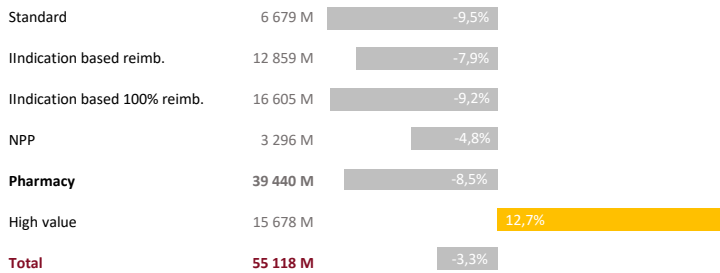


## News, current issues

- News** How to write off half of the extra profit tax for pharmaceutical manufacturers >>
- News** Association of Innovative Pharmaceutical Manufacturers takes a new direction >>
- News** Shocking data on Hungarian health care >>

## Macro approach to financing healthcare and medicinal products

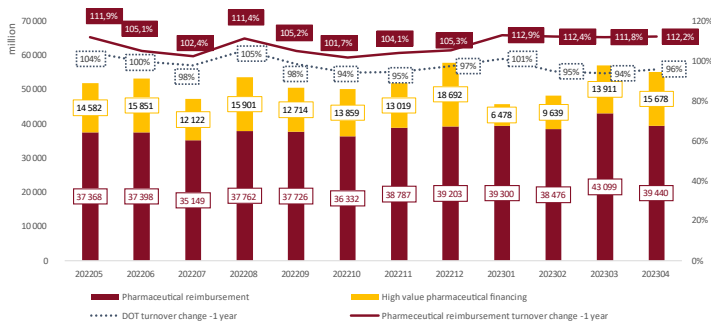
### Balance of the Health Insurance Fund, April 2023



Source: Healthware analysis based on NHIFA data

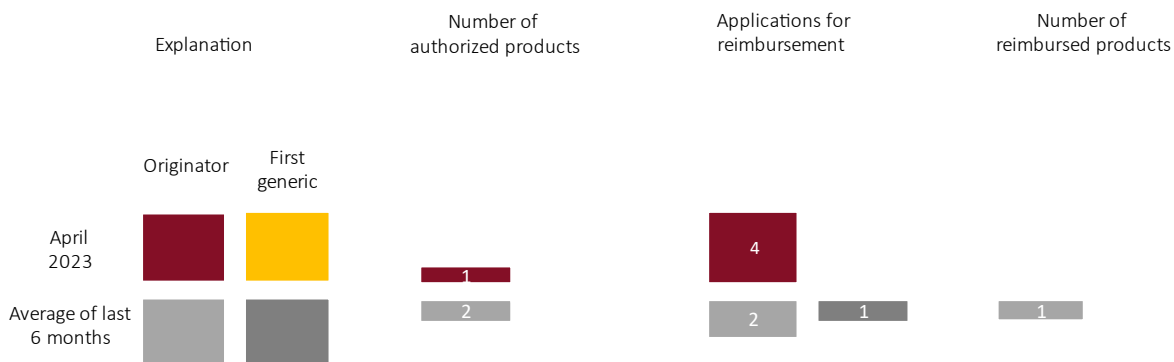
## Dynamics of the sales/circulation of prescription-only-medicine

### Pharmacy DOT turnover



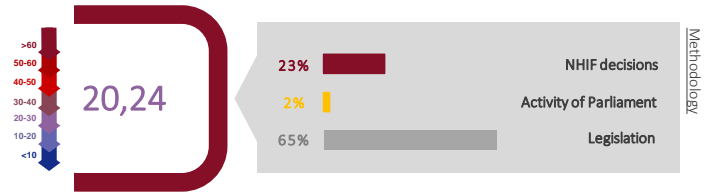
Source: Healthware analysis based on NHIFA data

## Changes to subsidized medicinal product categories, April 2023



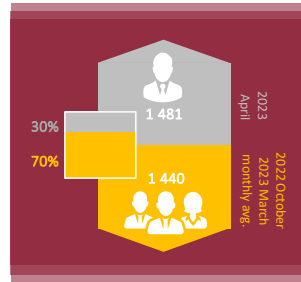
Source: Healthware analysis based on NHIFA data

