

Austria

Facts

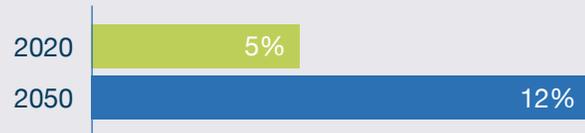
Demographic overview



8.88 million

as of 2019

Big increase of share of people 80+ projected, from 5% in 2020 to 12% in 2050.



Is Rx mail order permitted?

No,

but competition authority advocates liberalization – unclear when and how this could happen.



Market data



16

Pharmacies per 100,000 inhabitants.

€ 463

Drug expenses per capita in 2018.

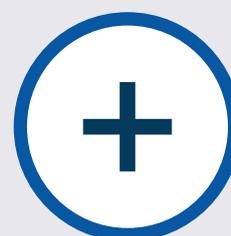


E-Rx



Implementation phase

In the wake of the Covid-19 pandemic, parts of the e-prescription system were launched ahead of schedule; widespread e-prescription use is planned for 2022.



1,380

total Pharmacies.

Belgium

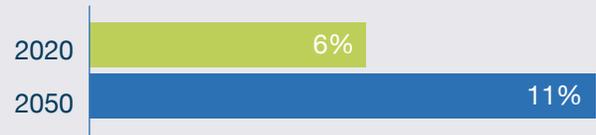
Facts

Demographic overview



11.50 million
as of 2019

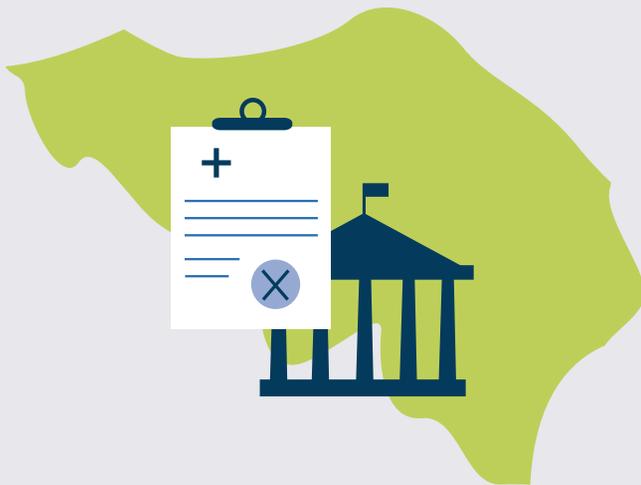
Increase of population older than
80 years from 2020 to 2050.



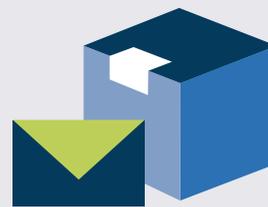
Is Rx mail order permitted?

Prohibited

Allowed for OTC since 2009.



Market data



**Approx.
100**

registered online Pharmacies,
general numbers of Pharmacies:
4,841.

42

Pharmacies per
100,000 inhabitants.



€ 518

Drug expenses per
capita in 2018.



71%

are financed through national insurance.

E-Rx

Yes, mandatory

Implemented since 2013
and mandatory since the
beginning of 2020.



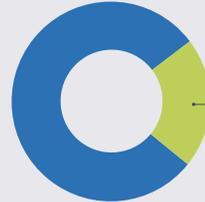
Bulgaria

Facts

Demographic overview



6.97 million
as of 2019



21.3%

People over 65 in
Bulgaria 2019.

Is Rx mail order permitted?

Prohibited

Allowed for OTC.
Almost all larger pharmacy chains offer
online services.



E-Rx

Yes

Implemented earlier due to
Covid-19, not mandatory,
not widely used yet.



Market data

Pharmacy chains:

75%
of the market
share



46

Pharmacies per
100,000 inhabitants.



€ 435

Drug expenses per
capita in 2018.



73%

of this number are paid privately
(particularly high proportion).



