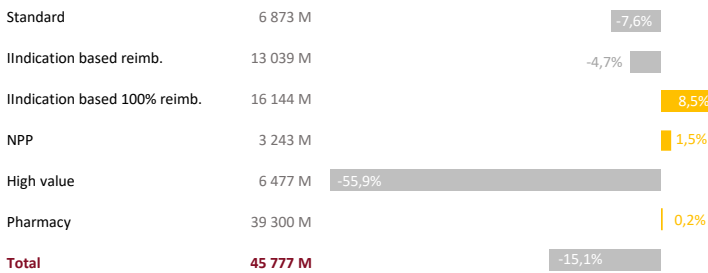


News, current issues

- News** The professional recommendation on the investigation and treatment of Parkinson's disease and other parkinsonisms is now available >>
- News** New bill: NHIFA will no longer be able to reimburse over-the-counter medicines on grounds of fairness >>
- News** Pharmacies are closing - hundreds of thousands of people already live in towns and cities without a pharmacy >>

Macro approach to financing healthcare and medicinal products

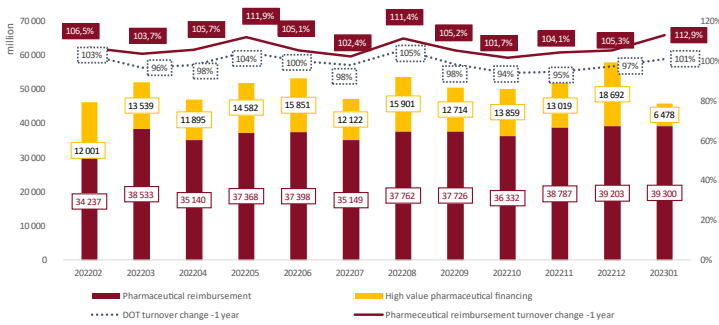
Balance of the Health Insurance Fund, January 2023



Source: Healthware analysis based on NHIFA data

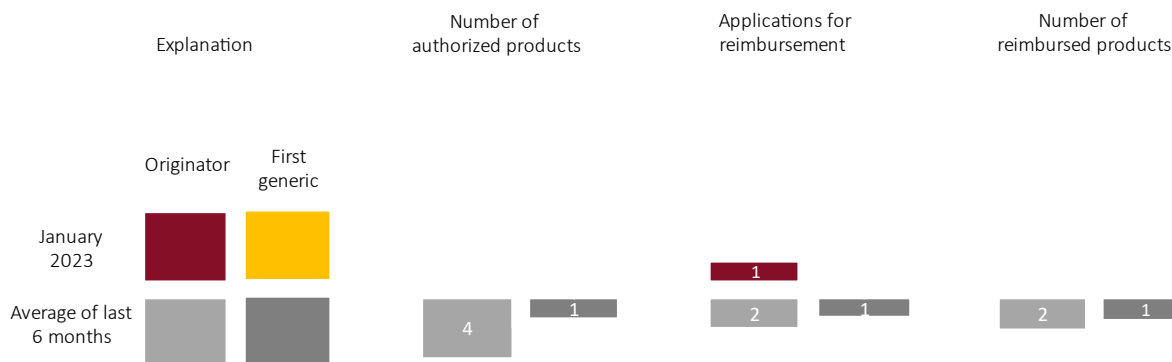
Dynamics of the sales/circulation of prescription-only-medicine

Pharmacy DOT turnover



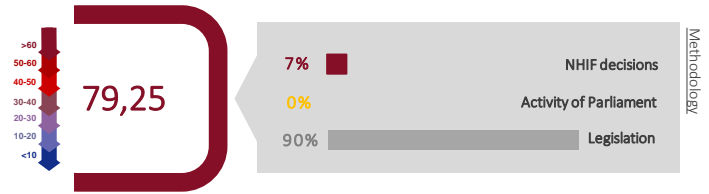
Source: Healthware analysis based on NHIFA data

Changes to subsidized medicinal product categories, January 2023



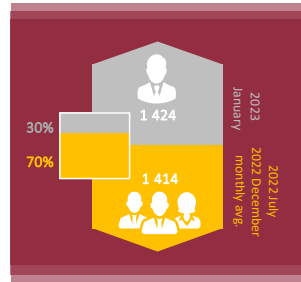
Source: Healthware analysis based on NHIFA data

