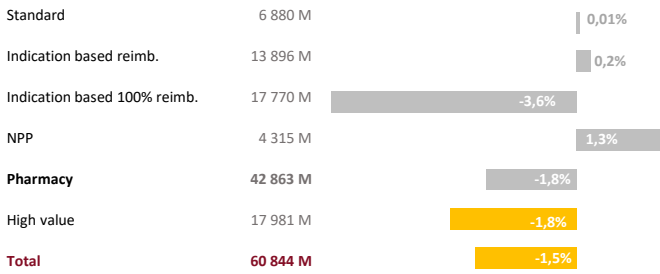


## News, current issues

- News** No more secrets, six thousand operations stuck in the system >>
- News** Should there be a concession solution in the Hungarian health care? >>
- News** The great hospital debt settlement is futile, there will be institutions that will not be able to pay market suppliers afterwards >>

## Macro approach to financing healthcare and medicinal products

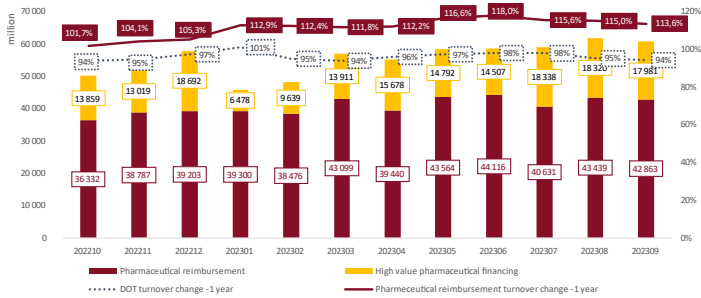
### Balance of the Health Insurance Fund, September 2023



Source: Healthware analysis based on NHIFA data

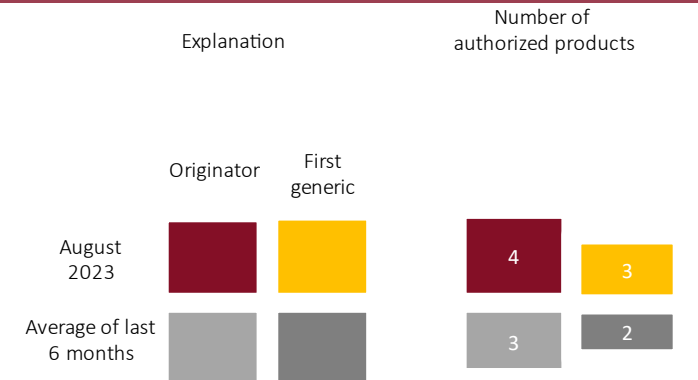
## Dynamics of the sales/circulation of prescription-only-medicine

### Pharmacy DOT turnover

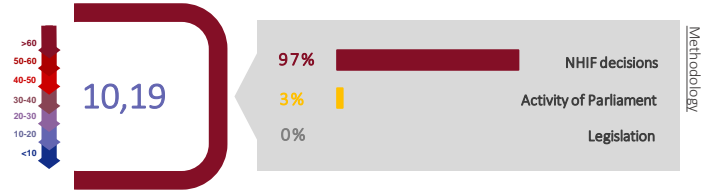


Source: Healthware analysis based on NHIFA data

## Changes to subsidized medicinal product categories, September 2023

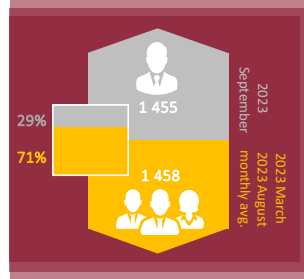


## Decision-making index, September 2023



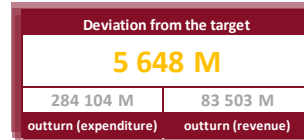
Methodology

## Average number of medical sales reps



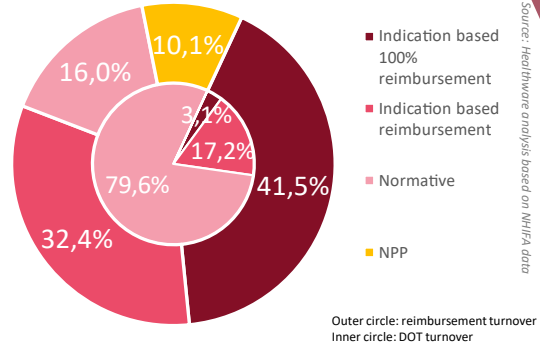
Share of doctors and others

Source: NHIFA data, Healthware analysis



Source: Healthware analysis based on NHIFA data

## Pharmacy reimbursement turnover



Source: Healthware analysis based on NHIFA data

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

## Applications for reimbursement

## Number of reimbursed products

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

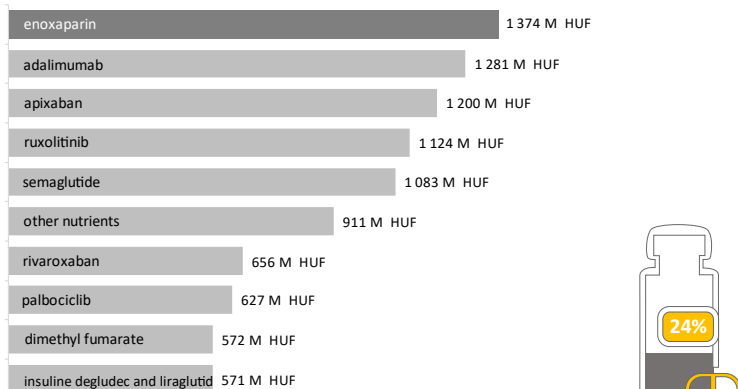
a report in order to compare the previous state with the amended one and an interpretation, in an intelligible form.

