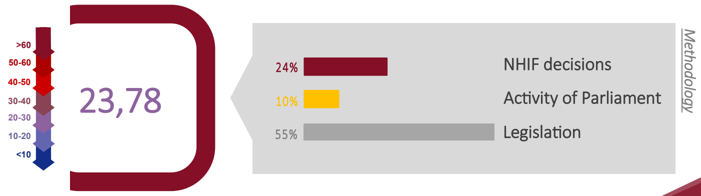
News, current issues

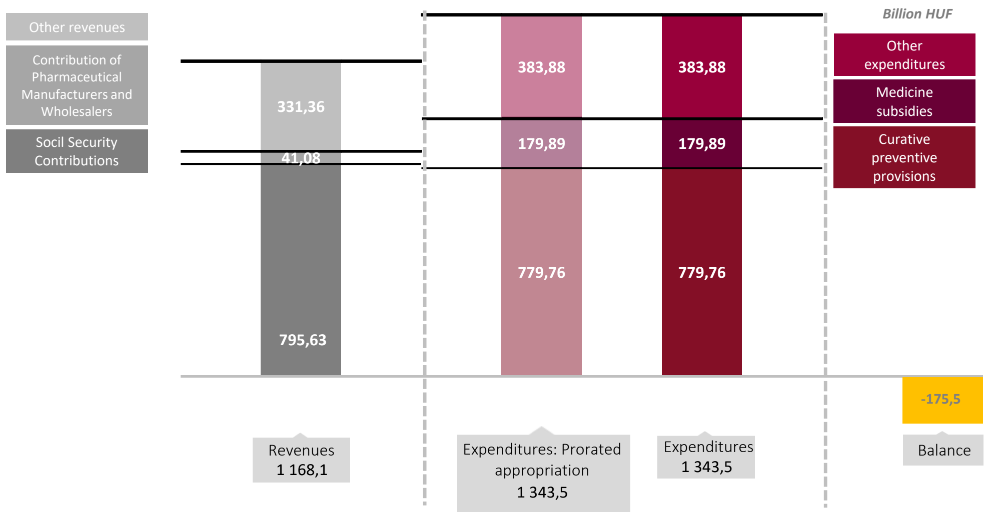
- News — No expense should be spared on healthcare »
- News — General practice partnership will be in practice from September »
- News — Hospital waiting lists have been exploded: Hungarian patients wait years for surgeries »

Decision-making index, May 2021



Macro approach to financing healthcare and medicinal products

Balance of the Health Insurance Fund, May 2021



Source: Healthware analysis based on NHIFA data

Product offering

Macroeconomic report

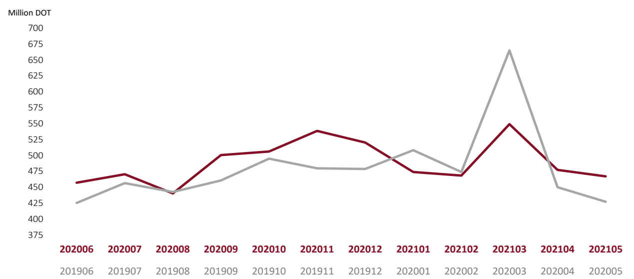
In our quarterly compiled macroeconomic report with our guide to the evolution of the main macroeconomic indicators, the absolute performance and the relative performance compared to the whole economy of the health care in the given period are the focus.

In addition to the domestic situation the description of the similar indicators in neighbouring countries also plays a role, which helps to place the situation of the domestic health care at regional level.

More about the service: **link**

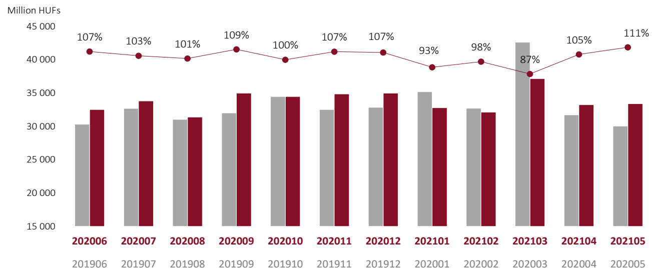
Dynamics of the sales/circulation of prescription-only-medicine

