Newsletter
No. 11 Issue XII. 2024
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Actualities of Hungarian pharmaceutical financing market

News, current issues

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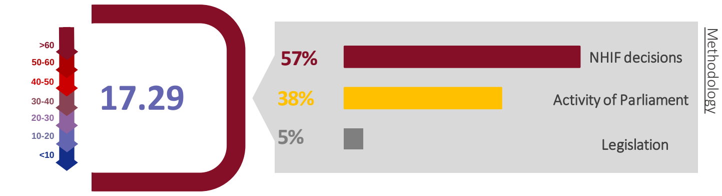
Decision-making index, September 2024



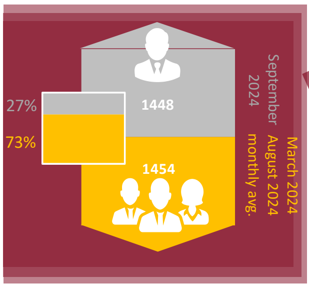
Macro approach to financing healthcare and medicinal products

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

Standard	7 173 M Ft	3,8%
Indication based	14 934 M Ft	2,8%
Indication b. 100%	20 029 M Ft	2,9%
NPP	3 742 M Ft	2,4%
Pharmacy	45 878 M Ft	3,0%
High value	20 335 M Ft	-10,2%
Total	**66 213 M Ft**	-1,5%

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	
-17,37M HUF	
403 475M HUF	129 280M HUF
outturn (expenditure)	outturn (revenue)

Source: Healthware analysis based on NHIFA data

Product offering

Legislation follow up

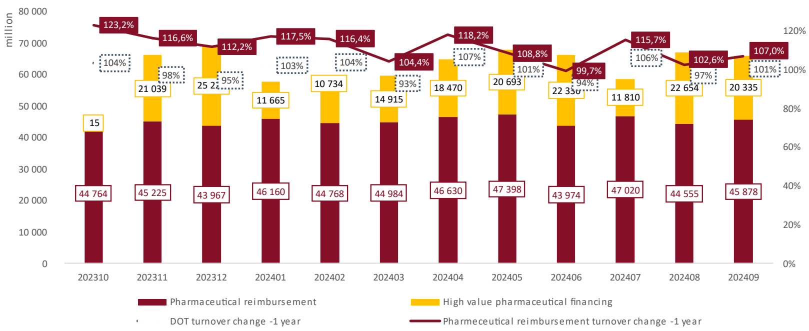
In the recent years Hungarian pharmaceutical market is characterized by rapidly changing and growing number of regulation instruments, as well as constant system transformations. Healthware Regulatory Compliance is a service in order to support companies with up-to date and comprehensive information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

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

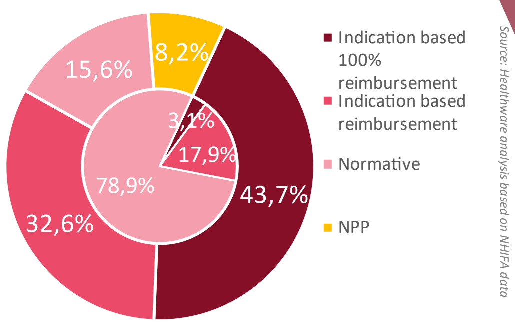
Dynamics of the sales/circulation of prescription-only-medicine

