



EAEP Annual Report 2024

UNLOCKING THE FUTURE OF ONLINE PHARMACIES:

Driving Access and Innovation in Europe

FOREWORD FROM THE PRESIDENT AND VICE-PRESIDENT

Dear Members, Partners, and Stakeholders,

As we present the EAEP's Annual Report for 2024, we do so with a profound sense of optimism. Last year has been transformative for the e-pharmacy sector, marked by pivotal advancements and a renewed EU mandate that reaffirms the vital role online pharmacies play in the healthcare ecosystem.

The theme of this year's report, "Unlocking the Future of Online Pharmacies: Driving Access and Innovation in Europe," encapsulates both the challenges we have faced and the opportunities that lie ahead. Across Europe, the demand for accessible, reliable, and innovative healthcare solutions continues to grow. Online pharmacies are uniquely positioned to meet this demand, providing both common and life-saving medications, and trusted healthcare services to millions – whether in bustling cities or underserved rural communities.

In 2024, we made significant strides toward achieving our shared vision. Together, we worked to align e-pharmacy practices with the European Union's digital transformation agenda, enhancing patient access, driving innovation, and ensuring compliance with new harmonised regulations. These milestones are a testament to the unwavering dedication of our members and partners, whose collaboration has been instrumental in advancing our mission.

Regulatory advancements and cross-border collaboration have been at the heart of this progress. By focusing on harmonising standards across Member States and addressing legal and political challenges, we have strengthened the framework within which online pharmacies operate.

Initiatives such as the European Health Data Space have brought us closer to a unified digital healthcare environment, making it easier for patients to access the medications they need, regardless of national borders. Throughout these efforts, we have remained steadfast in our commitment to ensuring that patient trust and safety remain the foundation of our work.

Looking ahead, we are inspired by the possibilities that the new EU mandate brings. It provides a clear framework to enhance cooperation among Member States, reduce barriers to e-health solutions, and establish online pharmacies as a cornerstone of Europe's healthcare strategy. However, achieving these goals will require continued collaboration, investment, and advocacy.

We are committed to leading this transformation. Our focus in the coming year will be to deepen engagement with policymakers, foster innovative partnerships with patients and stakeholders, and advocate for a future where e-pharmacies are seamlessly integrated into the healthcare journeys of all Europeans.

As we reflect on the achievements of 2024, we extend our heartfelt gratitude to our members, partners, and stakeholders. Your commitment, expertise, and passion have made our collective success possible. Together, we are shaping the future of healthcare in Europe, creating a system that prioritises access, innovation, and trust.

Thank you for your continued support and dedication. We look forward to another year of growth and collaboration as we unlock the future of online pharmacies – making healthcare more accessible, equitable, and innovative for all.



Walter Hess

Walter Hess
President



Olaf Heinrich

Olaf Heinrich
Vice-President

eaep⁺
EUROPEAN ASSOCIATION OF
E-PHARMACIES

KEY ACHIEVEMENTS IN 2024

Policy and Advocacy Successes

In 2024, the European Association of E-Pharmacies (EAEP) achieved several significant milestones and engaged in numerous activities to advance the e-pharmacy sector across Europe.

PUBLICATION OF THE EAEP 2023 ANNUAL REPORT

EAEP GENERAL ASSEMBLIES IN APRIL AND NOVEMBER

EXPANSION OF MEMBERSHIP: WELCOMED 11 NEW MEMBERS

ADOPTION OF THE EHDS AND RECOGNITION OF E-PHARMACIES IN EU LAW

EAEP celebrated the adoption of the European Health Data Space (EHDS) Regulation by the European Parliament. For the first time, EU law recognised online pharmacies as key actors in the healthcare system, granting them access to the new EU health data sharing infrastructure and preventing discriminatory treatment in healthcare service delivery.

OBSERVER STATUS IN EU EHEALTH STAKEHOLDER GROUP

The European Commission appointed the EAEP as an observer in the eHealth Stakeholder Group. In this role, EAEP assists in preparing policy initiatives and provides recommendations related to e-health, contributing to the development of digital health policies at the EU level.

JOINED THE EU POTENTIAL PROJECT ON THE EU DIGITAL IDENTITY WALLET

PUBLICATION OF JOINT DIGITAL HEALTH MANIFESTO FOR THE EU ELECTIONS

EUROPEAN HEALTH SUMMIT PANEL DISCUSSION ON DIGITAL HEALTH

EAEP AND ASOP EU EVENT ON "THE EU PHARMA LEGISLATION: WHY SHOULD ONLINE ACCESS TO RX BE ALLOWED?"

