HEALTHWARE

Newsletter
No. 3 Issue XII. 2024
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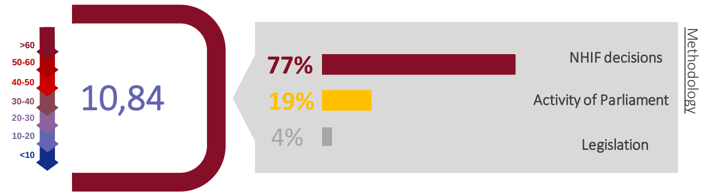
Actualities of Hungarian pharmaceutical financing market

News, current issues

- News 'Hospital closures' is a swear-word meanwhile the health system crackling »
- News The Hungarian healthcare system is splitting in two - what can stop it? »
- News The EU could overhaul the pharmaceutical market in April »

Decision-making index, January 2024



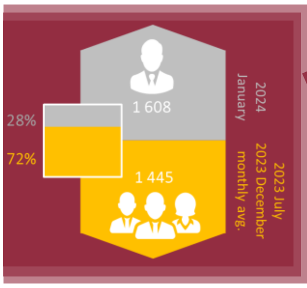
Macro approach to financing healthcare and medicinal products

Balance of the Health Insurance Fund, January 2024

Standard	7 532 M	1,2%
Indication based reimb.	14 596 M	1,3%
Indication based 100% reimb.	19 561 M	12,2%
NPP	4 468 M	-4,6%
Pharmacy	**46 159 M**	5%
High value	11 664 M	-53,7%
Total	**57 824 M**	-16%

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

-28 010 M	
87 875 M	31 330 M
outturn (expenditure)	outturn (revenue)

Source: Healthware analysis based on NHIFA data

Product offering

Legislation follow up

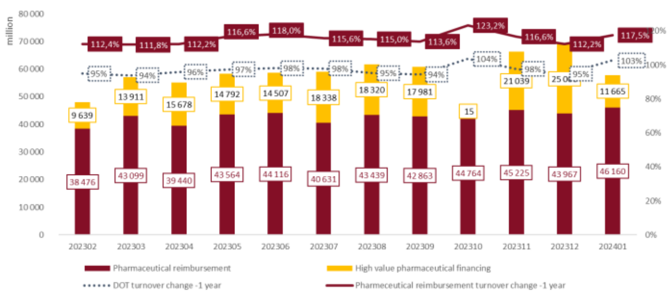
In the recent years Hungarian pharmaceutical market is characterized by rapidly changing and growing number of regulation instruments, as well as constant system transformations. Healthware Regulatory Compliance is a service in order to support companies with up-to date and comprehensive information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

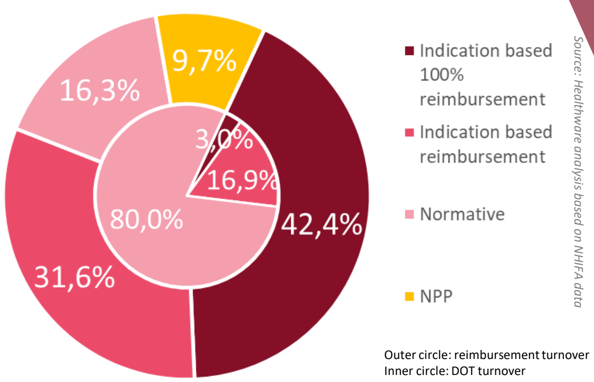
Dynamics of the sales/circulation of prescription-only-medicine

