EUROPEAN ASSOCIATION OF E-PHARMACIES

# MARKET REPORT

In collaboration with DatamedIQ

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# 2025

# Key Insights

## E-pharmacy 2025: from growth story to healthcare backbone

This year's analysis expands to 15 European markets, providing a more complete picture of how e-pharmacy is developing across the continent. The findings confirm continued strong growth, with the total market now exceeding €15 billion, but also reveal an increasingly fragmented landscape shaped by national regulatory choices.

While large markets such as Germany and the United Kingdom continue to dominate in absolute size, growth is no longer concentrated in a few countries. A broader group of markets – including Italy, Poland, Finland, Spain, the Netherlands, and Czech Republic – is driving expansion, with several countries posting double-digit growth rates. At the same time, more mature systems such as Sweden and Denmark demonstrate how fully digitalised healthcare ecosystems can support scalable and integrated e-pharmacy models.

However, this growth is uneven. The report highlights a clear structural divide across Europe: in countries where patients can access both OTC and prescription medicines (Rx) online, e-pharmacies are evolving into a core healthcare channel. In contrast, in markets where online access to prescription medicines remains restricted, growth is largely confined to OTC and overall scalability remains limited.

As a result, regulation has become the single most important factor shaping market outcomes, underlining the importance for the sector to act united through a single, clear voice. Digital infrastructure – including e-prescriptions – is widely in place across Europe, but its impact depends on whether it is matched by enabling legal frameworks. Additional digital tools – such as Digital Identity Wallets for healthcare – are expected to be rolled out throughout 2026 and 2027, giving an additional push to the spread and uptake of e-pharmacy.

What emerges is a market that is expanding in size, but diverging in structure: from fully integrated digital pharmacy ecosystems to constrained, OTC-driven models. This divergence will define the next phase of development.

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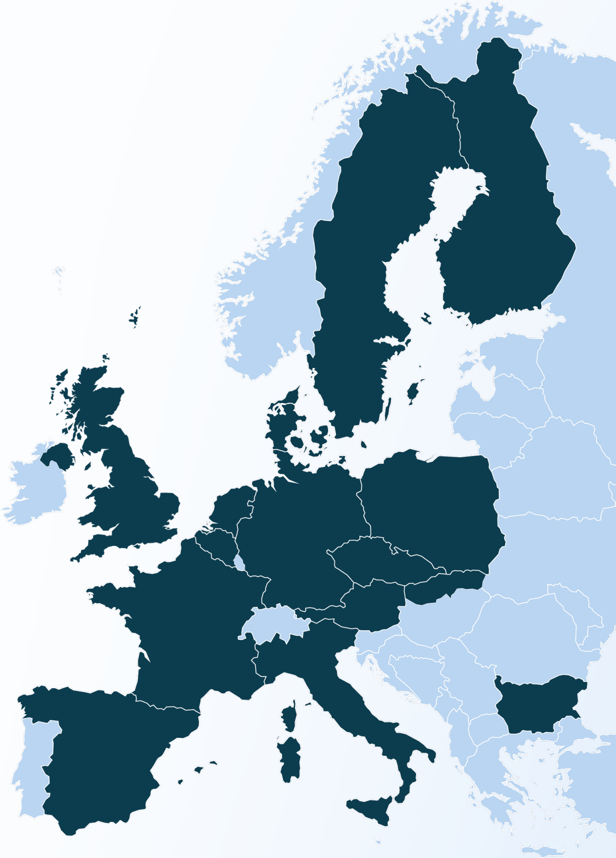

# Key Insights

## Key trends for the future

### 1. Operationalisation of the European Health Data Space (EHDS)

Following its entry into force in 2025, the EHDS moves from legislation to implementation. Beyond the formal recognition of a level playing field for healthcare providers (online/offline), e-pharmacies increasingly prepare their systems for interoperability with MyHealth@EU, laying the groundwork for cross-border e-prescription access, shared electronic health records, and pan-European personalised care services over the coming years.

### 2. Cross-border healthcare reinforcement

Ongoing EU policy initiatives and legislative discussions on cross-border healthcare are reinforcing the framework for a more integrated European Health Union. This momentum is further highlighted by discussions on how to modernise rules for patients' rights in cross-border healthcare, which signals renewed political will to update the regulatory framework. In parallel, the European Commission's strategic focus on strengthening the EU Single Market increasingly frames e-pharmacies as enablers of cross-border service provision, interoperability and patient choice.

### 3. Healthcare workforce shortages as structural issue

Workforce shortages across Europe are becoming a defining structural challenge for healthcare systems. Persistent gaps in pharmacists, doctors, and nursing staff – particularly in rural and ageing regions – are driving policy attention. E-pharmacies act as capacity multipliers, supporting medication management, adherence, and patient education. Rather than replacing physical pharmacies, e-pharmacies help redistribute scarce human resources toward higher-complexity care, positioning them as an essential response to systemic workforce constraints.