Decision-making index, January 2023



Methodology

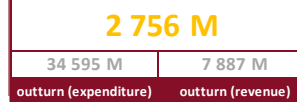
Average number of medical sales reps



Share of doctors and others

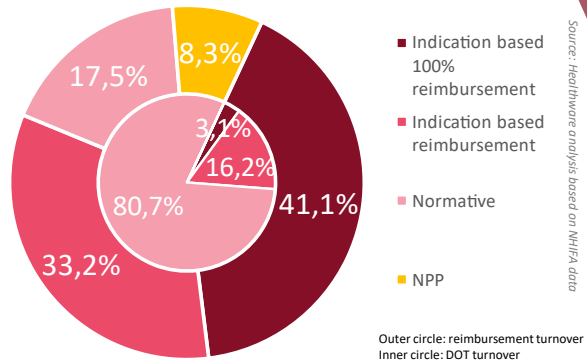
Source: NHIFA data, Healthware analysis

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

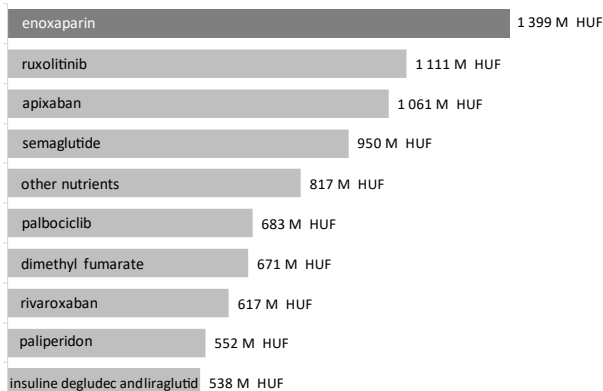
a report in order to compare the previous state with the amended one and an interpretation, in an intelligible form.

More about the services: [link](#)

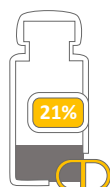


Toplists of reimbursement and number of patients, January 2023

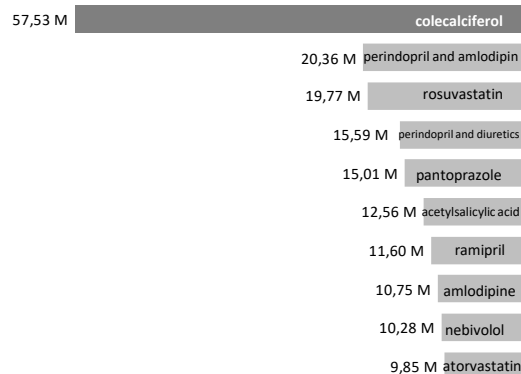
TOP 10 ATCs by all reimbursement paid



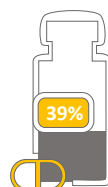
Source: Pharmacy turnover data, Healthware analysis



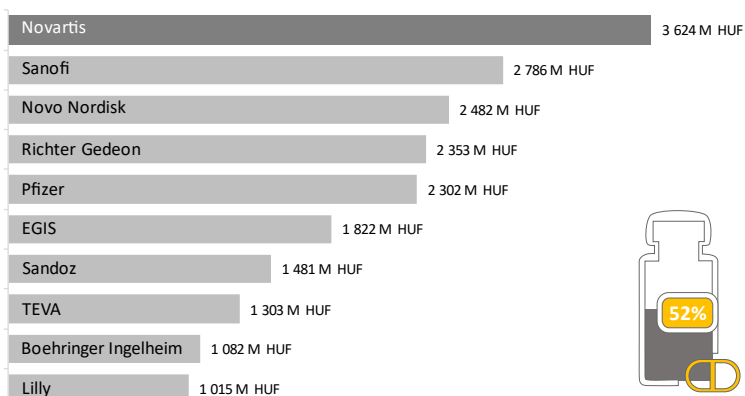
TOP 10 DOT by all reimbursement paid



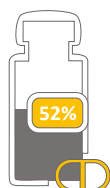
Source: Pharmacy turnover data, Healthware analysis



