Newsletter
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HEALTHWARE

Actualities of Hungarian pharmaceutical financing market

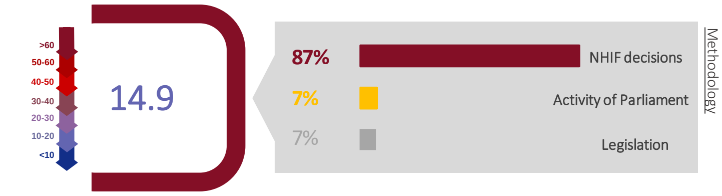
News, current issues

News — A drastic care reform is coming, the number of medical emergencies in the capital will decrease by a third >>

News — Doctors have identified a new risk factor: it can triple the chance of developing an incurable disease >>

News — The debt stock of budgetary bodies is still extremely high >>

Decision-making index, May 2024



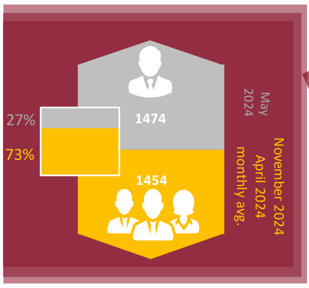
Macro approach to financing healthcare and medicinal products

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

Standard	7 539 M	
Indication based reimb.	15 269 M	3,6%
Indication based 100% reimb.	20 760 M	5,9%
		8,8%
NPP	3 831 M	-8,7%
Pharmacy	47 398 M	5,4%
High value	20 693 M	38,7%
Total	**68 091 M**	13,7%

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

-3,14M HUF

222 597M HUF	76 782M HUF
outturn (expenditure)	outturn (revenue)

Source: Healthware analysis based on NHIFA data

Product offering

Legislation follow up

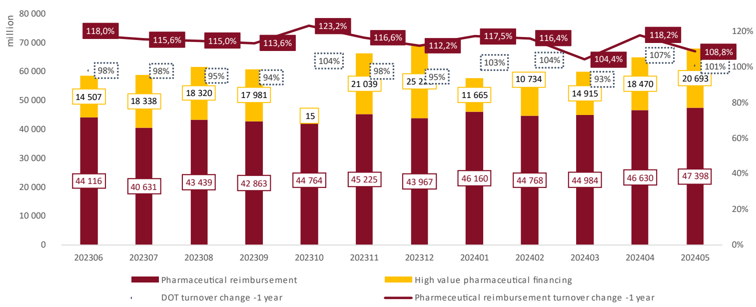
In the recent years Hungarian pharmaceutical market is characterized by rapidly changing and growing number of regulation instruments, as well as constant system transformations. Healthware Regulatory Compliance is a service in order to support companies with up-to date and comprehensive information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

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

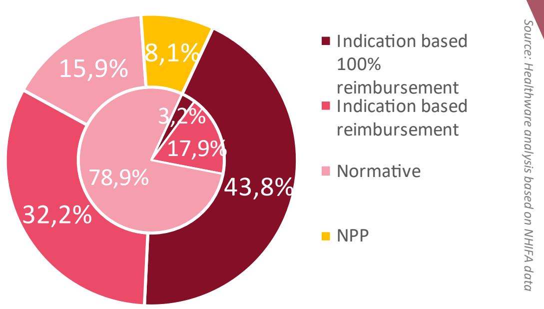
Dynamics of the sales/circulation of prescription-only-medicine

