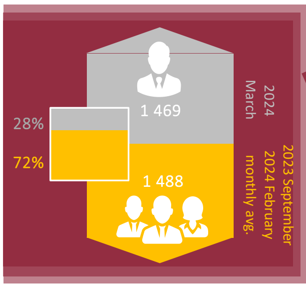
Macro approach to financing healthcare and medicinal products

Balance of the Health Insurance Fund, March 2024

Standard	7 277 M	-1,8%
Indication based reimb.	14 421 M	-0,3%
Indication based 100% reimb.	19 089 M	1,9%
NPP	4 195 M	0,9%
Pharmacy	**44 984 M**	0,5%
High value	14 914 M	-19,2%
Total	**59 898 M**	-5,3%

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	
-2,55 M	
131 471 M	43 311 M
outturn (expenditure)	outturn (revenue)

Source: Healthware analysis based on NHIFA data

Product offering

Legislation follow up

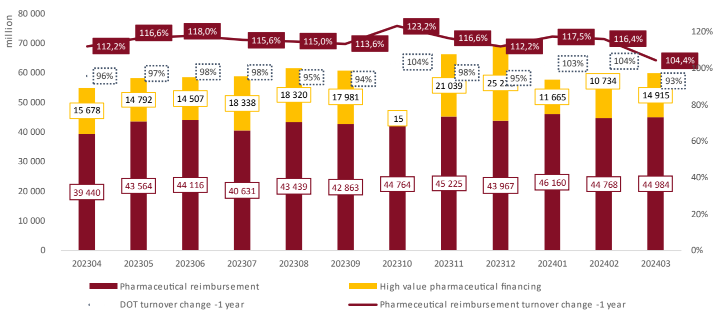
In the recent years Hungarian pharmaceutical market is characterized by rapidly changing and growing number of regulation instruments, as well as constant system transformations. Healthware Regulatory Compliance is a service in order to support companies with up-to date and comprehensive information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

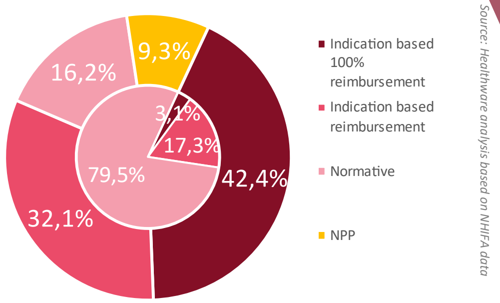
Dynamics of the sales/circulation of prescription-only-medicine

Pharmacy DOT turnover



Source: Healthware analysis based on NHIFA data

Pharmacy reimbursement turnover

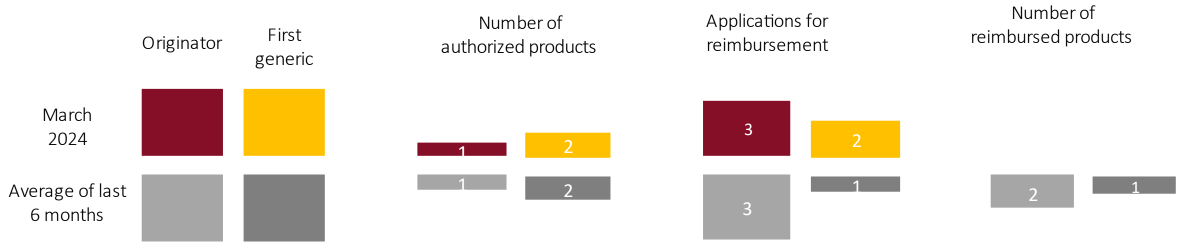


Outer circle: reimbursement turnover
Inner circle: DOT turnover

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

Changes to subsidized medicinal product categories, March 2024

Explanation



Source: Healthware analysis based on NHIFA data

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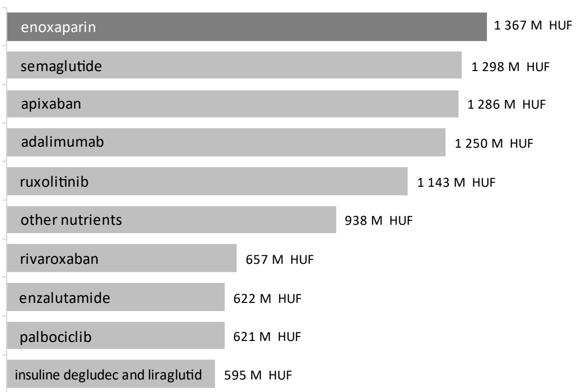
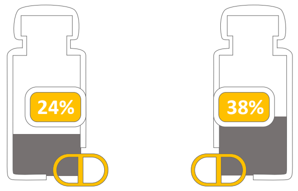
Toplists of reimbursement and number of patients, March 2024

