HEALTHWARE

Actualities of Hungarian pharmaceutical financing market

Newsletter
No. 4 Issue XII. 2024
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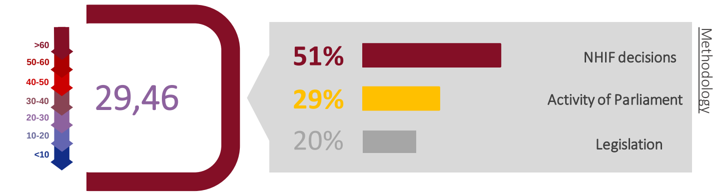
News, current issues

- News — Rogán's big pharmacy business - nationalised, centralised »
- News — The health system must be reformed first, then it is worth pouring money into it - interview with the State Secretary for Health »
- News — Why the masses are now choosing private healthcare in Hungary »

Decision-making index, February 2024



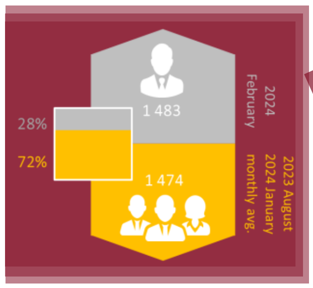
Macro approach to financing healthcare and medicinal products

Balance of the Health Insurance Fund, February 2024

Standard	7 410 M	-1,6%
Indication based reimb.	14 460 M	-0,9%
Indication based 100% reimb.	18 739 M	-4,2%
NPP	4 157 M	-7%
Pharmacy	**44 767 M**	-3%
High value	5 714 M	-51 %
Total	**50 482 M**	-12,7 %

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	
-122 M	
505 902 M	152 209 M
outturn (expenditure)	outturn (revenue)

Source: Healthware analysis based on NHIFA data

Product offering

Legislation follow up

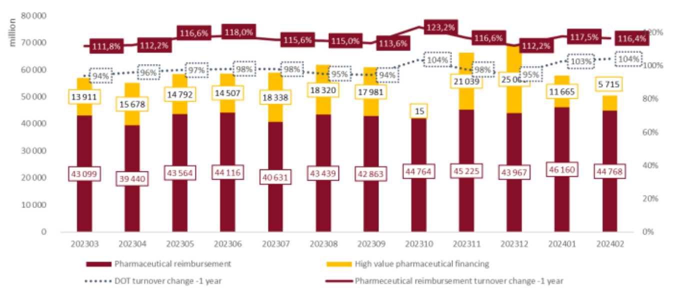
In the recent years Hungarian pharmaceutical market is characterized by rapidly changing and growing number of regulation instruments, as well as constant system transformations. Healthware Regulatory Compliance is a service in order to support companies with up-to date and comprehensive information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

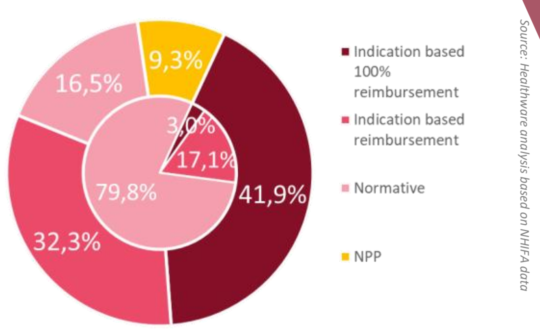
Dynamics of the sales/circulation of prescription-only-medicine

