Actualities of Hungarian pharmaceutical financing market

Newsletter
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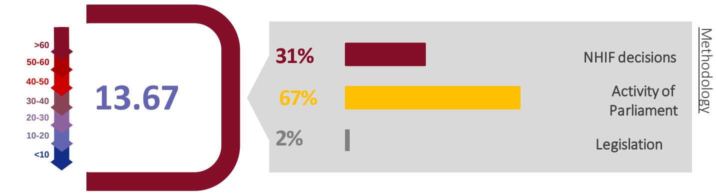
Decision-making index, November 2024



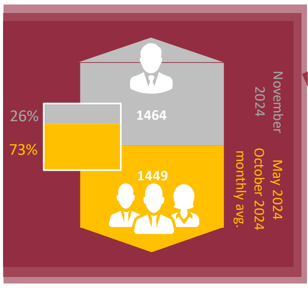
Macro approach to financing healthcare and medicinal products

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

Standard	7 697 M	-4,3%
Indication based	15 447 M	-3,8%
Indication b. 100%	20 151 M	-8,3%
NPP	3 858 M	-5,0%
Pharmacy	47 153 M	-5,9%
High value	910 M	-91,5%
Total	**48 063 M**	-21,0%

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

-0,77M HUF

500 247M HUF	185 583M HUF
outturn (expenditure)	outturn (revenue)

Source: Healthware analysis based on NHIFA data

Product offering

Legislation follow up

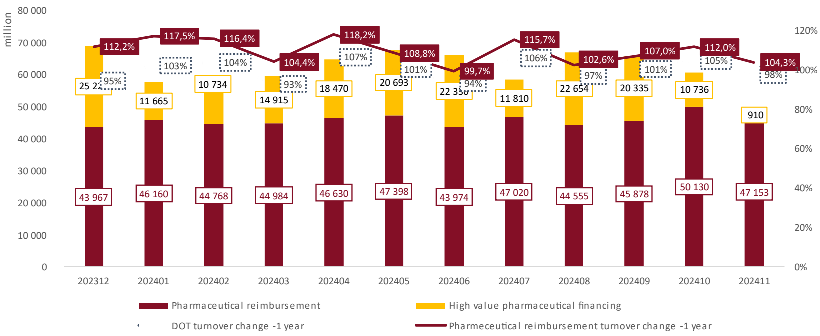
In the recent years Hungarian pharmaceutical market is characterized by rapidly changing and growing number of regulation instruments, as well as constant system transformations. Healthware Regulatory Compliance is a service in order to support companies with up-to date and comprehensive information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

In the framework of regulatory compliance service, immediate alerts November 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

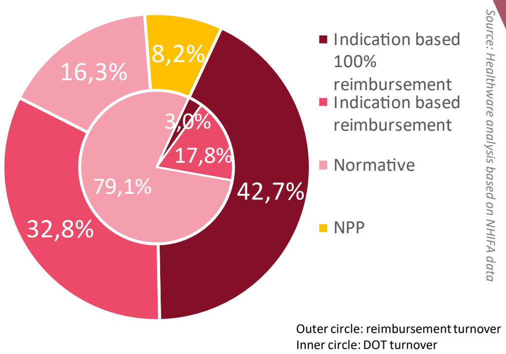
Dynamics of the sales/circulation of prescription-only-medicine

Pharmacy DOT turnover



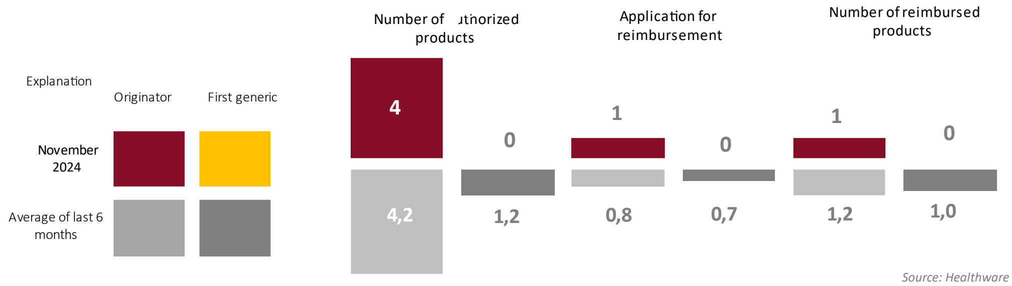
Source: Healthware analysis based on NHIFA data

