



Market Report

A glimpse into the European e-pharmacy market 2023

In collaboration with DatamedIQ

Key Insights

European e-pharmacies

The European e-pharmacy market is experiencing significant growth, driven by technological advancements, changing consumer/patient behavior, and supportive regulatory frameworks. Key markets such as Sweden, Germany, and the UK are leading the charge. Sweden is particularly noteworthy, demonstrating impressive growth with a market expansion rate of 17% across the entire e-pharmacy sector, including OTC, Rx, and BPC segments. Germany achieved a turnover of approximately €3.6 billion in 2023, with an 8% year-over-year (YoY) growth rate, while the UK reached a market value of €2.3 billion, also growing by 8% YoY, supported by strong regulations and widespread digital health services.

Emerging markets like Poland are also significant, with Poland's market growing by 19% YoY, driven by major e-pharmacies and digital health initiatives. France, though not as prominent, is also contributing to the market with a 7% YoY growth rate. Additionally, Spain and Austria are experiencing significant growth, with Spain's e-pharmacy market reaching €300 million in 2023, growing at 10%, and Austria's market hitting €250 million with a 14% YoY growth rate.

The e-pharmacy landscape in Europe is diverse, with both dominant players and a multitude of smaller e-pharmacies. For example, in Germany, top e-pharmacies such as Shop-Apotheke.de and DocMorris.de attract millions of monthly visitors, while in Sweden, Apotea.se and ApotekHjartat.se lead the market. Smaller e-pharmacies like Meds.se in Sweden and Apotheke.at in Austria also contribute to this dynamic market.

Overall, the European e-pharmacy market is characterized by a competitive environment, continuous innovation, and a growing demand for digital health solutions.

Key Trends

Several key trends are shaping the European e-pharmacy landscape. Firstly, the widespread adoption of e-prescriptions is notable. Germany, despite initial delays, has implemented e-prescriptions in 2023, while Sweden has had a 99% e-prescription rate since 1980. This trend is enhancing medication management and patient safety across Europe.

Secondly, the integration of digital health services is significantly improving consumer/patient access to healthcare. Notable examples include the UK's NHS App and the Pharmacy First Initiative, both of which are driving advancements in comprehensive digital health services.

Thirdly, the regulatory environment is evolving to support market growth. While key restrictions still affect patients in many European countries, such as Belgium, France, Italy, Poland, and Spain, particularly regarding online access to prescription medicines, the European Union is increasingly moving towards a more digital health-friendly legislative environment. A notable development in this context is the European Health Data Space (EHDS), which aims to facilitate health data sharing across borders, promoting personalized health solutions, telemedicine, and telepharmacy. Under the new EHDS Regulation, e-pharmacies are officially recognized as key players in the healthcare system, granting them access to the EU-wide health data sharing infrastructure. This inclusion prevents future discriminatory treatment of e-pharmacies at the national level and enhances their ability to provide comprehensive digital healthcare services, including remote consultations and easy access to medications, anytime and anywhere.

Key Insights

eRx Potential and Beyond

The potential for e-prescriptions (eRx) in Europe is vast, with significant room for growth. Countries like Sweden and the UK show the benefits of comprehensive eRx systems, ensuring efficient and safe medication management. As more countries implement supportive regulations and technology, eRx adoption is expected to rise.

Based on this infrastructure, and on the soon-to-be implemented European Health Data Space, a legislative change in those countries where the online sale of Rx medicines is still not allowed seems a natural next step. Beyond eRx, the future of e-pharmacies lies in integrating broader digital health services, enhancing patient engagement, and improving healthcare outcomes.

Innovations like telemedicine, telepharmacy, remote monitoring, and personalized health solutions will drive the digital transformation of the pharmaceutical sector, offering new growth opportunities. AI and big data analytics in e-pharmacy operations will streamline supply chain management, optimize inventory, and provide predictive insights into consumer/patient behavior. These advancements will enhance operational efficiency and improve patient outcomes by ensuring timely access to medications and health services.

