

News, current issues

- News** 2024 will be the most operational year for health care sector >>
- News** Péter Takács: We have put an end to the practice of employing nurses in the grey zone >>
- News** György Velkey: Hospital waiting time will remain too long >>

Macro approach to financing healthcare and medicinal products

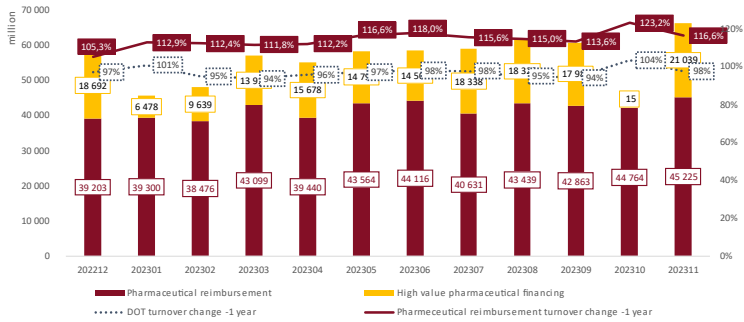
Balance of the Health Insurance Fund, November 2023

Standard	7 472 M	3,9%
Indication based reimb.	14 585 M	1,7%
Indication based 100% reimb.	18 436 M	-1,0%
NPP	4 730 M	2,4%
Pharmacy	45 225 M	1,0%
High value	21 039 M	100+%
Total	66 264 M	48,0%

Source: Healthware analysis based on NHIFA data

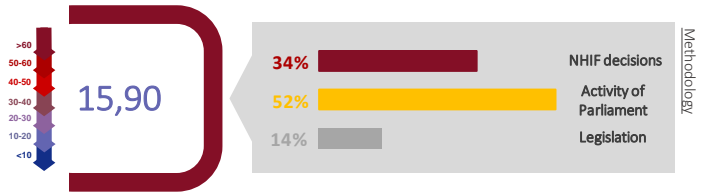
Dynamics of the sales/circulation of prescription-only-medicine

Pharmacy DOT turnover



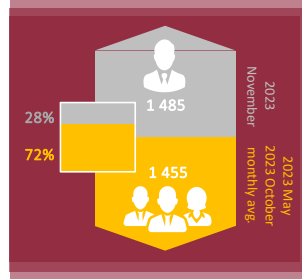
Source: Healthware analysis based on NHIFA data

Decision-making index, November 2023

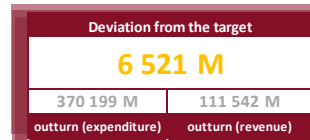


Methodology

Average number of medical sales reps

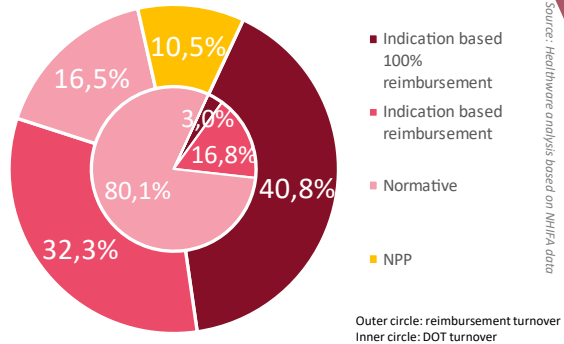


Share of doctors and others
Source: NHIFA data, Healthware analysis



Source: Healthware analysis based on NHIFA data

Pharmacy reimbursement turnover



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

Source: Healthware analysis based on NHIFA data

Changes to subsidized medicinal product categories, November 2023

Explanation	Number of authorized products	Applications for reimbursement	Number of reimbursed products
Originator	1	3	1
First generic	2	2	1
November 2023			
Average of last 6 months	2	4	1

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

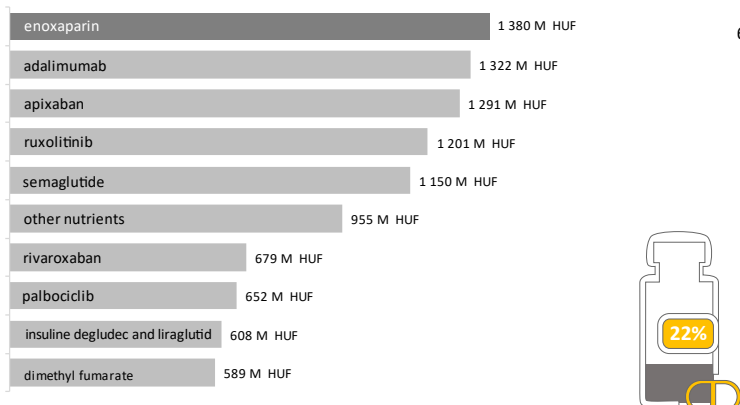
a report in order to compare the previous state with the amended one and an interpretation, in an intelligible form.