Pharmacy DOT turnover



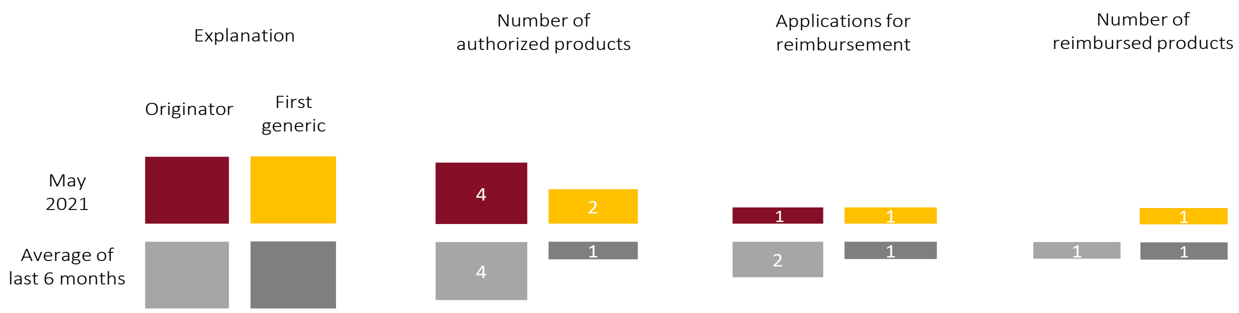
Source: Healthware analysis based on NHIFA data

Pharmacy reimbursement turnover



Source: Healthware analysis based on NHIFA data

Changes to subsidized medicinal product categories, May 2021

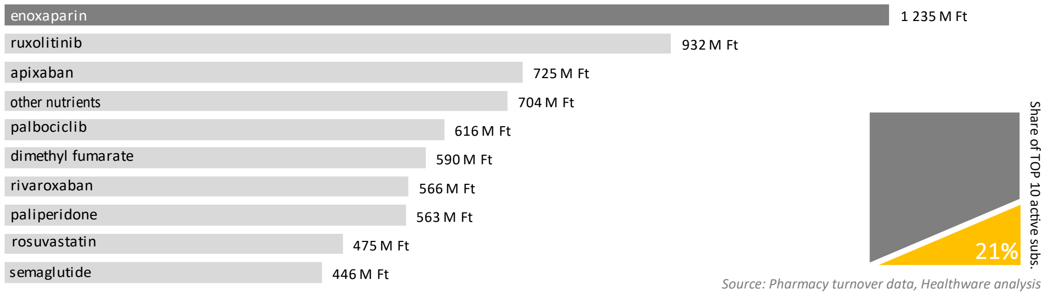


Source: Healthware analysis based on NHIFA data

Market data

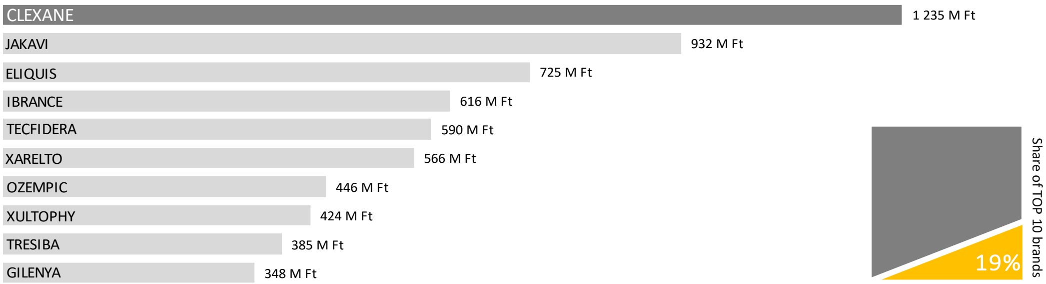
Toplists of reimbursement and number of patients, May 2021

TOP 10 ATCs by all reimbursement paid



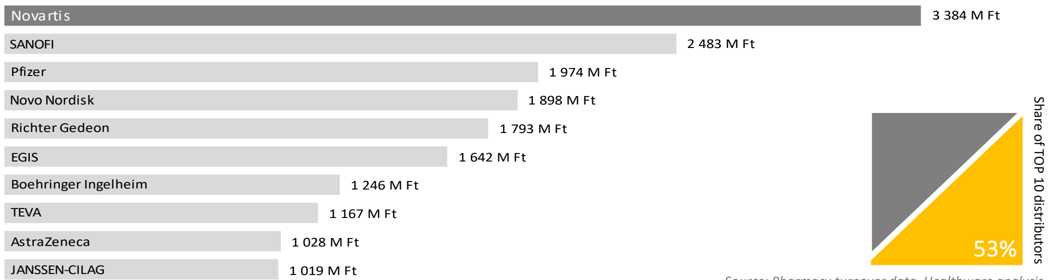
Source: Pharmacy turnover data, Healthware analysis

