

## News, current issues

- **Legislations** come into force between 1/1/2015 and 1/2/2015: Act XI of 1991 (2015.01.01.,2015.01.30.); Act LXXXIII of 1997 (2015.01.01.); Act CLIV of 1997 (2015.01.01.,2015.01.30.); Act XXV of 1998 (2015.01.01.); Act II of 2000 (2015.01.01.); Act XCV of 2005 (2015.01.01.,2015.01.30.); Act XCVII of 2006 (2015.01.01.); Act XCVIII of 2006 (2015.01.01.); Gov.Decree No.284/1997. (2015.01.01.); Gov.Decree No.43/1999. (2015.01.01.); Gov.Decree No.43/1999. (2015.01.30.); Gov.Decree No.337/2008. (2015.01.01.); Gov.Decree No.319/2010. (2015.01.01.); Gov.Decree No.323/2010. (2015.01.01.); Gov.Decree No.364/2010. (2015.01.01.); Gov.Decree No.59/2011. (2015.01.01.); Gov.Decree No.313/2011. (2015.01.01.); Gov.Decree No.46/2012. (2015.01.01.); ESzCsM Decree No.44/2004. (2015.02.01.); ESzCsM Decree No.53/2004. (2015.02.01.); EüM Decree No.5/2004. (2015.02.01.); EüM Decree No.52/2005. (2015.02.01.); EüM Decree No.14/2007. (2015.02.01.); EüM Decree No.41/2007. (2015.02.01.); EüM Decree No.2/2008. (2015.02.01.); EüM Decree No.3/2009. (2015.02.01.); NEFMI Decree No.11/2011. (2015.02.01.)
- **NEWS:** "Seven hundred generics' distribution in Europe are threatened by the result of the EMA's examination" [link](#)
- **NEWS:** "We must keep our feet firmly on the ground - an interview with dr. Mária Márki Sélleiné, Director General of OEP" [link](#)
- **NEWS:** "Shocking facts about Hungarian hospitals - this is what should be done" [link](#)
- **NEWS:** "Six new drugs' price could be reimbursed" [link](#)
- **NEWS:** "Healthcare: the negotiation begins, where no decision is taken, only one can left" [link](#)
- **NEWS:** "Pfizer to buy Hospira for \$15 billion to bolster hospital products" [link](#)

## Macro approach to financing healthcare and medicinal products

### Balance of the Health Insurance Fund

Health Security Fund	2013. I-XII.	2014 original appropriation	2014		
			I-XII. months	% of appropriation	% of last year
<b>Total of Budgetary Expenditures</b>	<b>1 847,8</b>	<b>1 884,2</b>	<b>1 907,1</b>	<b>101,2%</b>	<b>103,2%</b>
Curative preventive provisions	908,0	931,9	945,6	101,5%	104,1%
Medicine subsidies	296,0	294,1	302,3	102,8%	102,1%
Medicine subsidies (pharmacy)	281,5	222,4	286,4	128,8%	101,7%
<b>Total of Budgetary Revenues</b>	<b>1 847,8</b>	<b>1 884,2</b>	<b>1 907,1</b>	<b>101,2%</b>	<b>103,2%</b>
Social Security Contributions	768,0	852,9	896,3	105,1%	116,7%
Contribution of Pharmaceutical Manufacturers and Wholesalers	58,7	56,0	57,4	102,4%	97,8%
<b>Balance</b>	<b>0,0</b>	<b>0,0</b>	<b>0,0</b>		<b>0,0%</b>

Billion HUF

The 2014 budget counts with 2% increase in the expenditure and in the revenues too, while the balance is nil. The central budget contribution is planned to be less with 5% than last year fulfilment, and this gap is filled with the 11% higher social security contribution (85 billion HUF). The medicine subsidies plan are lower with 2 billion HUF than last year expenses. In 2014 the Health Security Fund balance was nil, while both the revenues and the expenditures exceed the provision with 22,9 billion HUFs. The social security contribution was higher the last year level with 16,7% (128,3 billion HUFs).