### 4. Growing national momentum on Rx online access

Across Europe, national debates on the online sale and delivery of prescription medicines are gaining traction. Several Member States are reassessing existing restrictions in light of digitalisation, patient demand, and healthcare system pressures. While regulatory approaches remain diverse, this shift signals increasing political and policy attention to the role of e-pharmacies in expanding access to prescription medicines, potentially paving the way for gradual market opening in currently restricted environments. At the same time, recent case law from the European Court of Justice is contributing to greater legal clarity on the application of Single Market principles to the pharmacy sector, reinforcing the need to assess national restrictions in light of EU law.

### 5. Strengthened collaboration with patient organisations across Europe

Renewed collaboration between e-pharmacies and patient organisations is emerging as an important driver of awareness and trust. Initiatives such as the newly established OnHOME Alliance are bringing together stakeholders across Europe to highlight the role of e-pharmacies in supporting medication adherence, ensuring continuity of care, and improving overall patient access to treatment. By amplifying the patient perspective, these partnerships are contributing to a more patient-centred narrative around digital pharmacy services and reinforcing their relevance within modern healthcare systems

# Key Insights

## Spotlight: From e-prescriptions to patient access – closing Europe's digital care gap

Europe has made substantial progress in digitalising healthcare systems, with e-prescriptions now widely implemented across Member States, as well as the European Health Data Space (EHDS) infrastructure. However, this report highlights a critical gap: while digital infrastructure is largely in place, patient access to medicines through fully digital pathways remains uneven and often restricted.

In many countries, patients can receive a digital prescription but cannot use it to obtain medicines online. This disconnect between prescription and fulfilment limits the real-world impact of digital health and remains one of the main structural barriers to the development of e-pharmacy in Europe.

The analysis across the 15 markets shows a clear pattern. Where the full digital pathway is enabled – from e-prescription to online order and home delivery – e-pharmacy markets are more mature, scalable, and better integrated into healthcare delivery. These systems improve convenience, support medication adherence, and help alleviate pressure on healthcare systems.

By contrast, in countries where online access to prescription medicines is restricted, market development remains largely confined to OTC products. This not only limits growth but also reduces the ability of healthcare systems to leverage digital solutions to address broader challenges such as workforce shortages and ageing populations.

Importantly, this fragmentation is not due to a lack of technological readiness. In many cases, advanced e-prescription systems are already in place. On top of this, throughout 2026 and 2027, Member States will be required to roll out Digital Identity Wallets for the storage of e-prescription, which will make it possible for patients to safely authenticate themselves. The key differentiator is regulatory: whether digital infrastructure is effectively translated into patient access.

Closing this gap will be critical to unlocking the full potential of digital health and ensuring more accessible, efficient, and patient-centered care across Europe.

# European E-Pharmacy Markets: Socio-Economic & Regulatory Overview (2025)

| Country | Population 2025 | OTC Online | RX Online | e-Prescription | Market Size 2025 (€M) | Growth 2025 vs 2024 |
|---|---|---|---|---|---|---|
| 🇩🇪 Germany | 83,6 M | ✓ | ✓ | ✓ | 4.600 | 10,0% |

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Population based on 2025 estimates (Eurostat / national statistics).;Rx online = legal home delivery of prescription medicines.; e-Prescription ≠ online fulfilment.
Market data researched and estimated by DatamedIQ.

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# GERMANY

# GERMANY´S E-PHARMACY MARKET:

## Europe's largest market with emerging Rx potential

Germany is Europe's largest e-pharmacy market, driven primarily by strong OTC demand and increasing consumer adoption. The nationwide rollout of e-prescriptions marks a major structural shift, creating the foundation for future Rx-driven growth. However, regulatory and operational challenges still shape the pace of market transformation.

### Demographic facts

| | Germany | EU |
|---|---|---|
| Population size (mid-year estimates) | 83.6M | 450.4 M |
| Share of population over age 65 (%) | 22.7 | 22.0% |
| Fertility rate[1] (2024) | 1.45 | 1.34 |

### Socioeconomic facts

| | Germany | EU |
|---|---|---|
| GDP per capita (EUR PPP[2]) | 47,900 | 41,600 |
| Relative poverty rate[3] (%, 2025) | 21.2% | 21.0% |
| Unemployment rate (%, 2025) | 3.9% | 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. Figures refer to the EU-27 (European Union). Source: Eurostat database, Statista, IMF, World Bank, OECD

### Health facts

Germany combines high healthcare spending with strong access and above-average life expectancy. However, a high prevalence of chronic diseases, particularly cardiovascular conditions, and adult obesity rates of around 23–25% add to the burden. An ageing population and low fertility further increase long-term system pressure.

### Market Maturity Takeaway

Large-scale market transitioning from OTC-driven growth to Rx-enabled scaling. Execution speed will define leadership.