TOP 10 brands by all reimbursement paid



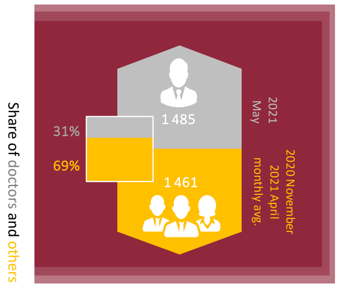
Source: Pharmacy turnover data, Healthware analysis

TOP 10 distributors by all reimbursement paid



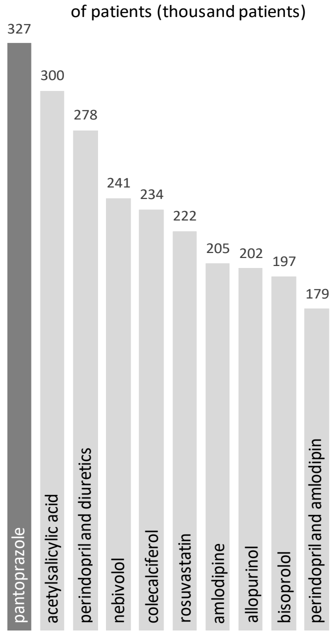
Source: Pharmacy turnover data, Healthware analysis

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

Pharmacy drug dispensing in the light of mental health issues and Covid-19 pandemic — Case study

Healthware analysis based on NEAK data

Our current case study provides a more profound analysis of the coronavirus pandemic's impacts. According to our hypothesis, the number of mental health issues - e.g. worsening of pre-existing psychiatric conditions or the appearance of new psychiatric disorders caused by the COVID-19 infection - has increased as a result of prolonged lock-down, rising unemployment and precarious epidemic situation, which is also reflected in pharmacy drug dispensing. We examine the extent to which and how the associated turnover has changed over the analyzed period seasonally, and in sections of each wave of the coronavirus-pandemic.

The focus of the case study is on the pharmaceutical preparations of Psycholeptics and Psychoanaleptics in ATC groups N05 and N06. However, further examining the data, we also tried to reveal the possible more significant changes by narrowing down the scope of product groups. The study was based only on the data of the turnover of pharmacy prescription medicines published by NEAK. Hence, no claims have been made regarding the OTC market.

Table 1: Changes in pharmaceutical turnover data in ATC groups N05 and N06

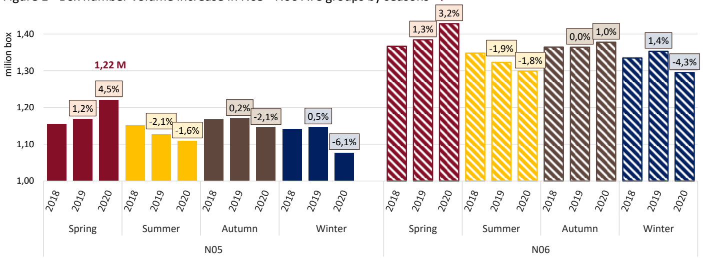
Year	N05 - Independently of reimbursement cathegory				N05 - Independently of reimbursement cathegory			
	Box numbers (million)	Reimb.-outflow (billion HUF)	Co-payment* (billion HUF)	DOT-turnover (million)	Box numbers (million)	Reimb.-outflow (billion HUF)	Co-payment* (billion HUF)	DOT-turnover (million)
2018	4 598 516	18 549 932 056	1 435 119 270	131 879 811	5 409 657	7 054 560 035	4 931 776 925	190 700 313
2019	4 611 342	18 425 205 956	1 458 202 657	130 199 425	5 414 583	7 110 947 931	4 850 029 932	190 368 394
2020	4 623 528	18 454 579 627	1 457 519 916	129 409 886	5 467 302	6 993 767 926	4 791 630 938	192 575 984
2021 I-V	1 796 413	7 410 946 702	676 035 042	50 659 085	2 151 288	2 791 441 634	2 268 327 681	74 941 564
Growth compared to the same period of the year before (%)								
2019	0,3%	-0,7%	1,6%	-1,3%	0,1%	0,8%	-1,7%	-0,2%
2020	0,3%	0,2%	-0,0468%	-0,6%	1,0%	-1,6%	-1,2%	1,2%
*2021 I-V***	-9,7%	-5,6%	9,4%	-8,0%	-7,7%	-6,9%	11,0%	-9,4%

