HEALTHWARE

Actualities of Hungarian pharmaceutical financing market

Newsletter
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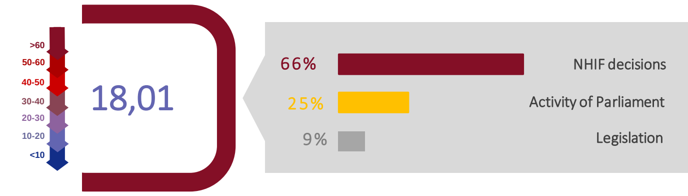
News, current issues

- News — A quarter of Hungarian patients over 70 are now taking more than 13 types of medication »
- News — Certain vaccines could be available in Hungarian pharmacies in the near future »
- News — Another step towards an EU health data hub »

Decision-making index, October 2023



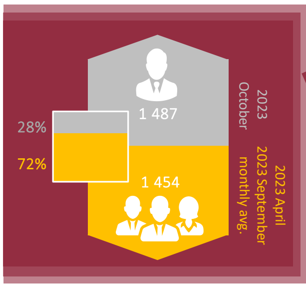
Macro approach to financing healthcare and medicinal products

Balance of the Health Insurance Fund, October 2023

Standard	7 191 M	4,5%
Indication based reimb.	14 337 M	3,2%
Indication based 100% reimb.	18 614 M	4,8%
NPP	4 619 M	7,0%
Pharmacy	**44 764 M**	4,4%
High value	0,014 M	-99,99%
Total	**44 778 M**	-26,4%

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	
7 434 M	
325 693 M	97 413 M
outturn (expenditure)	outturn (revenue)

Source: Healthware analysis based on NHIFA data

Product offering

Legislation follow up

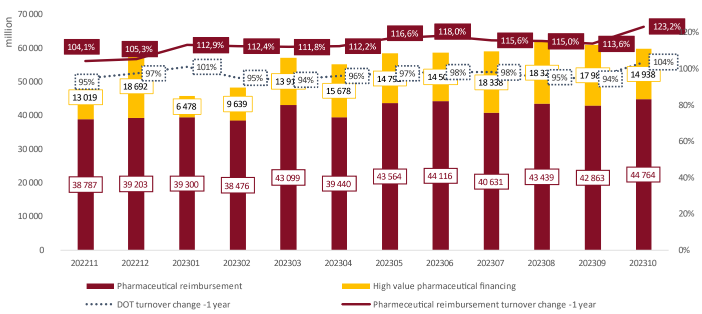
In the recent years Hungarian pharmaceutical market is characterized by rapidly changing and growing number of regulation instruments, as well as constant system transformations. Healthware Regulatory Compliance is a service in order to support companies with up-to date and comprehensive information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

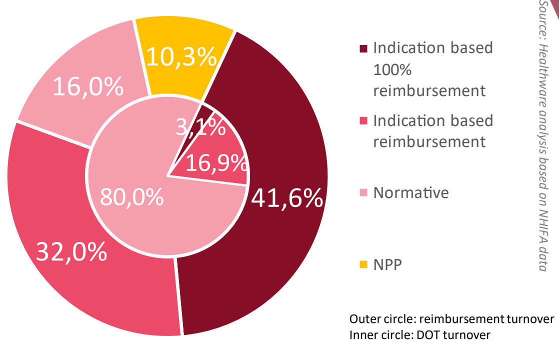
Dynamics of the sales/circulation of prescription-only-medicine

Pharmacy DOT turnover



Source: Healthware analysis based on NHIFA data

Pharmacy reimbursement turnover



Source: Healthware analysis based on NHIFA data

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

Changes to subsidized medicinal product categories, October 2023

Explanation	Number of authorized products	Applications for reimbursement	Number of reimbursed products

	Originator	First generic	Authorized: Originator	Authorized: First generic	Applications: Originator	Applications: First generic	Reimbursed: Originator	Reimbursed: First generic
October 2023			1	1	6	1		3
Average of last 6 months			3	2	3		1	1

Source: Healthware analysis based on NHIFA data

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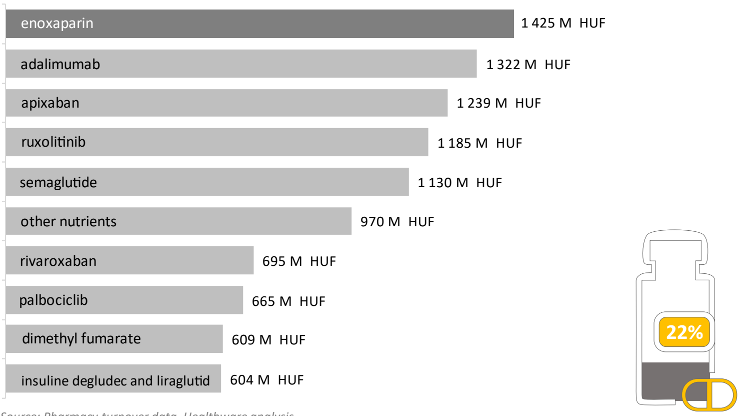
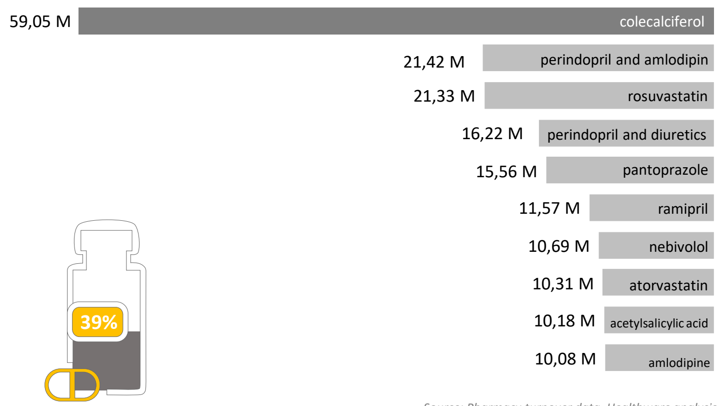
Toplists of reimbursement and number of patients, October 2023

