HEALTHWARE

Actualities of Hungarian pharmaceutical financing market

Newsletter
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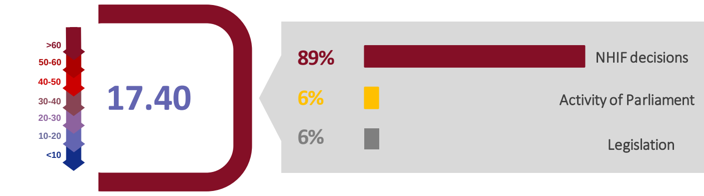
News, current issues

- News — The innovative pharmaceutical manufacturers expect the complete abolition of the extra profit tax >>
- News — Péter Takács: We focus on health promotion >>
- News — Domestic pharmaceutical companies can sigh for the third time >>

Decision-making index, July 2024



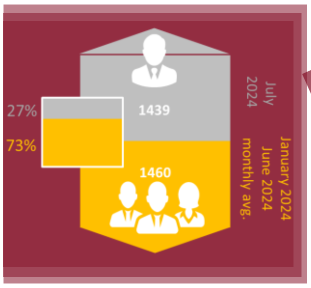
Macro approach to financing healthcare and medicinal products

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

Standard	7 332 M	5,3%
Indication based reimb.	15 387 M	7,0%
Indication based 100%.	20 546 M	7,2%
NPP	3 755 M	8,2%
Pharmacy	47 020 M	6,9%
High value	11 810 M	-47,1%
Total	**58 830 M**	-11,3%

Source: Healthware analysis based on NHIFA data

Average number of medical sales reps



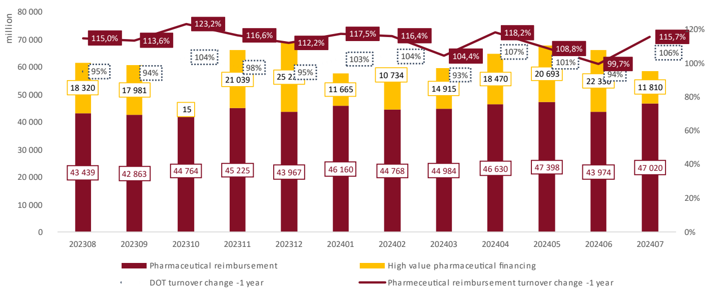
Share of doctors and others
Source: NHIFA data, Healthware analysis

Deviation from the target	
-8,08M HUF	
313 005M HUF	105 179M HUF
outturn (expenditure)	outturn (revenue)

Source: Healthware analysis based on NHIFA data

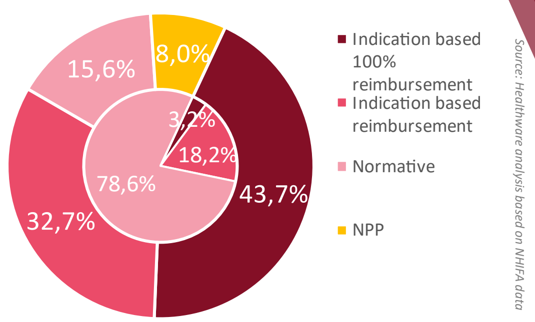
Dynamics of the sales/circulation of prescription-only-medicine

Pharmacy DOT turnover



Source: Healthware analysis based on NHIFA data

Pharmacy reimbursement turnover



Outer circle: reimbursement turnover
Inner circle: DOT turnover

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

Product offering

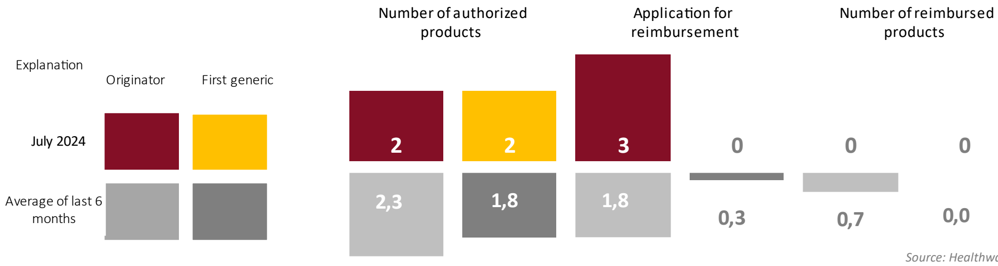
Legislation follow up

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 July 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

