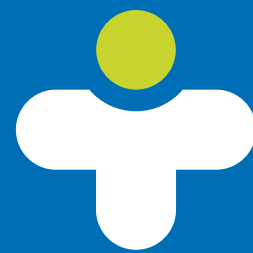




ANNUAL REPORT 2022



FOREWORD

2022 marked a pivotal year for Europe. Safeguarding access to medicines has once more become an urgent priority. We are looking back on an eventful year for online pharmacies with many challenges but also many opportunities. In 2022, we have demonstrated that we are able to achieve a lot when European e-Pharmacies speak with one voice.

With the European Health Data Space, the European Commission introduced a key initiative in the area of health politics that bears great potential not only for the online pharmacy sector but also for every European patient. It will create a highway for a true European Single Market for digital health data and services and will thus speed up the further evolution of the European Health Union. As providers of high-quality national and cross-border digital health services, the EAEP and its members have been bringing in their expertise and will continue to do so in order to achieve the best possible outcome.

2022 has also been a year of further professionalizing the Association and building upon enlarging our footprint in Brussels. Supported by the work of our committees focusing on eHealth, pharmacy and sustainability, we further established the EAEP as trusted partner on the European level. We are especially pleased that the Association has been growing significantly during the last year, widening its scope to even more European geographies.

The following pages will give an overview of what we have achieved last year. Without the energetic support of our members throughout Europe this would not have been possible. We are determined to tackling the challenges ahead of us and are looking forward to further developing our organisation together with all members.

