EUROPEAN ASSOCIATION OF E-PHARMACIES

Market Report

A Glimpse into the European e-Pharmacy Market 2024

In collaboration with DatamedIQ

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Key Insights

E-pharmacy 2024:
Digital health becomes more prominent

Building on last year's findings, we extended our analysis from 10 to 13 European countries to better understand how the e-pharmacy market continues to evolve. What becomes clear is that growth is accelerating - the market has expanded by over €2 billion since our last analysis, reaching more than €12 billion - and that regulatory frameworks are increasingly becoming the critical differentiator.

Online pharmacies are gaining relevance across Europe: The 13 countries analysed show significant market growth in 2024. Germany remains the largest single market with over EUR 4 billion (Retail Seller Price) including Rx Sales, followed by the UK with over EUR 2.7 billion. Sweden leads in terms of penetration, while Poland, Spain, Austria and Slovakia are growing dynamically with double-digit growth rates.

Momentum is building in Central and Eastern Europe in particular: Poland exceeds EUR 450 million with above-average growth, while the Czech Republic and Slovakia are benefiting from a more friendly legislative environment for e-pharmacies and growing user acceptance. In Italy, France, Belgium and Austria, regulatory barriers to online access to Rx medicines can still be observed.

Market leaders such as Shop Apotheke, Apotea, DocMorris and Dr. Max are focusing on logistics investments, subscription models, same-day delivery and personalised pharmaceutical care. National chains and platforms are also expanding their digital channels and integrating telepharmacy, prevention and AI-supported therapy support.

Conclusion: In 2024, online pharmacies are no longer a niche solution. They have evolved into an increasingly integral part of standard care across many European countries - driven by regulatory changes, technological progress, and also by the growing reliance of patients and healthcare systems on digital health solutions.

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Key Trends

1. Widespread e-Prescription Adoption
   Germany completed its e-prescription rollout in early 2024, marking a major step in digital healthcare integration. Other countries are also advancing: France, for example, has been accelerating its nationwide rollout, with broader adoption expected throughout 2025.
2. Pharmacies in the EHDS
   With the entry into force of the European Health Data Space (EHDS) in March 2025, which formally includes e- pharmacies as key healthcare providers that can no longer be discriminated, online pharmacies will be able to connect to the MyHealth@EU infrastructure by 2029. Ultimately, this will encourage the cross-border access to and uptake of digital pharmacy services - unlocking new personalised medication services
3. Platform Integration
   Leading e-pharmacies now combine eRx, teleconsultations, and chronic care support in single platforms - boosting access for rural and ageing populations.
4. AI in Pharmacy Operations
   Predictive stock management, demand forecasting, and personalised product recommendations optimise availability, improve customer experience, and enhance operational efficiency - creating measurable value for pharmacies and manufacturers alike.
5. Regulatory Momentum
   The EU is placing growing emphasis on both legislative and non-legislative initiatives to advance digital health and harmonise access to health data and remote healthcare services. From the European Health Data Space (EHDS) and the EU Digital Identity Wallet - enabling the storage and cross-border redemption of e-prescriptions - to innovative digital solutions addressing healthcare workforce shortages, regulatory momentum is building across Europe in support of e-pharmacies.

Key Insights

eRx & Beyond: Toward Integrated Digital Health

What Europe needs now for a networked supply of medicines

While nearly all EU Member States have now introduced e-prescriptions, access to prescription medicines through digital channels remains highly uneven across Europe. 8 out of 27 Member States (in addition to UK, Switzerland, Iceland, and Norway) - including Germany, Sweden, Denmark,, the Netherlands, Portugal, Lithuania, Estonia and Finland - currently allow prescription medicines to be dispensed online. In contrast, 19 of the Member States still prohibit the online sale and home delivery of Rx medicines, creating a fragmented landscape that limits patient access and undermines the full potential of digital health innovation.

This fragmented landscape is also clearly reflected in our analysis across the 13 markets: wherever robust legal frameworks and digital infrastructure are in place, the e-pharmacy market grows dynamically. In Poland, for instance, growth exceeds the average with 16%, driven by new regulations enabling remote treatment. In contrast, patient access in France, Italy, Belgium, and Austria remains limited, despite the necessary technical infrastructure being available. Later in this report, we will compare these developments in more detail and highlight what lessons can be learned across countries.

