

Executive Summary

The role of online pharmacies in the supply of pharmaceuticals in Germany: A quantitative and qualitative analysis

15 January 2025



Background

- Until now, data and analysis on the role of online pharmacies in the supply of pharmaceuticals in Germany has been lacking.
- In light of the current challenges facing the German pharmacy markets, evidence-based measures are necessary – the report makes a contribution to this and closes an important research gap.
- The report was prepared by the IEGUS Institute between May and November 2024. The EAEP members apo.com Group, Atida, DocMorris, Redcare Pharmacy (represented by Europa Apotheek and Shop Apotheke) commissioned the study.
- Due to the limited number of online pharmacies analysed (OTC market share of total mail-order business: 58.1%), the quantitative data analysis in the report only covers part of the mail-order pharmaceutical business in Germany. The supply of non-pharmaceuticals, e.g. beauty products, to the population through online pharmacies was not considered in the report.

Methodology

Qualitative Literature Research

- Scientific primary and secondary literature
- Regulatory and legislative documents
- Position papers
- Grey literature

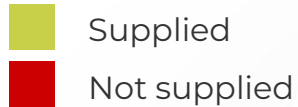
Quantitative Data Analysis

- Basis: Anonymized, aggregated order data from the participating online pharmacies in Germany
- Analysis with regard to development and spatial structures, among other things

Key Findings

Online pharmacies serving patients throughout Germany

- Supplying all of Germany: Every zip code area with more than 33 inhabitants was provided with Rx/OTC medicines
- Average deliveries:
Between 2,000 and 3,700 orders per year per zip code area



100%
2019



100%
2020



100%
2021



100%
2022

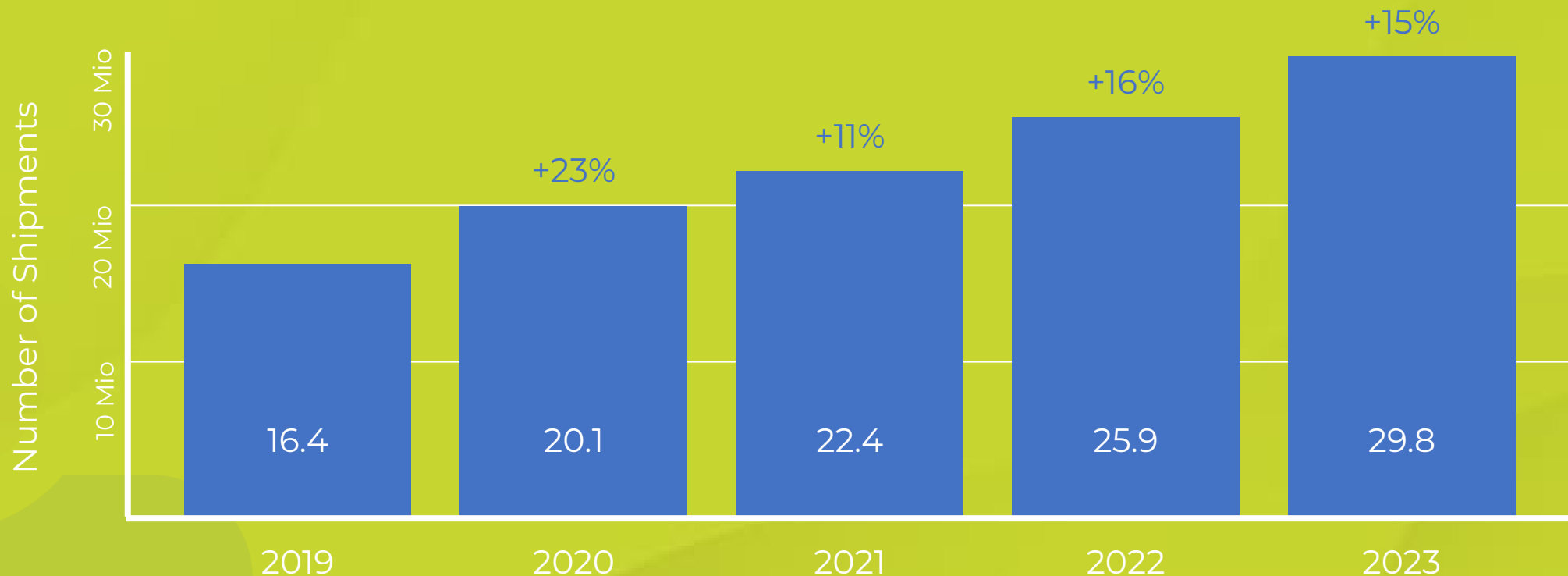


100%
2023

Key Findings

Online pharmacies have established themselves as a firm pillar in the supply of medicines