** Including quasi-co-payment*
***Compared to the same period of the year before*
Source: NEAK

Table 1 shows the changes in pharmaceutical turnover from 2018 to 2021 first five months and their growth rate in comparison with the year before. When looking at the different years, no outstanding growth can be seen in either the N05 or N06 groups. In 2020, for instance, an increase in turnover may be observed almost exclusively for the box numbers in both ATC groups, although their rates are still not significant, in the N05 group + 0.3%, while in the N06 group + 1.0%. Co-payment turnover in 2020 stagnated in the ATC group of N05, but in N06 it decreases by 1.2% when considering the whole year. The first five months of 2021 showed a 9.4-11.0% increase in the two groups in co-payment turnover compared to the same period of the previous year.

However, whether it has really increased, if so, to what extent, it is worth drawing consequences at the end of the year. There was an increase in the reimbursement outflow by a minimal degree for Psycholeptics, but for Psychoanaleptics a decline (-1.6%) can be seen in the initial year of the coronavirus epidemic in Hungary. It is interesting, however, that for the whole year of 2020, in contrast to the reimbursement outflow, the DOT turnover could also raise by 1.2% in the N06 group. In 2021 I-V, there was a decline in almost all turnover categories, but one of the main reasons for that is the basis of comparison with the same period of 2020 (biased by an upsurge in March 2020). Hence by the end of the year the extent of this decline may change.

Figure 1 - Box number volume increase in N05 - N06 ATC groups by seasons



The percentages show the degree of change compared to the same period of the previous year.
In our methodology, the winter season starts with December the year before, thus e.g. December 2019 belongs to the winter period of 2020.
Source: NEAK

Since real increase during the epidemic situation was mostly noticeable for box sales, the seasonal changes are also evaluated with the use of this indicator (Figure 1). In our methodology, the winter season starts with December the year before, thus e.g. December 2019 belongs to the winter period of 2020. The large increase seen in the spring of 2020 was followed by a 1.6% decline in the N05 ATC group for the summer, meaning a decrease of 112,000 boxes, at the same time, similar trend can be seen in the N06 group, where the number of sold boxes fell by about 129,000 boxes (-1.8%) in the summer period. By comparison to the same period in 2019, when the difference in N05 ATC between the spring and summer season was 41 thousand boxes of surplus in the spring months, while 61 thousand in N06, it can be said that the difference between the turnover data of these periods increased.

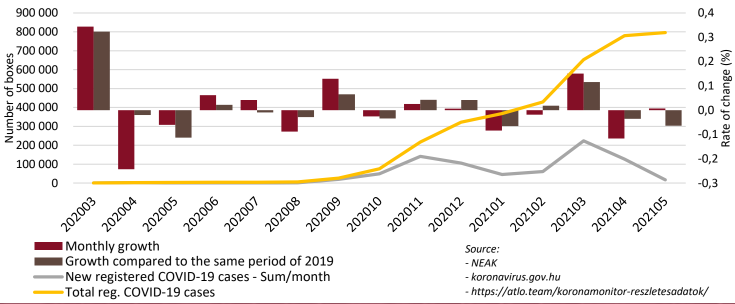
Pharmacy drug dispensing in the light of mental health issues and Covid-19 pandemic — Case study

Healthware analysis based on NEAK data

There is seasonality in the consumption of Psycholeptics and Psychoanaleptics; in the summer months, there is usually a decline compared to the spring period. In 2020, however, the accumulation of medicines due to the viral situation added also to the spring market expansion. In the autumn and winter period of 2020, box sales of prescription drug products again started to decline compared to the previous year in the N05 ATC by 2% for the former and 6% for the latter. At this time, closures may have reduced the visits with specialists, which could have made it difficult to adjust dosages as well as switch to other products. However, in September 2020, the N06 group showed an increase compared to 2019, which can also be interpreted as a seasonal natural growth trend, but for some products, it may have been induced by fear of tightening due to another epidemic or the resulting drug accumulation.