We also take a look across the Atlantic and see by comparison: in North America - defined as the United States, Canada and other countries in the region (mainly Mexico), the market is already significantly more advanced at around €22 billion - a direct result of tightly integrated digital processes, reimbursement systems and patient rights.

The EU's ongoing legislative efforts, including plans to revamp and modernise cross-border healthcare rules as well as to increase availability of medicines through a Critical Medicines Act, offer a historic opportunity to create a secure, cross-border framework for e-pharmacy.

In many EU countries, despite the mandatory adoption of e-prescriptions, the digital dispensing of prescription medicines is still prohibited. Patients can receive their prescriptions digitally, but they are still prevented from ordering the related medicine online and having it safely delivered to their homes by registered pharmacies. This represents first and foremost a patient equality issue - as we continue to see Tier 1 and Tier 2 patients in Europe when it comes to accessibility. With the European Health Data Space, the EU now has a historic opportunity to make the digital single market for medicines a reality. Clear rules, cross-border solutions, and finally a solid legal basis are needed to unleash the full potential of digital healthcare for all citizens.

Martino Canonico
Head of Brussels Office
European Association of E-Pharmacies (EAEP)

Methodology, Data Notes & Abbrevations

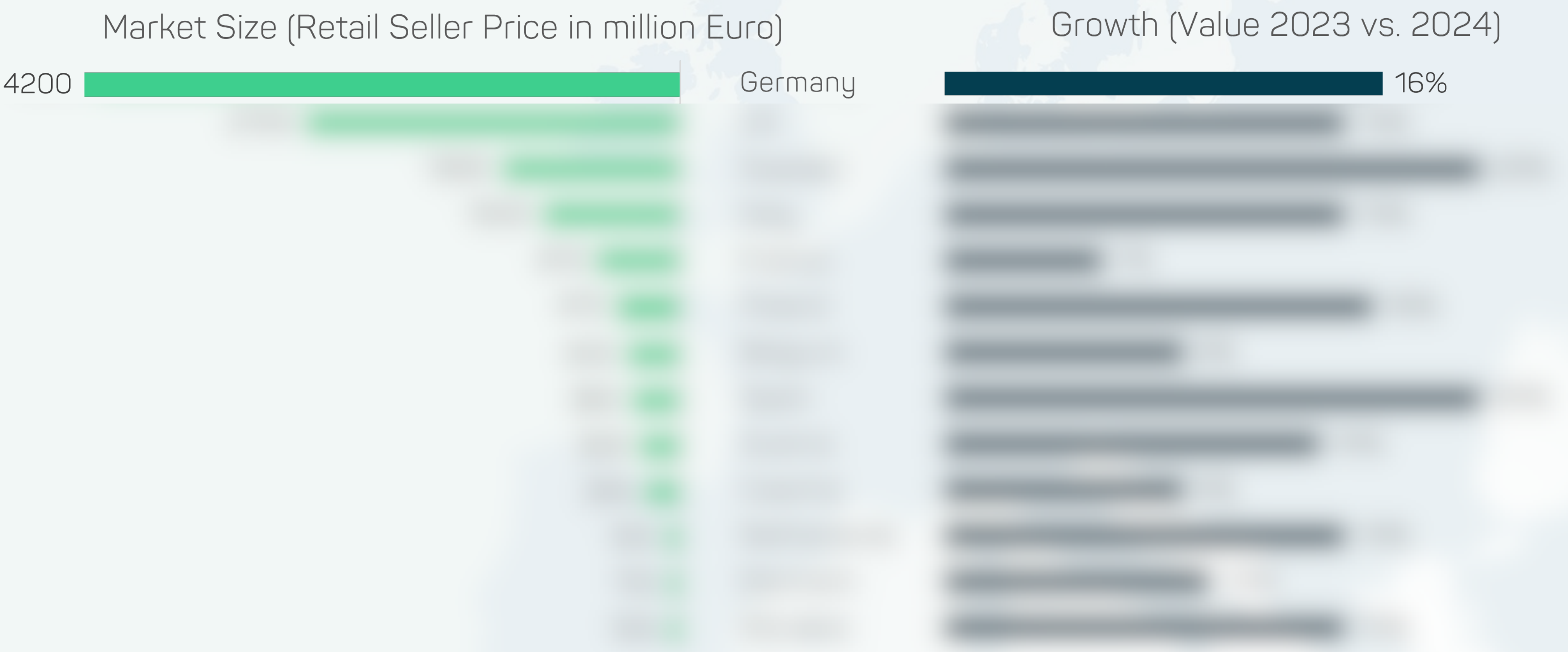
Methodology

- This report builds on last year's findings and extends the analysis to 13 European markets to provide a more comprehensive view of the evolving e-pharmacy landscape.
- Market sizes represent estimated 2024 sales volumes (at retail seller prices), including both OTC and prescription medicines (Rx) where permitted by national regulations.
- Data sources include proprietary DatamedIQ analyses, public regulatory data, and external market research (Market Data Forecast, Precedence Research).
- All growth rates reflect changes in value between 2023 and 2024.
- Exchange rates applied: 1 USD ≈ 0.92 EUR (mid-2024 average).
- While care was taken to ensure comparability, national differences in data collection, legal frameworks and digital adoption may affect individual figures.

Abbrevations

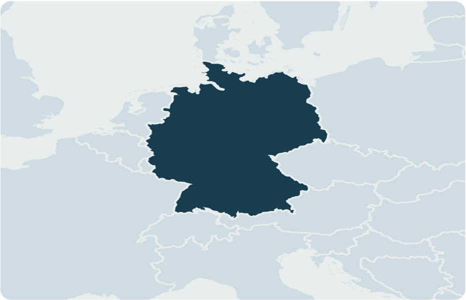
- K = Thousand
- M = Million
- B = Billion
- Rx = Prescription medicines
- OTC = Over-the-counter medicines
- PPP = Purchasing Power Parity (currency adjustment to equalize price levels across countries)
- EPR = Electronic Patient Record (general term for digital patient files)
- ePA = Elektronische Patientenakte (Germany's EPR system)
