

## News, current issues

- News** Péter Takács on the problems of the new on-call system, the exodus of nurses and the replacement of hospital directors >>
- News** The government plans to make huge changes to the Hungarian healthcare system >>
- News** Chamber's opinion on the unified institutional pharmacy service >>

## Macro approach to financing healthcare and medicinal products

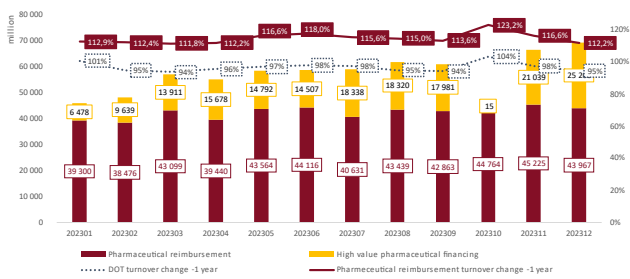
### Balance of the Health Insurance Fund, December 2023

Standard	7 443 M	-0,4%
Indication based reimb.	14 410 M	-1,2%
Indication based 100% reimb.	17 428 M	-5,5%
NPP	4 683 M	-1,0%
Pharmacy	43 967 M	-2,8%
High value	25 200 M	19,8%
<b>Total</b>	<b>69 167 M</b>	<b>4,4%</b>

Source: Healthware analysis based on NHIFA data

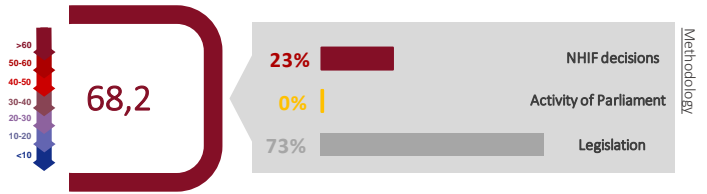
## Dynamics of the sales/circulation of prescription-only-medicine

### Pharmacy DOT turnover

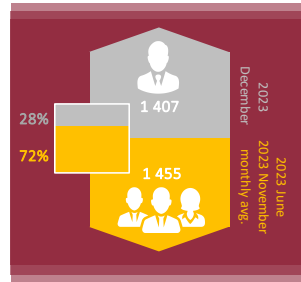


Source: Healthware analysis based on NHIFA data

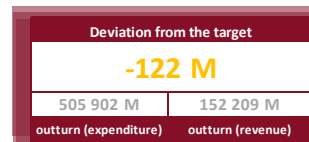
## Decision-making index, December 2023



## Average number of medical sales reps

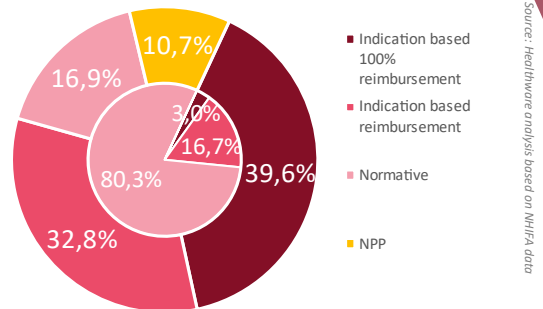


Share of doctors and others  
Source: NHIFA data, Healthware analysis



Source: Healthware analysis based on NHIFA data

## Pharmacy reimbursement turnover



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

Source: Healthware analysis based on NHIFA data

## Changes to subsidized medicinal product categories, December 2023

Explanation	Number of authorized products	Applications for reimbursement	Number of reimbursed products
Originator	1	2	1
First generic	2	2	1
December 2023	3	4	2
Average of last 6 months	2	4	1

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

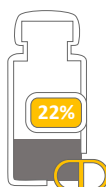
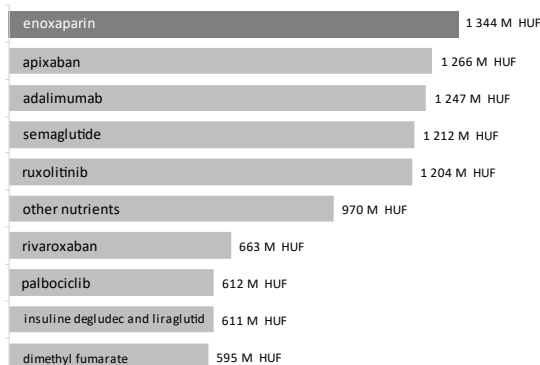
a report in order to compare the previous state with the amended one and an interpretation, in an intelligible form.