Pharmacy DOT turnover



Source: Healthware analysis based on NHIFA data

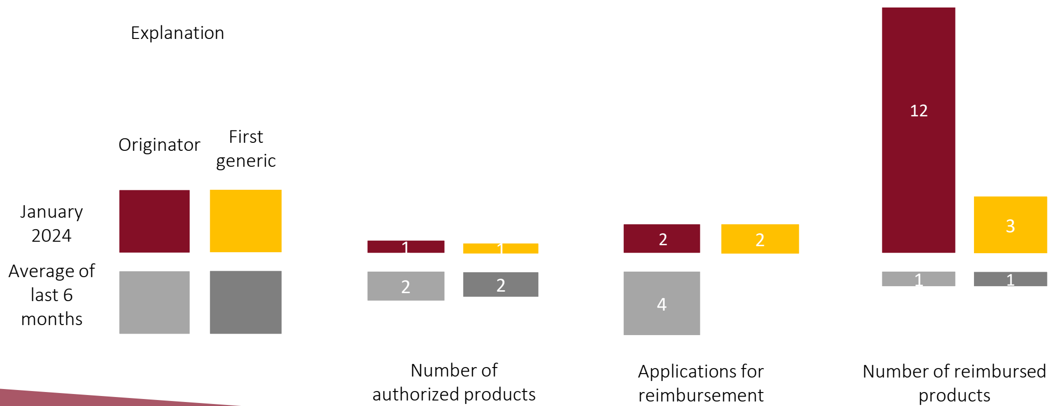
Pharmacy reimbursement turnover



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, January 2024



Source: Healthware analysis based on NHIFA data

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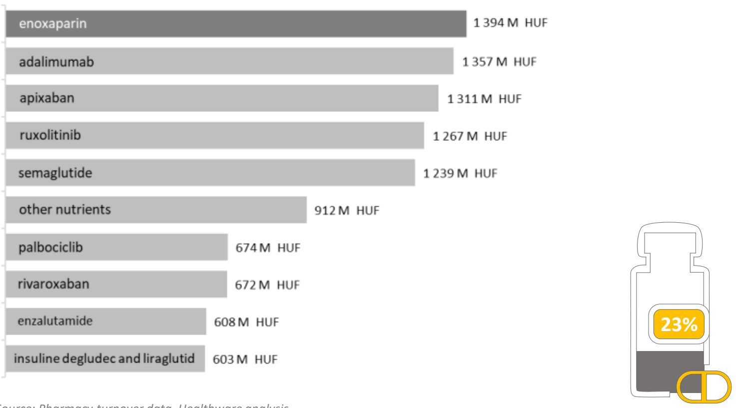
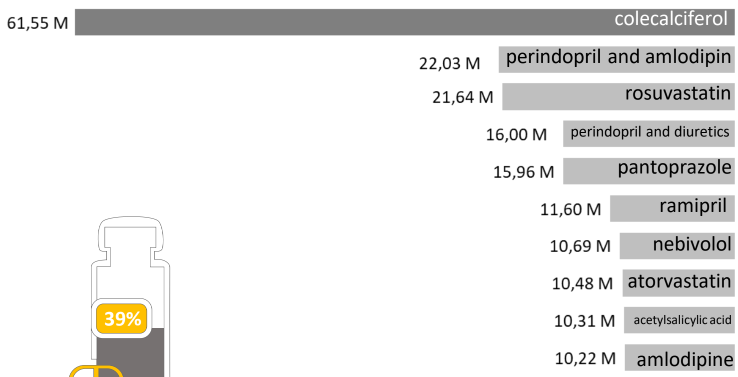
Toplists of reimbursement and number of patients, January 2024

TOP 10 ATCs by all reimbursement paid



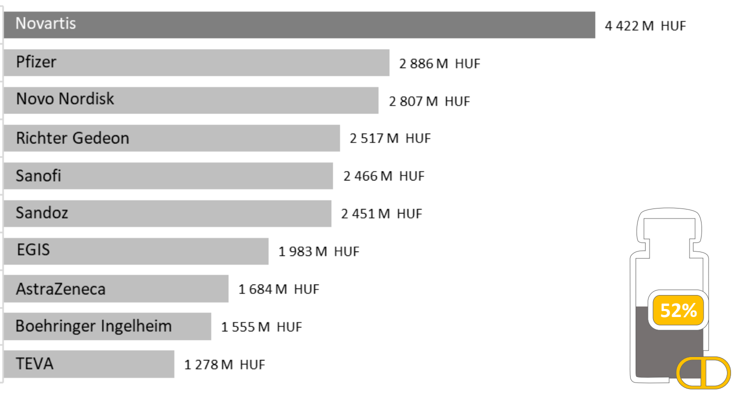
Source: Pharmacy turnover data, Healthware analysis