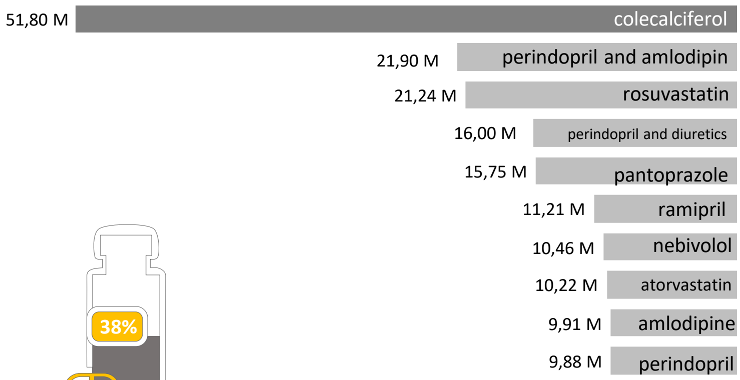
TOP 10 ATCs by all reimbursement paid





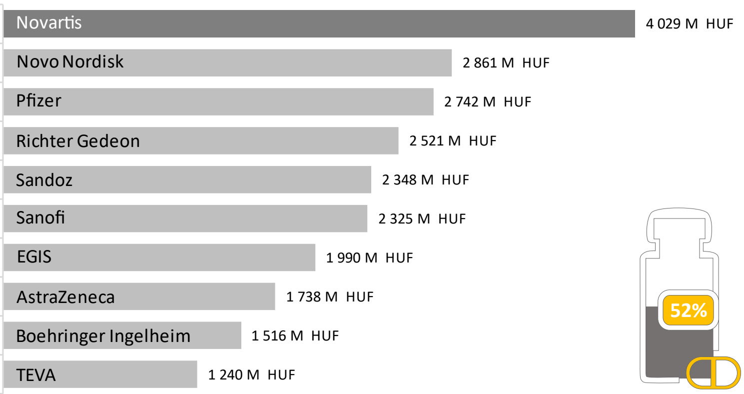
Source: Pharmacy turnover data, Healthware analysis

TOP 10 DOT by all reimbursement paid



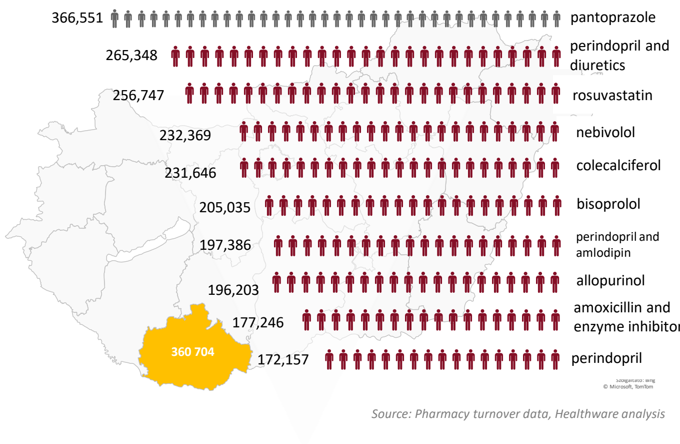
Source: Pharmacy turnover data, Healthware analysis

TOP 10 distributors by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

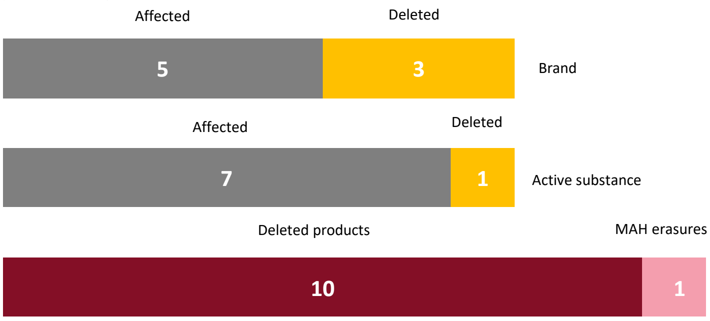
TOP 10 patient turnover by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

Substitutable products, March 2024

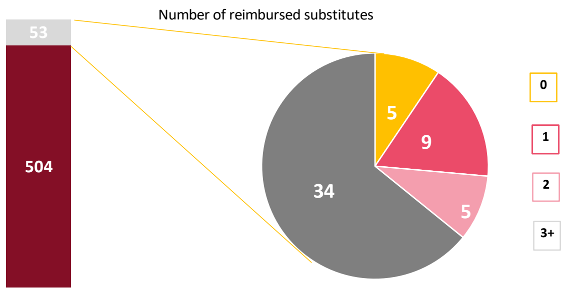
Within product deletions, marketing authorization (MAH) erasures were distinguished.
We also examined the active substances and brands affected in the procedure. These were divided into two groups according to whether the brand or active substance was completely removed from the formulary or whether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



Source: Pharmacy turnover data, Healthware analysis

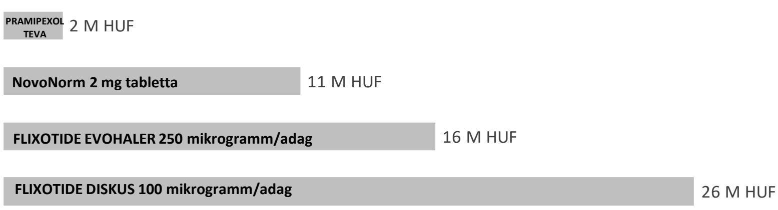
Product shortages

The graph shows the distribution of the reimbursed product shortage list. 504 products had been on the list before March 2024, compared to 53 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, March 2024 vs. February 2024 in HUF

	Company	Brand	Reimbursement increment	%*
1	Roche	OCREVUS	182 802 585 HUF	131%
2	AstraZeneca	KOSELUGO	68 998 977 HUF	119%
3	novo nordisk	RYBELSUS	34 036 669 HUF	120%
4	Roche	POLIVY	29 450 904 HUF	190%
5	AstraZeneca	FASENRA	29 250 216 HUF	116%
6	Leadiant Biosciences	CHENODEOXYCHOLIC ACID LEADIANT	28 572 824 HUF	166%
7	Pfizer	ENBREL	27 833 165 HUF	103%
8	astellas	XTANDI	27 550 851 HUF	110%
9	astellas	XOSPATA	26 847 748 HUF	139%
10	AOP HEALTH	TRESUVI	26 175 432 HUF	115%

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