



News, current issues

- **Legislations** come into force from January 2014: NM Decree No.9/1993. (2014.01.21.); Act XI of 1991 (2014.01.01.); Act LXXXIII of 1997 (2014.01.01., 2014.01.02.); Act CLIV of 1997 (2014.01.01.); Act XXV of 1998 (2014.01.01.); Act II of 2000 (2014.01.01.); Act XCV of 2005 (2014.01.01.); Act XCVIII of 2006 (2014.01.01.); Gov.Decree No.284/1997. (2014.01.01.); Gov.Decree No.43/1999. (2014.01.01.); Gov.Decree No.337/2008. (2014.01.01.); Gov.Decree No.235/2009. (2014.01.01.); Gov.Decree No.319/2010. (2014.01.01.); Gov.Decree No.323/2010. (2014.01.01.); Gov.Decree No.364/2010. (2014.01.01.); ESzCsM Decree No.32/2004. (2014.01.30.); ESzCsM Decree No.44/2004. (2014.01.25.); ESzCsM Decree No.53/2004. (2014.01.26.); EüM Decree No.43/2005. (2014.01.26.); EüM Decree No.52/2005. (2014.01.26.); EüM Decree No.14/2007. (2014.01.17., 2014.01.26.); EüM Decree No.41/2007. (2014.01.26.); EüM Decree No.53/2007. (2014.01.26.); NEFMI Decree No.11/2011. (2014.01.01.);
- **NEWS:** "New drugs, decreasing patient burdens" [link](#)
- **NEWS:** "New brand: "Hungarian drug" [link](#)
- **NEWS:** "Plus 20 bn HUF for health care system" [link](#)
- **INTERVIEW:** "Waiting for reimbursement" [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-XII.		
			Fact	% of appropriation	% of last year
Total of Budgetary Expenditures	1 791,3	1 804,3	1 847,8	102,4%	103,2%
Curative preventive provisions	842,1	880,6	908,0	103,1%	107,8%
Medicine subsidies	315,1	280,0	296,0	105,7%	93,9%
Total Of Budgetary Revenues	1 744,3	1 804,3	1 847,8	102,4%	105,9%
Social Security Contributions	854,2	727,0	768,0	105,6%	89,9%
Contribution of Pharmaceutical Manufacturers and Wholesalers	75,0	49,0	58,7	119,8%	78,2%
Balance	-47,0	0,0	0,0		0,0%

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 2013 the Health Security Fund balance was nil, while both the revenues and the expenditures exceed the provision. The Curative preventive care was higher than last year figure, and the social security contribution was below the last year level with about 10%.

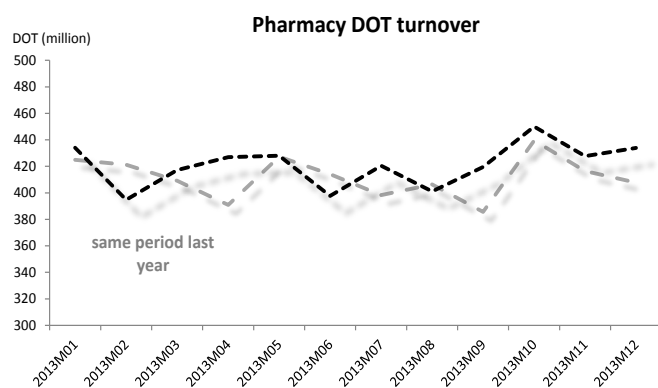
Changes to subsidised medicinal product categories

	Changes in the public drug list						
	2013 Sep.	2013 Oct.	2013 Nov.	2013 Dec.	2014 Jan.	2014 Feb.	2014
Number of new products	23	18	37	42	22	34	56
Number of new AI	0	1	1	0	1	8	9
Number of delisted products	6	34	28	41	63	21	84
Prices							
Decrease	2	686	6	4	33	7	40
Increase	0	0	0	0	0	0	0