Pharmacy DOT turnover



Source: Healthware analysis based on NHIFA data

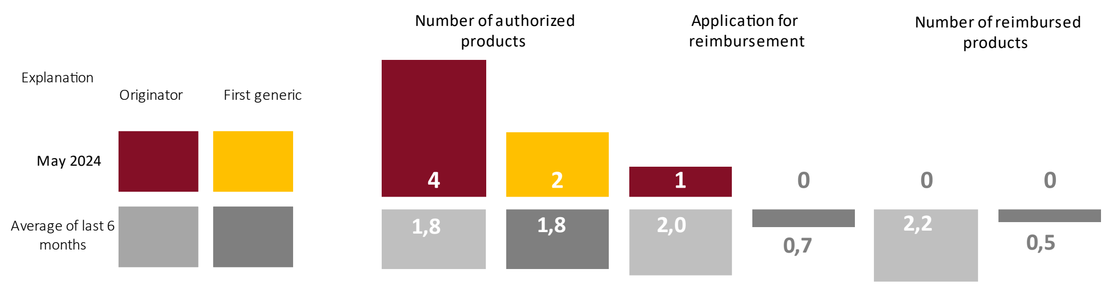
Pharmacy reimbursement turnover



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, May 2024



Source: Healthware analysis based on NHIFA data

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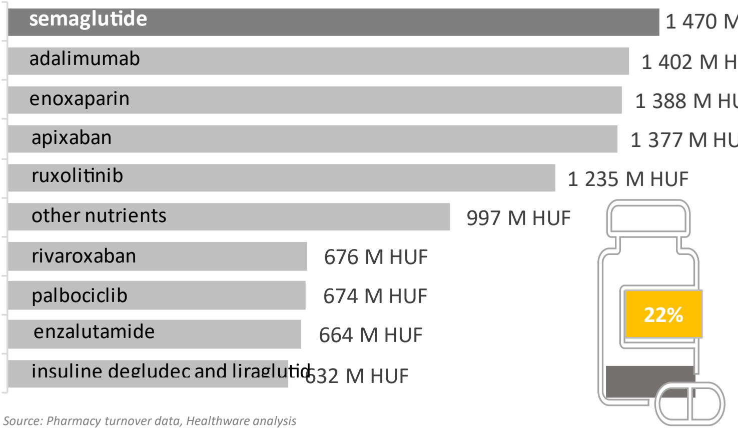
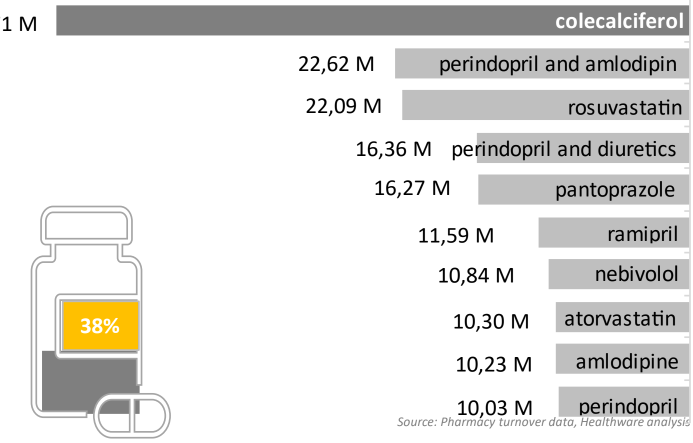
Toplists of reimbursement and number of patients, May 2024

TOP 10 ATCs by all reimbursement paid



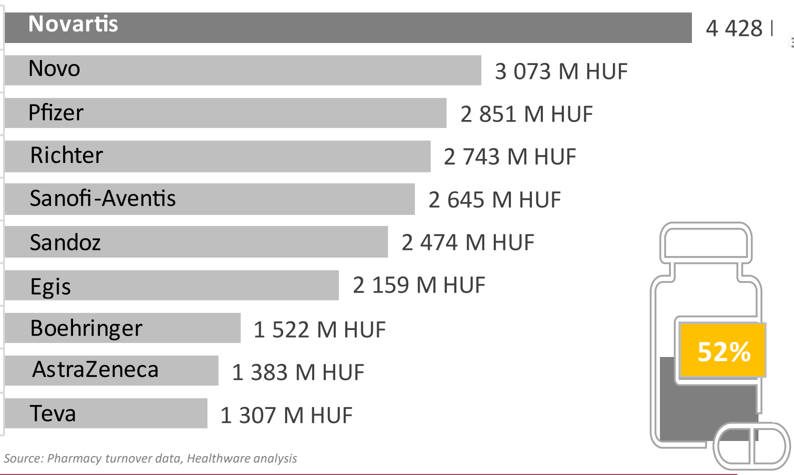
Source: Pharmacy turnover data, Healthware analysis

