# Actualities of the Hungarian pharmaceutical financing market

## News, current issues

- News: The awakened immune system sweeps out the tumor. »
- News: The most people who suffer from lung cancer die in Hungary. »
- News: Cancer is loosing now— Molecular diagnosis, precision oncology. »

## Decision-making index, April 2018

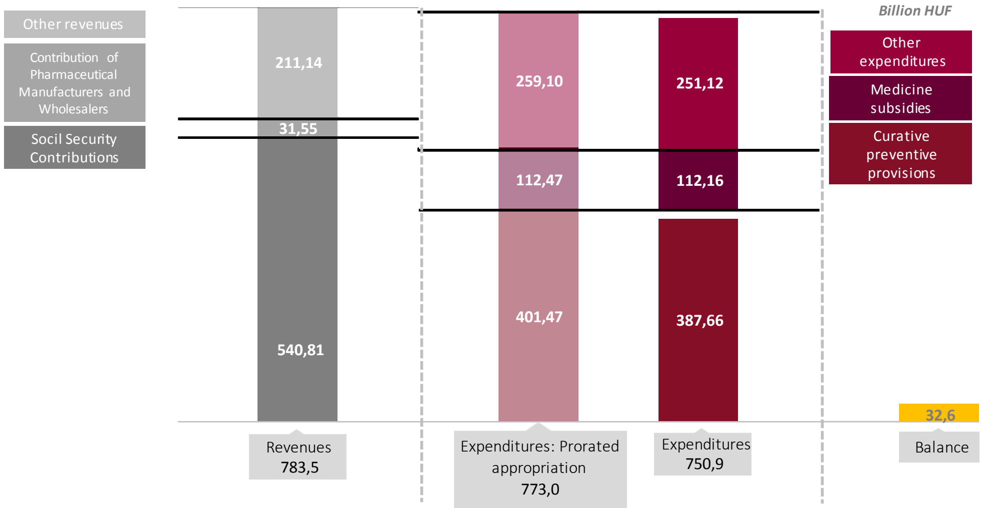
**3,39**

| | | |
|---|---|---|
| 23/95 | | Legislation |
| 0/95 | | Activity of Parliament |
| 33/95 | | NIHIFM decisions |

*Methodology*

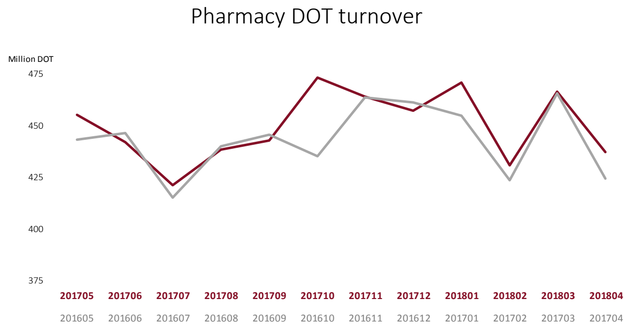
## Macro approach to financing healthcare and medicinal products