Pharmacy DOT turnover



Source: Healthware analysis based on NHIFA data

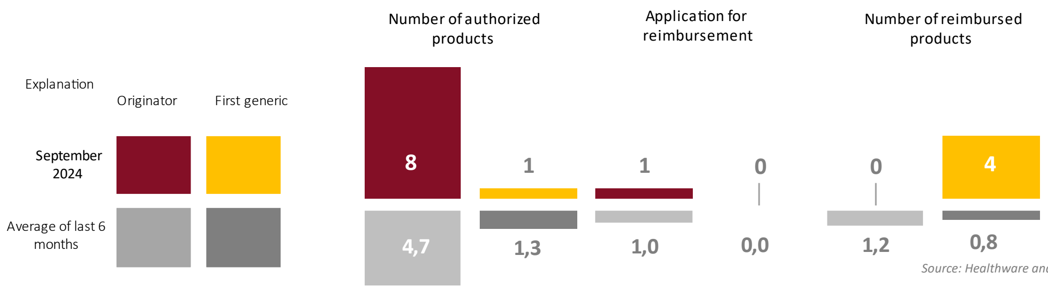
Pharmacy reimbursement turnover



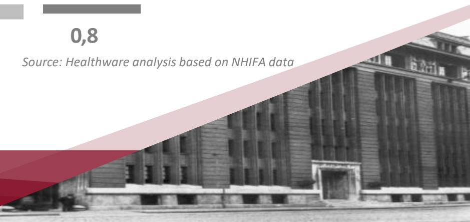
Outer circle: reimbursement turnover
Inner circle: DOT turnover

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

Changes to subsidized medicinal product categories, September 2024



Source: Healthware analysis based on NHIFA data



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HEALTHWARE

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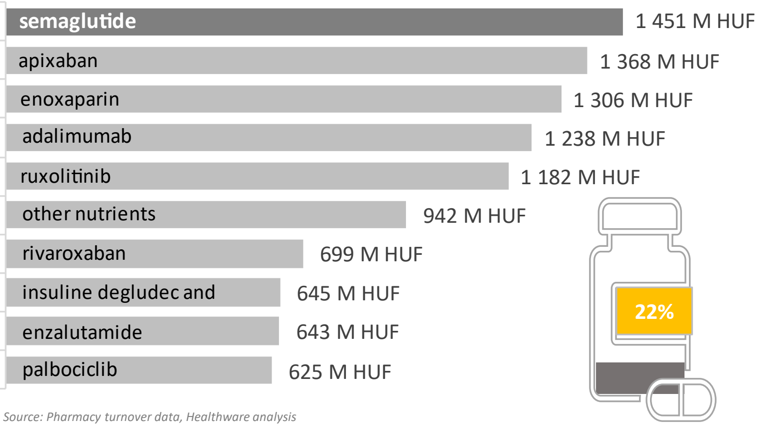
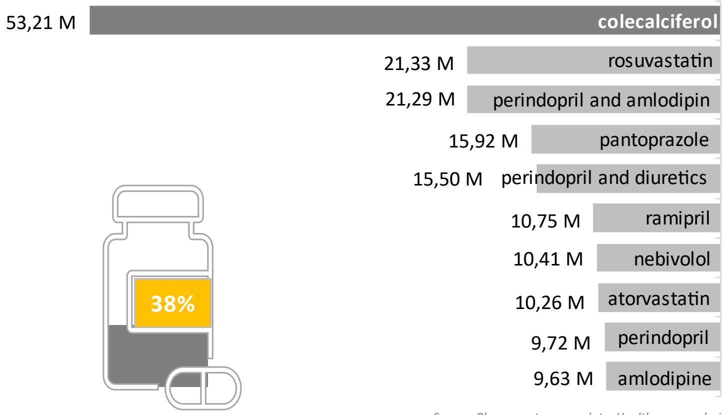
Toplists of reimbursement and number of patients, September 2024

TOP 10 ATCs by all reimbursement paid



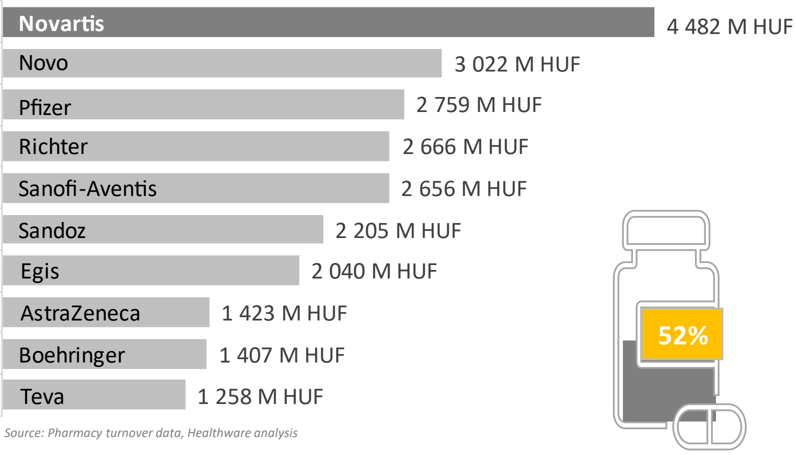
Source: Pharmacy turnover data, Healthware analysis

