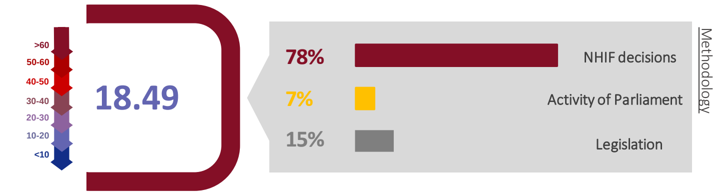
Newsletter
No. 10 Issue XII. 2024
Published: 13/11/2024

Actualities of Hungarian pharmaceutical financing market

News, current issues

- News — The pharmaceutical industry and the healthcare sector are undergoing serious restructuring >>
- News — How can you get a new drug if the person in charge has a few minutes to assess equity application? >>
- News — Can access to innovative therapies be improved? >>

Decision-making index, August 2024



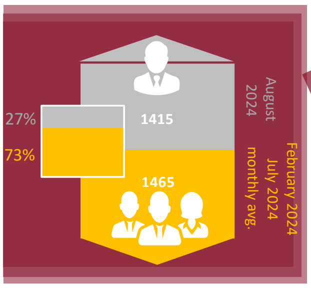
Macro approach to financing healthcare and medicinal products

Balance of the Health Insurance Fund (HUF), August 2024

Standard	6 913 M	-5,7%
Indication based reimb.	14 533 M	-5,5%
Indication based 100%.	19 456 M	-5,3%
NPP	3 653 M	-2,7%
Pharmacy	44 555 M	-5,2%
High value	22 654 M	91,8%
Total	**67 209 M**	**14,2%**

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	
-14,93M HUF	
360 543M HUF	117 322M HUF
outturn (expenditure)	outturn (revenue)

Source: Healthware analysis based on NHIFA data

Product offering

Legislation follow up

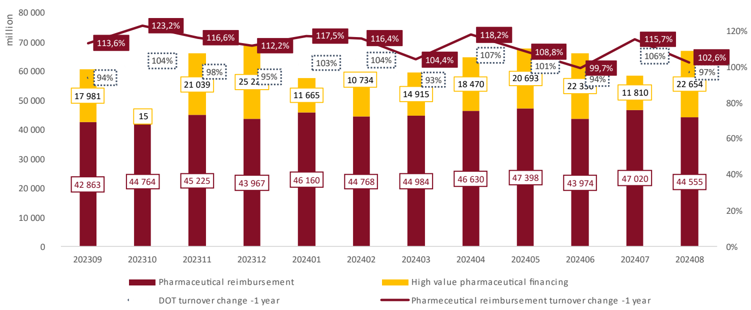
In the recent years Hungarian pharmaceutical market is characterized by rapidly changing and growing number of regulation instruments, as well as constant system transformations. Healthware Regulatory Compliance is a service in order to support companies with up-to date and comprehensive information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

In the framework of regulatory compliance service, immediate alerts August 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

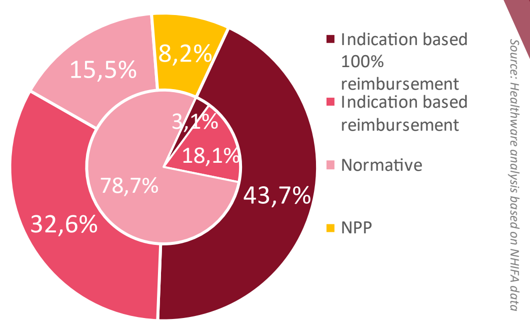
Dynamics of the sales/circulation of prescription-only-medicine