TOP 10 DOT by all reimbursement paid



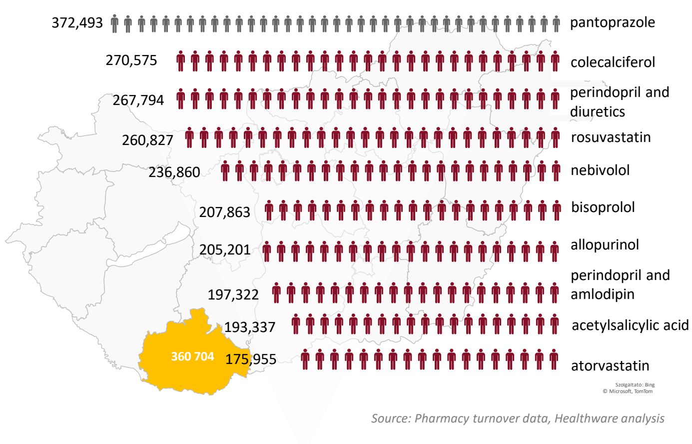
Source: Pharmacy turnover data, Healthware analysis

TOP 10 distributors by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

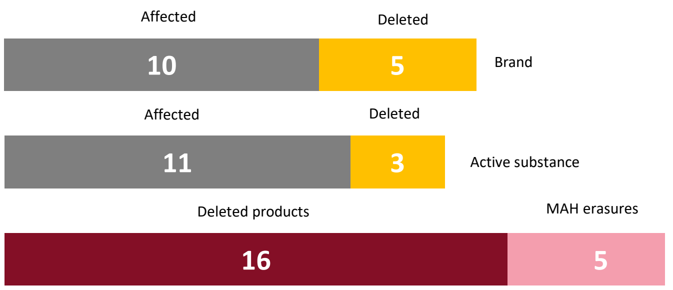
TOP 10 patient turnover by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

Substitutable products, January 2024

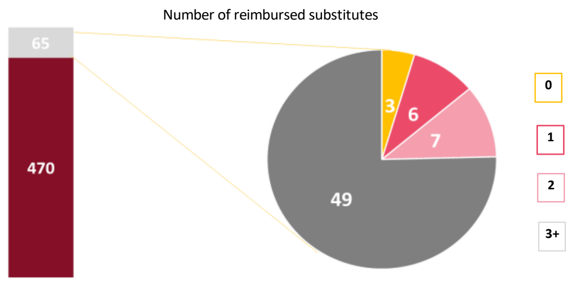
Within product deletions, marketing authorization (MAH) erasures were distinguished.
We also examined the active substances and brands affected in the procedure. These were divided into two groups according to whether the brand or active substance was completely removed from the formulary or whether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



Source: Pharmacy turnover data, Healthware analysis

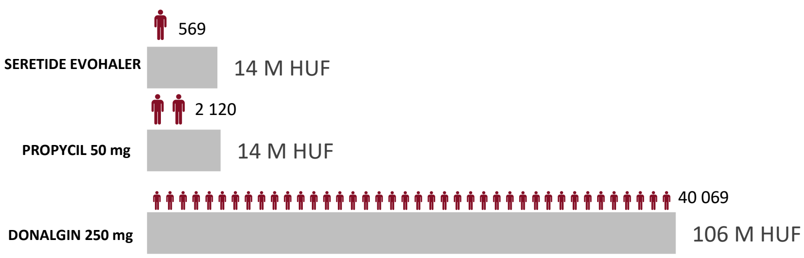
Product shortages

The graph shows the distribution of the reimbursed product shortage list. 470 products had been on the list before January 2024, compared to 65 new product added to the list in the month under review.
The 65 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, January 2024 vs. December 2023 in HUF

	Company	Brand	Reimbursement increment	%*
1	NOVARTIS	LEQVIO	177 497 477 HUF	253%
2	Roche	OCREVUS	146 242 108 HUF	117%
3	SANDOZ	HYRIMOZ	89 760 652 HUF	115%
4	janssen	TREVICTA	79 850 854 HUF	122%
5	NOVARTIS	KISQALI	77 970 565 HUF	112%
6	astellas	XTANDI	69 345 963 HUF	111%
7	MERCK	MAVENCLAD	65 320 628 HUF	126%
8	NOVARTIS	JAKAVI	62 938 113 HUF	108%
9	Pfizer	IBRANCE	62 048 343 HUF	104%
10	Biogen	TYSABRI	52 968 785 HUF	117%

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