Pharmacy reimbursement turnover



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

Changes to subsidized medicinal product categories, November 2024



Source: Healthware analysis based on NHIFA data

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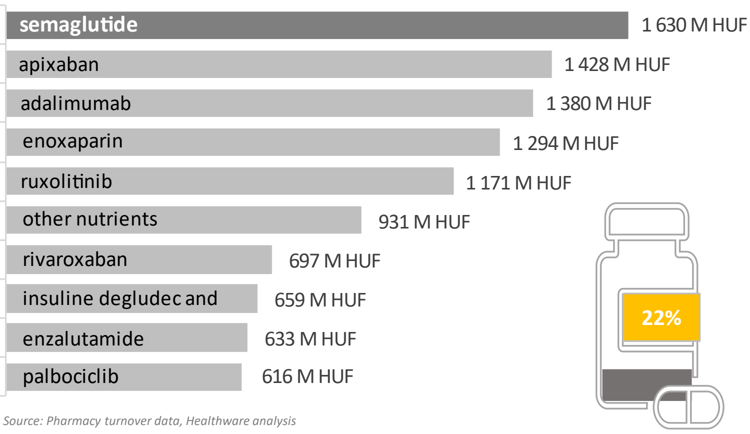
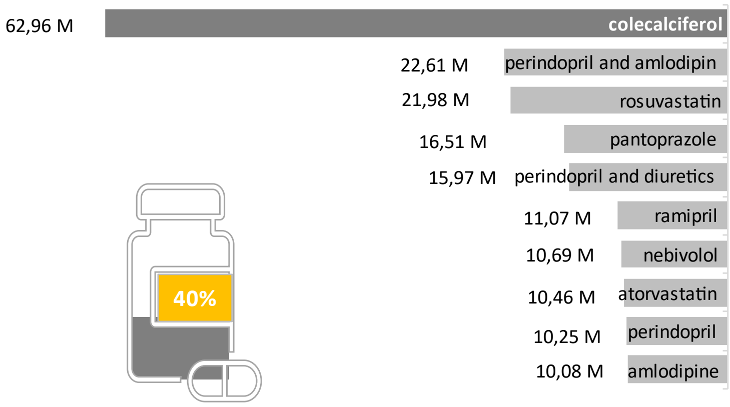
Toplists of reimbursement and number of patients, November 2024

TOP 10 ATCs by all reimbursement paid



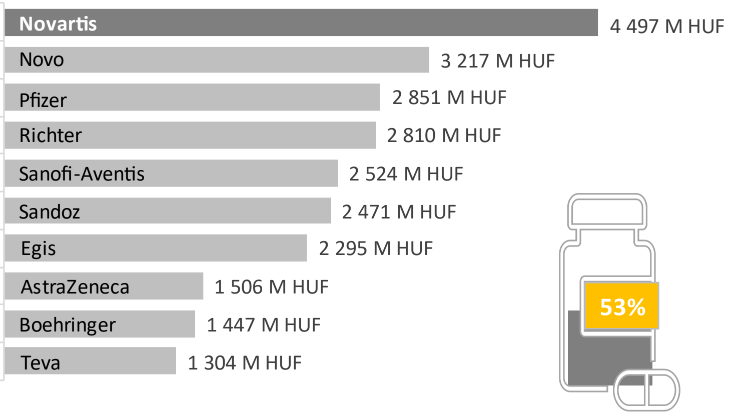
Source: Pharmacy turnover data, Healthware analysis