Pharmacy DOT turnover



Source: Healthware analysis based on NHIFA data

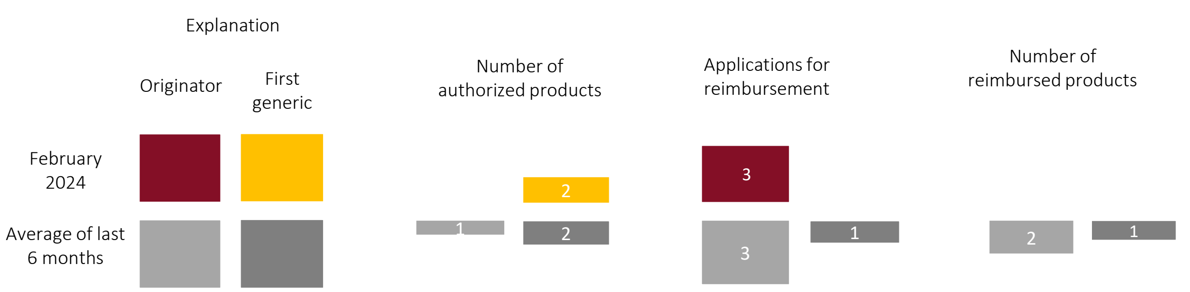
Pharmacy reimbursement turnover



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, February 2024



Source: Healthware analysis based on NHIFA data

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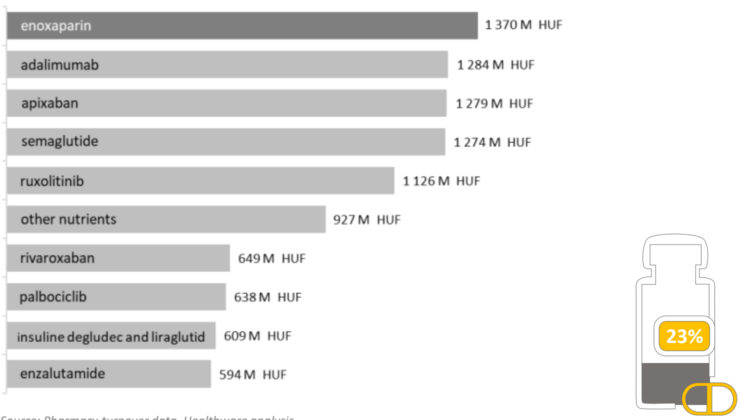
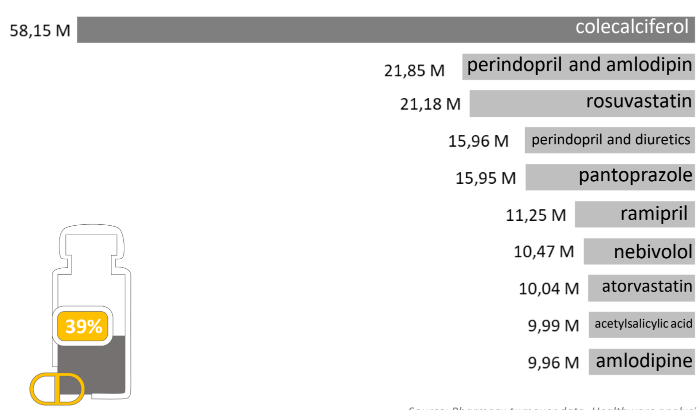
Toplists of reimbursement and number of patients, February 2024

TOP 10 ATCs by all reimbursement paid



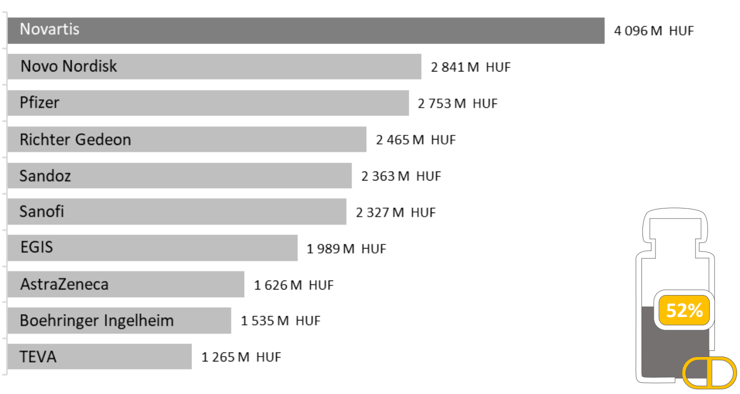
Source: Pharmacy turnover data, Healthware analysis

