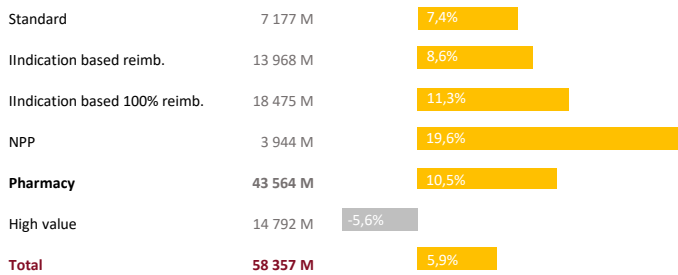


## News, current issues

- News** Here is the special tax decree package >>
- News** Twenty-two became the magic number in the transformation of healthcare: everything will be different from next March >>
- News** The government is completely transforming the National Public Health Center and abolishing National Institute of Pharmacy and Nutrition >>

## Macro approach to financing healthcare and medicinal products

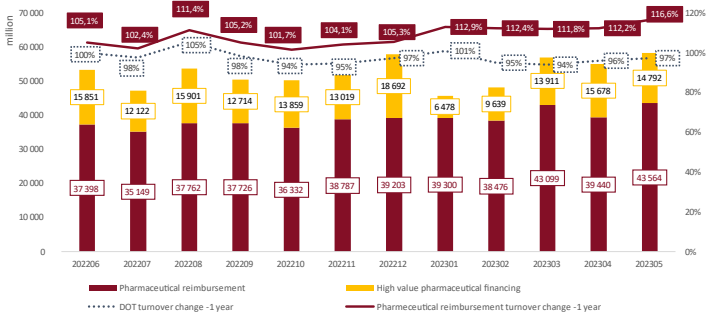
### Balance of the Health Insurance Fund, May 2023



Source: Healthware analysis based on NHIFA data

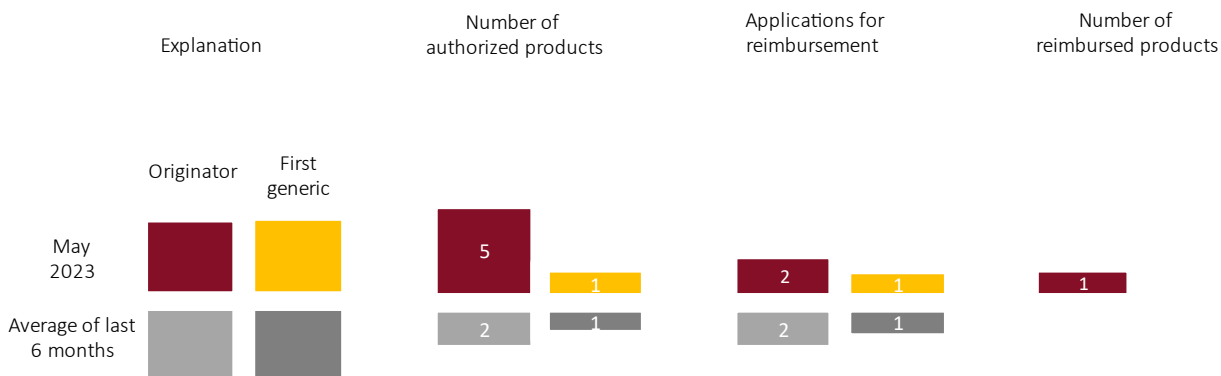
## Dynamics of the sales/circulation of prescription-only-medicine

### Pharmacy DOT turnover



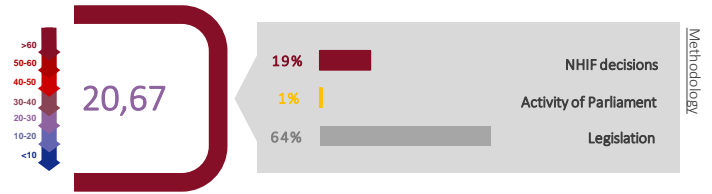
Source: Healthware analysis based on NHIFA data

## Changes to subsidized medicinal product categories, May 2023



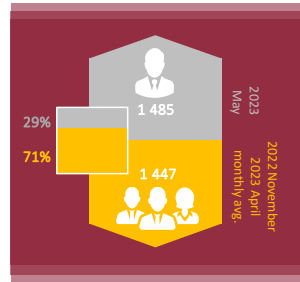
Source: Healthware analysis based on NHIFA data