Changes to subsidized medicinal product categories, July 2024



Source: Healthware analysis based on NHIFA data

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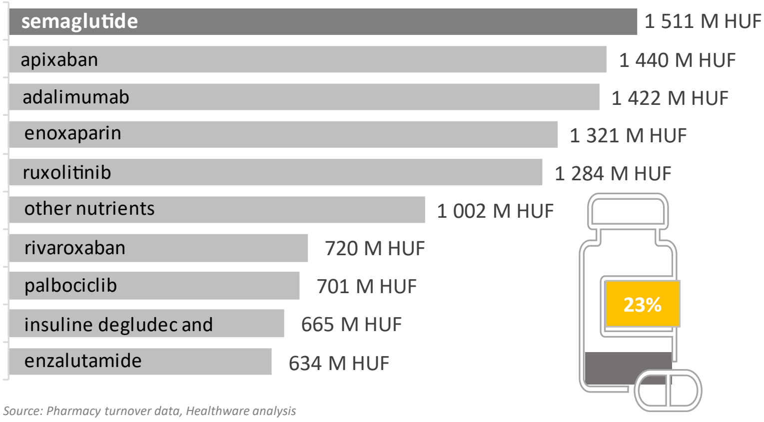
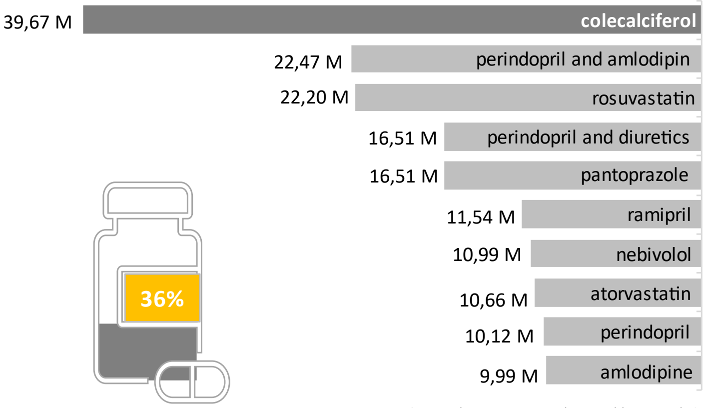
Toplists of reimbursement and number of patients, July 2024

TOP 10 ATCs by all reimbursement paid



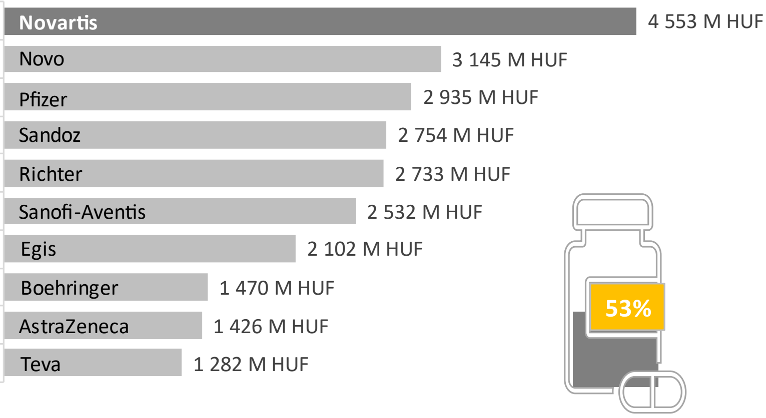
Source: Pharmacy turnover data, Healthware analysis

