Actualities of Hungarian pharmaceutical financing market

Newsletter
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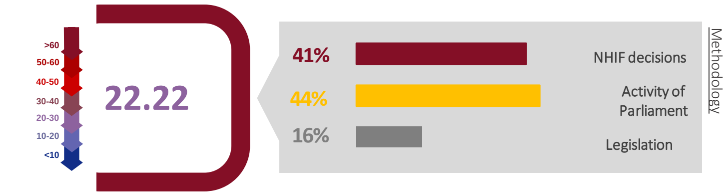
Decision-making index, December 2024



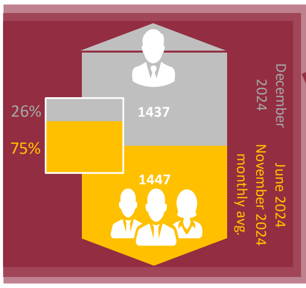
Macro approach to financing healthcare and medicinal products

Balance of the Health Insurance Fund (HUF), December 2024

Standard	7 770 M	0,9%
Indication based	15 519 M	0,5%
Indication b. 100%	19 841 M	-1,5%
NPP	4 014 M	4,0%
Pharmacy	47 143 M	0,0%
High value	33 261 M	3554,8%
Total	**80 404 M**	67,3%

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

-29,74M HUF

549 918M HUF	187 038M HUF
outturn (expenditure)	outturn (revenue)

Source: Healthware analysis based on NHIFA data

Product offering

Legislation follow up

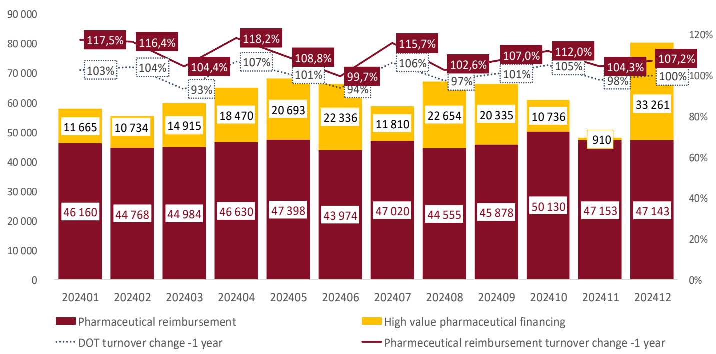
In the recent years Hungarian pharmaceutical market is characterized by rapidly changing and growing number of regulation instruments, as well as constant system transformations. Healthware Regulatory Compliance is a service in order to support companies with up-to date and comprehensive information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

In the framework of regulatory compliance service, immediate alerts December 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**

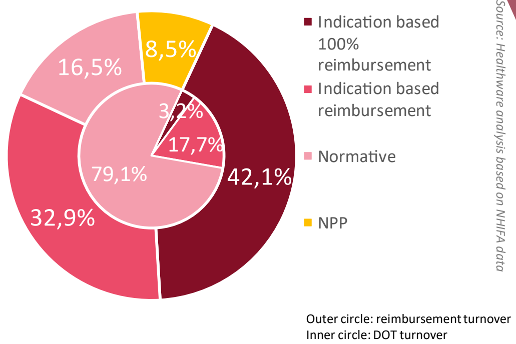
Dynamics of the sales/circulation of prescription-only-medicine

Pharmacy DOT turnover



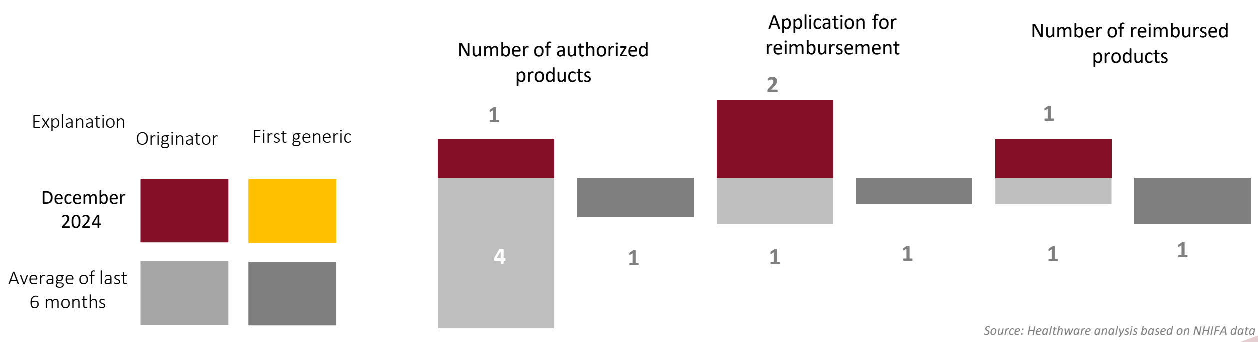
Source: Healthware analysis based on NHIFA data