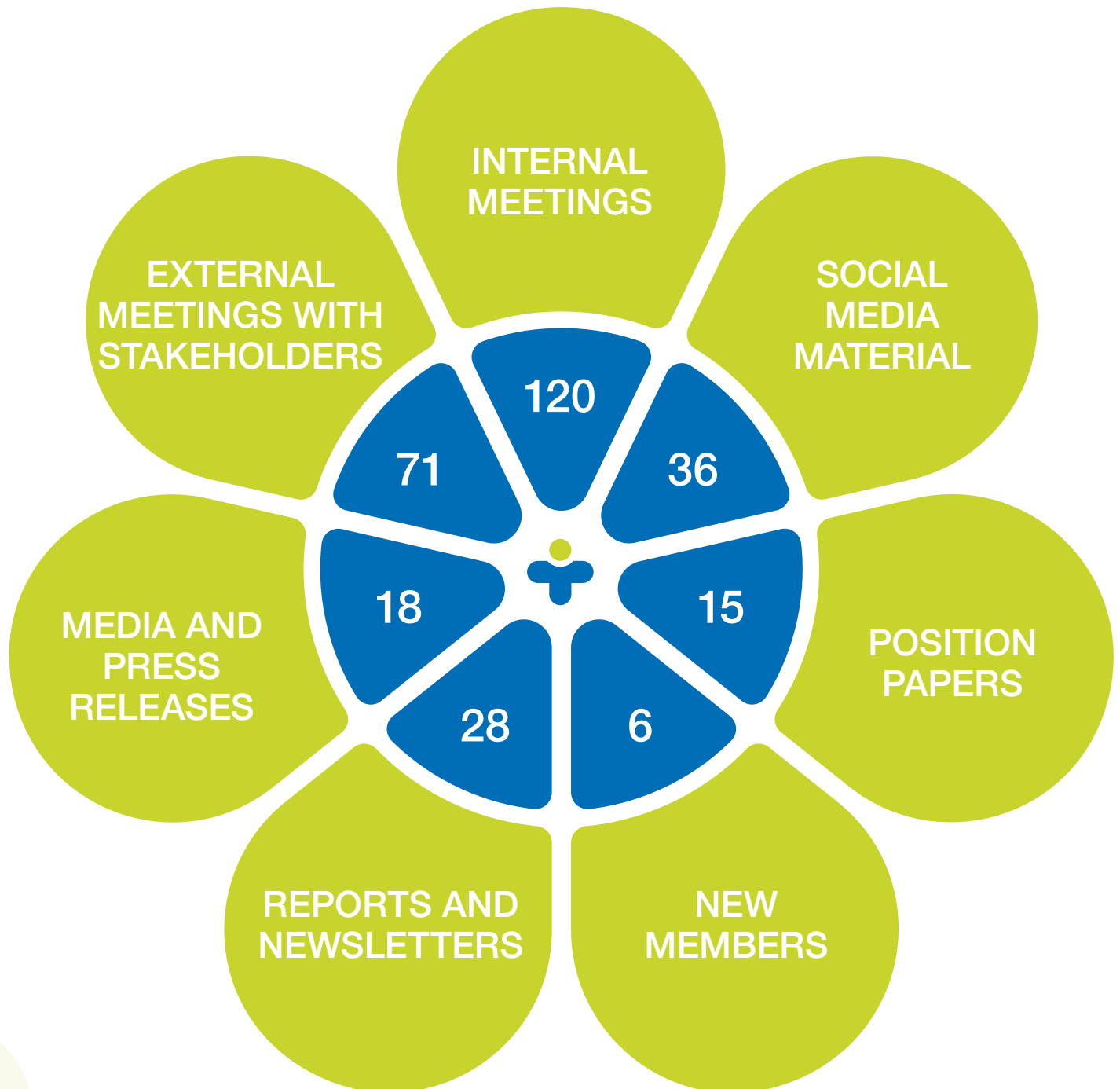
Regards,

Walter Hess,
President EAEP

Stefan Feltens,
Vice-President EAEP



KEY FACTS AND FIGURES

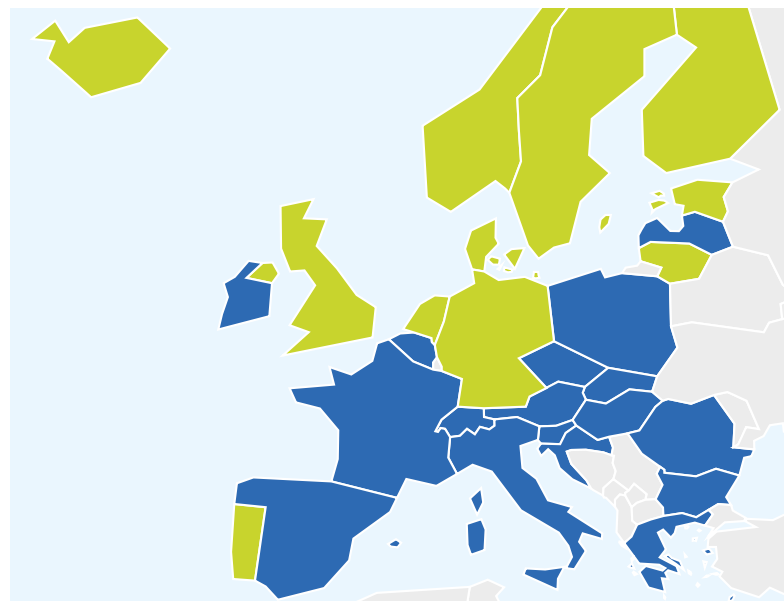


GETTING E-PHARMACIES AT THE TABLE

Landscape for e-pharmacies in Europe

Not in the least place accelerated by the Covid pandemic, we have witnessed that, also in 2022, the online pharmacy market has become more relevant. When looking at the figures, Europe witnessed an average growth in total visits of + 16 %, with countries like Sweden, Norway, Lithuania, Czech Republic, Netherlands, Romania, Slovakia, and Poland playing an important role¹. The overall landscape of online pharmacies in Europe is still very scattered, whereas only a handful of big online pharmacies operate in multiple countries while most of the players operate on a smaller scale. Nonetheless, the trend of online pharmacies existing next to brick-and-mortar pharmacies is increasing also in light of the accessibility, availability, and affordability of products for customers and patients.