### Balance of the Health Insurance Fund, April 2018

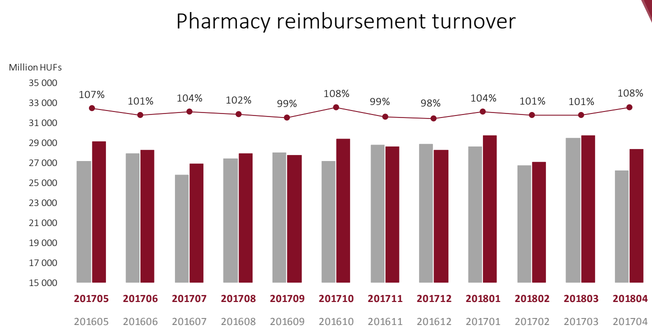



*Source: Healthware analysis based on NHIFA data*

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

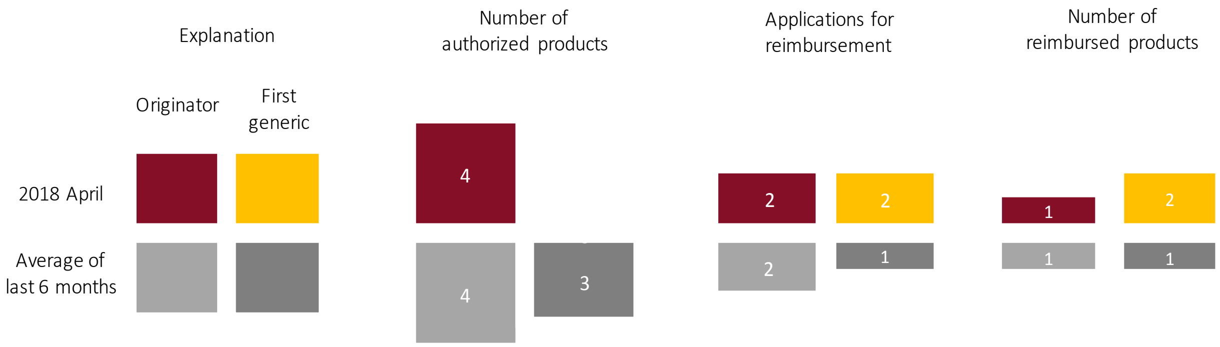



*Source: Healthware analysis based on NHIFA data*




*Source: Healthware analysis based on NHIFA data*

### Changes to subsidized medicinal product categories, April 2018




*Source: Healthware analysis based on NHIFA data*

## Product offering

### Questionnaire survey

Many marketing and health economic analyzes require information beyond the data in literary publications, that correct and complete them. In our projects the more frequently planned longitudinal data collection, fact finding and new information generating researches could provide useful support in addition to ad hoc surveys. Main steps:

- Preliminary review and interpretation of the input parameters
- Establishment of questionnaire involving 1-2 local experts
- Finalization of the questionnaires and querying on larger sample
- Receiving replies, recording questionnaires, processing responses, statistical evaluation
- Validation of results with the help of a local expert
- Web Report transfer in Hungarian and English language

Downloadable document:
**Cost-minimisation analysis of aripiprazole (Abilify®) for the treatment of acute bipolar disorder in Hungary**

Further information about the service: **link**

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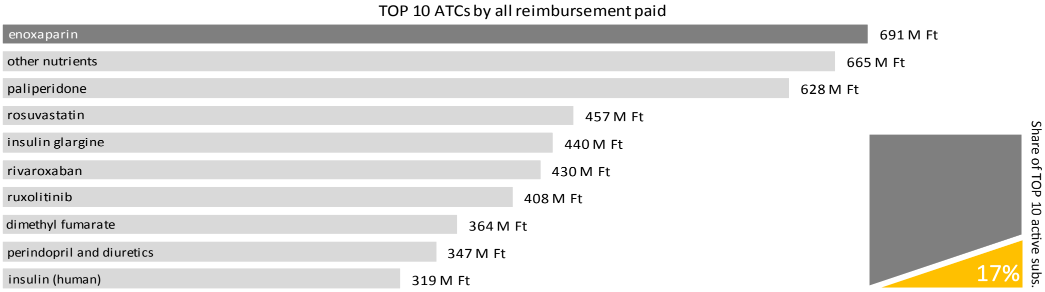
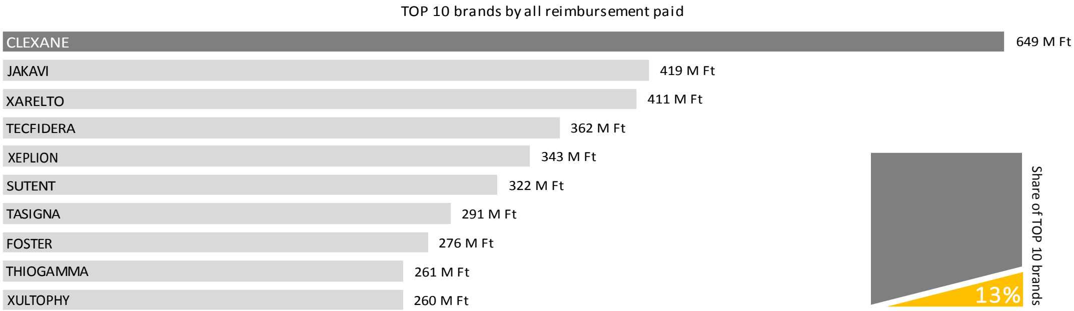
## Market data

