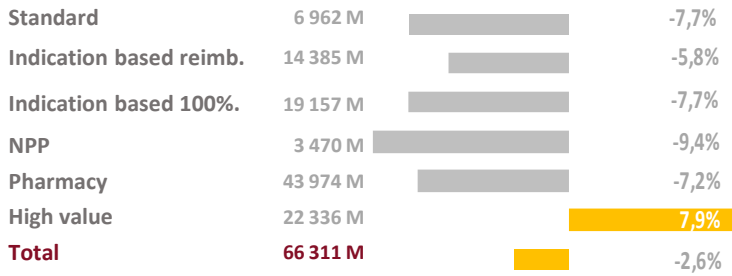


News, current issues

- News** World ranking: Semmelweis University is one of the best in the world in cardiovascular medicine >>
- News** GP practices have never been vacant at such a pace - the dramatic effects of the government's reform plan >>
- News** For the first time in decades, most of the health funds are spent not on medicine but on private healthcare >>

Macro approach to financing healthcare and medicinal products

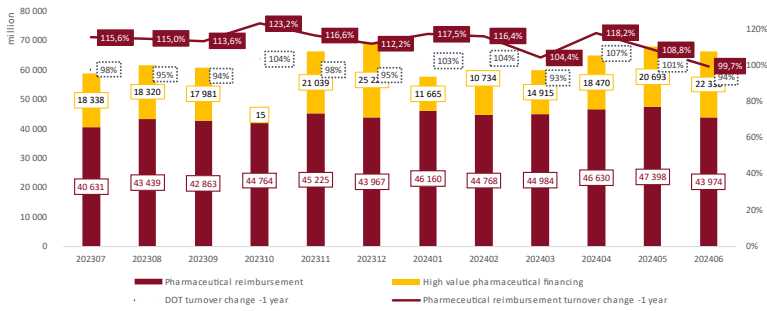
Balance of the Health Insurance Fund (HUF), June 2024



Source: Healthware analysis based on NHIFA data

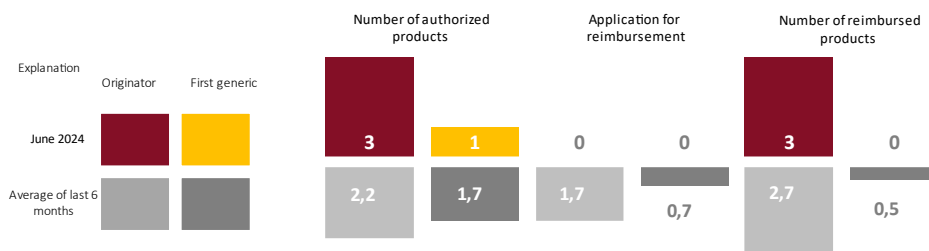
Dynamics of the sales/circulation of prescription-only-medicine

Pharmacy DOT turnover



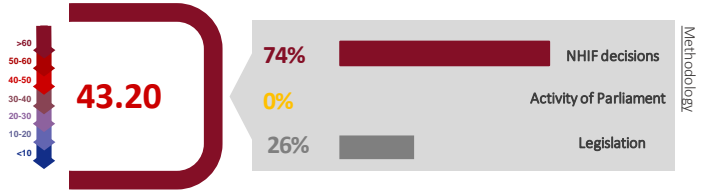
Source: Healthware analysis based on NHIFA data