EU/EEA/UK countries
based on different legal
frameworks for online
sale of medicines



Countries allowing
online sale of Rx and OTC

Countries allowing
online sale of OTC

From a regulatory framework perspective, 2022 saw some countries moving towards a more friendly regulatory environment for e-pharmacies: in Lithuania, the government liberalised the market for the online sale of prescription medicine (Rx) in July 2022 . The Baltic country has joined an increasingly large group of countries (figure 1) – Finland, Germany, Denmark, Sweden, Estonia, the Netherlands, Norway, Portugal, Sweden, the United Kingdom, Iceland – where the sale of Rx online is already allowed. In all other countries, only the sale of over-the-counter (OTC) products online is allowed. In Austria, the electronic prescription was introduced and is already implemented and used successfully by Austrian healthcare providers.

¹ <https://www.epharmacydata.com/convert-group-global-study-over-135-billion-online-visits-have-been-recorded-in-epharmacies-across-89-countries-during-2022>

² <https://ligoniukasa.lrv.lt/en/news/good-news-for-patients-prescription-medicine-can-already-be-purchased-online/>

Focus – Digital health

2022 has been a key year for all things digital health. Of utmost importance to online pharmacies, the European Commission published the long awaited European Health Data Space (EHDS) [proposal](#), a legislation which aims to create a highway for a true European single market for digital health data and services, whether for primary use for healthcare providers, or secondary use for amongst other research and innovation purposes. The proposed EHDS is expected to contribute to tackling existing obstacles, especially on a cross-border level, and to enable EU citizens and healthcare providers to make full use of the potential of a safe and secure exchange, use or reuse of health data, in the interest of patients. Throughout the past year, the EAEP has advocated for and successfully [obtained](#) a level playing field for online pharmacies in the Commission's proposal, as an integral part of the healthcare system.

While the legislative process towards a final EU law will continue in 2023 and most likely 2024, this already represents a clear political sign of the need to avoid discriminatory measures affecting e-pharmacies.

As underlined in our 2022 [position paper](#) on the EHDS, drafted in the context of the E-Health Committee, online pharmacies can contribute to making the EHDS a success, considering their sound experience in providing high-quality, cross-border digital health services.

“The focus of the EHDS on access to and interoperability of patients' health data is a true game changer for e-pharmacies. The new Regulation will make it a lot easier and less time consuming for healthcare providers to interact with each other and with the patient and thus optimising healthcare outcomes”.

Martin Bumm, Chair of the EAEP E-Health Committee

With a view to establishing a sound single market for digital health data and services, the EAEP will continue to provide a constructive input to the debate about the EHDS in the coming months and years.

2022 has been a key year
for all things digital health.



Focus – Future-proof pharmacy

From the lack of skilled workforce to the handling of drug shortages and the fight against the online sale of counterfeit medicines: online pharmacies are facing multiple challenges related to their day to day activities. In parallel, not only since the Covid pandemic, drug shortages constitute an enormous concern impacting European patients as well as healthcare providers.

With the revision of the General Pharmaceutical Legislation, announced in 2020, the European Commission, among others, aims to step up the efforts to tackle these issues. The EAEP strongly supports the aim of (i) providing better access to affordable medicines for European patients, (ii) strengthening the availability of drugs and (iii) enhancing the security of supply.

Still, on the national level limits for patient's access to affordable and high-quality medicines remain.

Therefore, in 2022 the EAEP advocated for the establishment of a Single Market for health care services and pharmaceuticals which could contribute to a better and more equal access to medicines for patients throughout Europe. In this sense, the EAEP stressed the importance of promoting the EU Common Logo, as an instrumental tool introduced by the EU to enable the patient to recognise trustful online pharmacies. Unfortunately, the latter is still widely unknown among European patients.