Pharmacy reimbursement turnover



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

Changes to subsidized medicinal product categories, December 2024



Source: Healthware analysis based on NHIFA data

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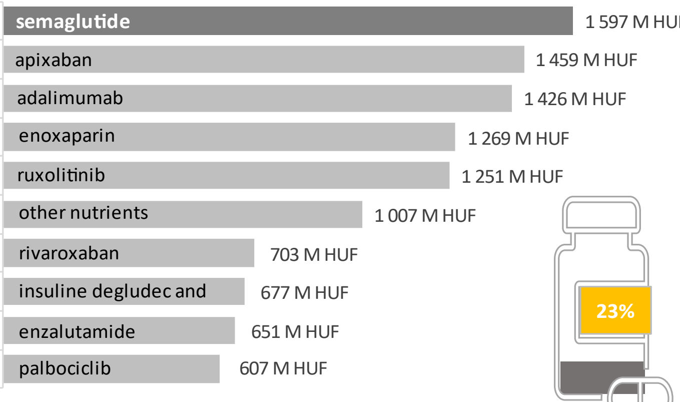
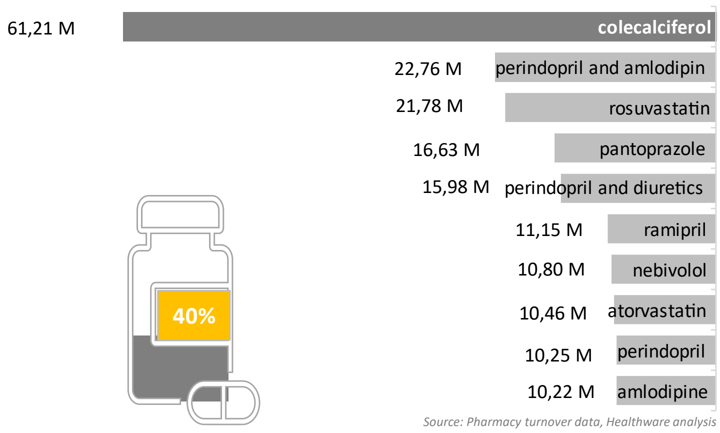
Toplists of reimbursement and number of patients, December 2024

TOP 10 ATCs by all reimbursement paid



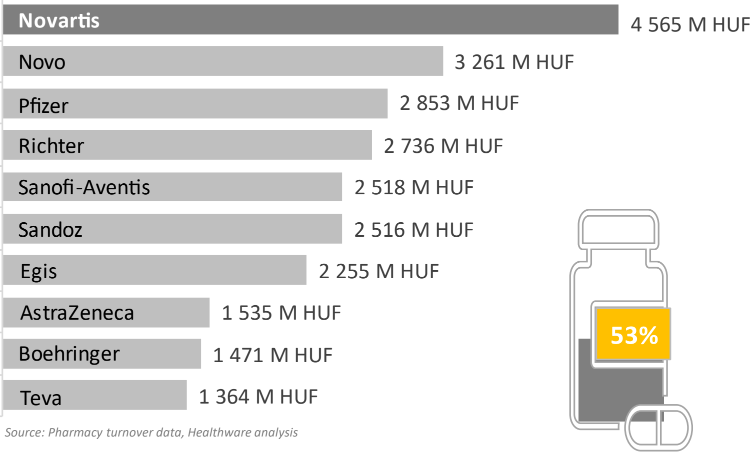
Source: Pharmacy turnover data, Healthware analysis