Croatia

Facts

Demographic overview



4.06 million
as of 2019



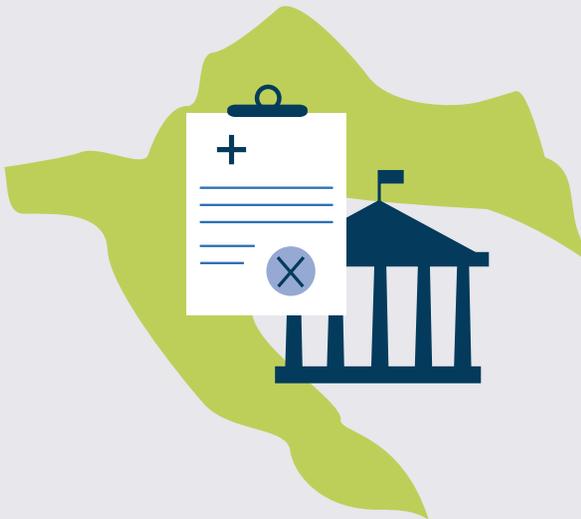
45%

Highest numbers of people with multiple chronic diseases and older than 65 years.

Is Rx mail order permitted?

No, prohibited

Only OTC may be sold online; there are also OTC products that can only be sold by Pharmacies. In the course of the Covid-19 pandemic, a co-operation between pharmacists and the German Red Cross was built, to deliver medicines to people with risk of infection or that were in quarantine.



Market data



28

Pharmacies per 100,000 inhabitants.

€ 270

Drug expenses per capita in 2018.



The pharmacy market was privatised in 1991; before that there were only state Pharmacies.

E-Rx

Yes, mandatory

Introduced in 2011, 98.8% of prescriptions were issued electronically in 2015. In 2019, the rate was 100%.



Cyprus

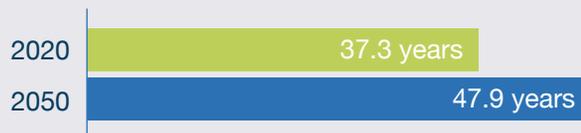
Facts

Demographic overview



0.88 million
as of 2019

A big increase in the median age is projected by 2050.



Is Rx mail order permitted?

Forbidden

Currently, there are no registered online Pharmacies. Only a few OTC medicines may be sold outside Pharmacies and then also online - through online Pharmacies of other EU countries.



Market data



62

Pharmacies per 100,000 inhabitants – second highest density in the EU.

€ 332

Drug expenses per capita in 2018.



E-Rx

Yes

e-prescriptions were introduced in the public sector via the gesy.org.cy portal of the health insurance organization HIO.



75%

Highest share of out-of-pocket expenses.

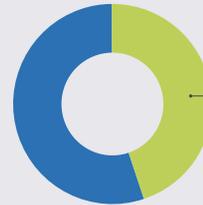
Czech Republic

Facts

Demographic overview



10.67 million
as of 2019



45%

Share of people 65+ who are chronically ill.

Is Rx mail order permitted?

Forbidden

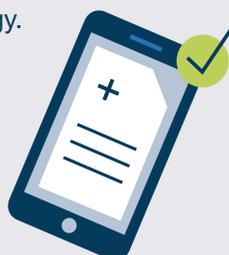
OTC mail order sales by stationary Pharmacies are permitted. Of the 6% of pharmaceutical sales made through online orders, the majority are collected from local Pharmacies.



E-Rx

Yes, mandatory

Introduced as part of the national e-health strategy.



Market data



24

Pharmacies per 100,000 inhabitants.

€ 354

Drug expenses per capita in 2018.



44%

Share of out-of-pocket payments.

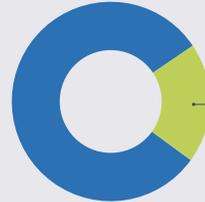
Denmark

Facts

Demographic overview



5.81 million
as of 2019



19.6%

People over 65 in
Denmark in 2019.

Is Rx mail order permitted?

Yes

Allowed and needed in order to guarantee
a nationwide drug supply.



Market data



8th

lowest amount of Pharmacies
per 100,000 inhabitants.

€ 235

Drug expenses per
capita in 2018.



E-Rx

Yes, mandatory

Denmark is a pioneer,
as it was the first
country that launched
e-prescriptions
nationwide.



98%

of the Danish population
already had Internet access
in 2014.

Estonia

Facts

Demographic overview



1.32 million
as of 2019



39%

Percentage of people with multiple chronic diseases older than 65 years in 2017.

Is Rx mail order permitted?

Yes

In 2013 the first online Pharmacies were authorised. There are currently only 4 online Pharmacies registered.



Market data



37

Pharmacies per 100,000 inhabitants.

€ 287

Drug expenses per capita in 2018.



€ 529 million

Total sales of all Pharmacies in 2019.