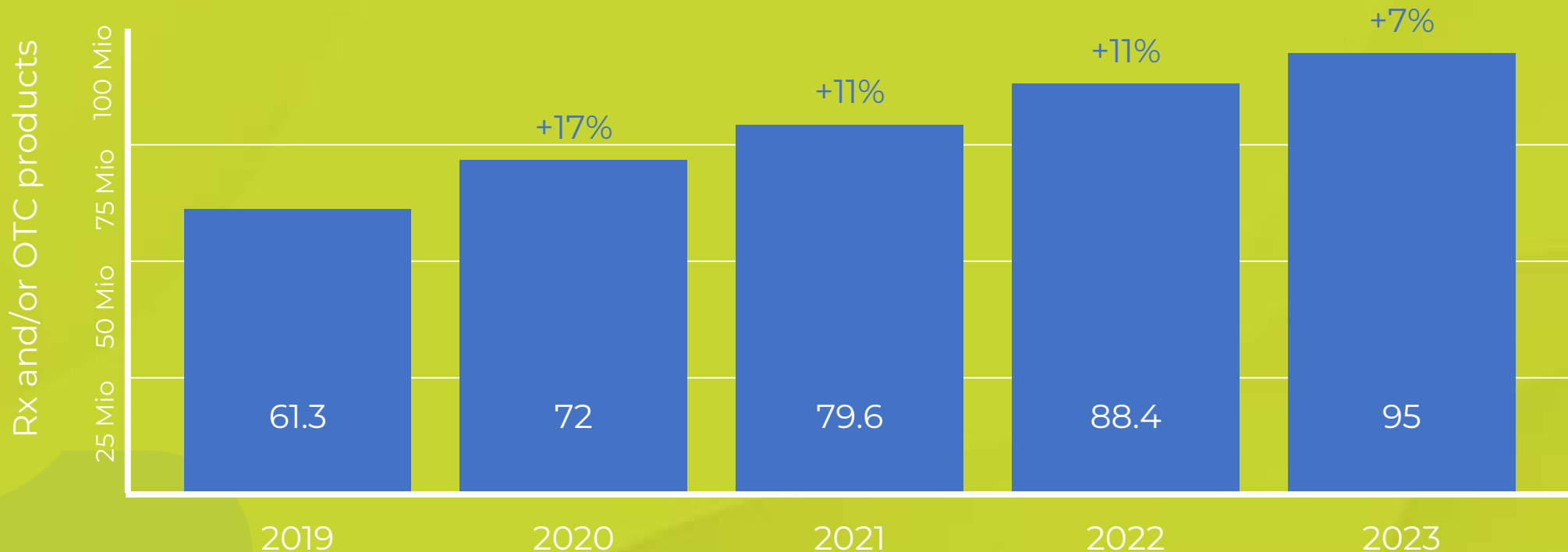
- Sharp increase in orders placed with online pharmacies:
An 80% increase between 2019 and 2023



Key Findings

Online pharmacies have established themselves as a firm pillar in the supply of medicines

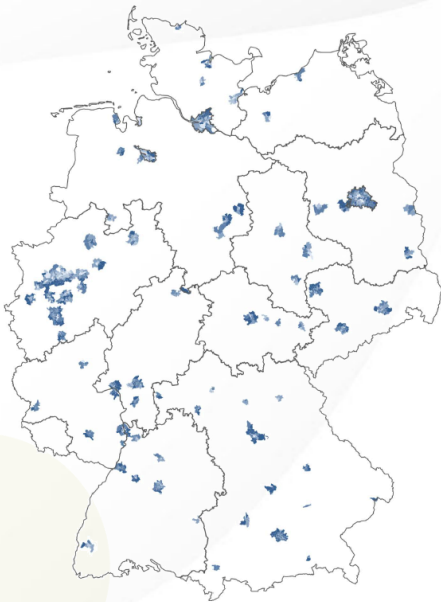
- The graphic shows the development of pharmaceutical deliveries at product level between 2019 and 2023.
- In 2023, the volume of Rx / OTC products delivered by the participating online pharmacies amounted to 95 million