## Decision-making index, April 2023



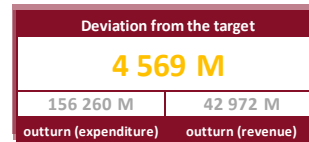
Methodology

## Average number of medical sales reps



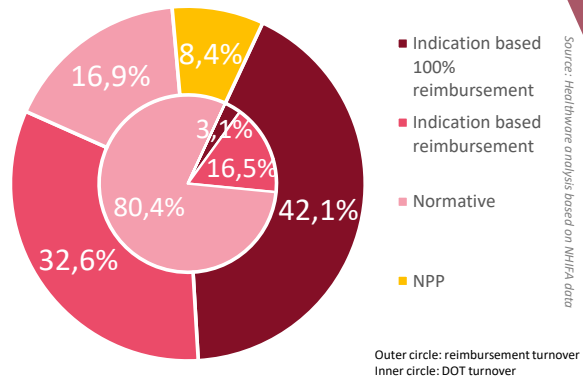
Share of doctors and others

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

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

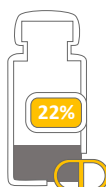
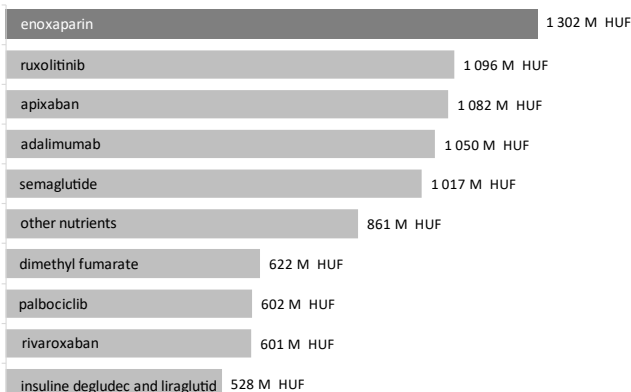
a report in order to compare the previous state with the amended one and an interpretation, in an intelligible form.

More about the services: [link](#)



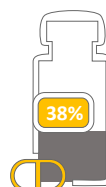
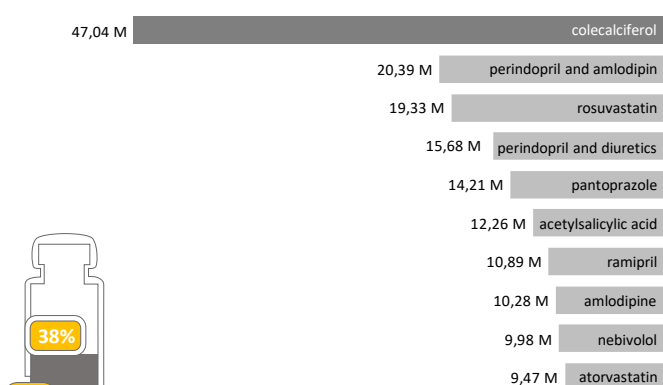
## Toplists of reimbursement and number of patients, April 2023

### TOP 10 ATCs by all reimbursement paid



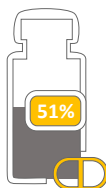
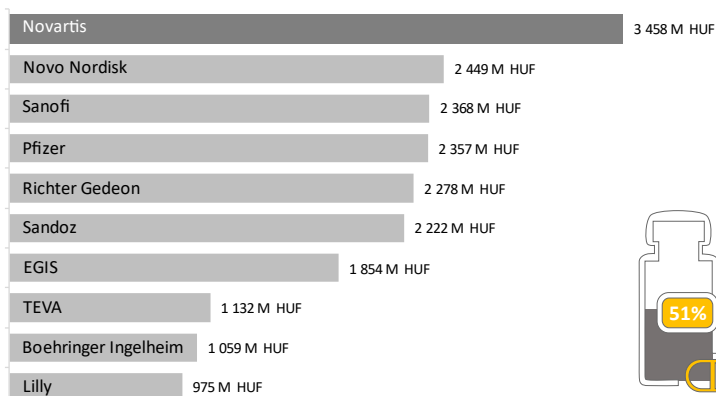
Source: Pharmacy turnover data, Healthware analysis