E-Rx

Yes, mandatory

99% of all prescriptions are issued electronically; there are 3 different prescription types: public prescription (standard version, usable for everybody with personal ID code); private prescription (only to be received by the patients themselves); authorised prescription (authorised people may receive the prescription for somebody else.).



Finland

Facts

Demographic overview



5.52 million
as of 2019



47%

Share of people with multiple chronic diseases 65+ in 2017.

Is Rx mail order permitted?

Yes

Prior to the online purchase, a registration of the customer / patient is required. When ordering prescription medications, one will be contacted by a pharmacist.



E-Rx

Yes, mandatory

Can be seen via the My Kanta website, that also contains the patient file and test results e.g. laboratory tests; 26.4 million prescriptions were issued electronically in 2020.



Market data



15

Pharmacies per 100,000 inhabitant.

€ 374

Drug expenses per capita.



19%

of all interviewees of a study conducted in 2017 confirmed to have used online services of Pharmacies.

There are more than **200 Pharmacies** that are allowed to sell drugs online.



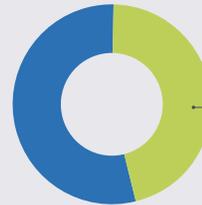
France

Facts

Demographic overview



67.05 million
as of 2019



46%

Share of people with multiple chronic diseases 65+ in 2017.

Is Rx mail order permitted?

No, prohibited

Exemption for the Covid-19 pandemic: patients who are in quarantine or at increased risk of infection are allowed to take medicines that would otherwise be dispensed by clinics, may order and take them from the nearest local pharmacy. Retail Pharmacies are allowed to sell OTC medicines online.



Market data



31

Pharmacies per 100,000 inhabitants.

€ 468

Drug expenses per capita in 2018.



Plan *Ma Santé 2022* foresees the digitalisation of the health care system in steps. The Covid-19 pandemic has accelerated the development of digital consultations and the process of electronic prescriptions. Compared to other European countries France is struggling with a considerable delay in the area of digitalisation of the health system.

E-Rx

Implementation phase

Full roll-out planned by 2022.



Germany

Facts

Demographic overview



83.09 million
as of 2019



47%

Share of people with multiple chronic diseases 65+ in 2017.

Is Rx mail order permitted?

Yes

Since 2004, through amendment of the AMG and ApoG nationwide, but only possible for bricks-and-mortar Pharmacies. Sending prescription drugs to Germany is permitted from Great Britain, the Netherlands, Sweden and Iceland, which are certified to meet safety standards.



Market data



23

Pharmacies per 100,000 inhabitants.

€ 615

Drug expenses per capita in 2018.



Bricks-and-Mortar Pharmacy Strengthening Law, as of 15.12.2020

Rx bonus not allowed anymore when reimbursed by the social health insurance. This does not affect private health insurances.

E-Rx

Yes, since July 2021 regionally available and from 2022 mandatory nationwide.



Greece

Facts

Demographic overview



10.71 million
as of 2019



35%

Highest percentage of smokers in the EU in 2018.

Is Rx mail order permitted?

No, not launched

The founding of online Pharmacies is only permitted to pharmacists who are holders of a licence to establish and operate a pharmacy (Law No. 4316/2014). Implementing regulations have also been issued. However, there is a considerable number of online Pharmacies that operate without meeting the minimum legal requirements. This is due to the lack of adequate market supervision (Lyberis, 2019).



E-Rx

Yes, mandatory

Since 2010, e-prescriptions have been used, but not completely paperless; since 2020 the paperless alternative is possible.



Market data

Forecast: Nearly doubling of the 80-year-olds and older in the population by 2050 from 8% to 14%.



88

Pharmacies per 100,000 inhabitants.

€ 414

Drug expenses per capita in 2018.



38.8%

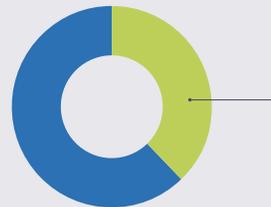
Expenditure on medicinal products decreased between 2009 and 2018.

Greece has a very high level of **OOP payments with 35%**; twice as high as the EU average.

Hungary

Facts

Demographic overview



38%

High proportion of chronically ill patients - one in two of those over 65 is affected.

Is Rx mail order permitted?

Forbidden

OTC mail order by bricks-and-mortar Pharmacies will be allowed after registration. Currently 345 of the 2,304 Pharmacies have registered online.