In collaboration with the Alliance for Safe Online Pharmacy in the EU (ASOP EU), EAEP hosted an event in Brussels to highlight the benefits of enabling patients to obtain prescription medicines through safe and secure digital solutions. The event featured a report by Copenhagen Economics, emphasising improved access for patients, especially those in rural areas or with chronic conditions.

LAUNCH OF ONHOME ALLIANCE

EAEP initiated the Online Order and Home Delivery of Medicines (OnHOME) Alliance, together with ASOP EU, bringing together patient organizations and healthcare stakeholders to advocate for online access to prescription medicines across the EU. The alliance aims to address patient inequalities and empower pharmacies to offer additional services, such as online dispensing and home delivery. The launch event took place in Brussels on 29 October.

PUBLICATION OF "UNLOCKING THE PHARMACY OF THE FUTURE" PAPER

HIGH-LEVEL MEETING WITH THE EUROPEAN MEDICINES AGENCY (EMA) IN AMSTERDAM

PUBLICATION OF FIRST EAEP-DATAMEDIQ E-PHARMACY MARKET REPORT

APPOINTED MEMBERS OF THE EU CRITICAL MEDICINES ALLIANCE

These achievements demonstrate the EAEP's ongoing dedication to promoting digital transformation in healthcare, enhancing patient access to medicines, and defending the positions and contribution of e-pharmacies throughout Europe.




COLLABORATION & ALLIANCES

In 2024, the EAEP continued to prioritise strategic partnerships to advance its mission of fostering safe, accessible, and innovative online pharmacy practices across Europe. Among these collaborations, the partnership with the Alliance for Safe Online Pharmacies (ASOP EU) and Online Order and Home Delivery of Medicines (OnHOME) Alliance proved particularly impactful, driving tangible progress in ensuring patients' access and collaboration, and promoting trust in digital healthcare services. Together, we are redefining how healthcare is delivered – making it more convenient, personalised, and inclusive for all European citizens.



EAEP and ASOP EU share a commitment to protecting patients from counterfeit medicines, illegal websites, and unsafe digital healthcare practices. In 2024, this partnership leveraged both organisations' expertise to raise awareness of these malpractices, advocate for stronger regulatory frameworks, and promote the adoption of trusted digital tools.

PUBLIC AWARENESS CAMPAIGNS

EAEP and ASOP EU launched joint campaigns targeting patients, policymakers, and healthcare professionals to educate them on identifying safe online pharmacies. These efforts prominently featured the EU Common Logo as a symbol of trust. **The two organisations collaborated on a comprehensive report**  targeting national Ministries across Europe to get their feedback on ongoing activities to raise the awareness of the Logo. The report, published in mid-2024, provided critical insights into emerging trends and actionable recommendations for policymakers, law enforcement, and healthcare stakeholders.

ADVOCACY

Together, EAEP and ASOP EU engaged with EU policymakers to strengthen the regulatory landscape for digital healthcare as part of the negotiations on the European Health Data Space. Joint efforts highlighted the importance of harmonised cross-border regulations to ensure access and safeguard the supply chain of medicines.

EVENTS

EAEP and ASOP EU co-organised an event aimed at informing policymakers about the importance of ensuring safe, equitable access to prescription medicines online, in the context of the revision of the EU Pharmaceutical Legislation.

In 2024, the EAEP strengthened its collaboration with patients organisations by launching the OnHOME Alliance, a key initiative focused on transforming healthcare delivery by integrating online pharmacy services with home-based care. This partnership, co-led by the EAEP, brought together a shared commitment to improving patient outcomes, enhancing accessibility, and advancing digital healthcare innovation.

PROMOTING ONLINE ACCESS TO RX

The Alliance worked closely with EU policymakers to advocate for policies that support the option for patients to access online pharmacy services. These efforts emphasised the importance of harmonised regulations across Europe, championing those legal frameworks where this option is already foreseen. Ultimately, the Alliance called for a revision of the EU Pharmaceutical Legislation to unlock the benefits of online access to prescription medicines.

NETWORK EXPANSION

The Alliance organised public events to position this topic high on the policymakers' agenda and highlight real-life scenarios where patients could benefit from enhanced accessibility and availability of medicines and healthcare services, through digital solutions.

AMPLIFYING PATIENTS' VOICES

The collaboration with patients organisations fostered research into the – actual or potential – impact of online order and home delivery of medicines for several categories of patients (e.g. chronic patients or patients with mobility issues) and for underserved populations. This resulted in real-life data emphasising the role of digital pharmaceutical services in advancing personalised and preventive care.