Changes to subsidized medicinal product categories, June 2024

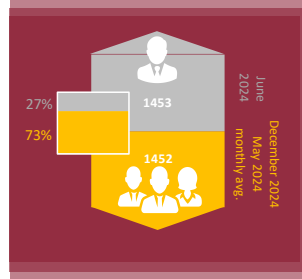


Source: Healthware analysis based on NHIFA data

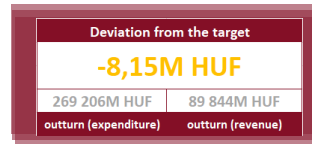
Decision-making index, June 2024



Average number of medical sales reps

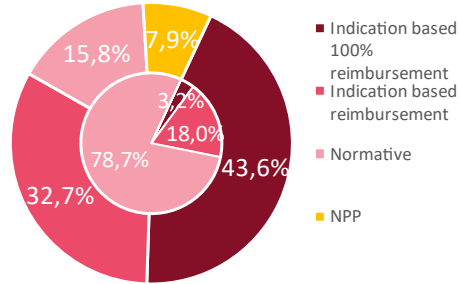


Share of doctors and others
Source: NHIFA data, Healthware analysis



Source: Healthware analysis based on NHIFA data

Pharmacy reimbursement turnover



Source: Healthware analysis based on NHIFA data

Outer circle: reimbursement turnover
Inner circle: DOT turnover

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

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 June be sent in the form of e-mails about the relevant legal changes along with

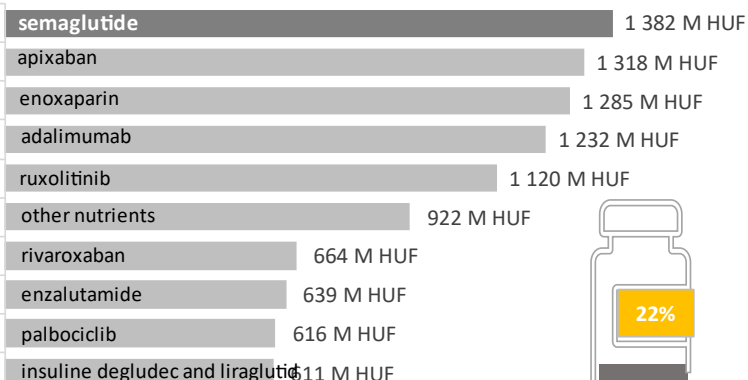
a report in order to compare the previous state with the amended one and an interpretation, in an intelligible form.

More about the services: [link](#)



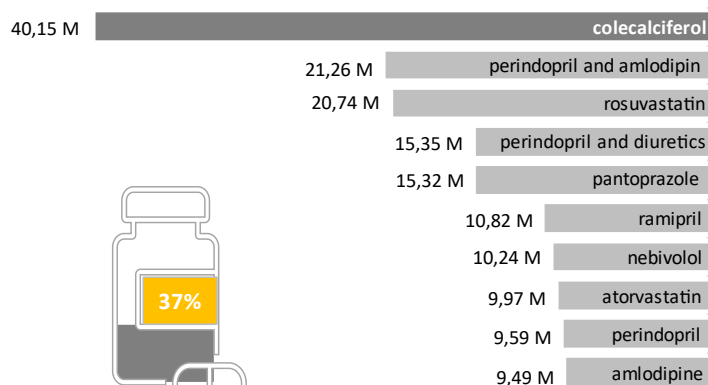
Toplists of reimbursement and number of patients, June 2024

TOP 10 ATCs by all reimbursement paid



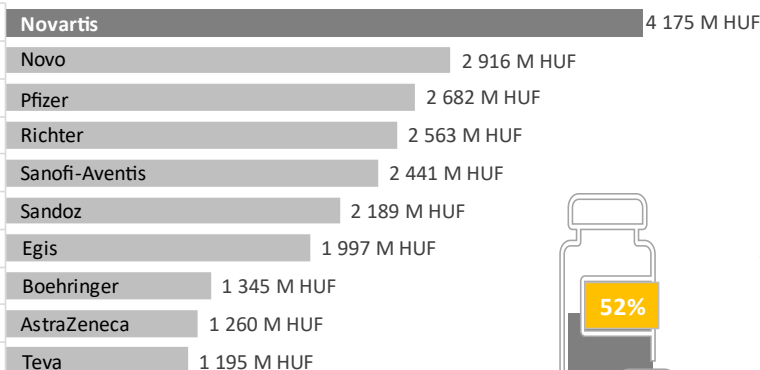
Source: Pharmacy turnover data, Healthware analysis

