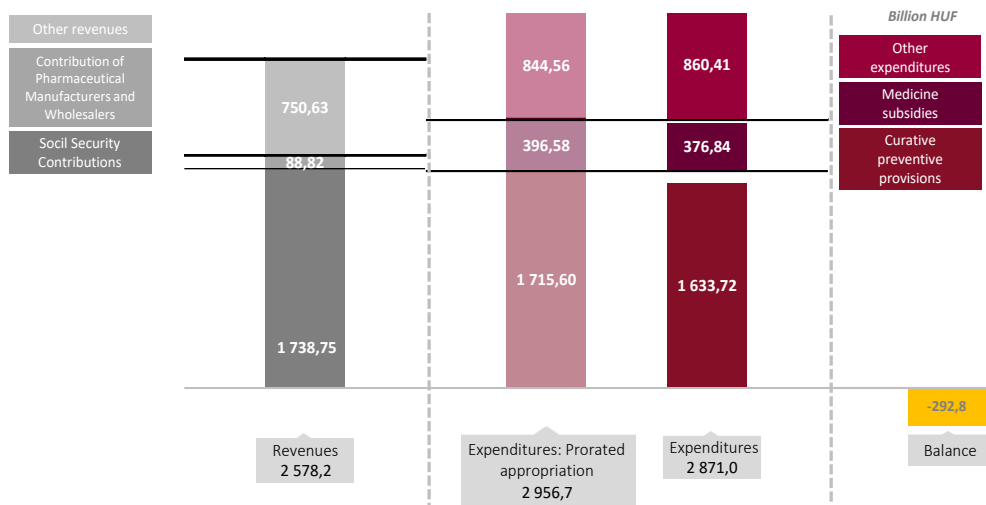


News, current issues

- News** Innovative pharmaceuticals have been admitted to the reimbursement system >>
- News** eHealth continues to expand >>
- News** The state has big plans to reform the health sector >>

Macro approach to financing healthcare and medicinal products

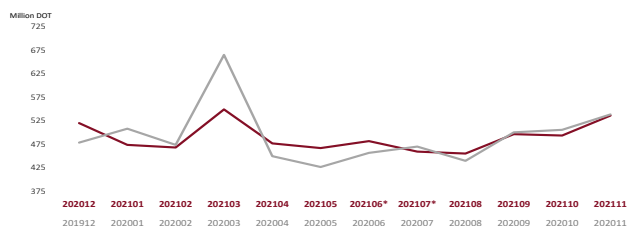
Balance of the Health Insurance Fund, November 2021



Source: Healthware analysis based on NHIFA data

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

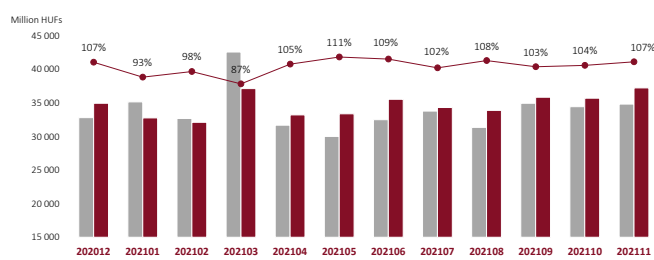
Pharmacy DOT turnover



*Note: Turnover data of SKU no. 210900238 is not displayed in DOT turnover figure (vitamin D3) - DOT 200,000 days -, this product first appeared in June 2021, as it significantly distorts the DOT turnover values as well as the overall market performance. The reimb. turnover of the SKU was taken into account.

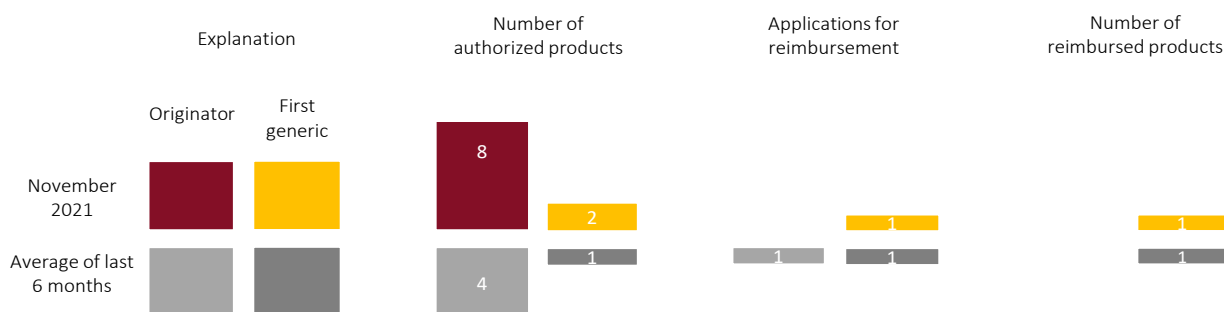
Source: Healthware analysis based on NHIFA data