MEP Vytenis Andriukaitis
(S&D, LT), S&D Coordinator
in SANT Committee



*Vytenis
Andriukaitis*

EU POLICY LANDSCAPE AND EAEP'S CONTRIBUTIONS

A BOLD VISION FOR THE PHARMACY OF THE FUTURE

The year 2024 marked a pivotal moment for the EAEP as we embraced a bold vision of the pharmacy of the future amid the start of a new EU mandate. This mandate reflects the European Union's growing recognition of online pharmacies as integral to the healthcare landscape, particularly in addressing the challenges of access, innovation, and patient safety in an increasingly interconnected world.

At its core, our vision is to establish e-pharmacies as trusted, indispensable allies in delivering high-quality healthcare to all European citizens, transcending geographical, economic, and social barriers. Guided by this vision, our mission focuses on creating a regulatory and operational environment where e-pharmacies can thrive while prioritising the well-being of patients.

As healthcare evolves in response to technological advances and societal needs, the EAEP stands at the forefront of redefining pharmaceutical care in Europe. The pharmacy of the future is no longer a distant concept – it is a rapidly unfolding reality that promises to transform how healthcare is accessed, delivered, and experienced across the continent.

In 2024, the EAEP focused on aligning the potential of digital pharmacies with the European Union's healthcare priorities. Central to this vision is the commitment to creating a healthcare system that is more inclusive, efficient, and patient-centric. By addressing regulatory gaps – e.g. discriminatory treatment; digital infrastructure for the redemption of prescription medicines – and fostering public awareness, the EAEP has reinforced the role of e-pharmacies as indispensable partners in Europe's healthcare ecosystem.

SHAPING A UNIFIED ONLINE PHARMACY LANDSCAPE

The European Health Data Space (EHDS) and the ongoing development of the European Health Union have provided a robust foundation for integrating digital tools into pharmaceutical care. The EAEP calls for the harmonisation of regulations across Member States, ensuring that patients can access safe and reliable e-pharmacy services irrespective of their location. This includes supporting cross-border e-prescriptions, telepharmacy services, and the adoption of secure digital identity solutions, all of which aim to bridge geographical and systemic barriers.

FOSTERING A PATIENT-CENTRED APPROACH

At the heart of the pharmacy of the future is the patient. The EAEP's paper emphasises the need for policies that protect and enhance patient access to digital healthcare services. By engaging with policymakers and healthcare stakeholders, the EAEP calls for:

Greater accessibility: Ensuring that digital pharmacies can serve patients in underserved or remote areas.

Enhanced public trust: Promoting the EU Common Logo as a symbol of safety and legitimacy for online pharmacies.

eaep*

ALLIED
FOR
STARTUPS

ASOP EU
Alliance for Online Pharmacy

EHMA
European Health Management Association

International Alliance of
Pharmacy Organisations

EHDS
The European Institute
for Innovation through
Health Data

Digital Health Manifesto

2024 EU Elections

Continued involvement of patients: Regular and ongoing alignment and exchange with patient organisations is necessary with a view to keeping the health needs and behaviour of the citizens at the core of policymaking.

POSITIONING E-PHARMACIES IN THE NEW EU MANDATE: SITTING IN THE DRIVER'S SEAT

With the 2024 European Parliament elections, and subsequent new EU mandate, emphasising the need for healthcare digitisation, the EAEP seized the opportunity to strengthen its advocacy efforts, focusing on policy reforms, regulatory harmonisation, and patient-centric innovations.

UNLOCKING THE BENEFITS OF ONLINE ACCESS TO MEDICINES

1

Throughout the past year, the EAEP intensified its advocacy efforts to **enable online access to prescription medicines** across the EU, particularly through its active engagement on the **revision of the EU Pharmaceutical Legislation**. The EAEP strongly advocated for **greater harmonisation of digital access to medicines**, urging policymakers to remove **unjustified restrictions on e-pharmacies** both at the EU level and in the 19 Member States where this option is still not available. As part of its policy work, the EAEP engaged with the European Commission, Members of the European Parliament (MEPs), and national government's representatives, highlighting how digital solutions can improve patient access, enhance medication adherence, and strengthen the resilience of pharmaceutical supply chains, and contribute to the efficiency of the overall healthcare system. The Association also submitted formal position papers and expert recommendations during the legislative consultation process, emphasising the need for a single EU-wide framework that ensures safe, transparent, and non-discriminatory online access to prescription medicines. Through high-level policy dialogues, the EAEP successfully positioned **e-pharmacies as a key player in the future of European healthcare**, aligning its proposals with the broader goals of the **European Health Union and digital health transformation**.

