

News, current issues

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Macro approach to financing healthcare and medicinal products

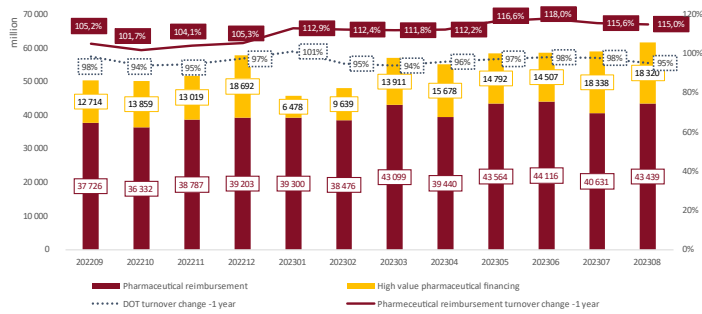
Balance of the Health Insurance Fund, August 2023

Category	Value (M)	Change (%)
Standard	6 877 M	3,7%
Indication based reimb.	13 868 M	2,4%
Indication based 100% reimb.	18 431 M	9,2%
NPP	4 261 M	19,2%
Pharmacy	43 438 M	6,9%
High value	18 319 M	-0,1%
Total	61 758 M	4,7%

Source: Healthware analysis based on NHIFA data

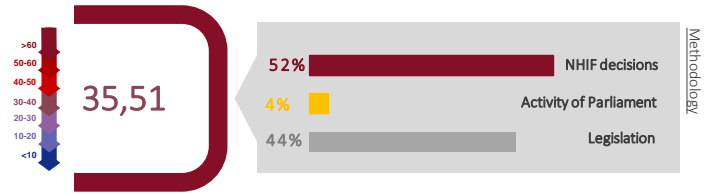
Dynamics of the sales/circulation of prescription-only-medicine

Pharmacy DOT turnover



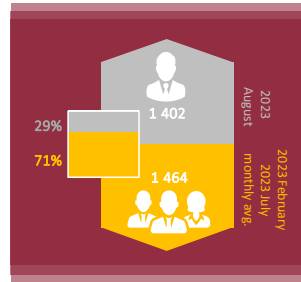
Source: Healthware analysis based on NHIFA data

Decision-making index, August 2023



Methodology

Average number of medical sales reps



Share of doctors and others

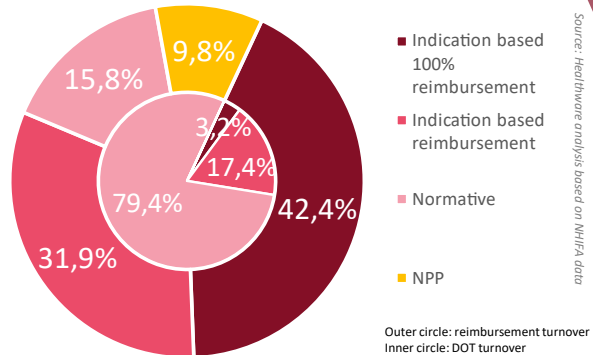
Source: NHIFA data, Healthware analysis

Deviation from the target

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

Source: Healthware analysis based on NHIFA data

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, August 2023

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

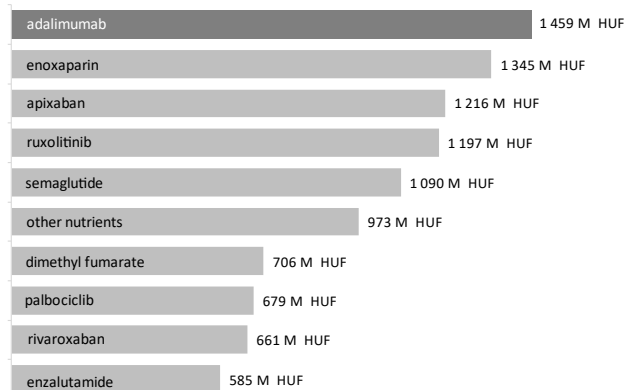
a report in order to compare the previous state with the amended one and an interpretation, in an intelligible form.

More about the services: [link](#)



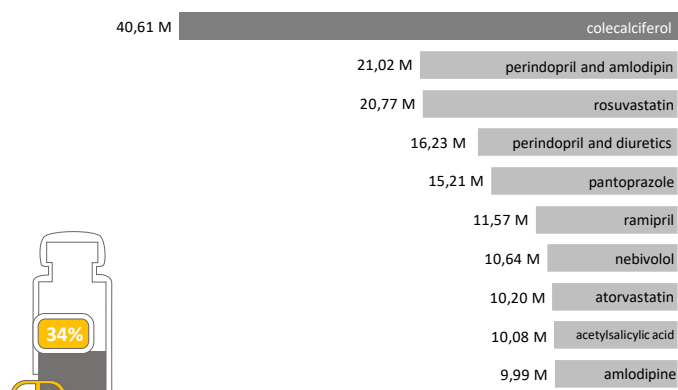
Toplists of reimbursement and number of patients, August 2023