- HCDSNS = Historia Clínica Digital del Sistema Nacional de Salud (Spain's national EHR)
- ELGA = Elektronische Gesundheitsakte (Austria's national EHR)

The top 13 e-pharmacy markets in Europe have a combined size of €12 billion, with an average online growth rate of 14%.



E-Pharmacy Deep Dive: Europe

Germany



Germany's Health & Economy: strong social system and economic power facing health challenges

Germany's GDP per capita is significantly higher than the EU average. Public health spending is among the highest in Europe. Still, life expectancy is only slightly above the EU level. Reflecting persistent challenges like cardiovascular disease, cancer, and the effects of an aging population.

Demographic facts

	Germany	EU
Population size (2024)	83,456,045	449,300,000
Share of population over age 65 (%)	22,8%	21.6%
Fertility rate[1] (2021)	1.58	1.4

Socioeconomic facts

GDP per capita (EUR PPP[2])	54,343.2	37,600
Relative poverty rate[3] (%, 2019)	17.2%	21%
Unemployment rate (%)	3.1%	5.9%

1. Number of children born per woman aged 15-49. 2. Purchasing power parity (PPP) is defined as the rate of currency conversion that equalises the purchasing power of different currencies by eliminating the differences in price levels between countries. 3. Percentage of persons living with less than 60 % of median equivalised disposable income. Source: Eurostat database.

Health status

Life expectancy in Germany is 81 years, slightly above the EU average. Cardiovascular diseases and cancers are the leading causes of death. Health trends are shaped by an aging population and lifestyle-related conditions such as obesity and smoking. Public health focuses on prevention and chronic disease management. Healthcare access in rural regions are increasingly important topics.

Health system

Germans spend approximately 12.7 % of their GDP per capita on health, which corresponds to about €7,513 over 87 % of funding comes from statutory health insurance. The system offers comprehensive access with low out-of-pocket costs and is recognized for its dense healthcare infrastructure. Current reforms emphasize digitalization and integrated care delivery.

Source: World Health Organization (2024): The digital transformation of health systems,
State of Health in the EU, OECD Publishing, Paris/European Observatory on Health Systems and Policies, Brussels.

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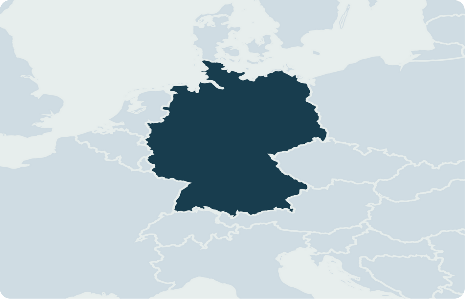

Germany's e-pharmacy market: expanding rapidly through digital infrastructure and regulation

eaep

In 2024, Germany's ePharmacy market reaches €4.2 billion with 16% growth. Online pharmacies gain ground as local pharmacies face pressure. The rollout of ePrescriptions and the Electronic Patient Record (ePA) accelerates the shift toward digital healthcare.