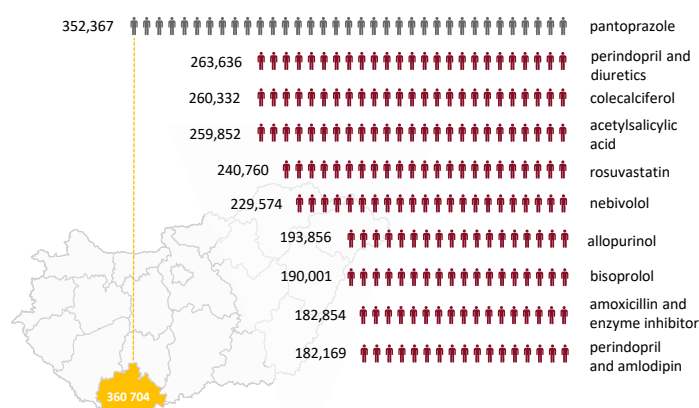
TOP 10 distributors by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis



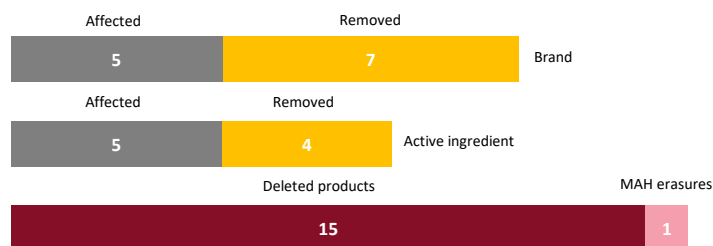
TOP 10 patient turnover by all reimbursement paid



Source: Pharmacy turnover data, Healthware analysis

Substitutable products, January 2023

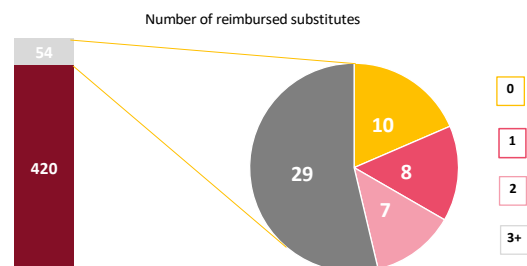
Within product deletions, marketing authorization (MAH) erasures were distinguished. We also examined the active substances and brands affected in the procedure. These were divided into two groups according to whether the brand or active substance was completely removed from the formulary or whether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



Source: Pharmacy turnover data, Healthware analysis

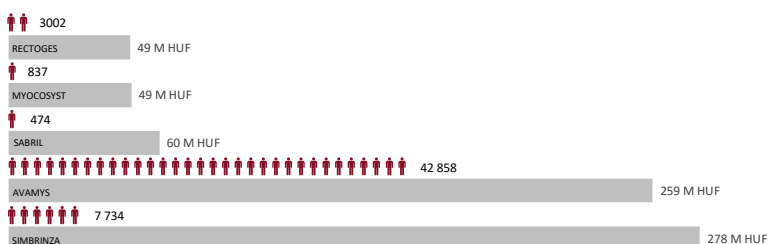
Product shortages

The graph shows the distribution of the reimbursed product shortage list. 420 products had been on the list before November 2022, compared to 54 new product added to the list in the month under review. The 54 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, January 2023



Source: Pharmacy turnover data, Healthware analysis

Highest growth, January 2023 vs. December 2022

Company	Brand	Reimbursement increment	%
1 sanofi	CLEXANE	157 545 390 HUF	115%
2 astellas	XTANDI	138 641 700 HUF	268%
3 Roche	OCREVUS	130 573 975 HUF	150%
4 MERCK	MAVENCLAD	66 761 708 HUF	128%
5 Theramex	OVALEAP	62 559 222 HUF	124%
6 GILEAD SCIENCES	BEMFOLA	49 578 691 HUF	130%
7 FERRING	REKOVELLE	43 730 207 HUF	160%
8 IBSA	MERIOFERT KIT	41 780 514 HUF	184%
9 sanofi	LIBTAYO	40 735 596 HUF	108%
10 teva	GEFITINIB TEVA	35 725 800 HUF	438%

Source: Pharmacy turnover data, Healthware analysis