TOP 10 DOT by all reimbursement paid



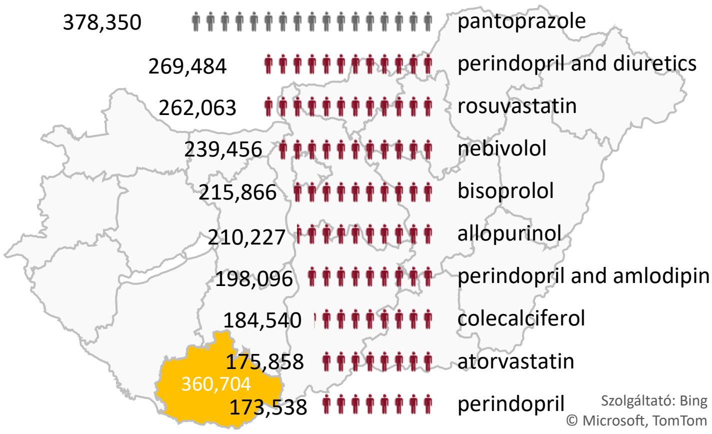
Source: Pharmacy turnover data, Healthware analysis

TOP 10 distributors by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

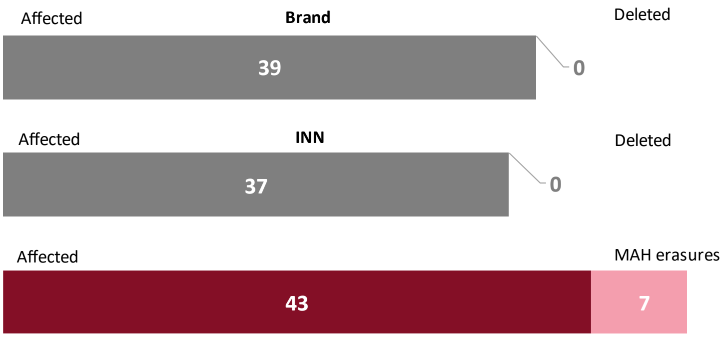
TOP 10 patient turnover by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

Substitutable products, July 2024

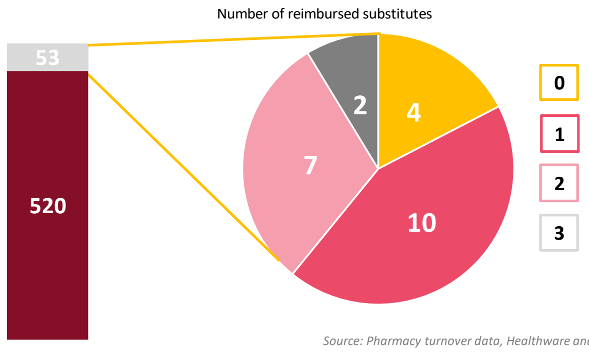
Within product deletions, marketing authorization (MAH) erasures were distinguished.
We also examined the active substances and brands affected in the procedure. These were divided into two groups according to whether the brand or active substance was completely removed from the formulary or whether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



Source: Pharmacy turnover data, Healthware analysis

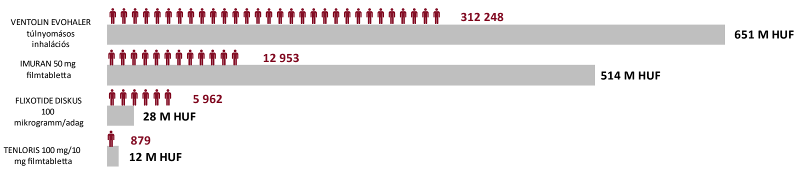
Product shortages

The graph shows the distribution of the reimbursed product shortage list. 520 products had been on the list before July 2024, compared to 53 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, July 2024 vs June 2024 in HUF

Ranking		Brand	Reimbursement increment	%*
1	SANDOZ	DIMETIL-FUMARÁT SANDOZ	365 188 568 HUF	2055%
2	NOVARTIS	JAKAVI	164 715 956 HUF	108%
3	SANDOZ	HYRIMOZ	142 185 135 HUF	103%
4	Bristol Myers Squibb	ELIQUIS	121 633 602 HUF	109%
5	Merck	MAVENCLAD	94 036 465 HUF	141%
6	Pfizer	IBRANCE	85 028 519 HUF	109%
7	Lilly	VERZENIOS	73 108 115 HUF	126%
8	AstraZeneca	KOSELUGO	70 075 505 HUF	127%
9	novo nordisk	RYBELSUS	64 998 713 HUF	121%
10	novo nordisk	OZEMPIC	64 577 043 HUF	106%

**Compared to the average of the 6 months preceding the reference month*

Source: Pharmacy turnover data, Healthware analysis