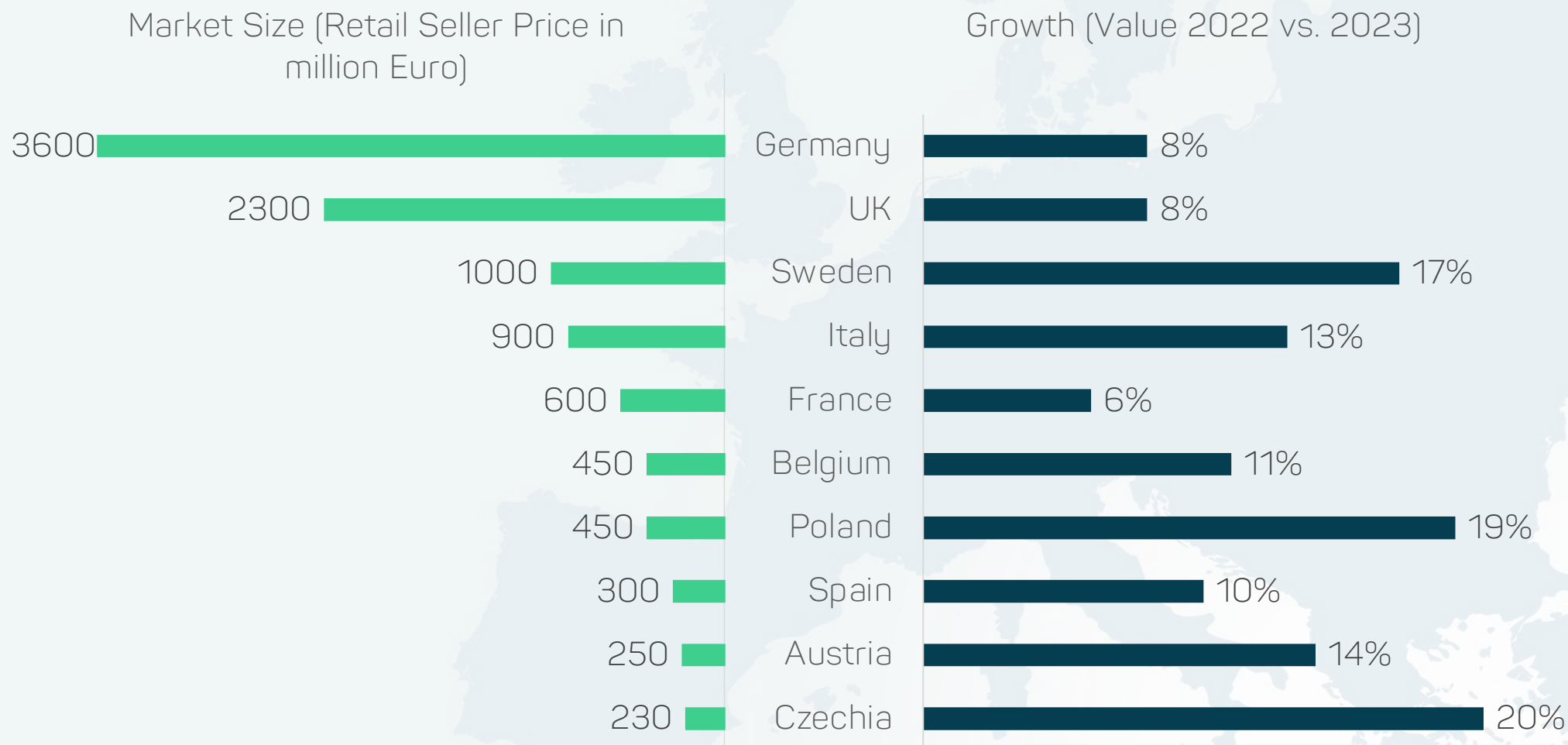
"In many countries, despite the mandatory use of e-prescriptions, patients still cannot access their prescription (Rx) medicine online. Indeed, while in countries as Sweden, Germany, Netherlands and five more this is a well-established practice, we still don't have a common framework to ensure equitable access to Rx medicines through safe digital solutions. This can change. And the EU has a role to play here, it's not all about national legislation. Obtaining Rx medicines digitally would pave the way to many other health services for patients, including teleconsultations, management of medicine taking, and support in day-to-day adherence. Recent data show that citizens would be eager to have the digital option as an alternative to the physical one. The implementation of the European Health Data Space coupled with the ongoing revision of the EU Pharmaceutical Legislation have the unprecedented chance to make such legal framework fit for the digital age"



Martino Canonico

Head of Brussels Office
European Association of e-pharmacies (EAEP)

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





Germany



Germany's Health & Economy: economy and Healthcare expenditure above the EU average

With a superior GDP per capita and the EU's highest health spending, Germany's life expectancy is marginally above the EU average, despite major health challenges like heart disease and cancer.