More about the services: [link](#)



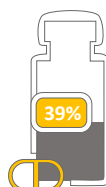
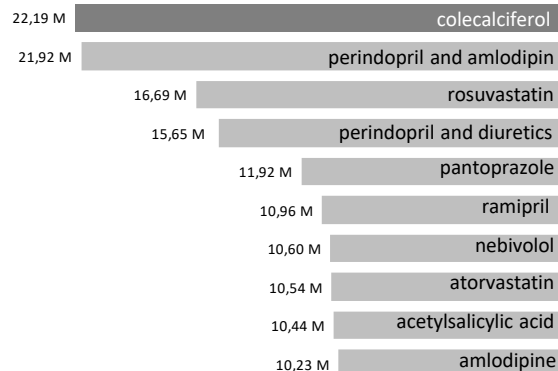
## Toplists of reimbursement and number of patients, December 2023

### TOP 10 ATCs by all reimbursement paid



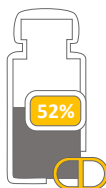
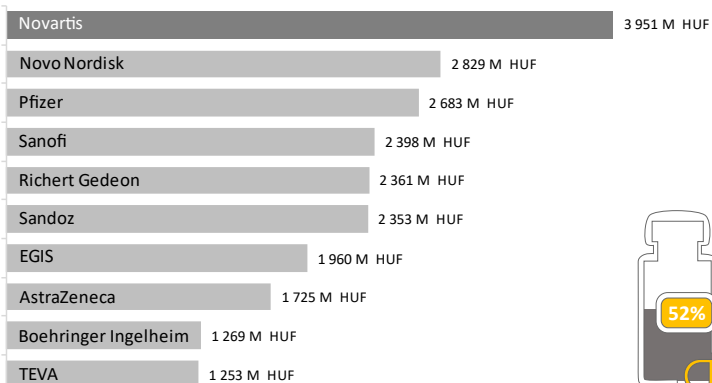
Source: Pharmacy turnover data, Healthware analysis

### TOP 10 DOT by all reimbursement paid



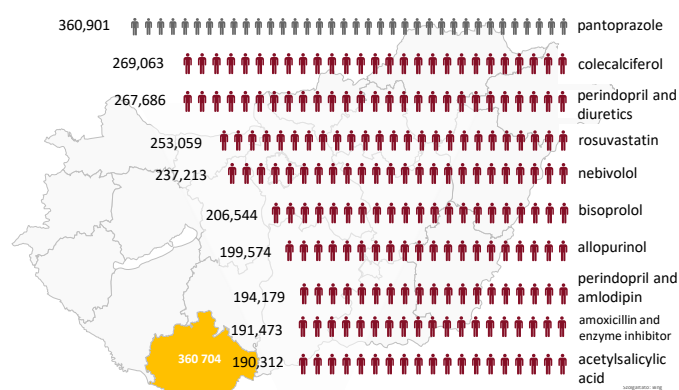
Source: Pharmacy turnover data, Healthware analysis

### TOP 10 distributors by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

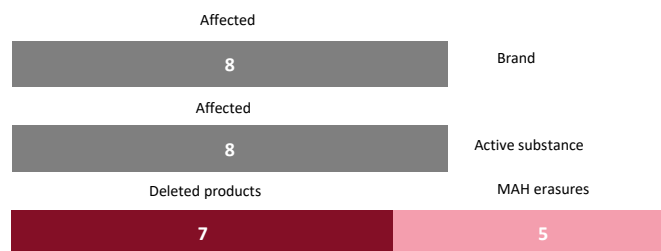
### TOP 10 patient turnover by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

## Substitutable products, December 2023

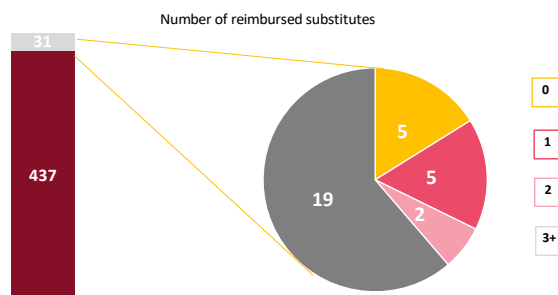
Within product deletions, marketing authorization (MAH) erasures were distinguished. We also examined the active substances and brands affected in the procedure. These were divided into two groups according to whether the brand or active substance was completely removed from the formulary or whether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



Source: Pharmacy turnover data, Healthware analysis

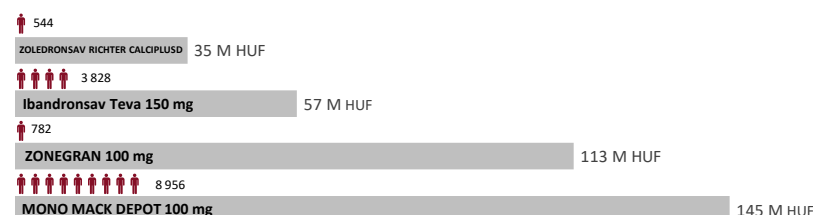
## Product shortages

The graph shows the distribution of the reimbursed product shortage list. 437 products had been on the list before November 2023, compared to 31 new product added to the list in the month under review. The 31 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, December 2023 vs. November 2023 in HUF

Company	Brand	Reimbursement increment	%*
1 AstraZeneca	KOSELUGO	97 023 397 HUF	148%
2 MSD	PREVYMIS	35 047 578 HUF	122%
3 MERCK	MAVENCLAD	33 018 365 HUF	100%
4 OZEMPIC	OZEMPIC	31 313 010 HUF	105%
5 RYBELSUS	RYBELSUS	31 273 790 HUF	116%
6 BIKTARVY	BIKTARVY	29 555 370 HUF	119%
7 MILUMIL	MILUMIL	26 708 297 HUF	108%
8 ILARIS	ILARIS	26 030 032 HUF	120%
9 KESIMPTA	KESIMPTA	22 503 300 HUF	252%
10 OFEV	OFEV	21 510 503 HUF	121%

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