TOP 10 ATCs by all reimbursement paid



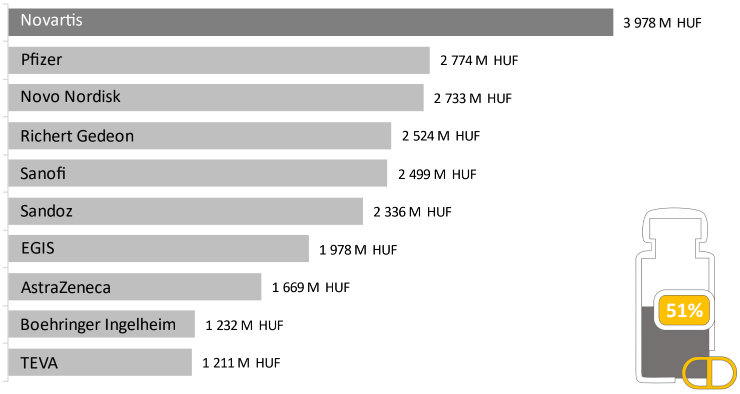
Source: Pharmacy turnover data, Healthware analysis

TOP 10 DOT by all reimbursement paid



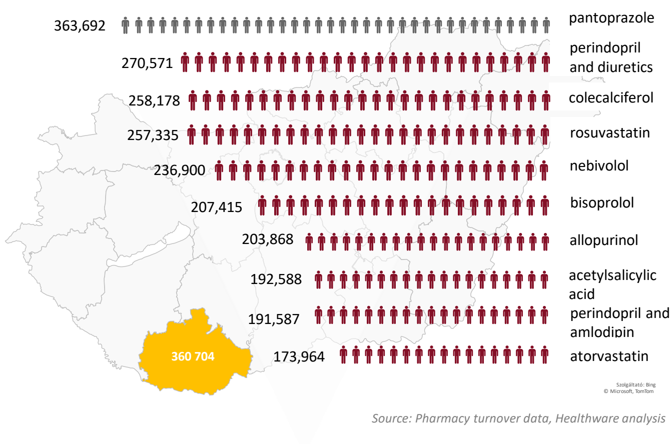
Source: Pharmacy turnover data, Healthware analysis

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

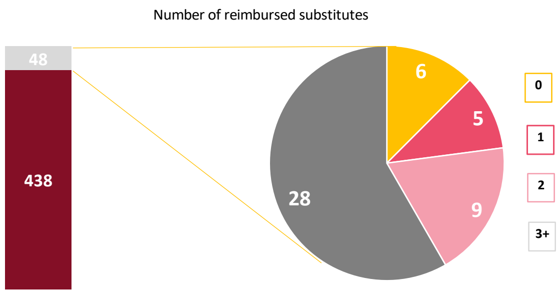
Substitutable products, October 2023

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

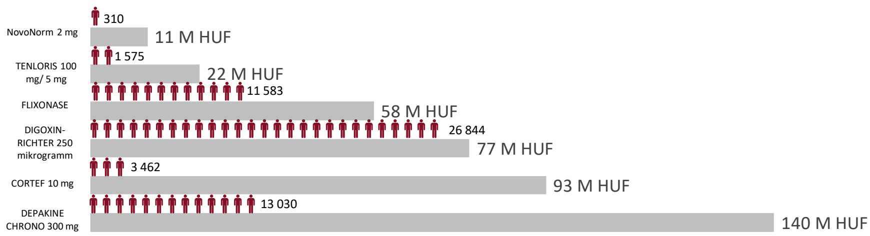
Product shortages

The graph shows the distribution of the reimbursed product shortage list. 438 products had been on the list before October 2023, compared to 48 new product added to the list in the month under review.
The 48 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, October 2023 vs. September 2023 in HUF

	Company	Brand	Reimbursement increment	%*
1	Pfizer	IBRANCE	68 176 581 Ft	110%
2	NOVARTIS	KISQALI	66 929 785 Ft	114%
3	NOVARTIS	JAKAVI	61 357 575 Ft	105%
4	NOVARTIS	LEQVIO	53 649 030 Ft	162%
5	VIATRIS	INSPRA	51 475 096 Ft	257%
6	sanofi	CLEXANE	51 103 312 Ft	104%
7	MERCK	MAVENCLAD	42 352 106 Ft	116%
8	SANDOZ	DOXAZOSIN SANDOZ	41 510 294 Ft	725%
9	AstraZeneca	LYNPARZA	39 060 500 Ft	108%
10	Pfizer	ELIQUIS	38 987 345 Ft	103%

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