E-pharmacy facts

01/2024

4.2B €

Total e-pharmacy Sales 2024

16%

Estimated Growth 2023/2024

Top e-pharmacies

Avg. monthly visitors

Rank	Domain	Monthly Visitors
1	Shop-Apotheke.de	14.0M
2	DocMorris.de	4.9M
3	Medikamente-per-Klick.de	2.4M
4	Medpex.de	1.9M
5	Apodiscounter.de	1.3M
6	Shop.apotal.de	1.2M
7	Aponeo.de	980K
8	Sanicare.de	437K
9	Mycare.de	415K
10	Versandapo.de	118K

Regulations

Current legal framework

OTC online ✓

Rx online ✓

e-prescription ✓

Other specifics

Germany introduced mandatory e-prescriptions in January 2024 after delays. Prescriptions are issued digitally and can be used via app, printout, or health card. The electronic patient record (ePA) followed in 2025 and is automatically activated for all statutory insurees unless they opt out.

Source: Online data from DatamedIQ, monthly visitors from SimilarWeb *(data based on Total Visits July 2025)

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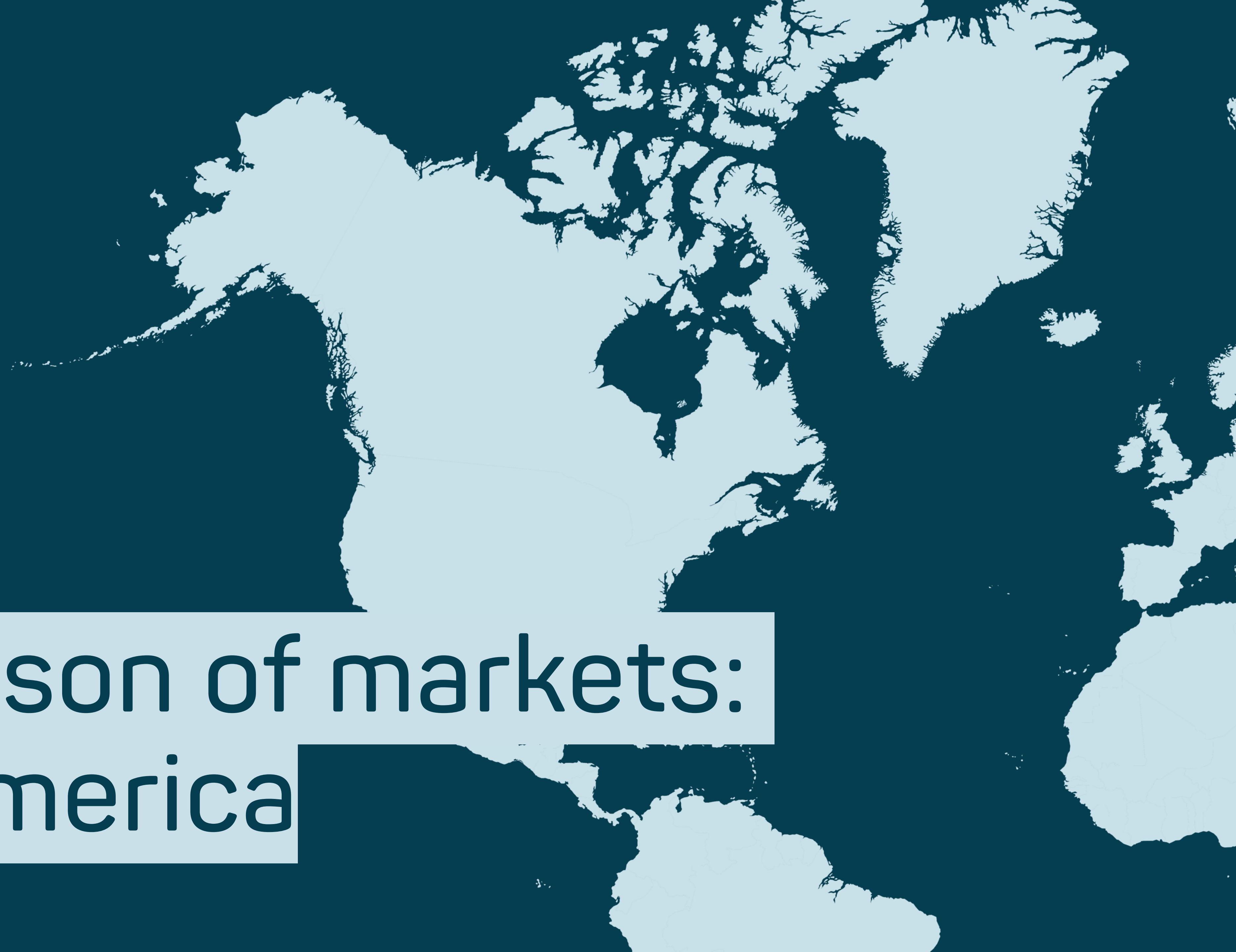
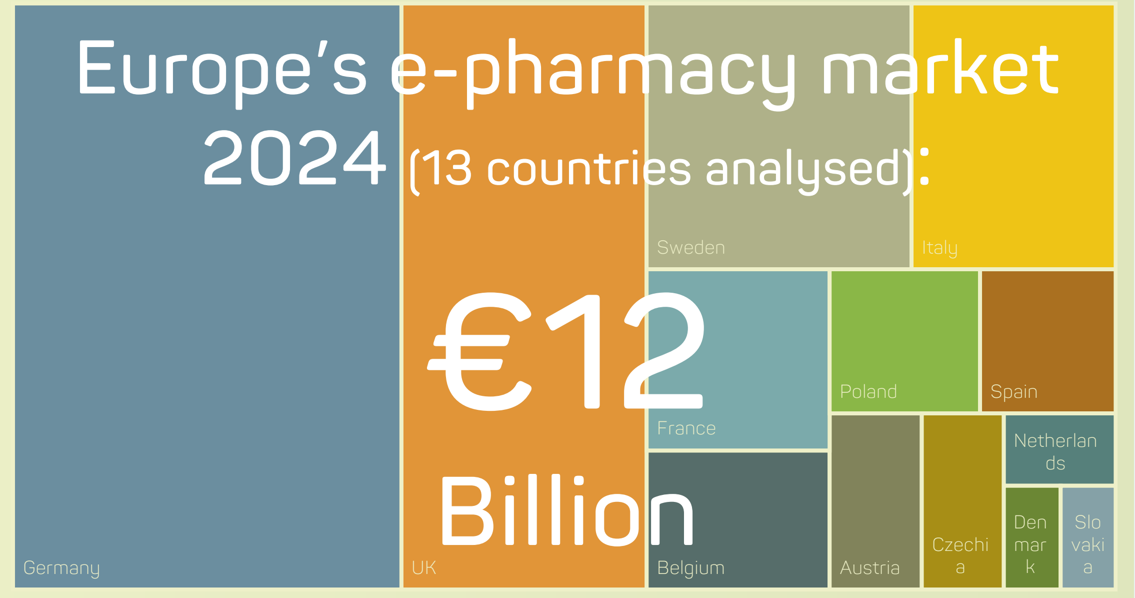