“EAEP members have proven to be safe and reliable providers of medications, standing for the highest quality standards when it comes to the online sale of medicines and pharmaceutical advice. We call on the European Commission and Member States to raise awareness of the EU Common Logo and what it stands for. The revision of the Pharmaceutical Legislation should, in this sense, be taken as the key opportunity to enhance transparency and safety for every patient ordering medicines online.”

Dr. Friederike Geiß, Chair of the EAEP Pharmacy Committee

The EAEP will closely monitor the related political developments on EU level and will actively contribute to the debate, in order to harness the potential of safe online sale of high quality medicines across the continent, setting up the pharmacy sector of the future.

Focus – Green transition

Since the European Commission released the [EU Green Deal](#) in 2019, the EU stepped up its ambitions to transform the economy into one with net-zero greenhouse gas emissions by 2050, minimal resource depletion, and no people or regions left to fend for themselves. In this context, also the healthcare sector, including online pharmacies, need to play their role and step up their efforts. As the EAEP, with the newly founded EAEP Sustainability Committee in June 2022, we intend to take responsibility in a holistic approach, namely along the axes of the three dimensions of sustainability – environmental, economic, and social. In this way, together with other actors along the supply chain, EAEP members do their utmost best to fully decarbonise the healthcare sector, the product and supply chain. We aim to give input to current and new legislation and reduce our carbon footprint towards the achievement of the green targets set by the European Union.

“Online pharmacies are well placed to deliver the best healthcare imaginable to patients. However, our services ranging from medication delivery need to come without unnecessary adverse environmental effects. Collectively, we contribute to the challenges we face, from packaging, to logistics to ensuring a healthy environment for both patients and employees”.

Anna Tönneßen, Chair of the EAEP Sustainability Committee

The EAEP is therefore following closely, and will give input to, the debate on EU initiatives such as the review of the Packaging and Packaging Waste Directive as well as the Corporate Sustainable Due Diligence Directive, which will result in new obligations for online pharmacies.

In October 2022, the EAEP hosted its first in-person event in Brussels. On the occasion, EU policymakers, industry stakeholders and civil society representatives, discussed opportunities and existing hurdles to digital health solutions. The event, titled “The next step for a real European Health Union - Delivering patient care through digital solutions”, provided a forum for discussion on healthcare policy in Europe, with a focus on the European Health Union and the European Health Data Space (EHDS).