TOP 10 DOT by all reimbursement paid



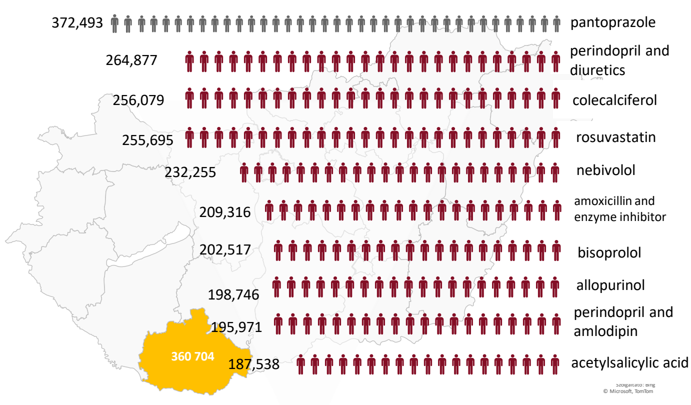
Source: Pharmacy turnover data, Healthware analysis

TOP 10 distributors by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

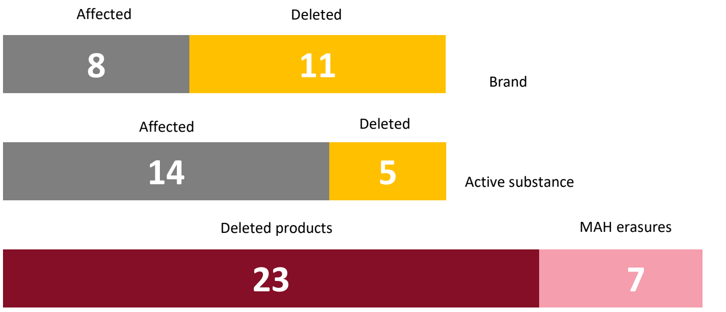
TOP 10 patient turnover by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

Substitutable products, February 2024

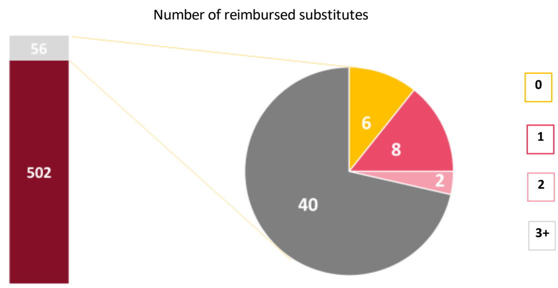
Within product deletions, marketing authorization (MAH) erasures were distinguished.
We also examined the active substances and brands affected in the procedure. These were divided into two groups according to whether the brand or active substance was completely removed from the formulary or whether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



Source: Pharmacy turnover data, Healthware analysis

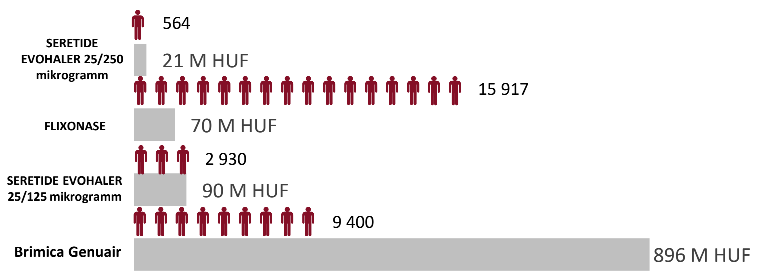
Product shortages

The graph shows the distribution of the reimbursed product shortage list. 502 products had been on the list before February 2024, compared to 56 new product added to the list in the month under review.
The 56 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, February 2024 vs. January 2024 in HUF

	Company	Brand	Reimbursement increment	%*
1	NOVARTIS	LEQVIO	40 981 743 HUF	224%
2	Roche	POLIVY	40 496 693 HUF	138%
3	IPSEN	CABOMETYX	36 980 040 HUF	120%
4	MSD	PREVYMIS	35 050 978 HUF	117%
5	EGIS	NOACID	33 824 092 HUF	159%
6	novo nordisk	RYBELSUS	31 955 096 HUF	118%
7	Pfizer	VYNDAQEL	25 013 736 HUF	153%
8	GSK	AUGMENTIN	22 967 096 HUF	183%
9	SANDOZ	BINOCRIT	22 841 522 HUF	105%
10	janssen	ERLEADA	22 598 276 HUF	299%

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