ADVANCING CROSS-BORDER DIGITAL HEALTHCARE

The EAEP has been a driving force in promoting the **harmonisation of cross-border e-prescription systems**, as part of the works on the European Health Data Space, and adoption of a non-discriminatory EU Digital Identity Wallet for pharmacy services. This aligns with the EU's goal to ensure seamless healthcare delivery for European citizens, regardless of their location. By engaging with EU policymakers and contributing to discussions on the upcoming legislative and non-legislative initiatives in the digital health domain, the e-pharmacy sector promoted its ambitious **Digital Health Manifesto** [↗](#). Co-signed by six healthcare organisations, the Manifesto called for better access to healthcare through transformative digital solutions, including across borders. This will ultimately improve access, quality and continuity of care offered to all European citizens, no matter where, and reduce healthcare costs.

2

PROMOTING INNOVATION-FRIENDLY FRAMEWORKS

3

In 2024, the EAEP focused its policy work in the digital domain on advocating for a more friendly environment for innovative digital solutions. The Association facilitated discussions on **embracing Artificial Intelligence, harmonising data sharing frameworks**, and implementing **future-proof cybersecurity rules** across Europe, with a view to ensuring that the e-pharmacy sector is at the forefront of crucial challenges.

RAISING AWARENESS ABOUT E-PHARMACIES' POSITIVE CONTRIBUTION

The EAEP carried out a series of initiatives to **raise awareness about the role of e-pharmacies and their positive contribution to healthcare access, patient safety, and pharmaceutical innovation**. Recognising the need to raise both policymakers and the broader public's awareness of what an e-pharmacy is and why increased access to digital health services brings about major benefits, the EAEP addressed misconceptions and promoted trust. Concretely, the Association launched **communications and information campaigns, stakeholder events, and education initiatives/reports**. The **OnHOME Alliance**, established in 2024, played a key role in advocating for the benefits of online access to prescription medicines, gathering support from healthcare professionals, patient organisations, and policymakers. Additionally, the EAEP also actively participated in major **health and digital policy conferences**, including the **European Health Summit and the Digital Health Society Forum**, to highlight the transformative impact of e-pharmacies on **improving medication adherence, expanding healthcare access in remote areas, and integrating digital pharmaceutical services**. Through social media engagement and thought leadership publications, the EAEP successfully positioned e-pharmacies as an essential component of Europe's evolving healthcare ecosystem, aligning with broader EU goals on **digitalisation, patient-centric care, and regulatory modernisation**.

4




Through its advocacy, initiatives, and collaborations in 2024, the EAEP has solidified its position as a key stakeholder in the digital transformation of European healthcare. By addressing challenges such as regulatory fragmentation, discriminatory treatment, and inequitable access to medicines, the Association ensured that e-pharmacies remain at the forefront of delivering accessible, safe, and innovative healthcare solutions under the new EU mandate.



STAY INFORMED ABOUT THE UPCOMING ACTIVITIES OF THE EAEP

COMMITTEES' WORK EAEP E-HEALTH COMMITTEE

It has not gone unnoticed that 2024 has been quite an exceptional year of e-health at the EU level. With the agreement on the [European Health Data Space \(EHDS\)](#)  Regulation in April 2024, it has for the first time been written into stone that online pharmacies should, like any other pharmacy, be able to accept cross border e-prescriptions. We reflect on this milestone as a major victory for the recognition of online pharmacies, and as a much needed to push for e-health in Europe.

Overall, the new Regulation strongly supports the integration of digital solutions in the delivery of healthcare services: “**Telemedicine** is becoming an increasingly important tool that can provide patients with access to care and tackle inequities. It has the potential to reduce health inequalities and reinforce the free movement of Union citizens across borders. Digital and other technological tools can facilitate the provision of care in remote regions. When digital services accompany the physical provision of a healthcare service, the **digital service** should be included in the overall care provision”.

With the new Regulation, patients will be able to electronically control their personal health data across the EU. Healthcare professionals can gain access to patients' electronic health records (EHRs), which includes patient summaries, e-prescriptions, medical imaging and laboratory results. To establish a unified health data space, the new rules make the participation for each EU Member State in the MyHealth@EU infrastructure mandatory. This infrastructure will connect national health data access services, facilitating the cross-border sharing of patients' health data among other functionalities.

This Regulation explicitly includes online pharmacies, recognising that online pharmacies must be allowed to take part in the MyHealth@EU infrastructure. As a matter of fact, the Regulation even states that different healthcare policies should not hinder the free movement of electronic health services, such as telemedicine, including online pharmacy services.



The framework and prerequisite for online pharmacies to access these services, is now set. The devil is however in the detail, ensuring that a framework is built which really allows online pharmacies and patients to participate in a low-threshold, user-friendly and easy to use way of redeeming e-prescriptions. For that, we are part of EU projects and in constant dialogue with EU Member States, the EU institutions and project partners to ensure no one is left behind.