Market data



23

Pharmacies per 100,000 inhabitants.

€ 402

Drug expenses per capita in 2018.



47%

Share of out-of-pocket expenses.

E-Rx

Mandatory

The state e-health platform EESZT covers 75% of all prescriptions. In the future, it will also be possible to prescribe therapeutic applications and medical devices.



Ireland

Facts

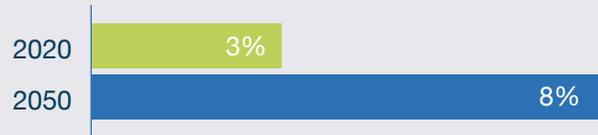
Demographic overview



4.93 million

as of 2019

The number of people that are older than 80 years, will almost triple until 2050, from 3% to 8%.



Is Rx mail order permitted?

No, prohibited

Under certain circumstances (registration of the pharmacy at the Society of Ireland PSI, listing on the Internet Supply List, labelling of the website with the EU safety logo), Pharmacies are allowed to sell OTC online.



Market data



38

Pharmacies per 100,000 inhabitants.

€ 424

Drug expenses per capita in 2018.



79%

were covered by the social insurance.

E-Rx

Yes

However, only in pilot projects and not yet on a nationwide basis. The e-mail service Healthmail is available. New legal regulations were issued in the wake of the Covid-19 pandemic in April 2020 to simplify the handling of digital prescriptions.



Italy Facts

Demographic overview



60.30 million
as of 2019



With 47.3 years, Italy has the highest median age in the EU and one of the oldest populations in the world.

Is Rx mail order permitted?

Prohibited

Only non-prescription drugs may be distributed by mail order.



Market data



32

Pharmacies per 100,000 inhabitants.

€ 434

Drug expenses per capita in 2018.



63%

were covered by the social insurance.

E-Rx

Yes, mandatory (with exceptions)

Launch between 2008 and 2012 in all regions of Italy. State-centred implementation; already in 2016 more than 80% digital ordinances.



Online retail picks up speed: Between 2010 and 2015 sales in e-commerce increased according to Di Nicola et al. in Italy.



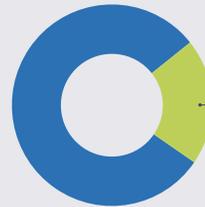
Latvia

Facts

Demographic overview



1.91 million
as of 2019



21%

Second highest share of adults with obesity in the total adult population in the EU 2018.

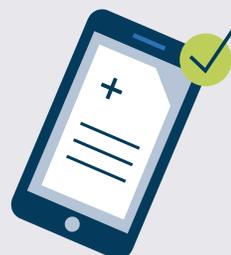
Is Rx mail order permitted?

No

Licensed general Pharmacies allowed to sell OTC drugs online; 9 of 804 Pharmacies covered also sell online; under 6% of Latvians obtained medicines online in 2019, according to data from the Central Statistical Office of Latvia.



E-Rx



Yes

Mandatory for government-reimbursed drugs; introduced in 2018, but utilization rate was still low at 20% in 2019.

Market data



43

Pharmacies per 100,000 inhabitants.

Highly concentrated pharmacy market: AS Sentor Farm Aptiekas, SIA A Aptiekas, SIA BENU Aptieka Latvija, SIA Latvijas Aptieka, SIA EUROAPTIEKA dominate the business.



€ 342

Drug expenses per capita in 2018.

61%

are privately paid (higher than average share).



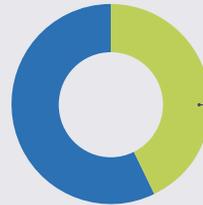
Lithuania

Facts

Demographic overview



2.79 million
as of 2019



43%

Share of the population aged 65+ and with multiple chronic diseases; doubling of 80+ share of the population by 2050.

Is Rx mail order permitted?

In the process of being launched

Pharmacies in Lithuania are currently only allowed to sell OTC medicines directly online. The legal basis for online trade in Rx medicines is provided by Article 35(1) of the Law on Medicinal Products, which came into force in November 2019. It is possible to offer remote sales of prescription drugs prescribed by e-prescription.



Market data



47

Pharmacies per 100,000 inhabitants.

€ 366

Drug expenses per capita in 2018.



60%

are privately paid (higher than average share).