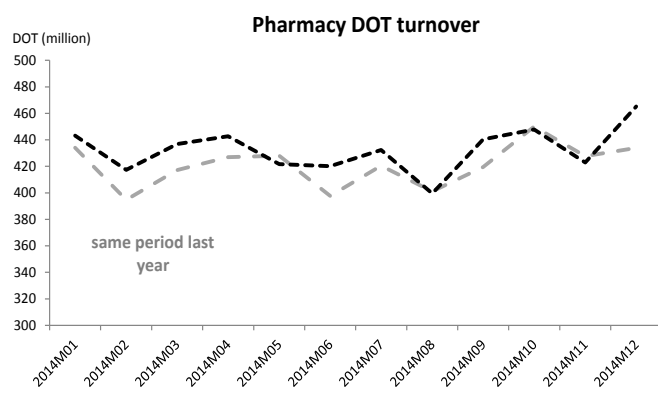
## Changes to subsidised medicinal product categories

	Changes in the public drug list						
	2014 Sep.	2014 Oct.	2014 Nov.	2014 Dec.	2015 Jan.	2015 Feb.	2015
Number of new products	26	23	13	8	26	6	32
Number of new AI	1	1	1	1	3	2	5
Number of delisted products	20	47	23	9	26	10	36
<b>Prices</b>							
Decrease	7	263	3	3	24	1	25
Increase	2	2	0	2	3	0	3

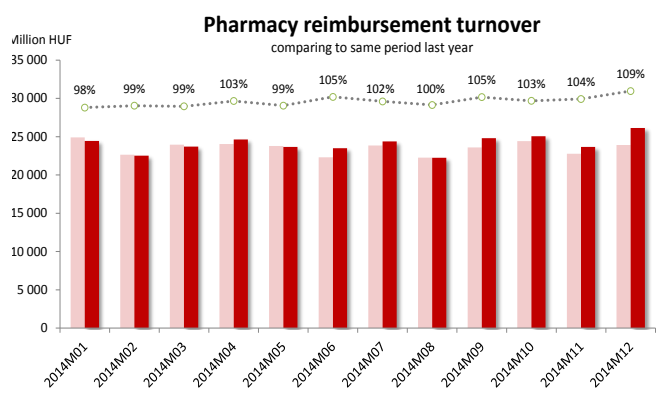
	Changes in the public drug list						
	2014 Sep.	2014 Oct.	2014 Nov.	2014 Dec.	2015 Jan.	2015 Feb.	2015
<b>Reimbursement</b>							
Decrease	2	683	1	2	47	1	48
Increase	0	78	1	6	13	0	13
<b>Co-payment</b>							
Decrease	9	348	7	4	42	1	43
Increase	2	511	0	5	24	0	24

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 2014 was 2,74% higher than in 2013, so the trend of drug consumption is slowly increasing, while the reimbursement turnover was higher the 2012 level with 2,2%. New innovative reimbursement decisions generated 1,53% of 2014 reimbursement outflow, while only 0,08% of yearly DOT turnover.

## FX-process/Reference pricing

Following the changes eventuated in the course of formation of FX-groups:

- Presentation of changes in group- and product level
- Modelling of forming of FX-groups
  - Cancel and create groups
  - Combine and dissociate groups
  - Cancellation of products
  - Translocation of products
  - Change of price, reimbursement and DOT-values of products
- Analysis related to FX-process

According to the demand of Client we make decision preparatory and modelling analysis about fix groups related to the portfolio of our Partner.

Further information about the service: [link](#)

Product offering



# Actualities of Hungarian pharmaceutical market

Newsletter



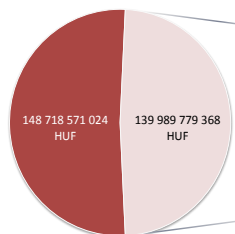
## Market data

### Marketing authorisation information

2014 - Q1	EMA	OGYI	2014 - H1	EMA	OGYI	2014	EMA	OGYI
New brands	16	56	New brands	35	92	New brands	66	182
New SKUs	215	541	New SKUs	381	944	New SKUs	351	1 771

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

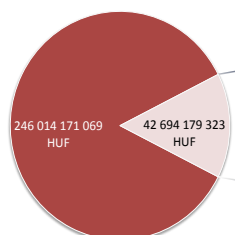
### TOP10 DISTRIBUTOR by all reimbursement paid in 2014