TOP 10 DOT by all reimbursement paid



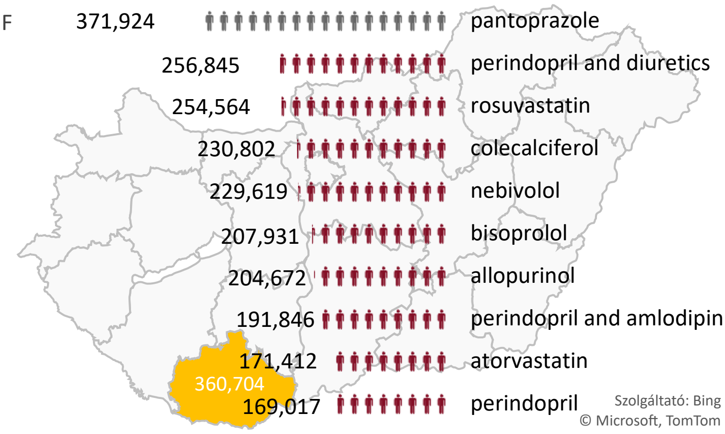
Source: Pharmacy turnover data, Healthware analysis

TOP 10 distributors by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

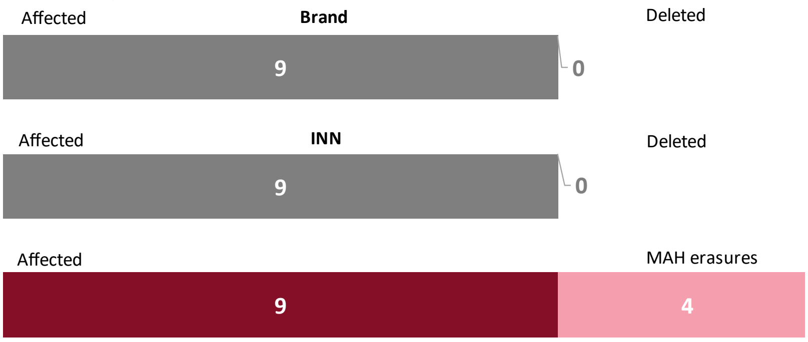
TOP 10 patient turnover by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

Substitutable products, September 2024

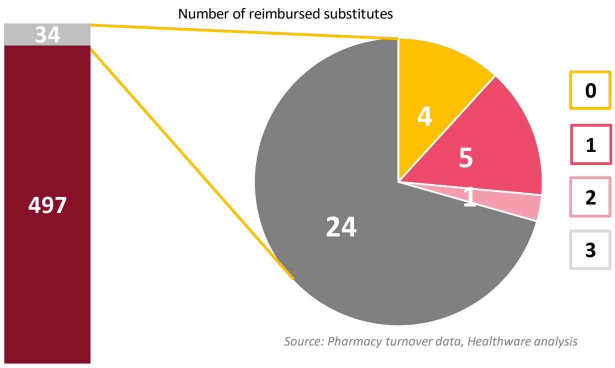
Within product deletions, marketing authorization (MAH) erasures were distinguished.
We also examined the active substances and brands affected in the procedure. These were divided into two groups according to whether the brand or active substance was completely removed from the formulary or whether 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. 497 products had been on the list before September 2024, compared to 34 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, September 2024 vs August 2024 in HUF

Ranking		Brand	Reimbursement increment	%*
1	HEALTHCARE CELLTRION	YUFLYMA	221 215 002 HUF	182%
2	NOVARTIS	LEQVIO	166 252 851 HUF	147%
3	Roche	OCREVUS	109 681 591 HUF	108%
4	STADA	HUKYNDRA	80 862 005 HUF	257%
5	AMGEN	PROLIA	48 367 620 HUF	108%
6	astellas	XOSPATA	46 980 584 HUF	138%
7	AstraZeneca	KOSELUGO	45 283 560 HUF	124%
8	sanofi	CLEXANE	40 156 778 HUF	98%
9	MERCK	PERGOVERIS	36 241 465 HUF	154%
10	novo nordisk	OZEMPIC	31 667 418 HUF	97%

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