Martin Bumm

Chair of the E-Health Committee and Director E-Health at Redcare Pharmacy



Martin Bumm

On top of the EHDS, the E-Health Committee is looking into the European Digital Identity Wallet (EUDIW), which also focuses on a use case on e-prescriptions.

As is the case with the EHDS, it needs to be safeguarded that online pharmacies will be integrated into the wallet framework, emphasising the need for interoperability among the future 27 national wallets.

PHARMACY COMMITTEE

In 2024, the EAEP Pharmacy Committee engaged in several significant activities aimed at enhancing the role of pharmacy in Europe and addressing current challenges in the field. One of the key highlights was a visit to the European Medicines Agency (EMA) in Amsterdam in January 2024. During this visit, the Committee introduced the EAEP and its Pharmacy Committee, fostering an exchange of views on initiatives that support the prevention and mitigation of medicine shortages. The Committee also presented its ongoing activities that promote the safe use of medicines, emphasising the importance of collaboration in these areas.

A major focus for the Committee this year was the publication of a paper titled "Pharmacy of the Future." This document aims to position the EAEP within the broader discussion regarding the future pharmacy landscape. It explores critical questions such as the anticipated role of (online) pharmacies in the next decade, new pharmaceutical services that pharmacies may offer to patients, and potential barriers and challenges that could arise.

In the paper, the Committee suggests four key recommendations to unlock the potential of the Pharmacy of the Future:



1

ACCELERATING THE UPTAKE OF DIGITAL HEALTH SOLUTIONS:

This involves advocating for innovation-friendly regulations and reducing existing barriers to the implementation of digital health technologies.

2

RAISING AWARENESS OF SAFE DIGITAL SOLUTIONS:

The Committee aims to promote awareness regarding secure digital solutions that facilitate access to healthcare.

3

ESTABLISHING A LEVEL PLAYING FIELD:

It is essential to create equitable conditions for both online and offline pharmacies and pharmacists.

4

EXPANDING THE ROLE OF PHARMACISTS:

Enabling pharmacists to provide digital healthcare services and focusing on advisory roles and preventive care is crucial for the evolution of pharmacy practice.

Additionally, the Committee facilitated exchanges of views and best practices among its members, fostering a collaborative environment. A notable contribution came from Claudia Rijken, lecturer at the University of Utrecht and founder/CEO of the start-up Pharmi. Her insights on Digital Pharmaceutical Care provided the EAEP membership with valuable information on the latest trends, challenges, and opportunities within the pharmaceutical care domain.

Also in the upcoming year, the Pharmacy Committee aims at playing a pivotal role in shaping the future of pharmacy, ensuring that it remains responsive to the evolving needs of patients and healthcare systems across Europe.



“

In the centre of our efforts as Pharmacy Committee this year was promoting our vision of the pharmacy of the future. Together, we want to ensure that pharmacy remains responsive to the evolving needs of patients and healthcare systems across the continent. The pharmacy of the future must embrace digital technologies and innovative practices to effectively address the growing challenges of workforce shortages and demographic changes, ensuring that we continue to provide high-quality care to our patients.”

Friederike Geiss

Chair of the Pharmacy Committee and
Head of Clinical Services at DocMorris AG

*Friederike
Geiss*

CYBERSECURITY AND DATA PROTECTION COMMITTEE

In 2024, the Cybersecurity and Data Protection Committee's work focused on key regulatory frameworks, including the NIS2 Directive and the AI Act, alongside the revision of the General Data Protection Regulation (GDPR). The Committee has actively contributed to shaping these policies, ensuring that compliance requirements are being met. The Committee has published infographics on GDPR/NIS 2/AI Act, creating awareness and highlighting the responsibilities and opportunities for EAEP members.

Furthermore, Committee members have shared insights on the Digital Services Act and AI Act, addressing the complexities of a rapidly evolving technological landscape and the lack of harmonisation across EU Member States. Most importantly, the group has developed principles for the ethical use of AI, emphasising transparency, accountability, and patient rights. These principles are crucial for maintaining trust in e-pharmacy services and ensuring highest quality standards in healthcare delivery.

Looking ahead to 2025, the Committee will continue to work on its mission to better prevent cyber and data protection risks and to further solidify its commitment to safeguarding sensitive health data.

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With the increasing sophistication of cyber threats targeting sensitive patient data, our commitment to enhancing cybersecurity and data protection has never been more critical. The security and protection of sensitive health data are paramount for European online pharmacies to earn and retain the trust of their customers. As we face growing challenges, our Committee remains dedicated to sharing knowledge and expanding our expertise to create a safer digital health landscape for all.