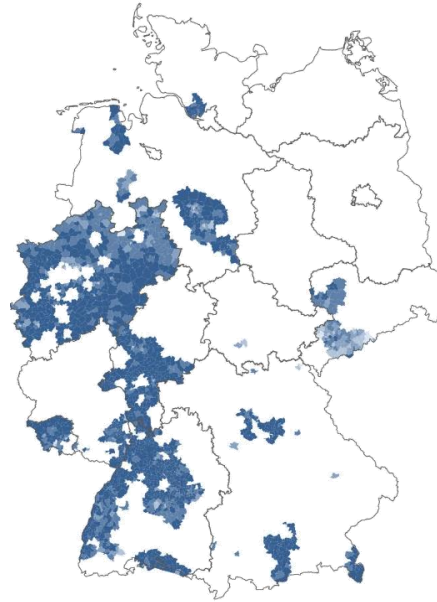
Key Findings

Online pharmacies close supply gaps

High population density



Medium population density



Low population density

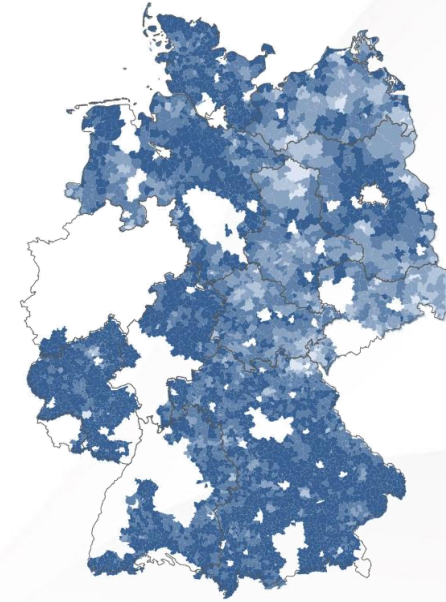


Figure illustrates the development of pharmaceutical supplies by region.

Source: own research (IEGUS, 2024)

Postcode areas coloured white in the charts do not fulfil the criterion of the corresponding population density

Key Findings

Online pharmacies make a significant contribution to care in rural areas

- The number of deliveries per capita in 2023 is highest in areas with medium and low population densities
- The analysis illustrates the importance of online pharmacies in rural and suburban areas

Population Density	Median Deliveries	Median Deliveries per capita
Low	1,616	0.406
Medium	4,459	0.420
High	5,633	0.330

Key Findings

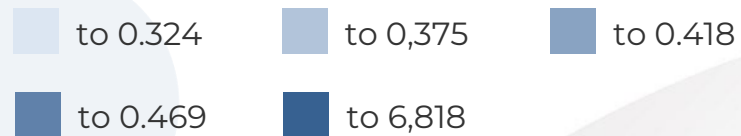
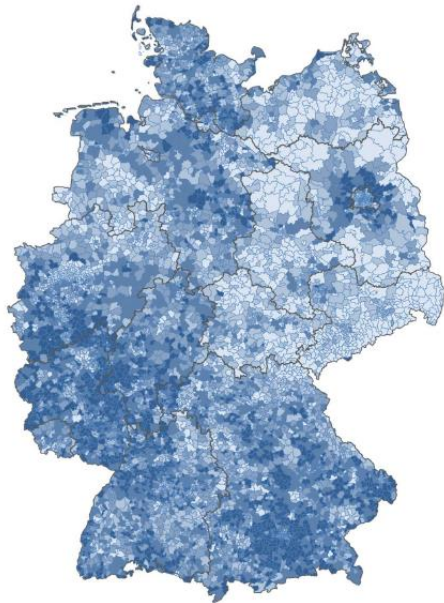
Online pharmacies are not responsible for the decline in local pharmacies

- Frequent argument: Online pharmacies are the main reason for the decline in the number of local pharmacies
- Evaluation of scientific studies shows that the decline is a complex interplay of several factors:
 - Shortage of skilled workers in pharmaceutical professions
 - Economic challenges
 - Competition among pharmacies (especially in urban areas)
 - Regulatory and technological developments
 - Closure of doctors' practices
(Decline in prescription refills at nearby pharmacies)