TOP 10 - DISTRIBUTOR	Reimbursement
Novartis Hungária Kft.	26 154 556 858 HUF
SANOFI-AVENTIS Zrt.	18 161 887 295 HUF
EGIS Gyógyszergyár Zrt.	14 651 216 443 HUF
TEVA Gyógyszergyár Zrt.	14 573 043 734 HUF
Richter Gedeon Vegyészeti Gyár NyRt.	13 700 778 960 HUF
Pfizer Kft.	12 145 713 781 HUF
Lilly Hungaria Kft.	11 081 267 298 HUF
Novo Nordisk Hungária Kft.	10 433 701 921 HUF
Janssen-Cilag Gyógyszerkereskedelmi Marketing Szolgáltató Kft.	9 688 723 594 HUF
Sandoz Hungária Kereskedelmi Kft.	9 398 889 483 HUF

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

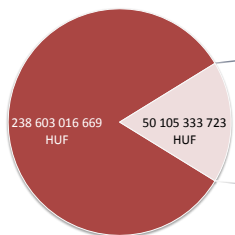
### TOP10 BRAND by all reimbursement paid in 2014



TOP 10 - BRAND	Distributor	Reimbursement
GLIVEC	Novartis Hungária Kft.	6 626 994 578 HUF
CLEXANE	SANOFI-AVENTIS Zrt.	5 912 571 164 HUF
SPIRIVA	Boehringer Ingelheim Pharma Gesellschaft m. b. H. N	5 126 109 623 HUF
SYMBICORT	Astra Zeneca AB	4 348 434 374 HUF
XEPLION	Janssen-Cilag Gyógyszerkereskedelmi Marketing Sz	4 198 189 218 HUF
LANTUS	SANOFI-AVENTIS Zrt.	3 910 765 217 HUF
HUMULIN	Lilly Hungaria Kft.	3 514 809 514 HUF
SUTENT	Pfizer Kft.	3 309 085 139 HUF
RISPERDAL	Janssen-Cilag Gyógyszerkereskedelmi Marketing Sz	2 931 101 100 HUF
SERETIDE	GlaxoSmithKline Kft.	2 816 119 396 HUF

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

### TOP10 ATC by all reimbursement paid in 2014



TOP 10 - ATC	International non-proprietary name (INN)	Reimbursement
L01XE01	imatinib	6 626 994 578 HUF
B01AB05	enoxaparin	5 912 571 164 HUF
V06D	other nutrients	5 457 672 602 HUF
R03AK07	formoterol and other drugs for obs. airway diseases	5 344 941 800 HUF
N05AX13	paliperidone	5 143 979 202 HUF
R03BB04	tiotropium bromide	5 126 109 623 HUF
C10AA07	rosuvastatin	4 608 799 667 HUF
A10AB01	insulin (human)	4 302 181 171 HUF
A10AE04	insulin glargine	3 910 765 217 HUF
C10AA05	atorvastatin	3 671 318 699 HUF

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

## Toplists based on the change of reimbursement amount; 2013/2014

### By Distributor

↑ TOP 5 increase	Reimbursement (HUF)		Change	
	2013	2014	Amount (HUF)	%
DISTRIBUTOR				
Novartis Hungária Kft.	24 369 806 846	26 003 323 305	1 633 516 459	6,70%
SANOFI-AVENTIS Zrt.	16 536 787 658	18 161 887 295	1 625 099 637	9,83%
Janssen-Cilag (4 distributors)	9 121 271 479	10 557 858 434	1 436 586 956	15,75%
Lundbeck Hungária Kft.	1 989 022 388	2 960 547 782	971 525 394	48,84%
Novo Nordisk Hungária Kft.	9 486 316 015	10 433 701 921	947 385 906	15,75%