TOP 10 DOT by all reimbursement paid



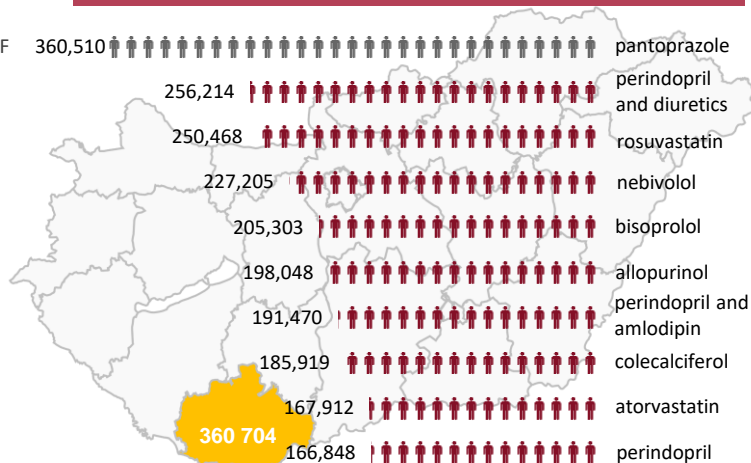
Source: Pharmacy turnover data, Healthware analysis

TOP 10 distributors by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

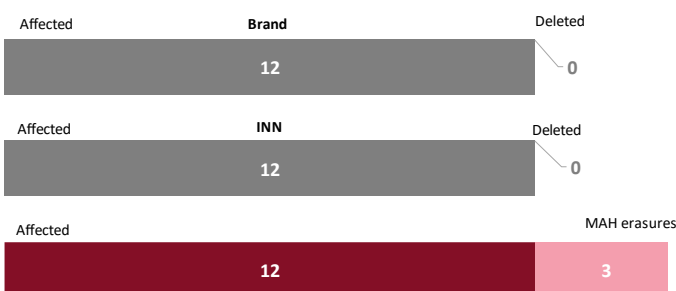
TOP 10 patient turnover by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

Substitutable products, June 2024

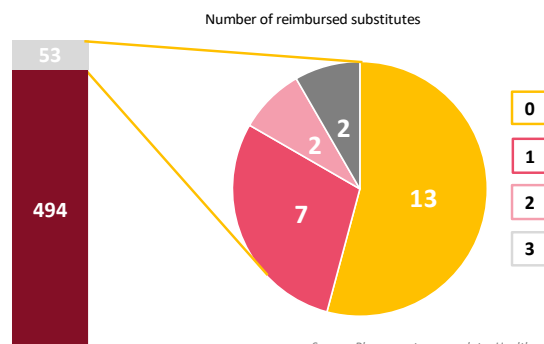
Within product deletions, marketing authorization (MAH) erasures were distinguished. We also examined the active substances and brands affected in the procedure. These were divided into two groups according to whether the brand or active substance was completely removed from the formulary or whether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



Source: Pharmacy turnover data, Healthware analysis

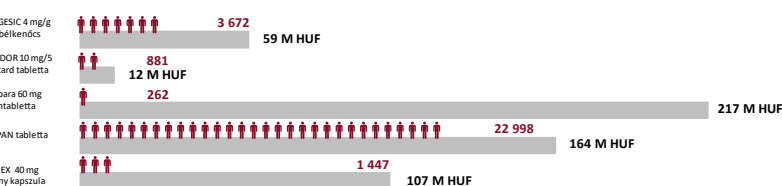
Product shortages

The graph shows the distribution of the reimbursed product shortage list. 494 products had been on the list before June 2024, compared to 53 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, June 2024 vs May 2024 in HUF

Ranking	Brand	Reimbursement increment	%*	
1	Leadiant Biosciences	CHENODEOXYCHOLIC		
2	ACID LEADIANT	35 716 030 HUF	225%	
1	MERCK	MAVENCLAD	26 553 477 HUF	119%
3	accord	ACCOFIL	19 050 719 HUF	146%
4	XARELTO	18 675 948 HUF	101%	
5	NOVARTIS	ILARIS	16 268 776 HUF	113%
6	Takeda	TAKHZYRO	14 249 799 HUF	155%
7	AOP HEALTH	TRESUVI	11 335 888 HUF	110%
8	NOVARTIS	REVOLADE	11 254 667 HUF	104%
9	NOVARTIS	KESIMPPTA	10 842 384 HUF	158%
10	janssen Johnson & Johnson	ERLEADA	10 352 089 HUF	189%

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