Pharmacy reimbursement turnover



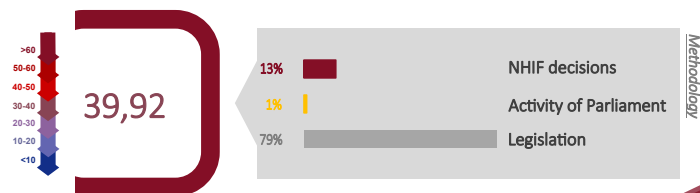
Source: Healthware analysis based on NHIFA data

Changes to subsidized medicinal product categories, November 2021



Source: Healthware analysis based on NHIFA data

Decision-making index, November 2021



Methodology

Product offering

Revealing real symptoms of diseases

In the analysis basic country-wide demographic data related to diseases (prevalence, incidence, mortality rates) are summarized along with randomly chosen subcategories (area, sex, primary disease, accompanying diseases [comorbidity]).

As a result of the analysis, the basic epidemiological characteristics of a given therapeutic area can be brought to light, which may provide a point to any further research, or may be suitable for independent use, especially in professional material to the attention of physicians.

Because there is no publicly accessible central patients' register, only limited disease-related data and information is available.

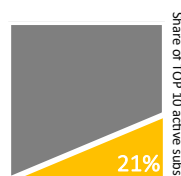
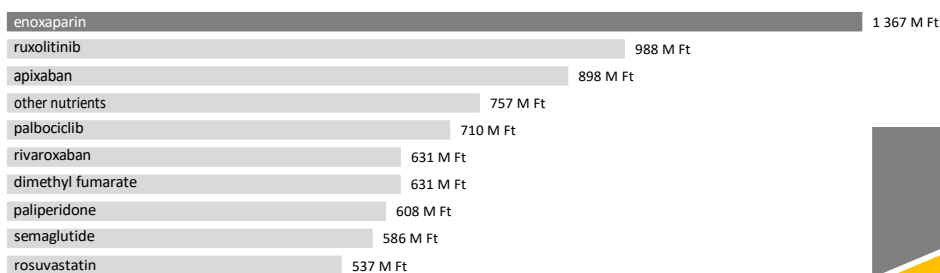
Consequently these pieces of information can play a valuable role on their own.

Further information: [link](#)

Market data

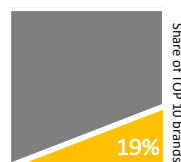
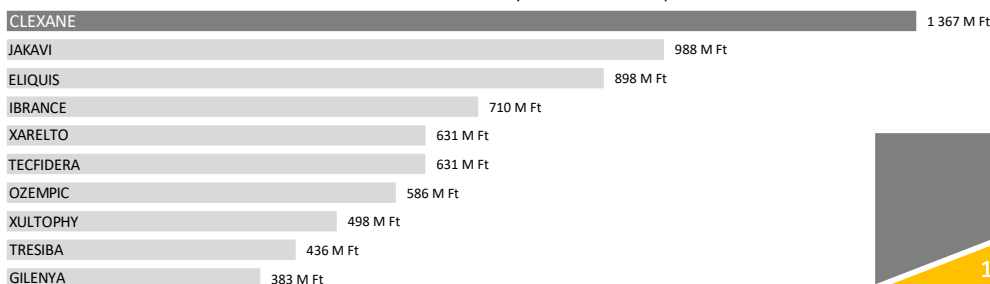
Toplists of reimbursement and number of patients, November 2021

TOP 10 ATCs by all reimbursement paid



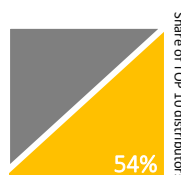
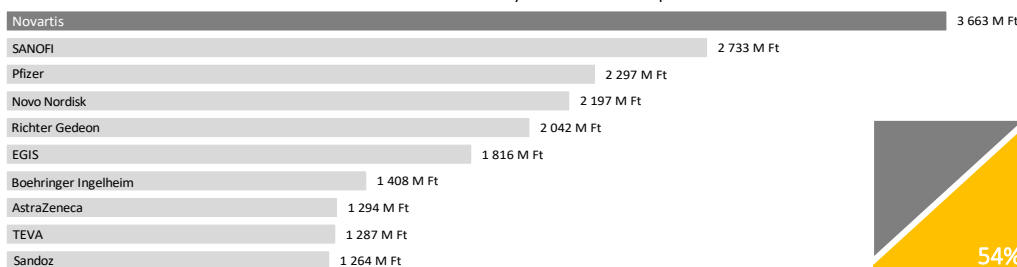
Source: Pharmacy turnover data, Healthware analysis