↓ TOP 5 decrease	Reimbursement (HUF)		Change	
	2013	2014	Amount (HUF)	%
DISTRIBUTOR				
MSD Pharma H. Kft. + Schering-Plough Hungary Kft.	10 110 855 763	8 260 533 764	-1 850 321 999	-18,30%
Bristol-Myers Squibb Gyógyszerkereskedelmi Kft.	4 437 783 647	2 627 665 691	-1 810 117 956	-40,79%
GlaxoSmithKline (8 distributors)	10 996 314 242	9 846 318 417	-1 149 995 825	-10,46%
Roche (2 distributors)	5 595 853 582	4 843 282 323	-752 571 260	-13,45%
Aramis Pharma Kft.	5 059 460 834	4 518 692 254	-540 768 580	-10,69%

### By BRAND

↑ TOP 5 increase	BRAND	Distributor	Reimbursement (HUF)		Change	
			2013	2014	Amount (HUF)	%
XEPLION	Janssen-Cilag		2 347 968 031	4 198 189 218	1 850 221 187	78,80%
CLEXANE	SANOFI-AVENTIS Zrt.		4 676 275 907	5 912 571 164	1 236 295 257	26,44%
SEEBRI BREEZHALE	Novartis Hungária Kft.		58 360 182	778 818 666	720 458 484	1234,50%
TASIGNA	Novartis Hungária Kft.		1 717 837 590	2 415 422 898	697 585 308	40,61%
XARELTO	Bayer Hungária		610 535 077	1 249 751 643	639 216 566	104,70%

↓ TOP 5 decrease	BRAND	Distributor	Reimbursement (HUF)		Change	
			2013	2014	Amount (HUF)	%
ZOMETA	Novartis Hungária Kft.		1 200 229 315	3 140 637 008	-1 200 373 354	-100,01%
RISPERDAL	Janssen-Cilag Gyógyszerker... Kft.		4 080 613 818	2 931 101 100	-1 149 512 718	-28,17%
SERETIDE	GlaxoSmithKline Kft.		3 854 048 066	2 816 119 396	-1 037 928 670	-26,93%
INEGY	MSD Pharma Hungary Kft.		1 892 981 815	1 282 729 823	-610 251 992	-32,24%
SPIRIVA	Boehringer Ingelheim Pharma...		5 715 506 450	5 126 109 623	-589 396 827	-10,31%

### By INN

↑ TOP 5 increase	ATC	International non-proprietary name	Reimbursement (HUF)		Change	
			2013	2014	Amount (HUF)	%
N05AX13		paliperidon	3 354 860 999	5 143 979 202	1 789 118 203	53,33%
B01AB05		enoxaparin	4 676 275 907	5 912 571 164	1 236 295 257	26,44%
L04AA27		fungolimod	209 357 930	1 188 642 255	979 284 325	467,76%
R03BB06		glycopyrronium bromide	58 360 182	778 818 666	720 458 484	1234,50%
L01XE08		nilotinib	1 717 837 590	2 415 422 898	697 585 308	40,61%

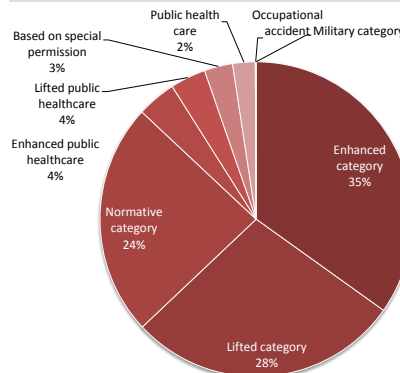
↓ TOP 5 decrease	ATC	International non-proprietary name	Reimbursement (HUF)		Change	
			2013	2014	Amount (HUF)	%
N05AX08		risperidon	4 344 866 294	3 140 637 008	-1 204 229 286	-27,72%
R03AK06		salmeterol and fluticasone	4 508 732 997	3 479 664 577	-1 029 068 420	-22,82%
C10AA05		atorvastatin	4 605 987 663	3 671 318 699	-934 668 964	-20,29%
C10AA07		rosuvastatin	5 324 204 598	4 608 799 667	-715 404 931	-13,44%
M05BA08		zoledronic acid	2 098 138 238	1 409 825 863	-688 312 375	-32,81%

### Average number of medical sales reps; 2014

All	1 701
Medicinal products	1 441
Medical aids	228
Both	32

Source: Healthware analysis based on OGYI's

### Drug reimbursement by legal title; 2014



Source: Healthware analysis based on the sales