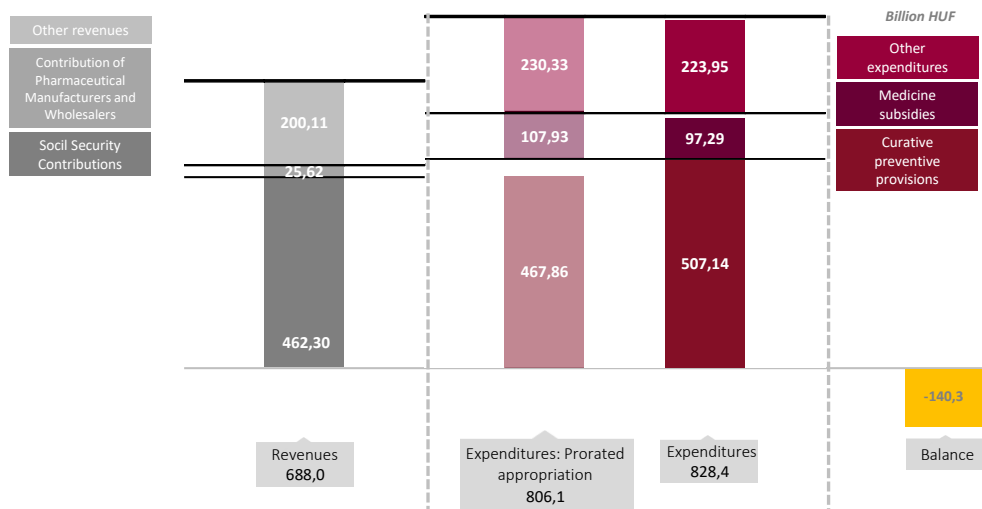


## News, current issues

- News** Larger increase of pharma expenditures would be necessary in the budget for next year >>
- News** NEAK has published the planned annual framework for specialty care >>
- News** Vitamins were the top-selling products in pharmacies during the Covid pandemic >>

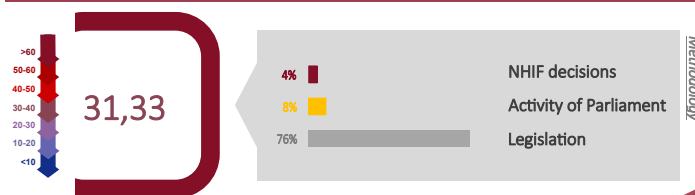
## Macro approach to financing healthcare and medicinal products

### Balance of the Health Insurance Fund, March 2021



Source: Healthware analysis based on NHIFA data

### Decision-making index, March 2021



Methodology

## Product offering

### Questionnaire survey

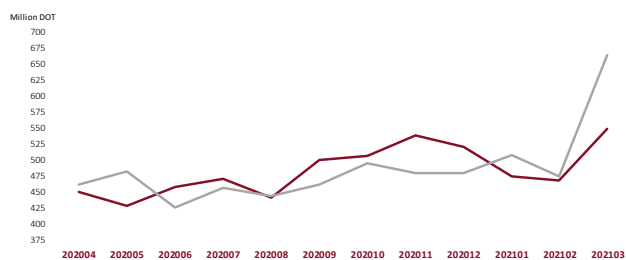
Many marketing and health economic analyzes require information beyond the data in literary publications, that correct and complete them. In our projects the more frequently planned longitudinal data collection, fact finding and new information generating researches could provide useful support in addition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

Further information about the service: [link](#)