During the whole observation period, the box turnover of the N06A (Antidepressants) group to the greatest extent. Figure 2 presents the growth of N06A group box turnover monthly, compared with the same period of 2019, and supplemented with Covid-19 case numbers and new patient numbers. In March 2020, when the outbreak was announced[1], a sudden upsurge emerged, which may be interpreted mainly as a consequence of the immediate accumulation following the disclosure of the first wave. This was followed by a decline in April, but its rate was not significant compared to 2019, totaling 2%. In May, a larger decrease of 6-11% can be seen. Interestingly, despite the easing of epidemiological measures, the box turnover of Antidepressants was still slightly increased even in the summer - in June and July. The initial period of the second wave (September 2020[2]) was also perceivable in box turnover in group N06A by a 6% increase compared to the same period of the year before, which could not continue in October, but only in November and December.

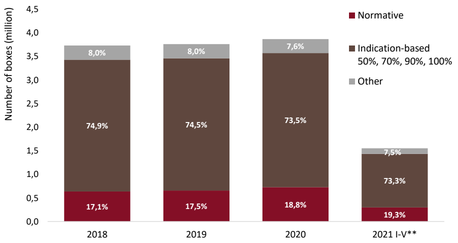
Figure 2: Box number - Rate of change in N06A ATC group in all reimb. category



In January 2021, in the descending branch of the second wave of the epidemic[3], box turnover began to decline both on a monthly basis (-8%) and compared to the same period in 2019 (-6%). At that time, epidemiological restrictions were still in place, which may have reduced the number of doctor-patient appointments. At the same time, in March 2021, when the epidemic curve of the third wave rose rapidly[4] and a larger peak was observed, the box turnover increased by 15% compared to February, but also almost by 12% compared to the same period of 2019.

The box turnover of Antidepressants was also examined by reimbursement category compared to the year before - or the same period of the concerned year. Independently of the reimbursement category the total box sale volume increased in 2020 by 2.8%.

Figure 3: N06A - Share of Normative, Indication-based and Other reimb. categories in box turnover



However, on a normative basis, the growth was 10.8%, meaning a surplus of 71,000 boxes in 2020 than in the year before. If we examine the share of the Normative, Indication-linked 50%, 70%, 90%, 100%, and Other reimbursement categories on an annual basis, it can be seen that while the proportion of Indication-linked and Other (e.g. social welfare, occupational accident, national defense) reimbursement categories decreased slightly, the normative increased by 1.4% in the main year so far in terms of the coronavirus epidemic, in 2020. A possible explanation of the shift in share may be that due to the pre-pandemic period, prescribing products for mental illness were undertaken by GPs on their own right for the normative reimbursement category due to prescribability obstacles and limited meetings with specialists. Limited data have yet been available for 2021, but the growing trend continues among the products prescribed in the normative reimbursement category.

Examining each brand separately, both increases and decreases could be observed in the N06A ATC group. However, these cannot be clearly associated with the Covid-19 epidemic due to the low extent of box and patient numbers and the lack of more in-depth study of trend analysis. In addition, MAT patient numbers in the N06A ATC group did not show epidemic-related movement in patient numbers, hence our assumption that there a large increase in the consumption of Antidepressants during the coronavirus epidemic period is not sufficiently substantiated.

Although in ATC groups of N05 and N06 the rate of reimb. outflow rose significantly at the beginning of the COVID epidemic in March 2020 (+20 and +28% compared to the same period in 2019), by the end of the year it was compensated, thus there is no significant change in the prescription of these medicinal products. In the full year of 2020, both the total reimbursement and co-payment turnover rates could increase minimally by 0.2% and 0.05% only in the N05 ATC group, while these indicators decreased by 1.6% and 1.2% in the N06 group compared to the previous year. For both Psycholeptics and Psychoanaleptics, there was only a slight increase in box sales in 2020 compared to 2019, therefore our hypothesis that drug dispensing for the treatment of mental disorders increased significantly as a result of the epidemic was not sufficiently evidenced. Antidepressants shows the largest increase in the number of boxes (compared to 2019, the number of boxes sold increased by almost 104,000), among that the largest increase can be perceivable in the number of prescriptions on normative reimbursement category. In our opinion, the general deterioration in mental conditions provoked by COVID-19 is an existing issue, however, this could not be tracked due to the limited access in the health care system. Additionally, it is important to note that further multivariate longitudinal analyzes may be required at a later stage when examining real trends in the development of mental disorders.

[1] koronavirus.gov.hu *(last viewed on 2020.08.02)*
[2] koronavirus.gov.hu *(last viewed on 2020.08.02)*
[3] koronavirus.gov.hu *(last viewed on 2020.08.02)*
[4] koronavirus.gov.hu *(last viewed on 2020.08.02)*
Coronavirus case numbers: atlo.team/koronamonitor-reszletesadatok