More about the services: [link](#)



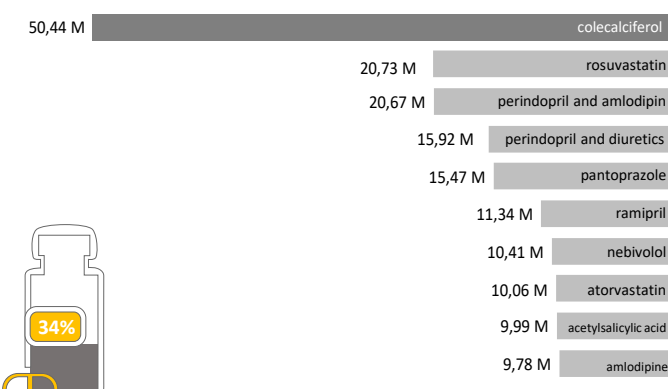
## Toplists of reimbursement and number of patients, September 2023

### TOP 10 ATCs by all reimbursement paid



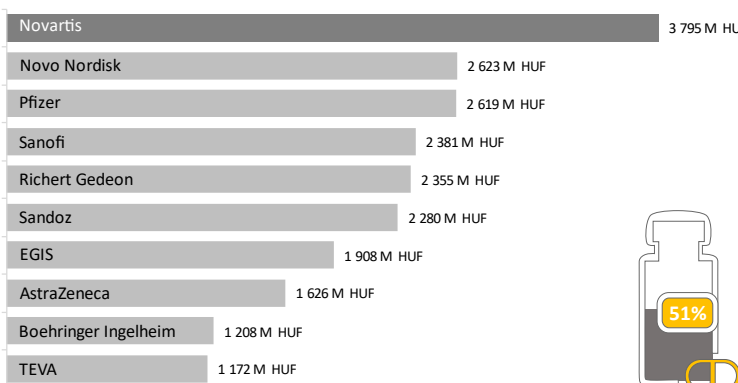
Source: Pharmacy turnover data, Healthware analysis

### TOP 10 DOT by all reimbursement paid



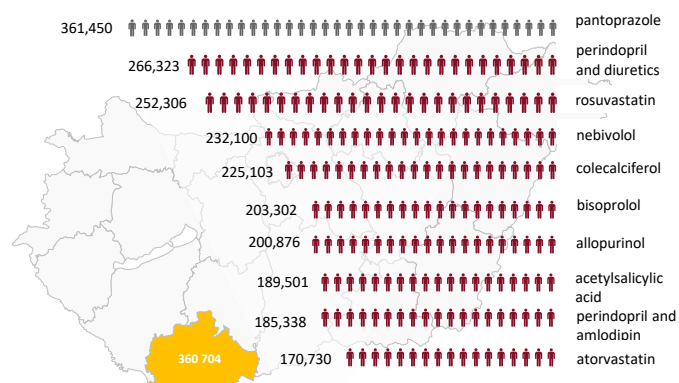
Source: Pharmacy turnover data, Healthware analysis

### 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, September 2023

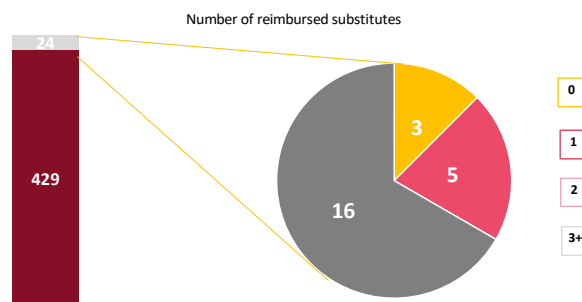
Within product deletions, marketing authorization (MAH) erasures were distinguished. We also examined the active substances and brands affected in the procedure. These were divided into two groups according to whether the brand or active substance was completely removed from the formulary or whether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



Source: Pharmacy turnover data, Healthware analysis

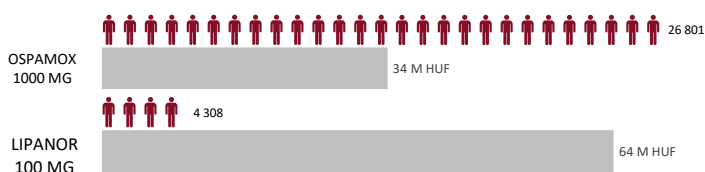
## Product shortages

The graph shows the distribution of the reimbursed product shortage list. 429 products had been on the list before September 2023, compared to 24 new product added to the list in the month under review. The 24 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 a substitute\*



\*Turnover in the 12 months preceding the product shortage  
Source: Pharmacy turnover data, Healthware analysis

## Highest growth, September 2023 vs. August 2023 in HUF

Company	Brand	Reimbursement increment	%*
1	Roche	OCREVUS	128 833 388 HUF / 151%
2	ORGANON	EZETROL	34 988 824 HUF / 115%
3	Boehringer Ingelheim	OFEV	33 077 323 HUF / 131%
4	AMGEN	PROLIA	32 859 272 HUF / 109%
5	Lilly	HUMULIN	29 418 525 HUF / 127%
6	sanofi	CLEXANE	28 596 181 HUF / 100%
7	Pfizer	VYNDAQEL	28 587 984 HUF / 181%
8	astellas	XOSPATA	27 994 288 HUF / 129%
9	FERRING	REKOVELLE	26 432 400 HUF / 134%
10	Goodwill	ELIGARD	24 698 458 HUF / 123%

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