Sources: Eurostat (2024/2025); OECD Health Statistics (2024); World Health Organization (2024); World Bank (2024); European Cancer Information System (ECIS); OECD/European Observatory on Health Systems and Policies (2024): State of Health in the EU

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# GERMANY´S E-PHARMACY MARKET:

## Europe's largest market with emerging Rx potential

### E-pharmacy facts

Estimations as of 01/2025

**€4.6 B**

Total e-pharmacy Sales 2025

**+10%**

Estimated Growth 2024/2025

eRX since 2024

### Top e-pharmacies

Avg. monthly visitors

| | | |
|---|---|---|
| 1. | Shop Apotheke | 15.8 M |
| 2. | DocMorris | 4.9 M |
| 3. | medikamente-per-klick.de – Ihre persönliche Versandapotheke | 2.0 M |
| 4. | medpex | 1.5 M |
| 5. | apo discounter | 1.0 M |

### Regulations

Current legal framework

- Rx Online ✓
- OTC Online ✓
- e-prescription ✓

Source: Online data from DatamedIQ, eRX Status: National eHealth authorities and health system institutions (e.g. gematik, NHS England, ANS France, INAMI Belgium, ELGA Austria).; monthly visitors from SimilarWeb *(data based on Total Visits March 2026). Note: Top e-pharmacy rankings are based on Similarweb average monthly visitor data and serve as a proxy for online visibility. Rankings may differ from actual market positions based on sales, orders or prescription volume.

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# SWEDEN

# SWEDEN´S E-PHARMACY MARKET:

## Europe’s benchmark for digital pharmacy maturity

Sweden represents the most advanced e-pharmacy market in Europe, with fully integrated e-prescriptions and a highly digital healthcare system. Patients can seamlessly access both OTC and Rx medicines online. This enables high market penetration and scalable platform models, positioning Sweden as a benchmark for digital pharmacy development.

### Demographic facts

| | Sweden | EU |
|---|---|---|
| Population size (mid-year estimates) | 10.6 M | 450.4 M |
| Share of population over age 65 (%) | 20.8% | 22.0% |
| Fertility rate[1] (2024) | 1.43% | 1.34 |

### Socioeconomic facts

| | Sweden | EU |
|---|---|---|
| GDP per capita (EUR PPP[2]) | 45,800 | 41,600 |
| Relative poverty rate[3] (%, 2025) | 18.6% | 21.0% |
| Unemployment rate (%, 2025) | 8.8% | 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. Figures refer to the EU-27 (European Union). Source: Eurostat database, Statista, IMF, World Bank, OECD

### Health facts

Sweden delivers excellent health outcomes, supported by strong public investment and very low smoking rates. Low levels of preventable mortality reflect effective prevention. A high share of elderly population is increasing demand, though overall system stability remains strong..

### Market Maturity Takeaway

European benchmark. Fully mature, scalable, and deeply embedded in digital healthcare delivery.

Sources: Eurostat (2024/2025); OECD Health Statistics (2024); World Health Organization (2024); World Bank (2024); European Cancer Information System (ECIS); OECD/European Observatory on Health Systems and Policies (2024): State of Health in the EU

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# SWEDEN´S E-PHARMACY MARKET:

Europe's benc... maturity

## E-pharmacy facts

Estimations as of 01/2025

Total e-pharmacy Sales 2025

Estimated Growth 2024/2025

eRx since 2012

## Regulations

Current legal framework

- Rx Online
- OTC Online
- e-prescription

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Source: Online data from DatamedIQ, eRX Status: National eHealth authorities and health system institutions (e.g. gematik, NHS England, ANS France, INAMI Belgium, ELGA Austria).; monthly visitors from SimilarWeb *(data based on Total Visits March 2026). Note: Top e-pharmacy rankings are based on Similarweb average monthly visitor data and serve as a proxy for online visibility. Rankings may differ from actual market positions based on sales, orders or prescription volume.

# UNITED STATES OF AMERICA

# USA vs. Europe: Two fundamentally different e-Pharmacy models

## 🇺🇸 USA: Ecosystem-driven model

- Prescription fulfilment via PBMs & insurers
- High share of mail-order pharmacy
- Digitally enabled, but not always counted as e-Pharmacy
- Driven by scale, integration and contracts
- Lower transparency on true digital market size

👉 **Result: Large digital volume, but underreported**

## 🇪🇺 Europe: Channel-driven model

- Orders via online pharmacies & platforms
- Clear online vs. offline distinction
- Rx & OTC visible in eCommerce data
- Driven by consumer choice & pricing
- High transparency of market size

👉 **Result: Smaller market, but fully captured**

**Bottom line: U.S. e-Pharmacy ≠ European e-Pharmacy**

Source: Online data from DatamedIQ, eRX Status: National eHealth authorities and health system institutions (e.g. gematik, NHS England, ANS France, INAMI Belgium, ELGA Austria).;

# Get the Full Report

- 53 Pages
- 15 European Markets
- Regulatory & Infrastructure Analysis
- E-Pharmacy Rankings
- Future Market Trends

https://www.datamediq.com/en/eaep-report-2025-en



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