E-Rx

Yes, mandatory

Launched in 2015 but some healthcare providers were not yet connected to the system in 2019 when the share of e-prescriptions was 91%. According to the Lithuanian Pharmacists's Association, local pharmacists fill ca. 50,000 e-scripts daily.



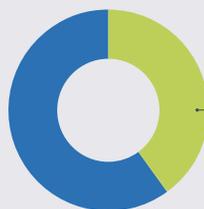
Luxembourg

Facts

Demographic overview



0.62 million
as of 2019



40%

Share of people 65+ with multiple chronic illnesses and a doubling of the share of people 80+ by 2050.

Is Rx mail order permitted?

No

There are 4 Pharmacies licensed to sell OTC online.



Market data



15

Pharmacies per 100,000 inhabitants – low density.

€ 409

Drug expenses per capita in 2018.



68%

were covered by state social security/compulsory insurance scheme.

E-Rx

Yes

Still in the process of being rolled out nation-wide; pilot ended in late 2019.



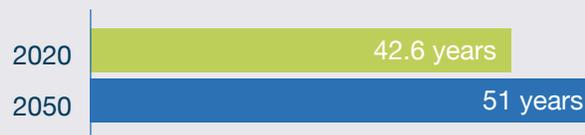
Malta

Facts

Demographic overview



A big increase in the median age is projected.



Is Rx mail order permitted?

No, but no ban either

There are no established online Pharmacies in Malta; residents are allowed to order Rx medicines from foreign Pharmacies on presentation of a valid prescription.



Market data



49

Pharmacies per
100,000 inhabitants.

€ 448

Drug expenses
per capita in 2018.



50%

out-of-pocket payments.

E-Rx



Yes

Implemented in 2016/17.

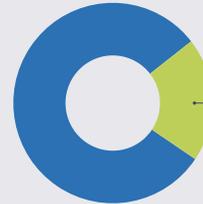
Netherlands

Facts

Demographic overview



17.34 million
as of 2019



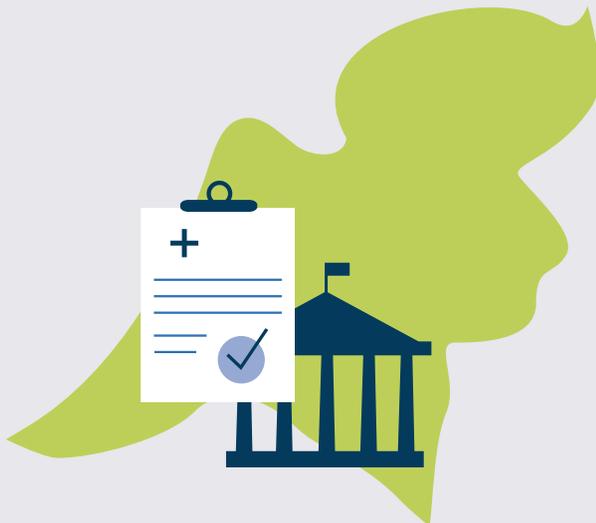
20%

Lowest share of people 65+ with chronic diseases in the EU.

Is Rx mail order permitted?

Yes

Permitted for Pharmacies, GPs with specific licenses and distributors with ministerial permission.



Market data



12

Pharmacies per 100,000 inhabitants.

€ 282

Drug expenses per capita in 2018.



E-Rx

Yes

Introduced in 2014, mandatory now.



68%

covered by state social/ compulsory insurance scheme.

Poland

Facts

Demographic overview



37.96 million
as of 2019



58%

Highest percentage of people 65+ with multiple chronic diseases in the EU.

Is Rx mail order permitted?

No, forbidden

Only pick-up service at Pharmacies possible on presentation of prescription; OTC medicines may be sold online.



Market data



36

Pharmacies per 100,000 inhabitants.

€ 306

Drug expenses per capita in 2018.



E-Rx

Yes, mandatory
since January 2020.



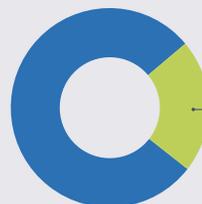
Portugal

Facts

Demographic overview



10.28 million
as of 2019



21.8%

Share of population 65+
- 3rd highest in the EU.

Is Rx mail order permitted?

Partially

While third-party sellers are basically prohibited, certified Pharmacies are allowed to sell both OTC and Rx medications online and deliver them in neighbouring towns/communities.



Market data



28

Pharmacies per
100,000 inhabitants.

€ 317

Drug expenses
per capita in 2018.