Comparison of markets: North America

North America's e-pharmacy market is nearly twice as large as the combined 13 European markets analysed.

North America's e-Pharmacy market 2024:

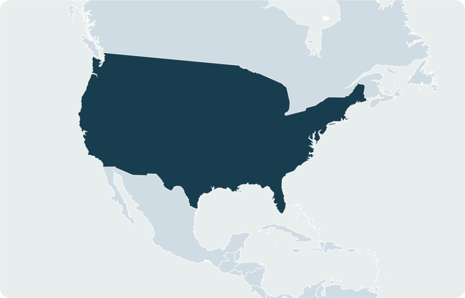
€22 Billion



Comparison Takeaways

- Europe's analysed e-pharmacy market still lags far behind North America, underscoring untapped growth potential across the continent – especially considering that the total population of both regions is roughly comparable.
- Fragmented regulations and uneven digital adoption in Europe hold back market size — despite comparable demand.
- The North American example highlights how streamlined policies and digital health infrastruture can nearly double market volumes.

Sources: Market Data Forecast Analysis U.S., Canada & The Rest of Northamerica: the latter includes all other countries in North America beyond the United States and Canada (such as Mexico and possibly others, depending on data availability); DatamedIQ; Research and Analysis of market revenues 2024 (estimated), including Rx sales where permitted by national regulations..



North America´s e-pharmacy market: from brick-and-mortar to booming online pharmacies

In 2024, the U.S. e-Pharmacy market reaches €22 billion, driven by rising demand. As CVS and Walgreens reduce store networks, digital pharmacies and platforms like Amazon accelerate the shift to data-enabled healthcare.