## Decision-making index, May 2023



Methodology

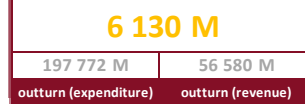
## Average number of medical sales reps



Share of doctors and others

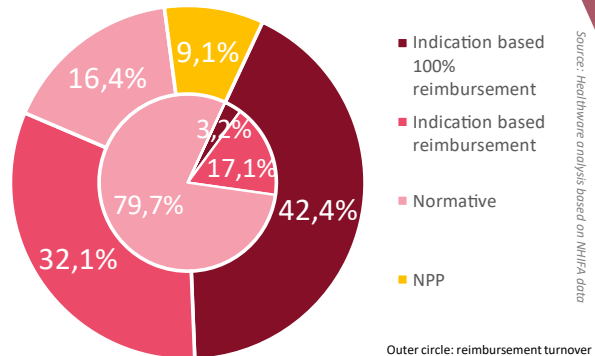
Source: NHIFA data, Healthware analysis

## Deviation from the target



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

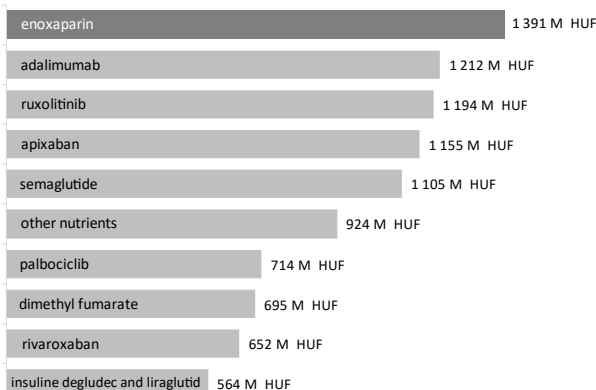
a report in order to compare the previous state with the amended one and an interpretation, in an intelligible form.

More about the services: [link](#)



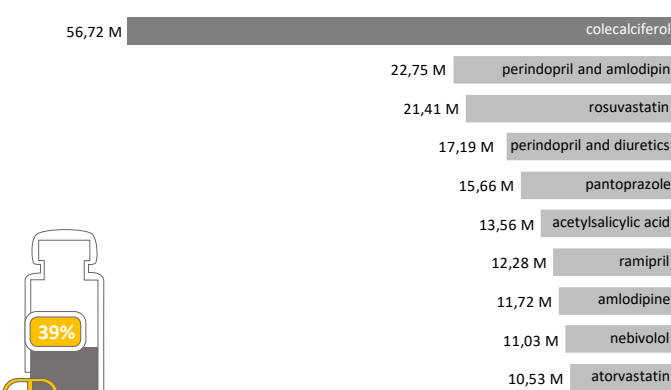
## Toplists of reimbursement and number of patients, May 2023

### TOP 10 ATCs by all reimbursement paid



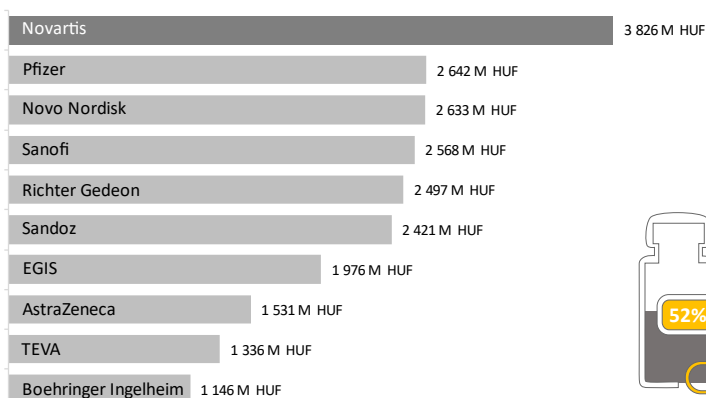
Source: Pharmacy turnover data, Healthware analysis