TOP 10 DOT by all reimbursement paid



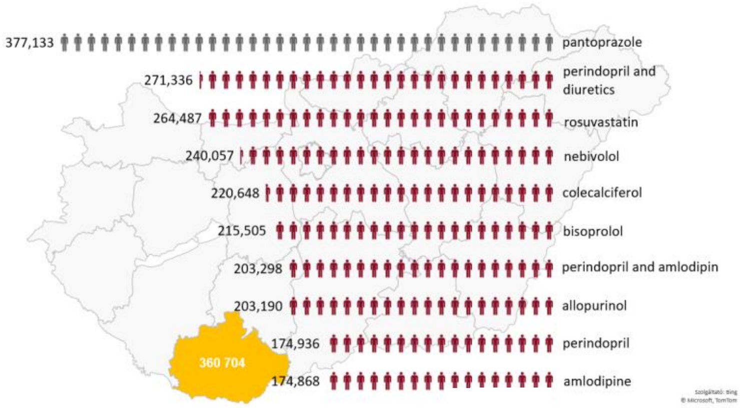
Source: Pharmacy turnover data, Healthware analysis

TOP 10 distributors by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

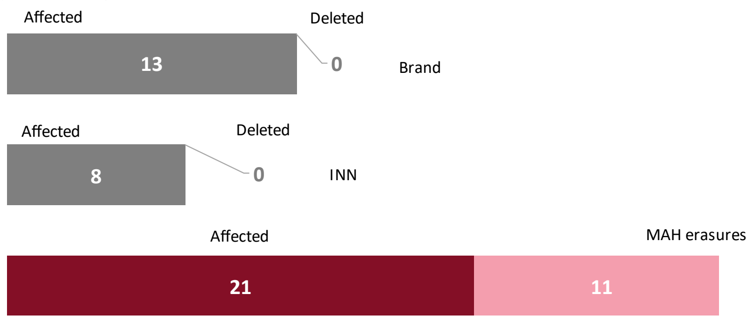
TOP 10 patient turnover by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

Substitutable products, May 2024

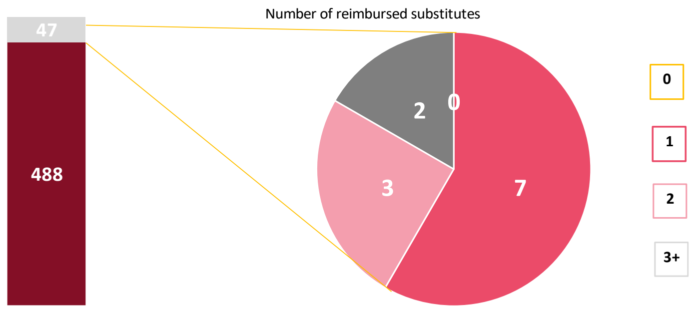
Within product deletions, marketing authorization (MAH) erasures were distinguished.
We also examined the active substances and brands affected in the procedure. These were divided into two groups according to whether the brand or active substance was completely removed from the formulary or whether 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. 488 products had been on the list before May 2024, compared to 47 new product added to the list in the month under review.
The 47 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**

In May 2024, no product shortages were reported for a product without a pharmacy 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, May 2024 vs March 2024 in HUF

Ranking		Brand	Reimbursement increment	%*
1	sanofi	LIBTAYO	100 068 837 HUF	178%
2	Roche	OCREVUS	48 747 316 HUF	135%
3	ucb	FINTEPLA	42 191 938 HUF	155%
4	MERCK	MAVENCLAD	41 632 305 HUF	118%
5	novo nordisk	RYBELSUS	40 641 537 HUF	126%
6	Boehringer Ingelheim	OFEV	38 148 878 HUF	119%
7	CHEPLAPHARM	LOKREN	37 010 791 HUF	137%
8	AMGEN	NPLATE	34 449 360 HUF	137%
9	novo nordisk	OZEMPIC	32 311 791 HUF	109%
10	Lilly	TRULICITY	30 777 020 HUF	84%

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