*Carolina
Souviron*

Carolina Souviron

Chair of the CDP Committee and Head of Data Protection
and Compliance, Senior Legal Counsel at DocMorris AG



THE EUROPEAN E-PHARMACY MARKET IN 2024: GROWTH, TRENDS, AND INSIGHTS

The European e-pharmacy market continued its remarkable growth in 2024, driven by evolving consumer/patients behaviour, regulatory advancements, and the expansion of digital health services. Increasing demand for online healthcare solutions, coupled with the rise of e-prescriptions and enhanced digital infrastructure, positioned e-pharmacies as key players in Europe’s healthcare ecosystem.

Despite challenges related to fragmented regulations across Member States, the sector demonstrated strong resilience, recording substantial growth in key markets.

This chapter provides an in-depth analysis of the European e-pharmacy landscape in 2024, focusing on market size, key growth drivers, consumer trends, and regulatory shifts.

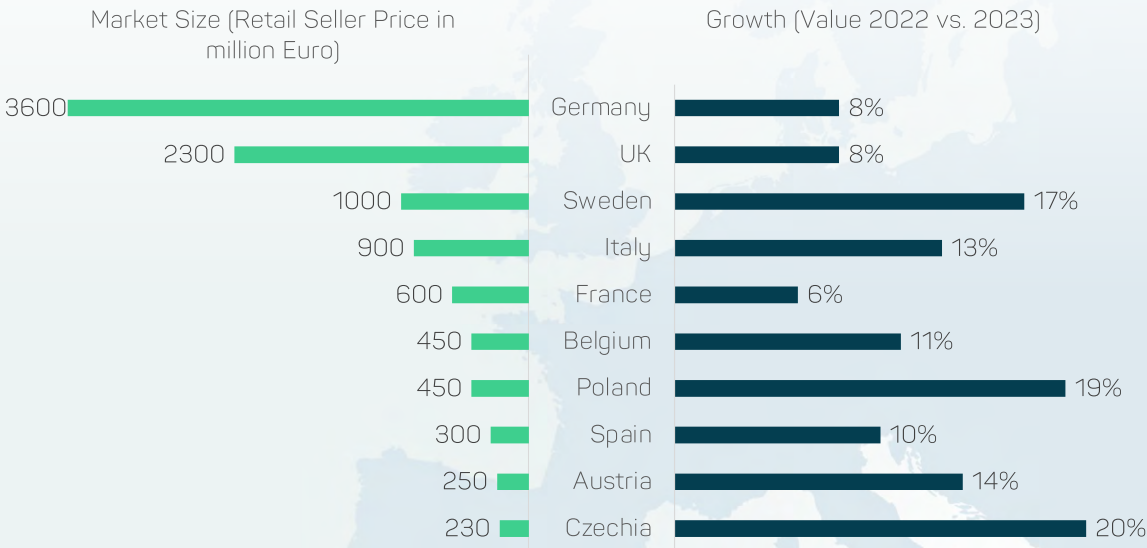
MARKET GROWTH AND KEY FIGURES

The European e-pharmacy market experienced **double-digit growth** in 2024, continuing a trajectory that has seen increasing adoption of digital healthcare solutions. According to the **EAEP-DatamedIQ Market Report**, the top 10 e-pharmacy markets in Europe reached a **combined value of over €10 billion**, with an **average growth rate of approximately 10% year-over-year**.

TOP E-PHARMACY MARKETS IN 2024

While Germany and the UK remained the largest e-pharmacy markets by value, Sweden, Poland, and the Czech Republic recorded the fastest growth, fueled by regulatory reforms and increasing digital adoption.

The top 10 e-pharmacy markets in Europe have a combined size of €10 billion, with an average online growth rate of roughly 10%



KEY TRENDS SHAPING THE MARKET IN 2024

1

EXPANSION OF E-PRESCRIPTIONS

The widespread **adoption of e-prescriptions has been a game-changer** for the e-pharmacy sector, allowing patients to receive and manage their prescriptions digitally. Sweden continues to lead in e-prescription implementation, with a 99% e-prescription rate. Germany completed its national rollout of e-prescriptions in early 2024, after gradual implementation starting in 2023. The UK's NHS digital strategy further integrated e-prescription into its national health system, increasing adoption rates. On the other hand, France, Belgium, Italy, and Spain still face regulatory hurdles, with restrictions on the online sale of prescription medicines.

GROWTH IN DIGITAL HEALTH SERVICES

Beyond medication sales, European **e-pharmacies are increasingly expanding their offerings to include telehealth services, remote consultations, and personalised health solutions**. The UK's Pharmacy First Initiative integrated e-pharmacies into its national telehealth ecosystem. Cross-border e-health initiatives allowed for better data interoperability, benefiting patient care. This will increasingly be enhanced by the implementation of the EHDS, which will enable e-pharmacies to participate in the EU-wide digital health ecosystem thus preventing discriminatory treatment.