### TOP 10 DOT by all reimbursement paid



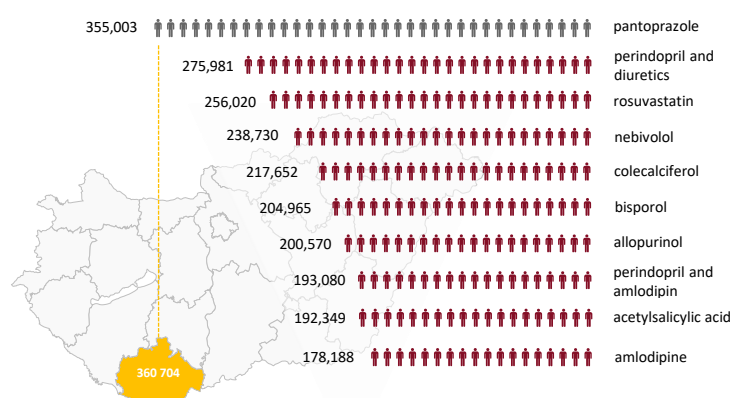
Source: Pharmacy turnover data, Healthware analysis

### TOP 10 distributors by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

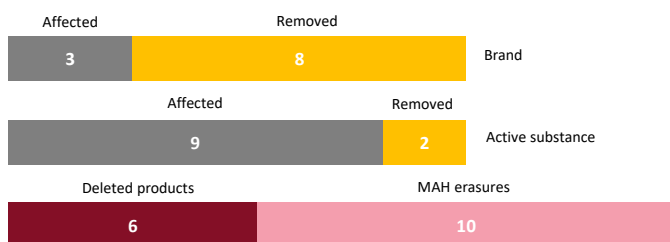
### TOP 10 patient turnover by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

## Substitutable products, May 2023

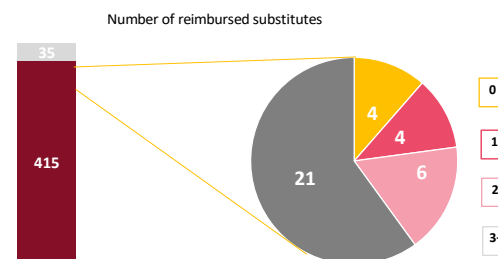
Within product deletions, marketing authorization (MAH) erasures were distinguished. We also examined the active substances and brands affected in the procedure. These were divided into two groups according to whether the brand or active substance was completely removed from the formulary or whether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



Source: Pharmacy turnover data, Healthware analysis

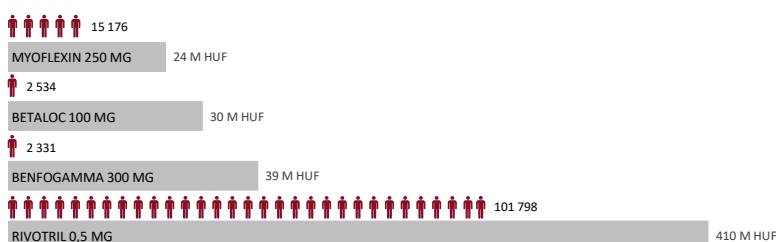
## Product shortages

The graph shows the distribution of the reimbursed product shortage list. 415 products had been on the list before November 2022, compared to 35 new product added to the list in the month under review. The 35 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, May 2023



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

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

| Company                      | Brand          | Reimbursement increment | %*   |
|------------------------------|----------------|-------------------------|------|
| 1 SANDOZ & Novartis Division | HYRIMOZ        | 126 946 338 HUF         | 156% |
| 2 Pfizer                     | IBRANCE        | 110 307 476 HUF         | 107% |
| 3 NOVARTIS                   | JAKAVI         | 97 910 554 HUF          | 105% |
| 4 Roche                      | OCREVUS        | 92 272 381 HUF          | 130% |
| 5 sanofi                     | CLEXANE        | 89 160 775 HUF          | 104% |
| 6 Pfizer                     | ELIQUIS        | 73 318 009 HUF          | 106% |
| 7 Biogen                     | TECFIDERA      | 72 038 753 HUF          | 105% |
| 8 teva                       | GEFITINIB TEVA | 69 286 400 HUF          | 234% |
| 9 NOVARTIS                   | KISQALI        | 64 171 165 HUF          | 113% |
| 10 Pfizer                    | ENBREL         | 56 249 980 HUF          | 153% |

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