Regulations

Current legal framework

OTC online ✓

Rx online ✓

e-prescription ✓

Other specifics

E-prescribing was introduced in 2003 and now covers 94% of U.S. prescriptions. Controlled substances are allowed under DEA rules. Electronic patient records are widespread, but face challenges like data privacy, inter-operability, and uneven provider adoption..

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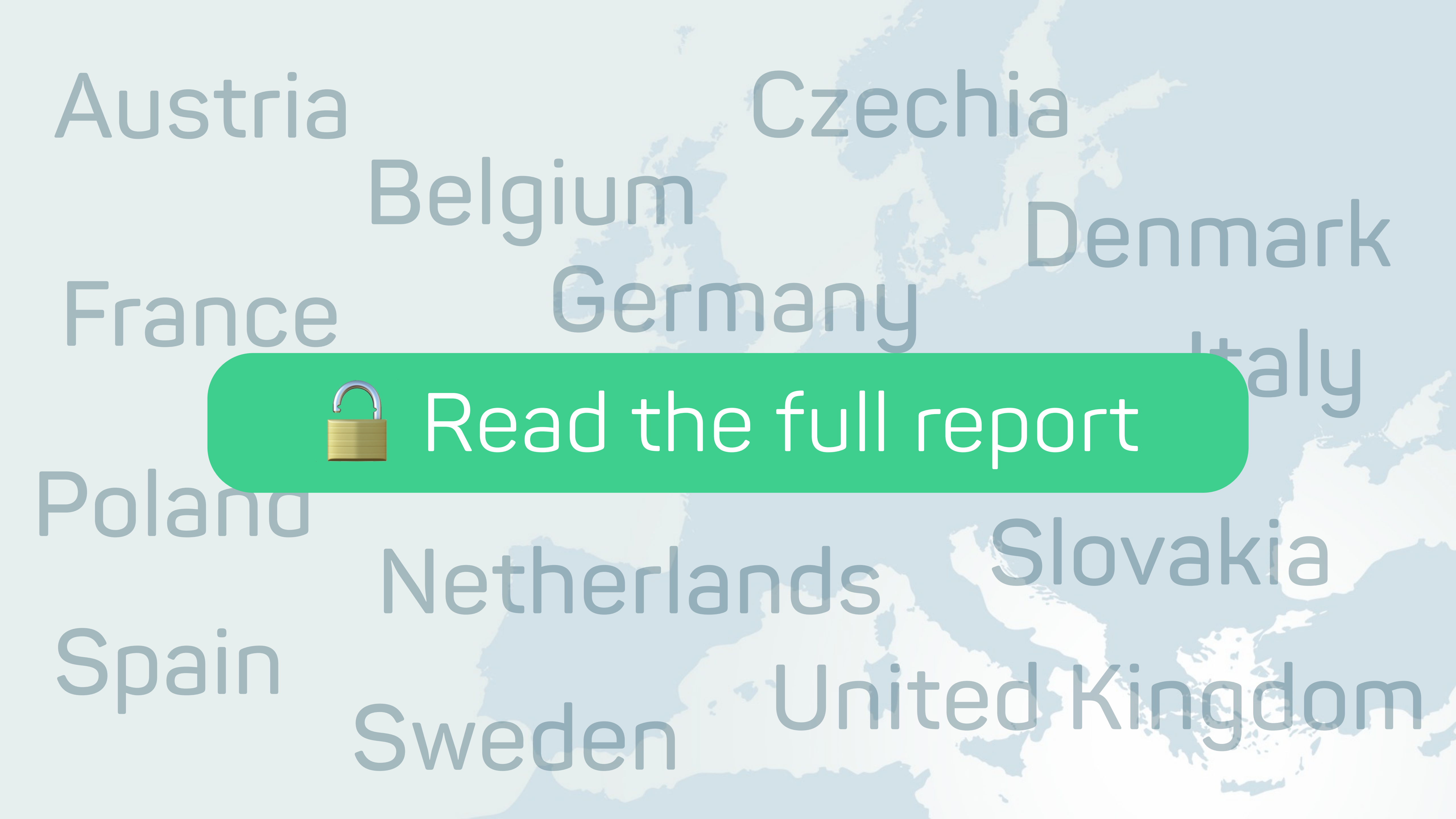
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