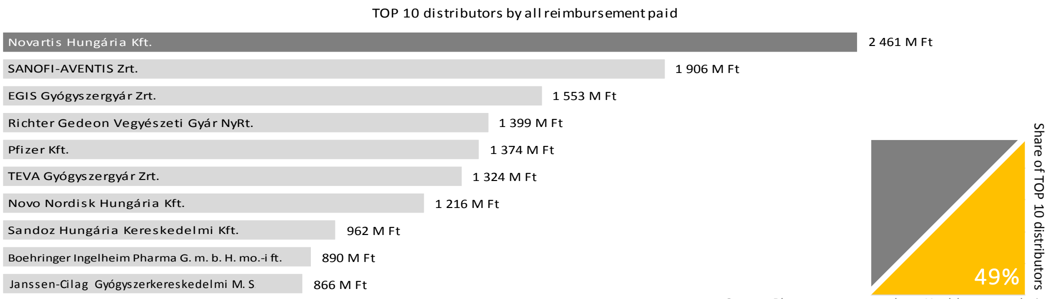
### Toplists of reimbursement and number of patients, April 2018




*Source: Pharmacy turnover data, Healthware analysis*

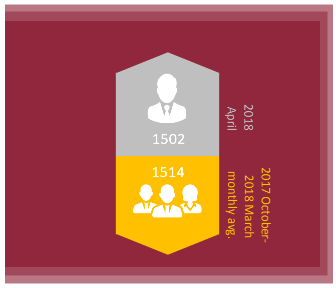



*Source: Pharmacy turnover data, Healthware analysis*

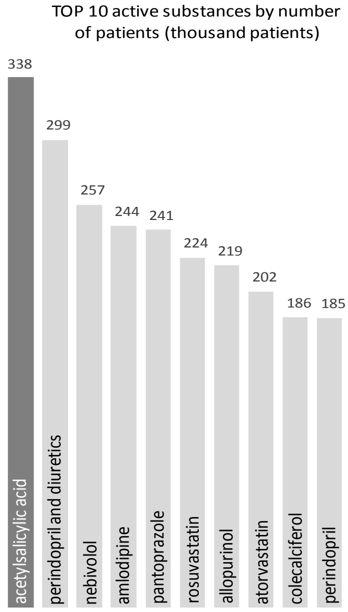



*Source: Pharmacy turnover data, Healthware analysis*

### Average number of medical sales reps




*Source: NHIFA data, Healthware analysis*

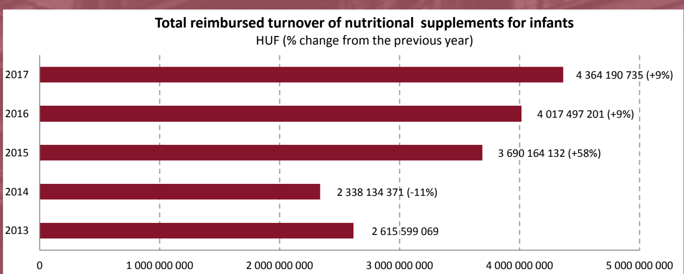



*Source: Pharmacy turnover data, Healthware analysis*

## Trends and characteristics of nutritional supplements for infants – Case study

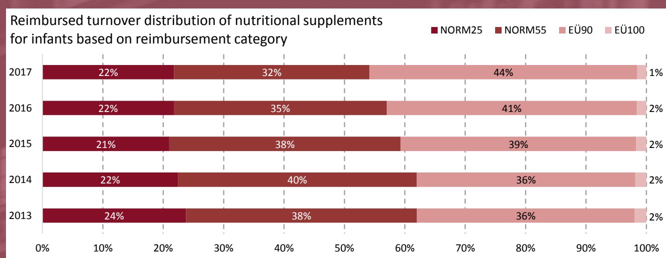
Actions of Act XCVIII of 2006 on the general rules of safe and economic medicine and medical device provision and the distribution of medicinal products, besides issues of Medicinal Products and Medical Appliances, also cover issues of nutritional supplements. Nevertheless, there is less analysis of nutritional supplements, although their health role and their budgetary impact are not negligible. Reimbursement cost of nutritional supplements affects the pharma budget; the budget impact of nutritional supplements for infants was nearly 4.5 billion HUF in 2017 and have been increasing steadily during the last years. This analysis focuses on presenting this market.

Regarding to nutritional supplements for infants, one can distinguish infant formulas, follow-on formulas and food for special medical purposes.* Special nutritional supplements for adults are not the subject of this study. The budget impact of nutritional supplements for infants has shown increasing tendency, except for the year 2014. Budget impact in 2017 (HUF 4,364,190,735) increased approximately 67% compared to 2013 (HUF 2,615,599,069).




*Source: NEAK (Pharmacy sales data), HW calculation*

Regarding to reimbursement category, budget impact of nutritional supplements for infants remained the same for the last 5 years. Indication based 100% reimbursement category had the lowest proportion with about 1-2%, while normative 25% reimbursement was about 21-24%. Normative 55% and indication based 90% reimbursement was approximately similar, about 40% each. Proportion of normative 25% reimbursement has decreasing slightly, while proportion of normative 55% reimbursement showed more dynamic decrease. Proportion of indication based 90% reimbursement showed increasing tendency, while proportion of indication based 100% reimbursement has basically stagnating. Only the proportion of normative titles decreased, the volume of normative 55% reimbursement stagnated in the last 3 years (~ HUF 1.4 billion), while the volume of normative 25% reimbursement showed an average increase of 11% from the last 2 years (2015: HUF 0.78 billion; 2016: HUF 0.83 billion; 2017: HUF 0.95 billion).