2

PATIENT BEHAVIOUR AND TRUST IN ONLINE PHARMACIES

Consumer confidence in e-pharmacies has grown steadily, driven by convenience, competitive pricing, and improved digital security. **A survey by Copenhagen Economics** [🔗](#) highlighted a striking finding: 69% of respondents value the ability to order medicines at any time, while 67% appreciate direct home delivery, underscoring the convenience factor driving demand. The demand for e-pharmacy services is also pronounced in countries where online prescription medicine sales are restricted. In these markets, 31% of respondents would obtain medicines online if given the opportunity, while in countries where online access is permitted, 56% of respondents have already used e-pharmacy services. For chronic patients, who often require regular medication refills, 64% of those who experience adherence issues due to time constraints believe online access would improve their medication adherence. Furthermore, 48% of surveyed chronic patients in Germany and Sweden (where access to prescription medicines online e-prescriptions are allowed) reported that home delivery would significantly help them stay on track with their treatments. The Copenhagen Economics report also estimates the economic benefits of lifting restrictions on online access to prescription medicines across the EU: if all 19 EU countries that currently prohibit online access were to allow it, savings for the overall healthcare system could generate up to €2.3 billion in long-term benefits.

3



A WORD ABOUT THE FUTURE

The European Union's new mandate marks a pivotal moment for the digital transformation of healthcare, presenting a unique opportunity to integrate e-pharmacies into the fabric of Europe's evolving health ecosystem. More than ever, patients and consumers are demanding **convenient, secure, and seamless access to healthcare services online**, recognising the advantages that digital solutions offer in terms of accessibility, efficiency, and personalised care.

At the EAEP, we stand at the forefront of this systemic transformation, **championing the role of e-pharmacies in delivering patient-centred, technology-driven healthcare solutions**. Our work in 2024, and previous years, laid a strong foundation and as we look ahead, we remain committed to **expanding our advocacy, strengthening cross-border cooperation, and increasing public awareness** to ensure that online pharmacies can fulfil their potential in Europe's healthcare landscape. "Ensure non-discriminatory treatment of e-pharmacies", our mission reads, and we are well on track to meet this long-term goal.

Building on the successes of 2024, we are setting ambitious goals to further enhance **regulatory frameworks, patient access, and digital innovation** in the e-pharmacy sector. Our priorities for the coming years include:

DRIVING REGULATORY CHANGE AT THE EUROPEAN AND NATIONAL LEVEL

1

While European legislation increasingly recognises the role of e-pharmacies, national **regulations in many Member States remain restrictive**, preventing patients from fully benefiting from online access to medicines and health services. In 2025, the EAEP will intensify its engagement with national governments, regulators, and stakeholders to drive legislative updates at the country level. By working directly with policymakers, we will push for **harmonised and patient-friendly regulations** that ensure safe, legal, and accessible online pharmacy services across all EU markets.

EXPANDING CROSS-BORDER INITIATIVES

The **digitalisation of healthcare should not stop at national borders**. In 2024, the EAEP worked on key initiatives to facilitate **cross-border access to e-prescriptions**, a critical step toward ensuring that all Europeans – whether traveling, living abroad, or in remote areas – can access their medications conveniently. Looking ahead, we will **expand our work on e-prescription interoperability**, collaborating with EU institutions and national health authorities to integrate **seamless e-prescription exchanges across Member States**. By doing so, we will help remove barriers to medication access and promote the **full realisation of the European Health Data Space (EHDS)**.

2

PROMOTING PUBLIC AWARENESS AND TRUST IN E-PHARMACIES

3

Consumer trust is fundamental to the success of digital healthcare. While awareness of licensed, secure e-pharmacies is growing, misinformation and uncertainty still pose challenges in some countries. In 2025, the EAEP will step up its efforts to **increase patients', healthcare stakeholders', and policymakers' awareness** of the safety, reliability, and benefits of online pharmacies. Through targeted campaigns and collaborations, public policy dialogues, and sector's reports, we will continue to strengthen transparency and build confidence in digital pharmacy services.



EUROPEAN ASSOCIATION OF
E-PHARMACIES



As we move forward, the introduction of the EHDS will be a game-changer for digital healthcare, including e-pharmacies. **The EHDS will enable greater data interoperability, improve cross-border healthcare coordination, and support innovative digital health services.** By actively engaging in the EHDS implementation process, the EAEP will work to ensure that **e-pharmacies can leverage this framework to enhance patient access, optimise medicine delivery, and contribute to a more connected and resilient European health system.** At EAEP, we are ready to lead this transformation: we will continue working toward a future where every European has equal, secure, and seamless access to the healthcare services they need—whenever and wherever they need them.