Focus – EAEP event

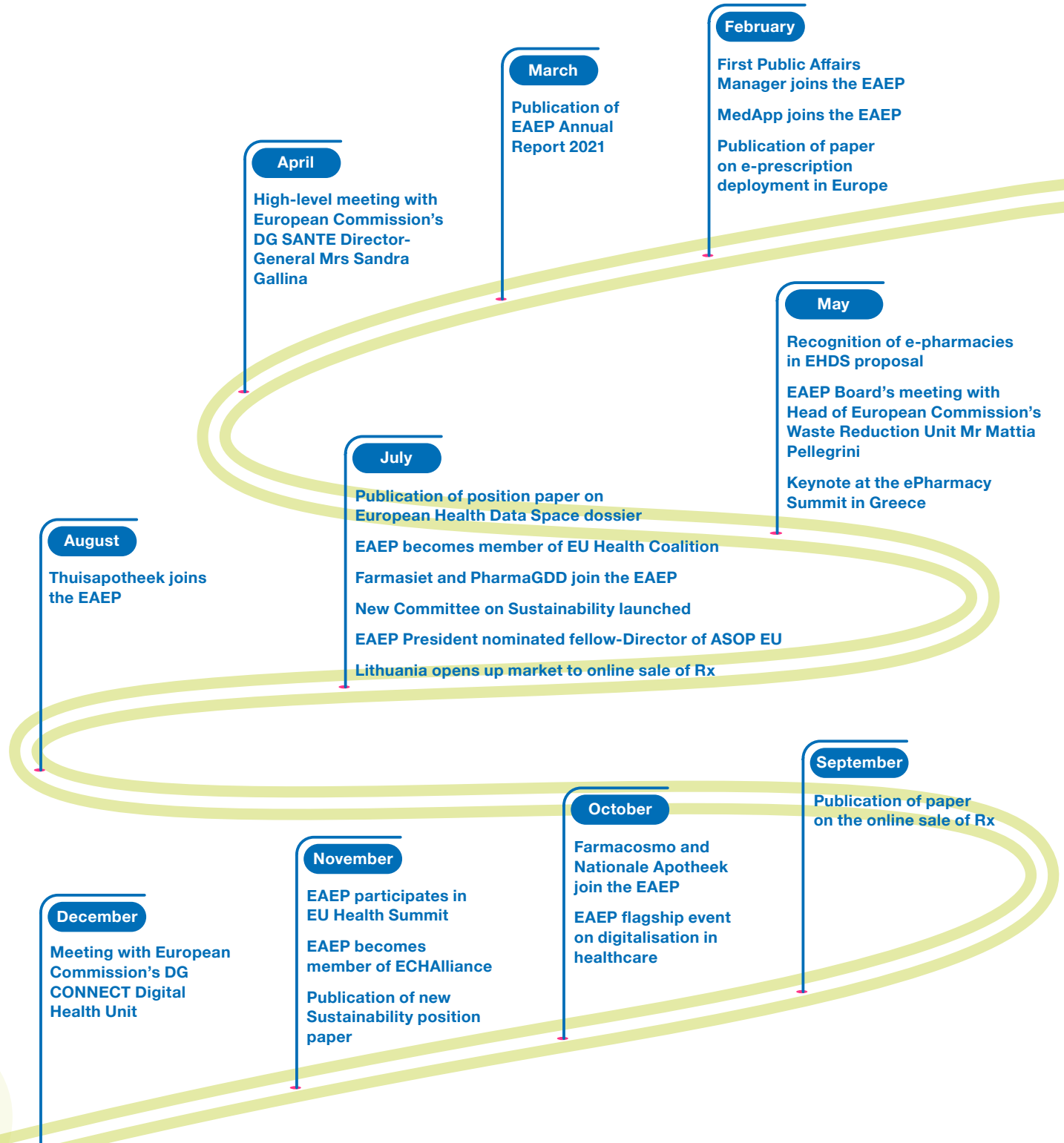
The panellists highlighted among others the importance of:

- ✦ Access to interoperable primary and secondary health data;
- ✦ Raising awareness and trust among patients of the benefits of digital solutions in healthcare;
- ✦ Integrating digital approaches and making different healthcare systems better connected;
- ✦ Investing in training and upskilling for professionals and patients.

Among the key hurdles to the development of a truly digitalised healthcare sector, panellists primarily identified fragmented national frameworks which lead to an overall lack of patients', professionals', and providers' access to (digital) health data. A video message from MEP Tomislav Sokol (European People's Party, Croatia), rapporteur on the EHDS in the European Parliament, pointed at a key next step for the establishment of a real European Health Union: creating a sound single market for digital health data and services, which is “of key importance to patients and healthcare providers as online pharmacies”.