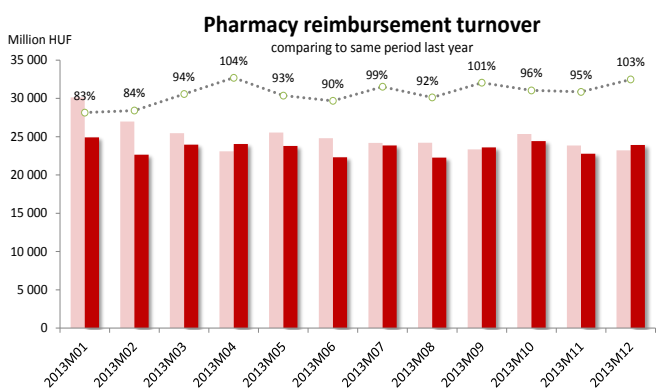
	Changes in the public drug list						
	2013 Sep.	2013 Oct.	2013 Nov.	2013 Dec.	2014 Jan.	2014 Feb.	2014
Reimbursement							
Decrease	2	1 277	3	0	47	1	48
Increase	0	104	1	9	3	2	5
Co-payment							
Decrease	4	768	13	14	46	10	56
Increase	0	732	0	0	16	0	16

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

Prescription drug sales in 2013 was 2,2% higher than in 2012, so the trend of drug consumption is slowly increasing, while the reimbursement turnover was below the 2012 level with almost 6%. As a consequence the average reimbursement per DOT decreased further thanks to mainly the reference pricing system.

Survey of references, meta – analysis

We collect the available information, evidence in related articles, directives, studies, research. As the first step of systematic research of the scientific literature we define the relevant keywords. Then we present the evidence charts, it is followed by organization and comparative analysis.

Meta – analysis

We are able to make an exact summary of the results with statistical methods, which is based on the systematic research of scientific literature that led to compiling the parameters of evidence charts.

More details: [link](#)

Product offering



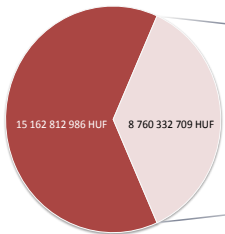
Market data

Marketing authorisation information

2013	EMA	OGYI	2013 - Q4	EMA	OGYI	December 2013	EMA	OGYI
New brands	79	207	New brands	14	40	New brands	3	13
New SKUs	716	1 742	New SKUs	198	372	New SKUs	58	79

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

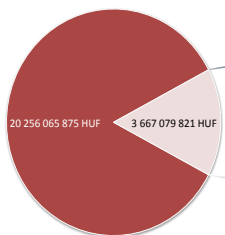
TOP10 MAH by all reimbursement paid in December 2013



TOP 10 - MAH	Reimbursement
Novartis Europharm Limited	1 260 563 330 HUF
EGIS Gyógyszergyár Nyrt.	1 100 226 901 HUF
Richter Gedeon Vegyészeti Gyár NyRt.	1 073 982 479 HUF
Eli Lilly Nederland B. V.	927 740 505 HUF
Novo Nordisk A/S	874 628 377 HUF
SANOPI-AVENTIS Zrt.	794 834 624 HUF
GlaxoSmithKline Kft.	739 622 206 HUF
Boehringer Ingelheim International GmbH	679 209 586 HUF
Teva Magyarország Zrt.	664 795 566 HUF
AstraZeneca Kft.	644 729 135 HUF

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

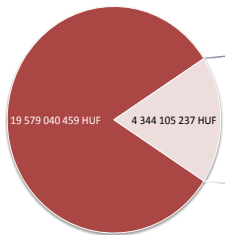
TOP10 BRAND by all reimbursement paid in December 2013



TOP 10 - BRAND	Distributor	Reimbursement
GLIVEC	Novartis Hungária Kft.	530 335 114 HUF
SPIRIVA	Boehringer Ingelheim Pharma Gesellschaft m. b. H. N.	466 573 605 HUF
CLEXANE	SANOPI-AVENTIS Zrt.	429 237 103 HUF
SYMBICORT	AstraZeneca Kft.	398 240 666 HUF
SUTENT	Pfizer Kft.	323 236 401 HUF
SERETIDE	GlaxoSmithKline Kft.	322 349 608 HUF
LANTUS	SANOPI-AVENTIS Zrt.	318 268 154 HUF
HUMULIN	Lilly Hungaria Kft.	316 672 276 HUF
RISPERDAL	Janssen-Cilag Gyógyszerkereskedelmi Marketing Szo	292 421 968 HUF
KOGENATE BAYER	Bayer Hungária Kereskedelmi és Szolgáltató Kft.	269 744 927 HUF