### TOP 10 DOT by all reimbursement paid



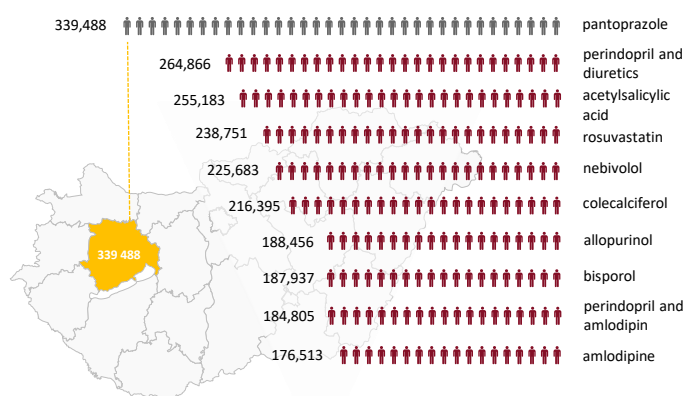
Source: Pharmacy turnover data, Healthware analysis

### TOP 10 distributors by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

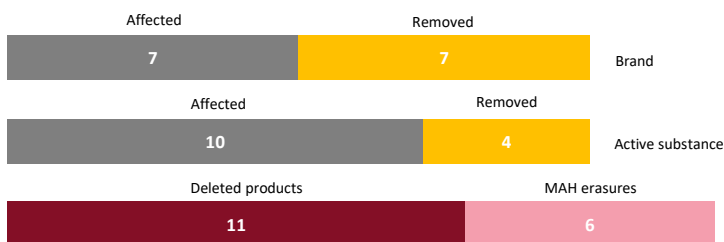
### TOP 10 patient turnover by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

## Substitutable products, April 2023

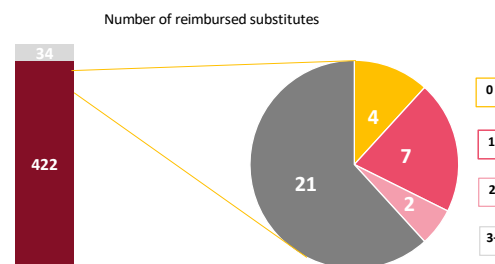
Within product deletions, marketing authorization (MAH) erasures were distinguished. We also examined the active substances and brands affected in the procedure. These were divided into two groups according to whether the brand or active substance was completely removed from the formulary or whether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



Source: Pharmacy turnover data, Healthware analysis

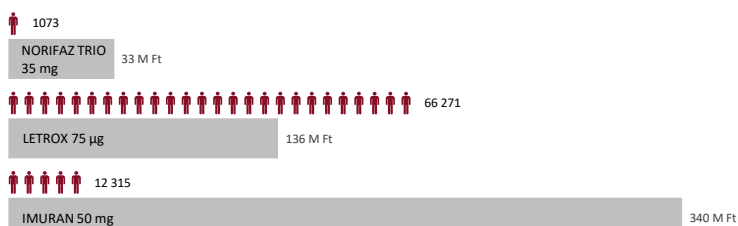
## Product shortages

The graph shows the distribution of the reimbursed product shortage list. 422 products had been on the list before November 2022, compared to 34 new product added to the list in the month under review. The 34 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

## Turnover data for preparations without a substitute, April 2023



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

## Highest growth, April 2023 vs. March 2023 in HUF

Company	Brand	Reimbursement increment	%*
1	THIOGAMMA	156 176 710 HUF	133%
2	XTANDI	68 373 576 HUF	284%
3	OZEMPIC	40 269 813 HUF	98%
4	CABOMETYX	38 520 875 HUF	117%
5	BAVENCIO	30 556 880 HUF	191%
6	RIVOTRIL	24 785 046 HUF	113%
7	HYRIMOZO	24 687 287 HUF	318%
8	RETSEVMO	21 940 984 HUF	220%
9	LYNPARZA	21 227 365 HUF	107%
10	NUTRISON	18 789 556 HUF	136%

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