Pharmacy DOT turnover



Source: Healthware analysis based on NHIFA data

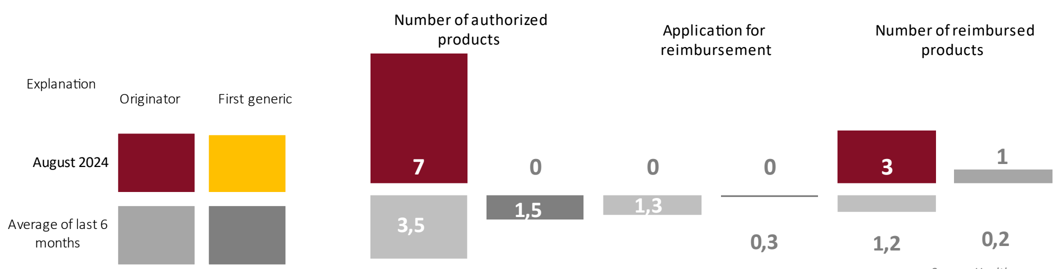
Pharmacy reimbursement turnover



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, August 2024



Source: Healthware analysis based on NHIFA data

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HEALTHWARE

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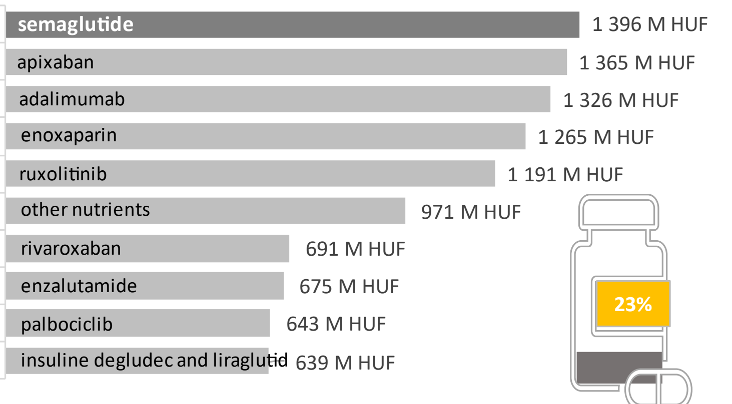
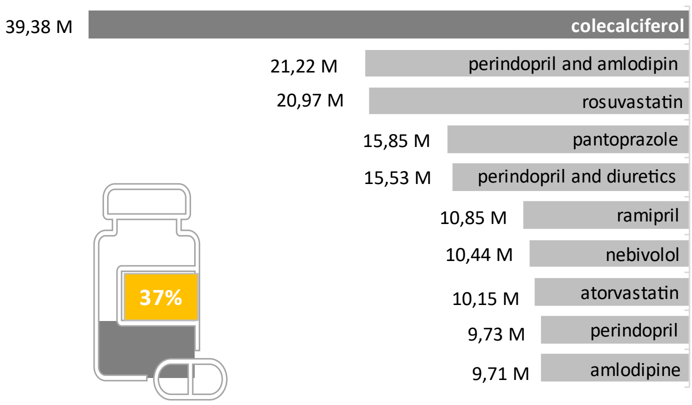
Toplists of reimbursement and number of patients, August 2024

TOP 10 ATCs by all reimbursement paid



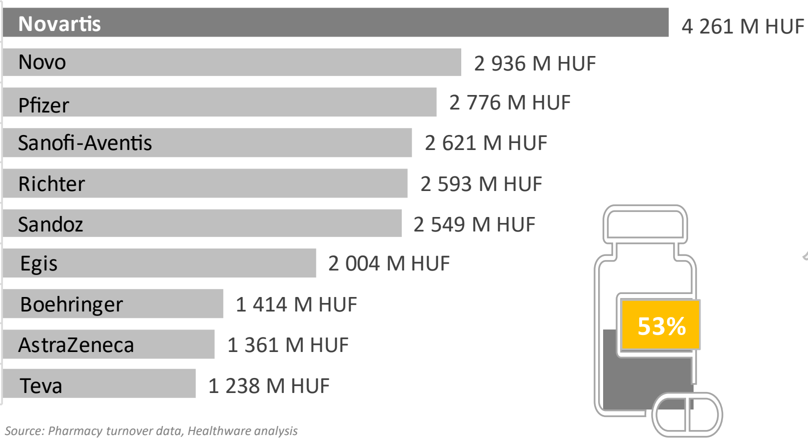
Source: Pharmacy turnover data, Healthware analysis