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

TOP10 ATC by all reimbursement paid in December 2013



TOP 10 - ATC	International non-proprietary name (INN)	Reimbursement
R03AK07	formoterol and other drugs for obs. airway diseases	584 376 130 HUF
L01XE01	imatinib	530 335 114 HUF
V06D	other nutrients	484 210 417 HUF
R03BB04	tiotropium bromide	466 573 605 HUF
B01AB05	enoxaparin	429 237 103 HUF
C10AA07	rosuvastatin	402 958 880 HUF
A10AB01	insulin (human)	387 028 945 HUF
R03AK06	salmeterol and other drugs for obs. airway diseases	383 830 706 HUF
N05AX13	paliperidone	345 111 513 HUF
C10AA05	atorvastatin	330 442 825 HUF

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

Active Ingredient Evaluating Score (AIES) — Case study

In our current study we are presenting a newly developed framework and tool which was designed to evaluate pharmaceutical active ingredients with the Active Ingredient Evaluating Score (AIES). The aim of AIES is to evaluate and rank the reimbursed molecules in the Hungarian drug market based on objective criteria in order to define specific subgroups with given common characteristics. Among the indicators we chose such quantifiable variables on which the molecules as pharma submarkets can be valued and compared. The indicators are classified on a five point scale and for given analytic or market research purpose they can be selected and weighted with which we gain a multidimensional assessment tool, in which we can rank the Hungarian reimbursed molecules on the basis of an aggregated score.

In the example below we present a toplist based on the AIES of 5 variables, in which the active ingredients are evaluated regarding the opportunity of the market launch. The table shows the number of years in reimbursement of the molecules, which can be used as a filter criteria, to pick out the markets standing before the opening to the generics. The turnover data is the last 12 month public data from OEP data service and can be updated in every month. The turnover indicators are ranked by quintiles, and weighted to get an aggregate score.

The selected variables can be seen in the table below:

Market actors	Num. of companies, num. of brands, num. of products, years of reimbursement
Turnover	Quantitative turnover (DOT), Sales, Net income (after taxes), trend of turnover, market concentration
Prices	Change of patients, minimum price
Patients	Num. of patients, co-payment

In our model example the AI with the highest AIES is Cefprozil. There is 1 MAH in the submarket, it generated 413 million HUF income, which was increased by 14% monthly in the last six month, meanwhile the prices were steady.

ATC code	AI	AIES	Years in reimbursement	Num. of companies		Patients number (yearly)		Net income / company (yearly)		Change in sales (monthly, last 6 months)		Change in prices (monthly, last six months)	
				Score	Value	Score	Value	Score	Value	Score	Value	Score	Value
J01DC10	Cefprozil	65/65	7	5	1	5	195 106	5	413 M	5	14,08%	5	0,2%
J01DD08	Cefixime	65/65	7	5	1	5	181 783	5	439 M	5	8,59%	5	0,1%
R03BA05	Fluticasone	63/65	11	5	1	4	44 326	5	465 M	5	3,27%	5	0,0%
A10AB04	Lispro Insulin	61/65	11	5	1	3	12 740	5	638 M	5	3,23%	5	1,9%
A10AD04	Insulin Lispro	61/65	7	5	1	3	6 180	5	410 M	5	8,32%	5	1,7%
C01EB17	Ivabradin	61/65	5	5	1	3	5 529	5	312 M	5	4,08%	5	0,0%
J05AX05	Inosin Pranobex	61/65	11	5	1	4	45 601	5	231 M	5	6,63%	4	0,0%
N05AX13	Paliperidon	61/65	6	5	1	3	5 728	5	2 239 M	5	3,68%	5	2,0%
A10AB05	Insulin Aspart	60/65	11	5	1	4	26 356	5	1 344 M	4	1,77%	5	0,0%
B03AB05	(Vas(III)-Oxid)-Polimaltóz Komplex	60/65	11	5	1	4	46 488	4	93 M	5	3,75%	5	0,2%
B03AD19	(Vas(Hidroxiid)-Polimaltóz Komplex - Folsav Kombináció	60/65	11	5	1	5	74 231	5	323 M	4	2,03%	4	0,0%
J01DD14	Ceftibuten	60/65	7	5	1	5	64 031	4	197 M	5	6,80%	4	0,0%
N06AX21	Duloxetine	60/65	8	5	1	4	27 773	5	1 466 M	4	1,72%	5	0,1%