TOP 10 DOT by all reimbursement paid



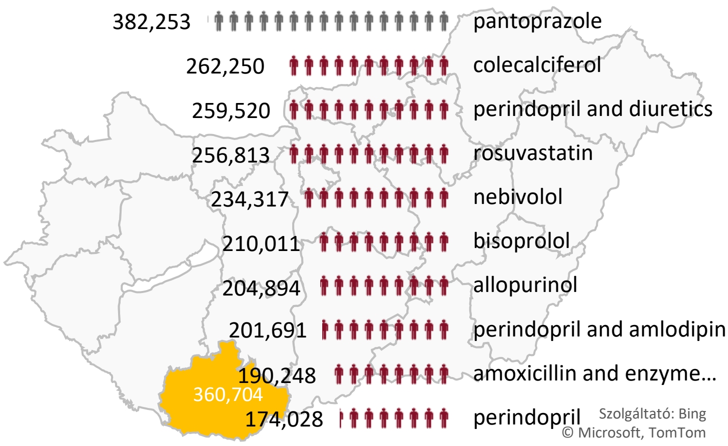
Source: Pharmacy turnover data, Healthware analysis

TOP 10 distributors by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

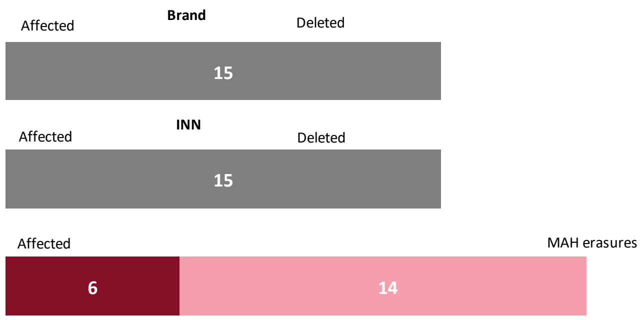
TOP 10 patient turnover by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

Substitutable products, December 2024

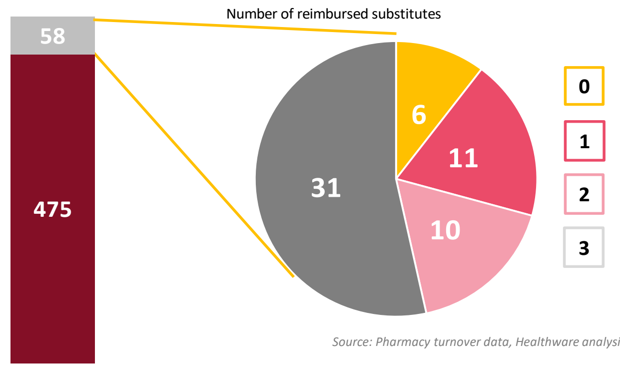
Within product deletions, marketing authorization (MAH) erasures were distinguished.
We also examined the active substances and brands affected in the procedure. These were divided into two groups according to whether the brand or active substance was completely removed from the formulary or whether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



Source: Pharmacy turnover data, Healthware analysis

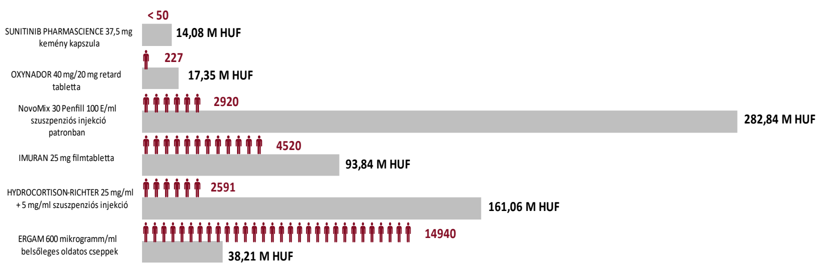
Product shortages

The graph shows the distribution of the reimbursed product shortage list. 475 products had been on the list before December 2024, compared to 58 new product added to the list in the month under review.
The 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, December 2024 vs November 2024 in HUF

Ranking		Brand	Reimbursement increment	%*
1	NOVARTIS	JAKAVI	80 725 440 HUF	104%
2	MSD	PREVYMIS	46 189 421 HUF	172%
3	NOVARTIS	REVOLADE	44 498 680 HUF	108%
4	Takeda	TAKHZYRO	37 999 464 HUF	126%
5	sanofi	LIBTAYO	31 558 847 HUF	96%
6	NOVARTIS	KESIMPTA	31 171 854 HUF	138%
7	AOP HEALTH	TRESUVI	31 014 277 HUF	118%
8	Bristol Myers Squibb	ELIQUIS	30 914 938 HUF	104%
9	novo nordisk	TRESIBA	28 750 543 HUF	107%
10	DANONE	MILUMIL	26 237 204 HUF	105%

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