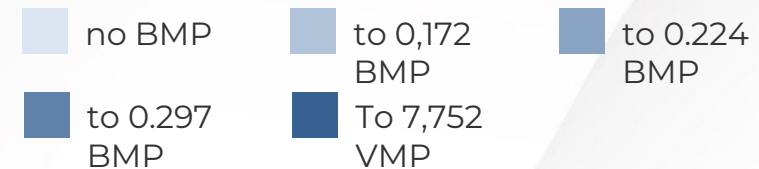
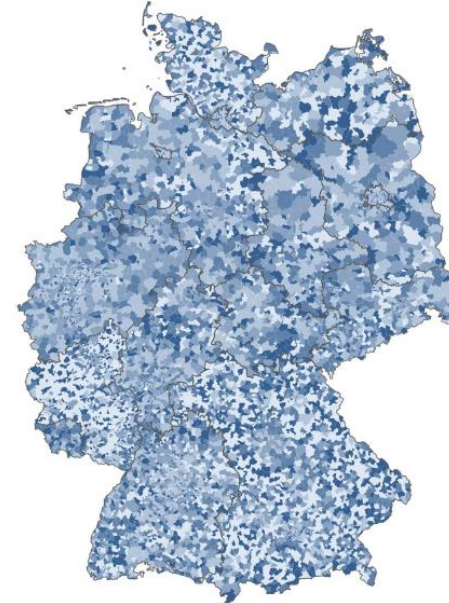
Key Findings

Online pharmacies close supply gaps

Supply of pharmaceuticals from online pharmacies per capita in 2023



BMP* per 1,000 inhabitants in 2024



*Brick-and-mortar pharmacy

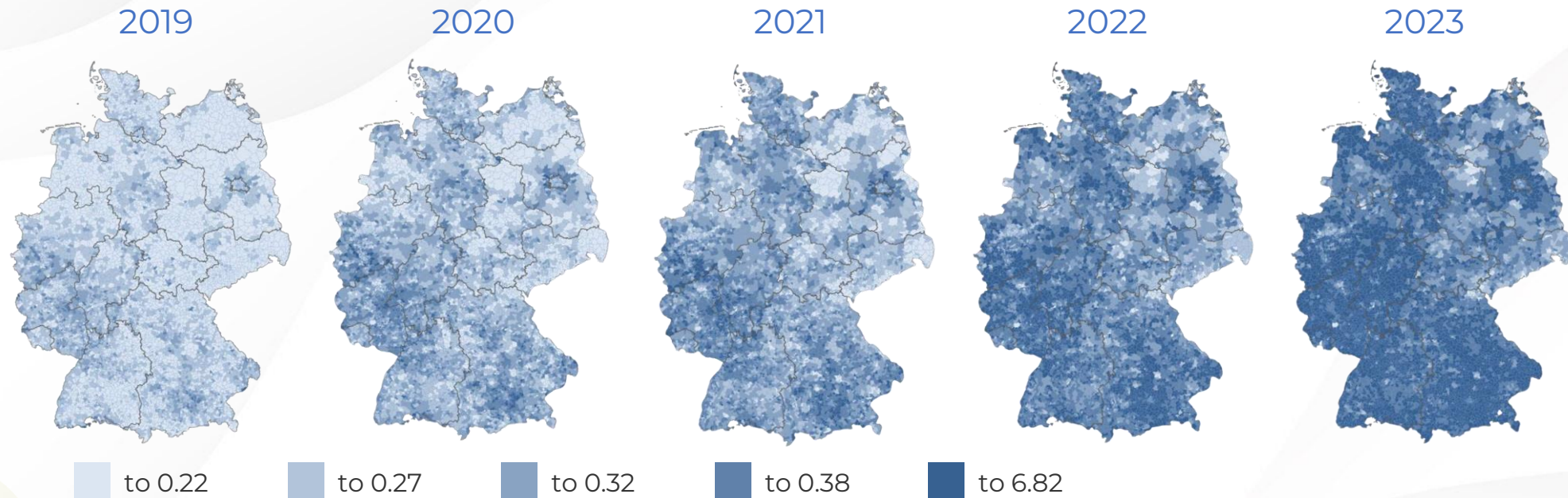
Key Findings

Online pharmacies close supply gaps

- Analysis of order data shows: The lower the density of local pharmacies, the more intensive the supply of medicines by online pharmacies

	Zip code areas without resident VOA	Zip code areas with at least one resident VOA	
	Median	Median	Correlation between pharmacy and delivery density
n	2.189	5.964	
Population Density	80	259	
OTC products supplied per capita by online pharmacies	1,303	1,162	$\tau = 0,021^*$

Diffusion patterns in the supply of pharmaceuticals 2019 - 2023



- Illustration shows the development of geographical structures in the supply of pharmaceuticals. In general, deliveries per capita are increasing
- Rhineland Palatinate, Bavaria, Hesse and Baden Württemberg are the most intensively supplied regions (deliveries per capita)

Source: own research (IEGUS, 2024)

**If you have any questions please
contact our Brussels office team at
any time.**

info@eaep.com