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

### Pharmacy DOT turnover



Source: Healthware analysis based on NHIFA data

### Pharmacy reimbursement turnover



Source: Healthware analysis based on NHIFA data

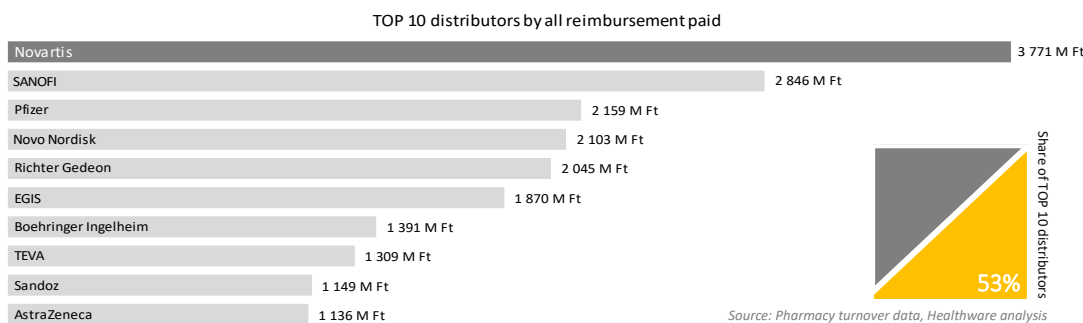
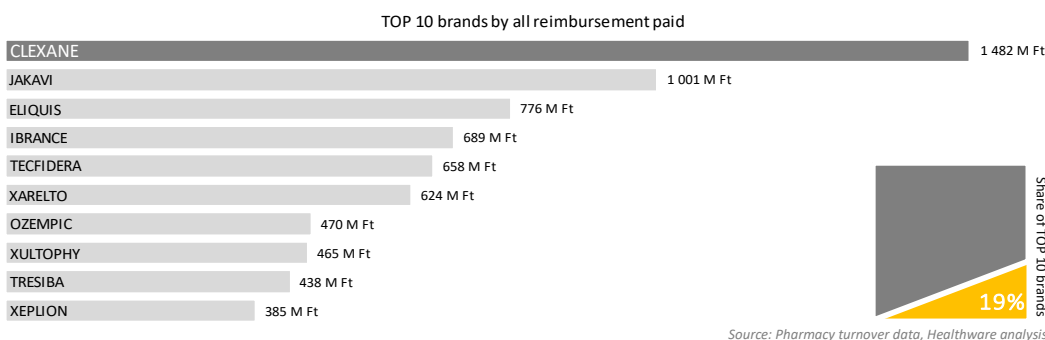
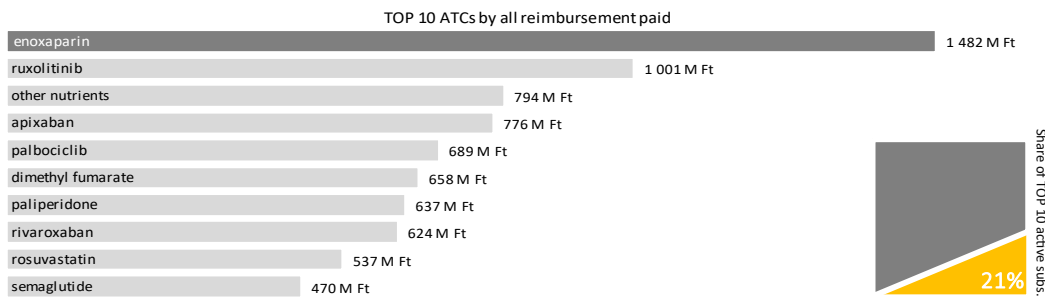
## Changes to subsidized medicinal product categories, March 2021

Explanation	Number of authorized products	Applications for reimbursement	Number of reimbursed products
Originator	4	2	1
First generic	2	1	1
March 2021	4	2	1
Average of last 6 months	3	2	1

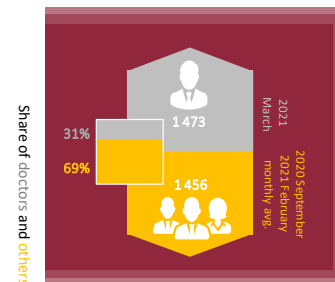
Source: Healthware analysis based on NHIFA data