*Source: NEAK (Pharmacy sales data), HW calculation*

In case of infant formulas and follow-on formulas reimbursement category and extend of reimbursement show correlation with the method used for preparing proteins in formulas. For intact formulas, where the protein is not structurally modified, the reimbursement category is normative 55%. For partially hydrolised formulas the reimbursement category is normative 25%, while for extensively hydrolised formulas it is indication based 90% (24/a1, 24/a2, 24/b1, 24/b2, 24/c1, 24/c2 indications). Indication based 100% reimbursement can be applied „In case of absence of mother's milk, to replace it with new-born babies with a small body weight of 2500 g and premature babies up to the weight of 3000 g" (21/a indication).

Similarly, to medicinal products, price volume agreements also exist in case of nutritional products for infants, mostly with payback per unit. There are some special characteristics in case of nutritional supplements for infants. For infant formulas and follow-on formulas only 10% producer payment needed compared to 20% in case of medicinal products and food for special medical purposes based on Section 36. (1) of Act XCVIII of 2006. The market of nutritional supplements for infants is much more concentrated, there are only 4 producers on the market. About 90% of budget impact of nutritional supplements for infants covered by 2 producers, Numil and Nestlé. Although market of nutritional supplements is much smaller than the market of medicinal products, new products are marketed continuously.

*Based on the *Regulation (Eu) No 609/2013 Of The European Parliament And Of The Council*: Infant formula means food intended for use by infants during the first months of life and satisfying by itself the nutritional requirements of such infants until the introduction of appropriate complementary feeding. Follow-on formula means food intended for use by infants when appropriate complementary feeding is introduced and which constitutes the principal liquid element in a progressively diversified diet of such infants. Food for special medical purposes means food specially processed or formulated and intended for the dietary management of patients, including infants, to be used under medical supervision; it is intended for the exclusive or partial feeding of patients with a limited, impaired or disturbed capacity to take, digest, absorb, metabolise or excrete ordinary food or certain nutrients contained therein, or metabolites, or with other medically-determined nutrient requirements, whose dietary management cannot be achieved by modification of the normal diet alone.