Actualities of Hungarian pharmaceutical market

Newsletter



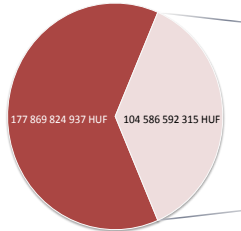
Market data

Marketing authorisation information; 2011 - 2013

2013 - Q1	EMA	OGYI	2013 - H1	EMA	OGYI	2013	EMA	OGYI
New brands	16	72	New brands	29	103	New brands	79	207
New SKUs	204	577	New SKUs	433	856	New SKUs	716	1 742

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

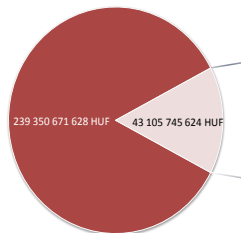
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Richter Gedeon Vegyeszeti Gyár NyRt.	13 184 618 149 HUF
EGIS Gyógyszergyár Nyrt.	13 050 554 147 HUF
Eli Lilly Nederland B. V.	10 723 952 885 HUF
Novo Nordisk A/S	9 510 886 015 HUF
SANOFI-AVENTIS Zrt.	9 248 685 901 HUF
GlaxoSmithKline Kft.	9 130 256 937 HUF
Boehringer Ingelheim International GmbH	7 982 106 960 HUF
Teva Magyarország Zrt.	7 836 933 192 HUF
AstraZeneca Kft.	7 704 868 606 HUF

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

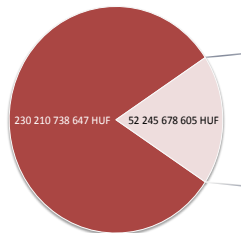
TOP10 BRAND by all reimbursement paid in 2013



TOP 10 - BRAND	Distributor	Reimbursement
GLIVEC	Novartis Hungária Kft.	6 995 728 034 HUF
SPIRIVA	Boehringer Ingelheim Pharma Gesellschaft m. b. H. N.	5 715 506 450 HUF
CLEXANE	SANOFI-AVENTIS Zrt.	4 676 275 907 HUF
SYMBICORT	AstraZeneca Kft.	4 661 849 527 HUF
RISPERDAL	Janssen-Cilag Gyógyszerkereskedelmi Marketing Szó	4 080 613 818 HUF
SERETIDE	GlaxoSmithKline Kft.	3 854 048 066 HUF
HUMULIN	Lilly Hungaria Kft.	3 729 595 048 HUF
SUTENT	Pfizer Kft.	3 446 529 900 HUF
LANTUS	SANOFI-AVENTIS Zrt.	3 428 409 742 HUF
COVEREX	EGIS Gyógyszergyár Nyrt.	2 517 189 132 HUF

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

TOP10 ATC by all reimbursement paid in 2013



TOP 10 - ATC	International non-proprietary name (INN)	Reimbursement
L01XE01	imatinib	6 995 728 034 HUF
R03AK07	formoterol and other drugs for obs. airway diseases	6 659 813 764 HUF
R03BB04	tiotropium bromide	5 715 506 450 HUF
C10AA07	rosuvastatin	5 324 204 598 HUF
V06D	other nutrients	4 878 020 832 HUF
B01AB05	enoxaparin	4 676 275 907 HUF
C10AA05	atorvastatin	4 605 987 663 HUF
A10AB01	insulin (human)	4 536 542 066 HUF
R03AK06	salmeterol and other drugs for obs. airway diseases	4 508 732 997 HUF
N05AX08	risperidone	4 344 866 294 HUF

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

Toplists based on the change of reimbursement amount; 2012/2013

By MAH

MAH	Reimbursement		Change		MAH	Reimbursement		Change	
	2012	2013	Amount	%		2012	2013	Amount	%
JANSSEN-CILAG INTERNATIONAL NV	2 092 391 514 Ft	3 739 687 950 Ft	1 647 296 436 Ft	78,73%	Roche Registration Limited	5 913 888 400 Ft	2 817 338 646 Ft	-3 096 549 754 Ft	-52,36%
Hospira UK Ltd.	1 001 914 340 Ft	1 914 700 151 Ft	912 785 811 Ft	91,10%	Amgen Europe BV	5 714 882 199 Ft	2 873 690 393 Ft	-2 841 191 806 Ft	-49,72%
Novartis Europharm Limited	15 103 635 598 Ft	15 943 815 500 Ft	840 179 902 Ft	5,56%	Krka d.d.	8 664 430 922 Ft	6 096 547 396 Ft	-2 567 883 526 Ft	-29,64%
Bayer Pharma AG	3 663 390 940 Ft	4 319 825 541 Ft	656 434 601 Ft	17,92%	SANOFI-AVENTIS Zrt.	11 627 125 575 Ft	9 248 685 175 Ft	-2 378 440 400 Ft	-20,46%
Sandoz Pharmaceuticals GmbH	1 270 920 456 Ft	1 812 268 003 Ft	541 347 547 Ft	42,59%	EGIS Gyógyszergyár Nyrt.	14 607 754 824 Ft	13 050 554 267 Ft	-1 557 200 557 Ft	-10,66%