2022 MILESTONES

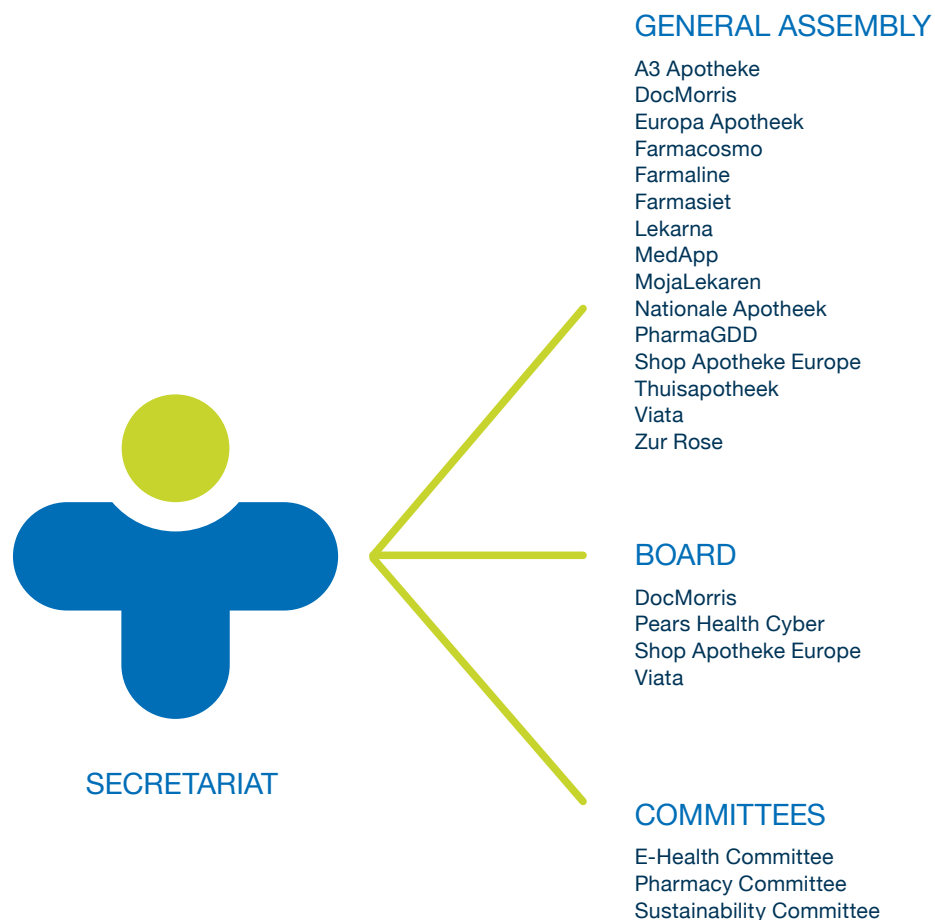


STRUCTURE AND GOVERNANCE

The Board and General Assembly constitute the governing bodies of the EAEP. In 2022, the Board and General Assembly gathered on three occasions, (one online meeting and two in-person meetings in Brussels).

The works and activities of the Association are brought forward by dedicated working groups: E-Health Committee, Pharmacy Committee, and Sustainability Committee (the latter established in July 2022). Through the exchange of views and best practices, all three Committees provide the EAEP with the necessary technical input to produce ad-hoc reports, position papers, and studies aimed at advancing the e-pharmacy sector's stances.

As of 2022, the secretariat is steered by the Public Affairs Manager, Martino Canonico.



³ The graphic below does not include members that joined as of 1 January 2023.

ABOUT THE EAEP

The EAEP is Europe's only trade association representing the voice of the online pharmacy sector in the EU and EEA countries, including Switzerland and the UK. As innovative healthcare providers acting at the crossroad of healthcare, sustainability and digital, e-pharmacies contribute to strengthening healthcare systems across Europe.

Through its growing membership, the EAEP's mission is to promote the stances and positions of the e-pharmacy sector in Europe, with a view to:

- ✦ **Create a level-playing field for (online and brick-and-mortar) healthcare providers:** prevent and counter existing and future discriminatory treatment affecting online pharmacies across Europe, as this ultimately puts patients making use of digital health in danger.
- ✦ **Strengthen the European Health Union:** showcase the contribution of innovative pharmacies to achieving the goals of the EU and national governments in the healthcare domain, including fostering accessibility, availability, and affordability of healthcare for patients.

We do so by informing the public in a transparent manner, entering into a dialogue with politics, business and market partners and leveraging existing best practices. As the European think tank for e-health issues, our vision is for a strong European healthcare sector which makes the most out of digitalisation. Together, we ensure that Europeans everywhere have safe access to a high-quality supply of medications and pharmaceutical consulting services.

CONTACT US

If you would like to know more about what we do, please visit our [website](#).

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