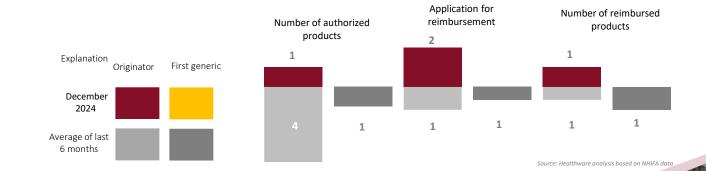


Actualities of Hungarian pharmaceutical financing market

-					
News, current issues	5			Decision-making index, December 2	2024
healthcare system	n is underfunded	varns: The Hungarian by 2,500 billion forin e young doctors in He	ts.	5060 5060 4050 30-40 20-30 222.22 44%	NHIF decisions Activity of Parliament
than those over 6	55			10-20	Legislation
News Cecília Müller pre	esented the latest	epidemic curve	>>		eps product offering
Macro approach to f	financing health	ncare and medicina	al products	Average number of medical sales re	eps product a
Balance of the Healt	h Insurance Fui	nd (HUF), Decembe	er 2024		Legislation follow up
Standard	7 770 M	0,9%		26% 1437 2024 ecember	In the recent years Hungarian pharmaceutical market is characterized by rapidly changing and growing number of regulation
Indication based	15 519 M	0,5%			instruments, as well as constant system
Indication b. 100%		-1,5%		this 202	transformations. Healthware Regulatory Compliance is a service in order to support
NPP	4 014 M	4,0%			companies with up-to date and comprehensive information in this complex
Pharmacy High value	47 143 M	0,0%	3554.8%		legal environment.
Total	80 404 M	67,3%	3337,070	Share of doctors and others Source: NHIFA data, Healthware analysis	In the framework of regulatory compliance service, immediate alerts December be sent in the form of e-mails
Dynamics of the sale	es/circulation o		e analysis based on NHIFA data -medicine	Deviation from the target -29,74M HUF 549 918M HUF 187 038M HUF outturn (expenditure) outturn (revenue) Source: Healthware analysis based on NHIFA data	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.
Pharmacy DOT turno	over			Pharmacy reimbursement turnover	More about the services: <u>link</u>
90 000 80 000 70 000 50 000 50 000 11 665 10 734 44 768 44 984 10 000 20 20401 20 20402 20 20403 Pharmaceutical reimbursa 	ement	47 020 44 555 45 878 40 202407 202408 202409 High value pharmaceutical fir Pharmaceutical reimbursem	50 130 47 153 47 143 60% 40% 20% 20% 20% 20% 20% 20% 20% 20% 20% 2	16,5% 8,5% 3/% 17,7% 42,1% 32,9%	 Indication based 100% reimbursement Indication based reimbursement Normative NPP Outer circle: reimbursement turnover Inner circle: DOT turnover
		source: Healthwa	ne unalysis basea on NHIFA data	* The value of social welfare prescriptions is shown under the	relevant title
Changes to subsidize	ed medicinal pro	oduct categories, [December 2024		



tter by se

nding an e-mail to

<u>Subscribe</u>

in

FIFE

Healthware Consulting Ltd. H-1133 Budapest, Váci út 76. 7.em. 2. tor. + 36-1-324-2050



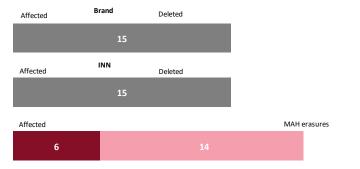
Actualities of Hungarian pharmaceutical financing market

Toplists of reimbursemen	nt and number of patients, D	ecember 2024		
TOP 10 ATCs by all reimburseme	ent paid		TOP 10 DOT b	all reimbursement paid
semaglutide		1 597 M HUF	61,21 M	colecalciferol
apixaban		1 459 M HUF		22,76 M perindopril and amlodipin
adalimumab		1 426 M HUF		21,78 M rosuvastatin
enoxaparin	1 269	M HUF		16,63 M pantoprazole
ruxolitinib	1 251 N	1 HUF		15,98 M perindopril and diuretics
other nutrients	1 007 M HUF			11,15 M ramipril
rivaroxaban	703 M HUF			10,80 M nebivolol
insuline degludec and	677 M HUF	23%		40% 10,46 M atorvastatin
enzalutamide	651 M HUF			10,25 M perindopril
palbociclib 6	07 M HUF			10,22 M amlodipine
Source: Pharmacy turnover data, Healthware	analysis			Source: Pharmacy turnover data, Healthware analysis
TOP 10 distributors by all reimbe	ursement paid		TOP 10 patier	nt turnover by all reimbursement paid
Novartis		4 565 M HUF	382	,253 • • • • • • • • • • • • • • • • pantoprazole
Novo	3 261 1	M HUF		262,250 ******* colecalciferol
Pfizer	2 853 M HUF		5	259,520 1111111111 perindopril and diuretics
Richter	2 736 M HUF		gut	256,813 141111111 rosuvastatin
Sanofi-Aventis	2 518 M HUF		flast	234,317
Sandoz	2 516 M HUF			210,011 1111111 bisoprolol
Egis	2 255 M HUF		Same	The second secon
AstraZeneca 15	35 M HUF			204,894 ***** allopurinol
Boehringer 1 47	'1 M HUF	- 53%	for	201,691 Internet perindopril and amlodipin
	MHUF		Constant and the second s	190,248 ***** amoxicillin and enzyme 360,704
Source: Pharmacy turnover data, Healthware	e analysis			174,028 • • • • • • • • perindopril Szolgáltató: Bing © Microsoft, TomTom
				Source: Pharmacy turnover data, Healthware analysis

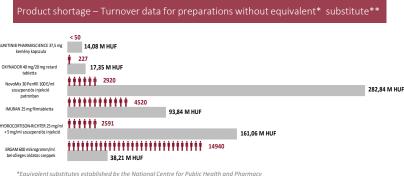
Substitutable products, December 2024

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



*Equivalent substitutes established by the National Centre for Public Health and Pharman **Turnover in the 12 months preceding the product shortage

Source: Pharmacy turnover data, Healthware analysis

Healthware Consulting Ltd.

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

Source: Pharmacy turnover data, Healthware analysis

Source: Pharmacy turnover data, Healthware analysis

Highest growth, December 2024 vs November 2024 in HUF

Product shortages

	Ranking	Brand	Reimbursement increment	%*
1	U NOVARTIS	JAKAVI	80 725 440 HUF	104%
2	🔁 MSD	PREVYMIS	46 189 421 HUF	172%
3	U NOVARTIS	REVOLADE	44 498 680 HUF	108%
4	Takeda	TAKHZYRO	37 999 464 HUF	126%
5	sanofi	LIBTAYO	31 558 847 HUF	96%
6	U NOVARTIS	KESIMPTA	31 171 854 HUF	138%
7		TRESUVI	31 014 277 HUF	118%
8	💾 Bristol Myers Squibb	ELIQUIS	30 914 938 HUF	104%
9		TRESIBA	28 750 543 HUF	107%
10	DANONE	MILUMIL	26 237 204 HUF	105%