TOP 10 brands by all reimbursement paid



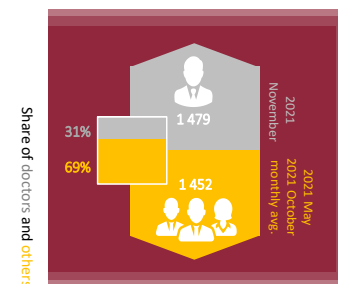
Source: Pharmacy turnover data, Healthware analysis

TOP 10 distributors by all reimbursement paid



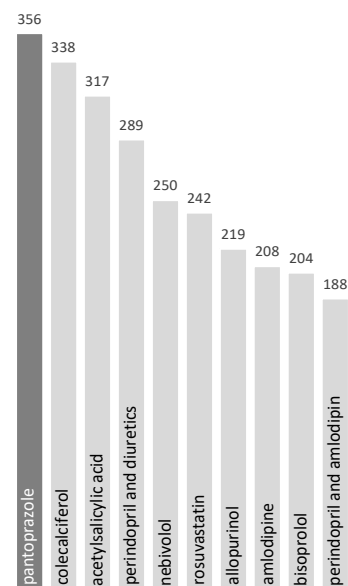
Source: Pharmacy turnover data, Healthware analysis

Average number of medical sales reps



Source: NHIFA data, Healthware analysis

TOP 10 active substances by number of patients (thousand patients)



Source: Pharmacy turnover data, Healthware analysis

Analysis of pharmaceuticals published in January 2022 — Case study

Healthware analysis based on NEAK data

EMMI Decree No. 55/2021 (XII. 22.) amending the Ministerial Decrees concerning the reimbursement of medicinal products has been published in the Hungarian Gazette No. 237 of 22.12.2021, with which 31 new innovative products were included in the reimbursement system with effect from 1.1.2022.

Prior to this, applications for medicinal products requiring legislative changes were published on 15.01.2020. It is important to note, however, that in this round, only innovative products that have secured a neutral cash effect were eligible for the list of reimbursed products, according to NHIF's (National Health Insurance Fund) communication. As a result, 6 products were included in this year's wave that did not make it into the previous call.

As a result, the applications published in January this year have had a bumpy two years. NHIF submitted the relevant applications to the Ministry on 11.09.2020. At that time, the pharmaceutical package consisted of 42 applications, but the circular published in September 2021 only included 30 medicinal products, including the 6 previously omitted products. Accordingly, during the discussions with the Ministry, 12 applications were eliminated at this stage. Public information is not available at this stage of the inclusion process, and therefore it is not possible to know the exact reason for each product being excluded from the draft during the Committee meetings. This being said, it is only during the period between dossier submission and referral that the applicant can meaningfully comment on the individual stages of the procedure. (e.g. reflection on the HTA assessment, participation in the TÉB (Health Technology Assessment Committee) meeting, price negotiation).

All of the 30 applications that took part in the social circular were included in the gazette published last December, with the addition of a new innovative product, which NHIF submitted to the Ministry on 27.10.2021.

The most important parameters of the included products are summarised in Table 1.