More about the services: [link](#)



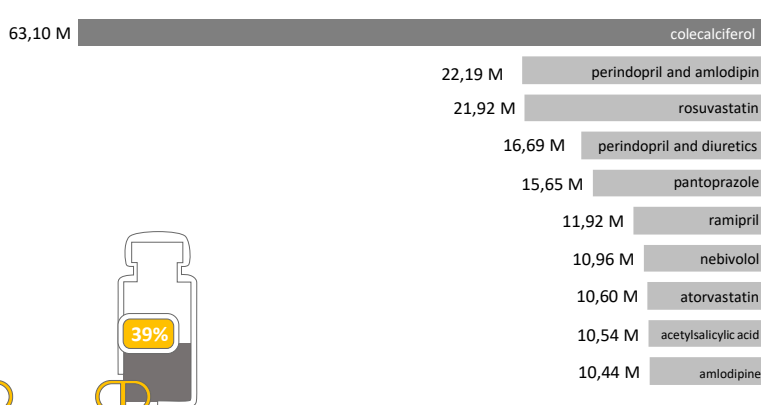
Toplists of reimbursement and number of patients, November 2023

TOP 10 ATCs by all reimbursement paid



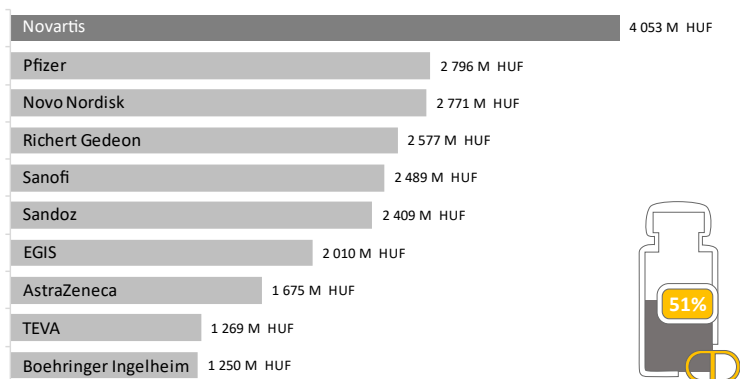
Source: Pharmacy turnover data, Healthware analysis

TOP 10 DOT by all reimbursement paid



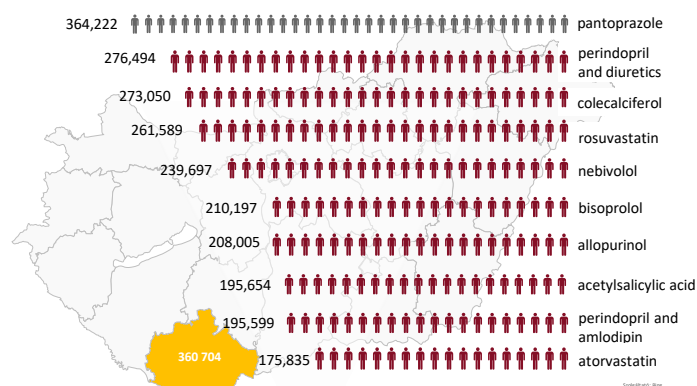
Source: Pharmacy turnover data, Healthware analysis

TOP 10 distributors by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

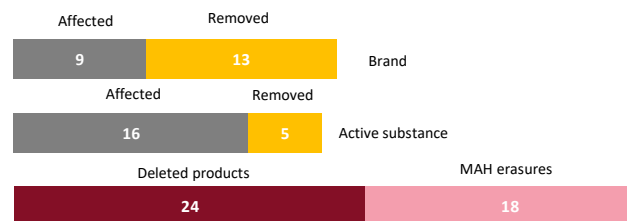
TOP 10 patient turnover by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

Substitutable products, November 2023

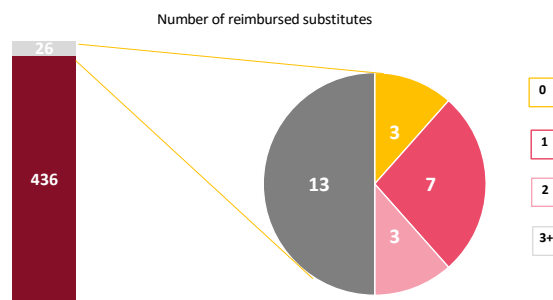
Within product deletions, marketing authorization (MAH) erasures were distinguished. We also examined the active substances and brands affected in the procedure. These were divided into two groups according to whether the brand or active substance was completely removed from the formulary or whether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



Source: Pharmacy turnover data, Healthware analysis

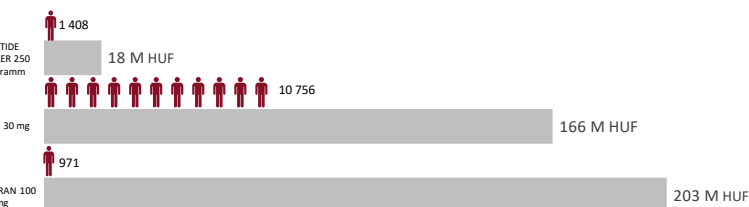
Product shortages

The graph shows the distribution of the reimbursed product shortage list. 436 products had been on the list before November 2023, compared to 26 new product added to the list in the month under review. The 26 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 a substitute*



*Turnover in the 12 months preceding the product shortage
Source: Pharmacy turnover data, Healthware analysis

Highest growth, November 2023 vs. October 2023 in HUF

Company	Brand	Reimbursement increment	%*
1 NOVARTIS	TASIGNA	52 186 450 HUF	124%
2 Pfizer	ELIQUIS	51 271 733 HUF	104%
3 SANDOZ	HYRIMOZ	35 812 822 HUF	104%
4 Leadiant	CHENODEOXYCHOLIC ACID LEADIANT	35 716 030 HUF	194%
5 sanofi	LIBTAYO	35 180 742 HUF	117%
6 sanofi	DUPIXENT	28 681 531 HUF	111%
7 Takeda	TAKHZYRO	28 499 598 HUF	157%
8 teva	DOXAZOSIN RATIOPHARM	27 246 557 HUF	173%
9 NOVARTIS	ENTRESTO	26 166 783 HUF	114%
10 Lilly	VERZENIOS	23 731 430 HUF	110%

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