TOP 10 DOT by all reimbursement paid



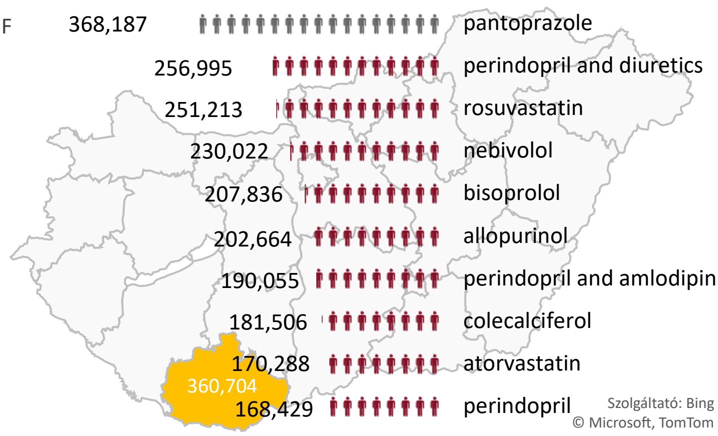
Source: Pharmacy turnover data, Healthware analysis

TOP 10 distributors by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

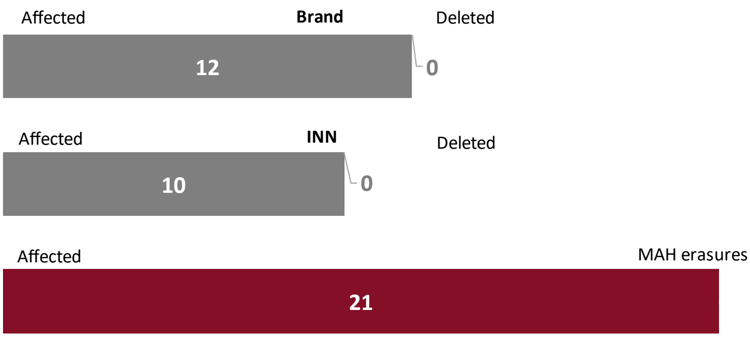
TOP 10 patient turnover by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

Substitutable products, August 2024

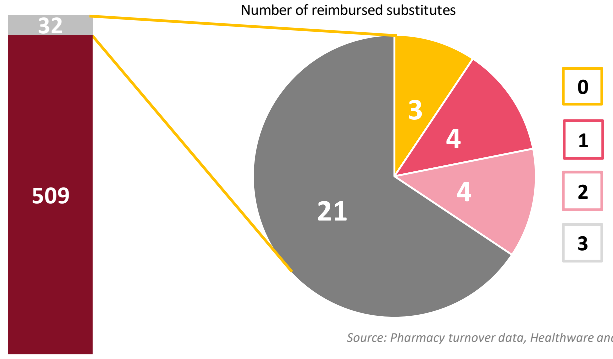
Within product deletions, marketing authorization (MAH) erasures were distinguished.
We also examined the active substances and brands affected in the procedure. These were divided into two groups according to whether the brand or active substance was completely removed from the formulary or whether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



Source: Pharmacy turnover data, Healthware analysis

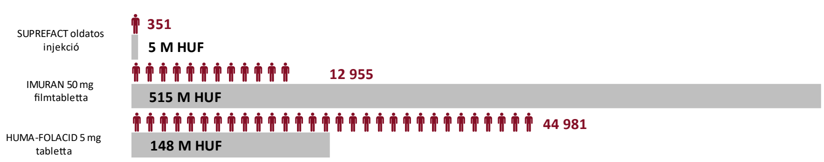
Product shortages

The graph shows the distribution of the reimbursed product shortage list. 509 products had been on the list before August 2024, compared to 32 new product added to the list in the month under review.
The 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, August 2024 vs July 2024 in HUF

Ranking	Brand	Reimbursement increment	%*
1	GRUMABIX	60 625 950 HUF	115%
2	XTANDI	40 837 014 HUF	107%
3	REKOVELLE	34 196 070 HUF	105%
4	SAIZEN	31 214 950 HUF	114%
5	TRESUVI	26 992 061 HUF	124%
6	PARSABIV	26 558 304 HUF	123%
7	YUFLYMA	26 454 079 HUF	118%
8	ILARIS	26 030 026 HUF	126%
9	TAKHZYRO	23 749 665 HUF	162%
10	LAPIDEN	22 784 541 HUF	234%

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