TOP 10 DOT by all reimbursement paid



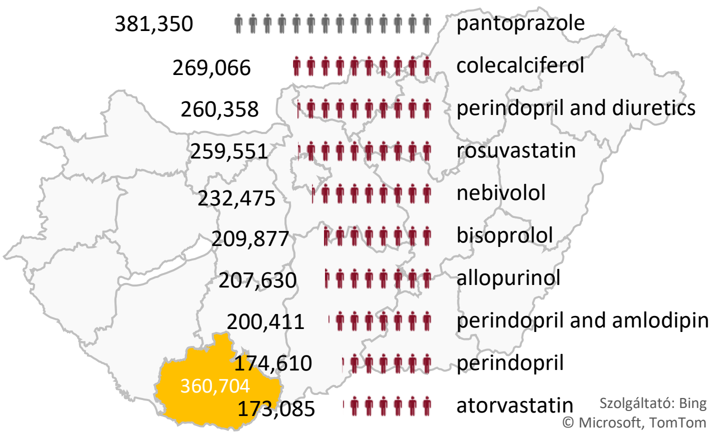
Source: Pharmacy turnover data, Healthware analysis

TOP 10 distributors by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

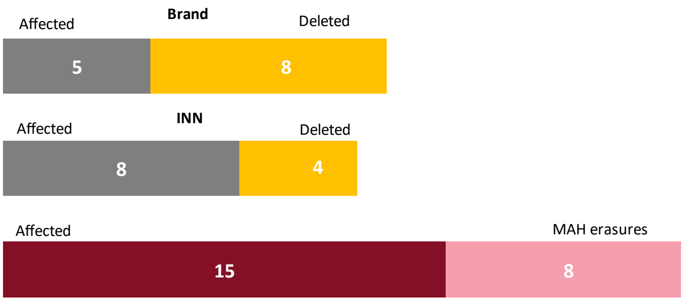
TOP 10 patient turnover by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

Substitutable products, November 2024

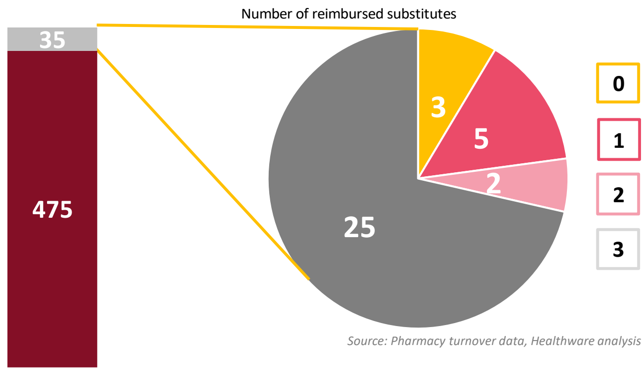
Within product deletions, marketing authorization (MAH) erasures were distinguished.
We also examined the active substances and brands affected in the procedure. These were divided into two groups according to whether the brand or active substance was completely removed from the formulary or whether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



Source: Pharmacy turnover data, Healthware analysis

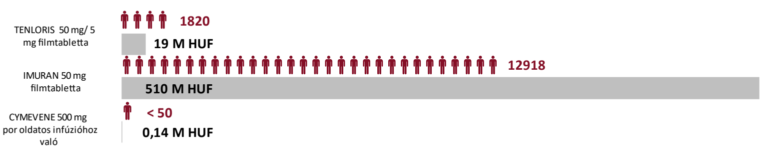
Product shortages

The graph shows the distribution of the reimbursed product shortage list. 475 products had been on the list before November 2024, compared to 35 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, November 2024 vs October 2024 in HUF

Ranking		Brand	Reimbursement increment	%*
1	novo nordisk	OZEMPIC	76 458 588 HUF	113%
2	AstraZeneca	KOSELUGO	48 513 144 HUF	124%
3	Pfizer	MYLOTARG	37 416 785 HUF	273%
4	Leadiant	CHENODEOXYCHOLIC	35 716 030 HUF	200%
5	MERCK	SAIZEN	24 036 280 HUF	106%
6	MSD	PREVYMIS	23 892 135 HUF	117%
7	ucb	FINTEPLA	20 633 448 HUF	109%
8	RICHTER GEDEON	TELEXER	19 069 464 HUF	117%
9	AMGEN	PARSABIV	18 922 579 HUF	133%
10	Pfizer	VYNDAQEL	17 866 740 HUF	127%

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