91

Number of pharmacists per
100,000 inhabitants in 2019.
No other OECD country has
had a bigger increase in the
number of pharmacists than
Portugal.

E-Rx

Yes, mandatory

Decided by decree in 2015 and implemented by law in 2016. Since 2019, doctors can prescribe digital prescriptions without a computer or card reader using the PEM app. Over 13,000 doctors are registered with the system.



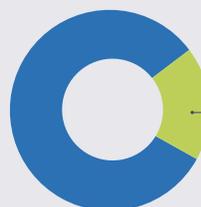
Romania

Facts

Demographic overview



19.36 million
as of 2019



18.5%

Share of inhabitants
65+ in 2019.

Is Rx mail order permitted?

No, forbidden

OTC medicines may only be sold online by Pharmacies or drugstores. As of March 2021, around 80 Pharmacies and drugstores offered online sales.



Market data



44

Pharmacies per 100,000
inhabitants – above average
density.

€ 290

Drug expenses
per capita in 2018.



E-Rx



Yes

Required since 2013; by 2019 all
prescriptions issued electronically.



**€ 93
million**

worth of online medications
sold in 2019.

Slovakia

Facts

Demographic overview



5.45 million
as of 2019



28%

Second lowest share of people aged 65+ with multiple chronic conditions in the EU.

Is Rx mail order permitted?

No, forbidden

OTC medicines may be sold online by Pharmacies as of March 2021, there were 115 online Pharmacies.



Market data



37

Pharmacies per 100,000 inhabitants – second-highest density of Pharmacies per 100,000 inhabitants in the EU.

€ 380

Drug expenses per capita in 2018.



E-Rx



Yes

Introduced in 2018. There is a transition period until 2022, after which all players must participate in the system. At the end of 2019, the share of digital prescriptions was over 87%.



€ 1.3 billion

Market value of medicines sold based on producer's price in 2019; 89% of that were prescription medicines.

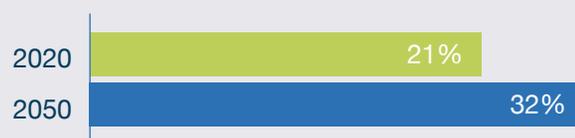
Slovenia

Facts

Demographic overview



Big increase in the share of people 65+ by 2050.



Is Rx mail order permitted?

No, forbidden

Pharmacies can sell personal care products or OTC medicines in webshops.



Market data



16

Pharmacies per 100,000 inhabitants – low density.

€ 380

Drug expenses per capita in 2018.



E-Rx



Yes

The fully digital e-prescription system has been available in Slovenia since 2016. It is mandatory for state-reimbursed medicines. The usage rate in 2019 was just under 98%.



23%

Slovenia has one of the lowest shares of out-of-pocket expenses in the EU.

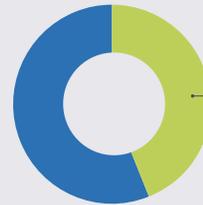
Spain

Facts

Demographic overview



47.13 million
as of 2019



44%

of people 65+ are
chronically ill.

Is Rx mail order permitted?

Forbidden

Is prohibited for reasons of patient safety. OTC mail order is reserved for licensed Pharmacies and the import of Rx medicines by mail is prohibited.



Market data



47

Pharmacies per
100,000 inhabitants.

€ 366

Drug expenses
per capita in 2018.



E-Rx

Yes

Was introduced as a mandatory part of the national e-health strategy.



All Pharmacies are private,
chains are prohibited and
only trained pharmacists are
allowed to operate them.

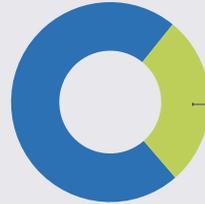
Sweden

Facts

Demographic overview



10.28 million
as of 2019



28%

Low share of people 65+ with multiple chronic diseases compared to other EU countries, and very low projected increase in median age by 2050.

Is Rx mail order permitted?

Yes

In 2006, the state-owned chain Apoteket AB began selling Rx medicines online. Pharmacy reform 2009: All trustworthy Pharmacies based in Sweden are allowed to offer online sales.



Market data



14

Pharmacies per 100,000 inhabitants – low density.

€ 372

Drug expenses per capita in 2018.



E-Rx

Yes, not mandatory

Almost all prescriptions are issued digitally (99%). The first e-prescription was issued in 1980.