By BRAND

BRAND	Distributor	Reimbursement		Change		BRAND	Distributor	Reimbursement		Change	
		2012	2013	Amount	%			2012	2013	Amount	%
NIVESTIM	Aramis Pharma Kft.	556 529 HUF	1 263 560 HUF	707 031 HUF	127,04%	NEULASTA	Amgen Gyógyszerkereskedelmi Kft.	3 225 726 HUF	1 311 408 HUF	-1 914 318 HUF	-59,35%
XOLAIR	Novartis Hungária Kft.	1 178 779 HUF	1 864 273 HUF	685 494 HUF	58,15%	CLEXANE	SANOFI-AVENTIS Zrt.	6 101 341 HUF	4 676 276 HUF	-1 425 065 HUF	-23,36%
INSUMAN	SANOFI-AVENTIS Zrt.	1 159 614 HUF	1 779 943 HUF	620 329 HUF	53,49%	RISPERDAL	Janssen-Cilag Kft.	5 288 430 HUF	4 080 614 HUF	-1 207 816 HUF	-22,84%
TASIGNA	Novartis Hungária Kft.	1 167 116 HUF	1 717 838 HUF	550 721 HUF	47,19%	ATORIS	KRKA Magyarország Kft.	2 229 748 HUF	1 299 623 HUF	-930 125 HUF	-41,71%
FRAXIPARINE	GlaxoSmithKline Kft.	1 853 937 HUF	2 389 027 HUF	535 090 HUF	28,86%	ZOMETA	Novartis Hungária Kft.	2 111 897 HUF	1 200 229 HUF	-911 667 HUF	-43,17%

By INN

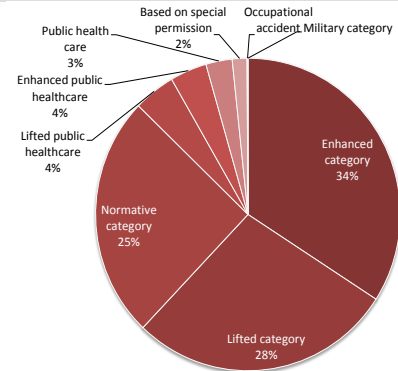
ATC	International non-proprietary name	Reimbursement		Change		ATC	International non-proprietary name	Reimbursement		Change	
		2012	2013	Amount	%			2012	2013	Amount	%
N05AX13	paliperidone	1 083 038 HUF	3 354 861 HUF	2 271 823 HUF	209,76%	C10AA05	atorvastatin	7 713 214 HUF	4 605 988 HUF	-3 107 227 HUF	-40,28%
A10AB01	insulin (human)	3 808 563 HUF	4 536 542 HUF	727 979 HUF	19,11%	L03AA13	pegfilgastrom	3 225 726 HUF	1 311 408 HUF	-1 914 318 HUF	-59,35%
R03DX05	omalizumab	1 178 779 HUF	1 864 273 HUF	685 494 HUF	58,15%	N05AX08	risperidone	5 794 417 HUF	4 344 866 HUF	-1 449 551 HUF	-25,02%
B01AB06	nadroparin	1 900 559 HUF	2 510 778 HUF	610 218 HUF	32,11%	B01AB05	enoxaparin	6 101 341 HUF	4 676 276 HUF	-1 425 065 HUF	-23,36%
A10AC01	insulin (human)	2 195 969 HUF	2 793 032 HUF	597 064 HUF	27,19%	A02BC02	pantoprazole	1 726 085 HUF	483 509 HUF	-1 242 576 HUF	-71,99%

Average number of medical sales reps; 2013

All	1 701
Medicinal products	1 443
Medical aids	231
Both	27

Source: Healthware analysis based on OGYI's

Drug reimbursement by legal title; 2013



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