Table 1: List of published products

Applicant	Brand	INN	ATC	Budget	Requested indication
Bayer	JIVI	damactocog alfa pegol	B02BD02	Special budget	Haemophilia type A
Novo Nordisk	REFIXIA	nonacog beta pegol	B02BD04	Special budget	Haemophilia type B
Astra Zeneca	BRIUQUE	ticagrelor	B01AC24	Pharmacy	Acute coronary syndrome
Phytotec	FERINJECT	ferric carboxymaltose	B03AC	Pharmacy	Heart failure
Novartis	RYDAPT	midostaurin	L01XE39	Pharmacy	AML/ASM/MCL
Servier	ONCASPASPAR	pegaspargase	L01XX24	Itemized accounting	ALL
Roche	OCREVEUS	ocrelizumab	L04AA36	Pharmacy	Sclerosis multiplex
Adacap	LUTATHERA	lutetium (177Lu) oxodotreotide	V10X004	Itemized accounting	GEP-NET
Chiesi	SABACOMB	beclomethasone dipropionate, anhydrous; salbutamol sulphate	R03AK13	Pharmacy	Asthma bronchiale
MSD	PREVYMIS	letermovir	J05AX18	Pharmacy	Cytomegalovirus (CMV)
Pfizer	MYLOTARG	gemtuzumab ozogamicin	L01XC05	Pharmacy	Acute myeloid leukaemia
Swiix	OPDIVO	nivolumab	L01XC17	Itemized accounting	Melanoma adjuvant
Swiix	OPDIVO	nivolumab	L01XC17	Itemized accounting	SCCHN - squamous cell carcinoma of the head and neck
Swiix	OPDIVO	nivolumab	L01XC17	Itemized accounting	Hodgkin-lymphoma
MSD	KEYTRUDA	pembrolizumab	L01XC18	Itemized accounting	Melanoma adjuvant
MSD	KEYTRUDA	pembrolizumab	L01XC18	Itemized accounting	Hodgkin-lymphoma
MSD	KEYTRUDA	pembrolizumab	L01XC18	Itemized accounting	Non-small cell lung carcinoma-first line
Astra Zeneca	IMFINZI	durvalumab	L01XC28	Itemized accounting	Non-small cell lung carcinoma
Novartis	TAFINLAR	dabrafenib	L01XE23	Itemized accounting	Melanoma adjuvans
Novartis	MEKINIST	trametinib	L01XE25	Itemized accounting	Melanoma adjuvans
Astra Zeneca	TAGRISO	osimertinib	L01XE35	Itemized accounting	Non-small cell lung carcinoma
Abbvie	VENCLYXTO	venetoclax	L01XX52	Itemized accounting	Lymphoid leukaemia
Pfizer	XELJANZ	tofacitinib	L04AA29	Itemized accounting	Arthritis psoriatica
Pfizer	XELJANZ	tofacitinib	L04AA29	Itemized accounting	Colitis ulcerosa
Abbvie	RINVOQ	upadacitinib	L04AA44	Itemized accounting	Rheumatoid arthritis
UCB	CIMZIA	certolizumab pegol	L04AB05	Itemized accounting	Plakkos psoriasis
Janssen-Cilag	STELARA	ustekinumab	L04AC05	Itemized accounting	Colitis ulcerosa
Abbvie	SKYRIZI	risankizumab	L04AC18	Itemized accounting	Plakkos psoriasis
Celgene	IMNOVID	pomalidomide	L04AX06	Itemized accounting	Myeloma multiplex
Janssen-Cilag	IMBRUVICA	ibrutinib	L0XE27	Itemized accounting	Lymphoid leukaemia-IGHV mutation
Richter	XADAGO	safinamide	N04BD03	Pharmacy	Parkinson's disease

Analysis of pharmaceuticals published in January 2022 — Case study

Healthware analysis based on NEAK data

Table 2: Published brands

Brand	NPP*
OCREVUS	1 784 050 525 HUF
TAGRISSO	1 443 571 874 HUF
IMFINZI	1 376 685 600 HUF
IMNOVID	936 814 600 HUF
PREYVIMS	674 774 424 HUF
RYDAPT	261 480 772 HUF
SKYRZI	169 502 369 HUF
MEKINIST	45 225 128 HUF
RINVOQ	31 582 362 HUF
FERINJECT	405 110 HUF
ONCASPAR	0 HUF
LUTATHERA	0 HUF
XADAGO	0 HUF
BRILIQUE	0 HUF
SABACOMB	0 HUF
MYLOTARG	0 HUF

In addition to the obvious benefits, the inclusion of innovative medicinal products will release a significant administrative burden from the NHIF side, as they will be exempted from the Named Patient Program (NPP) framework.

We examined the NPP turnover of both included and rejected products in 2021 (Table 2 and 3).

Table 3: Rejected brands

Brand	NPP*
LORVIGUA	368 873 680 HUF
PRALLUENT	154 952 616 HUF
REPATHA	64 477 622 HUF
ERLEADA	27 491 942 HUF
XARELTO	636 713 HUF
SYNAGIS	**
DARZALEX	**
TECENTRIQ	**
ALLUNBRIG	***
ORKAMBI	***
LATUDA	***

According to publicly available data, almost HUF 7 billion NPP turnover has been generated by this funding algorithm thanks to the inclusions. The actual amount may be much higher given that NPP funding for active substances that are already accounted for in the itemized funding is not available from the published data.

However, this is only temporary „release”, as the HUF 600,000 million turnover of the products that have not been published will continue to be charged to the NPP budget. In addition, in Spetember-October 2021, NHIF submitted 63 additional medicinal products to the Ministry for inclusion, which already have a significant NPP turnover authorization.

This applications are not affected by the legislation change in December, so the procedures for these applications will continue unchanged. A significant number of the 31 applications just published waited nearly two years to reach the reimbursed market. For the six products omitted over from earlier, it is even longer. The exact procedure times will be detailed in our next special edition, *as usual*. In the face of extremely long and decreasing inclusion procedures, it is of paramount importance to make the internal decision-making processes that take place after referrals transparent and to make the publication of new products predictable.

Inclusions could truly free up capacity in the long term if innovative technologies were published in a predictable manner at regular intervals. The primary condition for achieving this objective would be quarterly ministerial dissemination and periodic Ministerial Committee meetings.

*Named Patient Program / MAT turnover (202101-202112) / Based on National Health Insurance Fund Administration public turnover data.

**The product already reimbursed in other indications in itemized accounting, therefore no NPP turnover can be determined from public data.

***NPP turnover cannot be determined from public data.