TOP 10 ATCs by all reimbursement paid



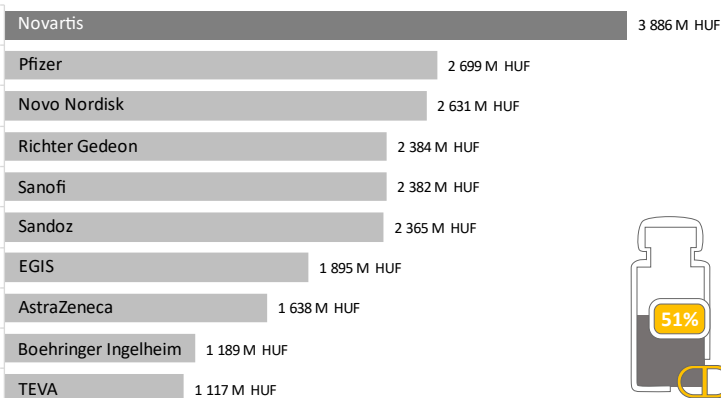
Source: Pharmacy turnover data, Healthware analysis

TOP 10 DOT by all reimbursement paid



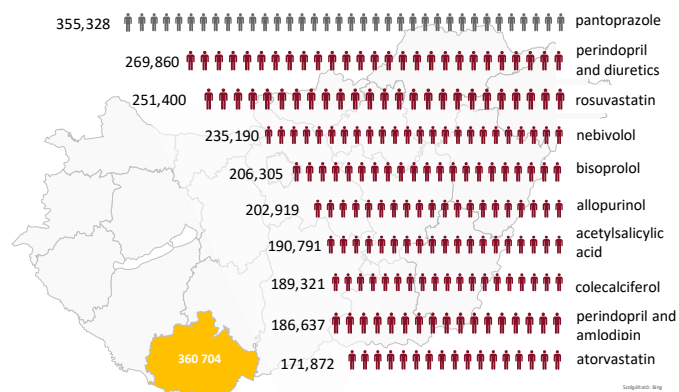
Source: Pharmacy turnover data, Healthware analysis

TOP 10 distributors by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

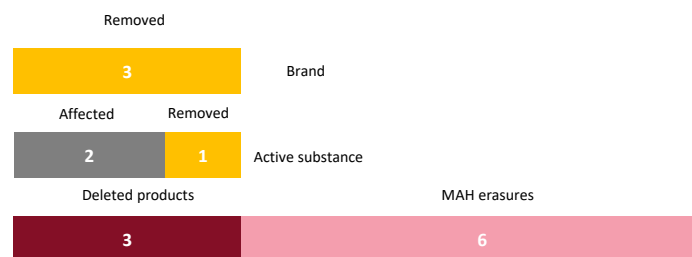
TOP 10 patient turnover by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

Substitutable products, August 2023

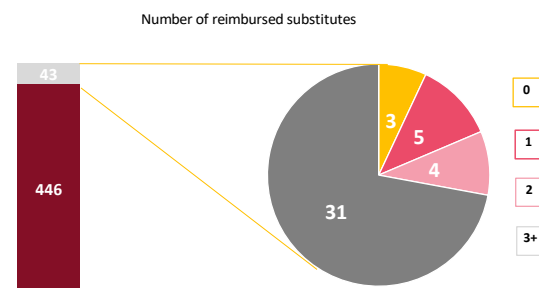
Within product deletions, marketing authorization (MAH) erasures were distinguished. We also examined the active substances and brands affected in the procedure. These were divided into two groups according to whether the brand or active substance was completely removed from the formulary or whether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



Source: Pharmacy turnover data, Healthware analysis

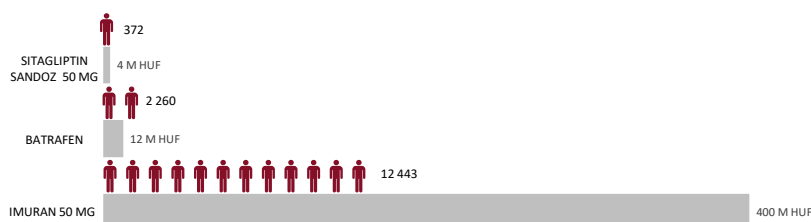
Product shortages

The graph shows the distribution of the reimbursed product shortage list. 446 products had been on the list before August 2023, compared to 43 new product added to the list in the month under review. The 43 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, August 2023 vs. July 2023 in HUF

Company	Brand	Reimbursement increment	%*
1 SANDOZ	HYRIMOZ	585 349 495 HUF	114%
2 AstraZeneca	LYNPARZA	91 702 258 HUF	119%
3 astellas	XTANDI	73 082 454 HUF	127%
4 Roche	OCREVUS	64 412 659 HUF	110%
5 IPSEN	CABOMETYX	61 633 400 HUF	128%
6 sanofi	LIBTAYO	61 103 394 HUF	124%
7 sanofi	DUPIXENT	60 877 532 HUF	145%
8 Biogen	TYSABRI	50 956 125 HUF	116%
9 Bristol Myers Squibb	SPRYCEL	49 757 354 HUF	61%
10 Pfizer	ELIQUIS	44 885 123 HUF	107%

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