## Market data

### Toplists of reimbursement and number of patients, March 2021

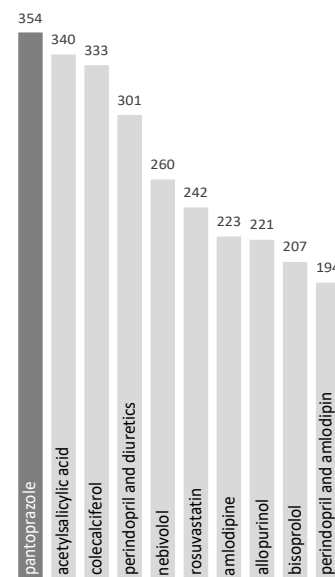


### Average number of medical sales reps



Source: NHIFA data, Healthware analysis

### TOP 10 active substances by number of patients (thousand patients)



### Analysis of innovative reimbursement submissions — Case study

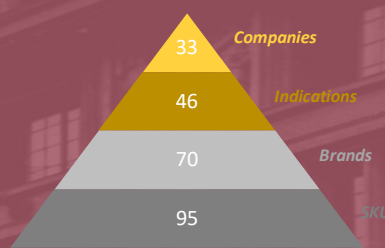
Healthware analysis based on NEAK data

On the 31st of May, 2021 there were 95 reimbursement submission (of 70 brands) before NHIFA, in the case of which a legislation amendment is required for the inclusion, therefore NHIFA cannot make the final decision on its own competence\*

In this case study, we provide a brief overview of these requests' typical processing time, also divided into sections according to each decision point. When interpreting the analysis, it is important to consider that after the change of legislation in 2018, the analysis of a submission's timeline faces many obstacles, since these procedures have to be closed within 360 days. In the case of submissions that appears to exceed this procedure time, companies tend to initiate the closure of the process and resubmitting the dossiers without any, or with minimal changes. In our analysis, the requests closed by a termination order and submitted again within a few month were considered as a re-submission. In case of these products, the submission date was determined based on the first submission.

Based on our analysis, the following statements hold regarding the timeline of the analyzed procedures:

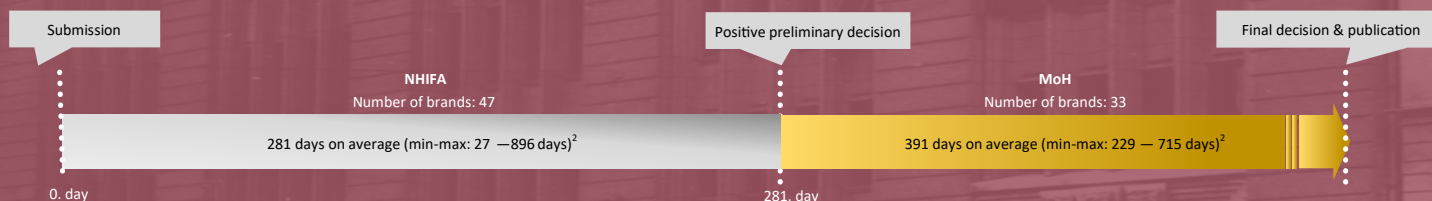
- ♦ average time between (atb) submission and proposal to the TÉF is 10 days (min. 0 days, max. 27)
- ♦ atb. the handover to TÉF and the first TÉB session takes 93 days (min. 22, max. 163)
- ♦ atb. first and last TÉB session is 217 days (min. 36, max. 833)
- ♦ atb. last TÉB session and proposal to MoH is 172 days (min.19, max. 408)



NHIFA proposes legislation amendment requests intermittently to the Minister responsible for Health Insurance - in line with the TÉB decision - , based on 2006. Act XCVIII. [Gyftv.], according to which reimbursement of pharmaceutical applications or alteration of reimbursement conditions of an already reimbursed medicine requires amendment of legislation.

Transparent traceability of submissions of pharmaceuticals lasts from the moment of submission till the NHIFA proposal to the Ministry. Thereafter, public information is not available regarding the decisions until the publication of the bulletin.

A more detailed analysis of these submissions will be published in the June Special Edition, where, in addition to the overall timeline, we also present the distribution of submissions based on the need for the legislative amendment. We also highlight the companies and therapeutic areas with the most submissions and analyze the procedure times of the given submissions in different breakdowns (by requested reimbursement categories, companies). The whole analysis will be available on our [LinkedIn](#) site, soon.



\* In this analysis we have used the information that were published on 31st of May, 2021 by NHIFA.