Our mission is ambitious yet clear: to bridge gaps in healthcare delivery, enhance transparency and accessibility, and establish e-pharmacies as a cornerstone of Europe's digital health ecosystem.

Martino Canonico

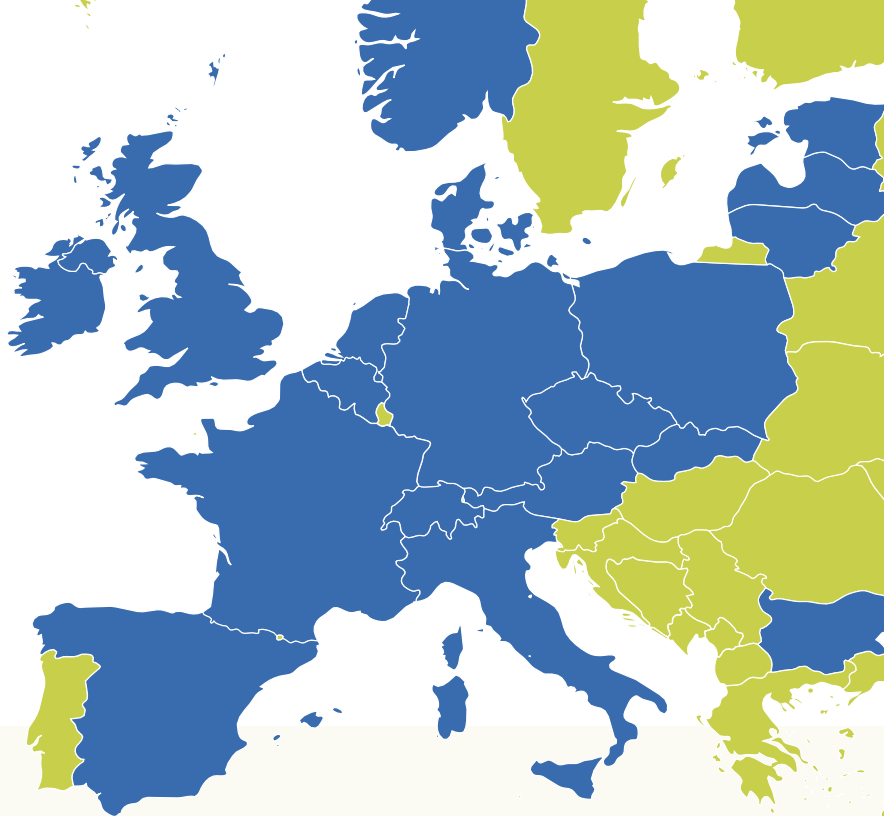
Martino Canonico
Head of Brussels Office, EAEP



ABOUT THE EAEP

The membership of the European Association of E-Pharmacies (EAEP) is constantly growing across Europe.

Members are active in the following European countries: Austria, Belgium, Bulgaria, Croatia, the Czech Republic, Denmark, Estonia, France, Germany, Ireland, Italy, Latvia, Lithuania, the Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Sweden, Spain, Switzerland, and UK.



OUR MEMBERS



OUR PARTNERS

The European Association of E-Pharmacies EAEP supports as a member:



ORGANISATIONAL STRUCTURE

The Board and General Assembly constitute the governing bodies of the EAEP. In 2024, the Board and General Assembly gathered on two occasions, for in-person meetings in Brussels. The works and activities of the Association are brought forward by dedicated working groups: Cybersecurity and Data Protection Committee, E-Health Committee, Pharmacy Committee, and Sustainability Committee, as well as by the Public Affairs Working Group. Through the exchange of views and best practices, all Committees and members 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. The secretariat is steered by the Head of Brussels Office, Martino Canonico.

MEMBERSHIP ADVANTAGES

We represent the voice of the e-pharmacy sector on the European continent and safeguard the needs of our members' patients and customers. We inform the public in a transparent manner, enter into a dialogue with politics, business and market partners and leverage our concepts to strengthen the European healthcare sector and lower costs through digitisation.



KNOWLEDGE SHARING

Access to e-pharmacy-focused network



CRAFTING KEY MESSAGES

Studies, reports, newsletters, actionable material



PARTICIPATION IN COMMITTEES' WORK


Pharmacy Committee, E-Health Committee, Sustainability Committee, Cybersecurity & Data Protection Committee



SHAPING EU AND NATIONAL POLICYMAKING

Meetings, events, roundtables

CONTACTS

If you would like to know more about what we do, please visit our website eaep.com 

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