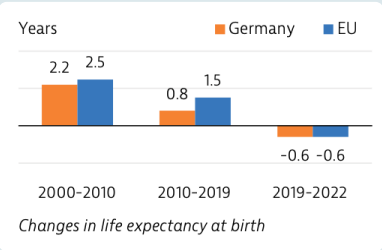
Demographic facts

	Germany	EU
Population size (mid-year estimates)	88,237,124	446,735,291
Share of population over age 65 (%)	22.1%	21.1%
Fertility rate ₁ (2021)	1.6	1.5

Socioeconomic facts

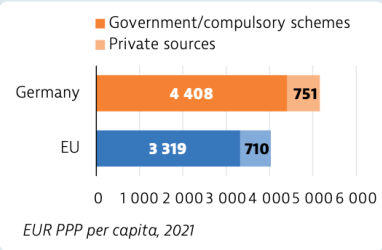
	Germany	EU
GDP per capita (EUR PPP ₂)	41,246	35.219
Relative poverty rate ₃ (% , 2019)	14.7%	16.5%
Unemployment rate (%)	3.1%	6.2%

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. Source: Eurostat database.



Health status

In 2020, Germany registered a life expectancy of 81.1 years – half a year above the EU average but still lower than in EU countries with the highest levels. The COVID-19 pandemic had less of an impact on life expectancy in Germany than in the EU, with a decrease of 2.5 months in 2020 compared to an average decline of just over 8 months across the EU. The leading causes of death in Germany in 2019 were ischaemic heart disease, stroke and lung cancer.



Health system

In 2019, Germany spent EUR 4505 per capita on health – the highest among EU countries, and 28% more than the average (EUR 3523). Germany also spends a greater proportion of its GDP on health (11.7 %) than any other EU country. Most of the health spending comes from public sources; out-of pocket payments amount to only 12.7 %, which is well below most other EU countries.



Germany's e-pharmacy Market: balancing high traffic with diverse offerings

The German e-pharmacy market is one of the most developed in Europe, with a turnover of approx. 3.6 billion euros. Despite a modest growth rate of 8%, it is experiencing a significant shift in distribution channels.

e-pharmacy facts

Estimations as of 01/2024

3,6 bn €

Total e-pharmacy Sales 2023

8 %

Estimated Growth 2022/2023

Top e-pharmacies

Avg. monthly visitors

Rank	Domain	Monthly Visitors
1	Shop-Apotheke.de	13,3 mln
2	DocMorris.de	5,8 mln
3	Medpex.de	3,5 mln
4	Medikamente-per-Klick.de	2,7 mln
5	Apodiscounter.de	2,1 mln
6	Shop.apotal.de	1,3 mln
7	Aponeo.de	1,0 mln
8	Sanicare.de	0,4 mln
9	Volksversand.de	0,6 mln
10	Mycare.de	0,6 mln

Regulations

Current legal framework

OTC online



Rx online



e-prescription



Other specifics

Germany lags behind many European markets in e-prescriptions. Shipping prescription medications has been allowed since 2004. The mandatory e-prescription launch was delayed due to technical issues. Gradual implementation began in January 2023.



United
Kingdom



United Kingdom's Health & Economy: strong public health system with moderate expenditure

The UK, with a life expectancy of 81.3 years, maintains robust healthcare through significant public funding, moderate healthcare spending, and widespread digital health initiatives.

Demographic facts

	UK	EU
Population size (mid-year estimates)	66,971,395	446,735,291
Share of population over age 65 (%)	19 %	21.1%
Fertility rate ¹ (2021)	1.6	1.5

Socioeconomic facts

GDP per capita (EUR PPP ²)	45,208	35,219
Relative poverty rate ³ (% , 2021)	16.8%	16.5%
Unemployment rate (%)	5,1%	6.2%

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. Source: Eurostat database.

Health status

In 2022, the United Kingdom reported a life expectancy of 81.3 years, which is above the EU average. The COVID-19 pandemic had a significant impact on life expectancy in the UK, with a notable decline between 2019 and 2020. However, life expectancy levels have shown signs of recovery in the subsequent years. The leading causes of death in the UK include ischaemic heart disease, stroke, and respiratory diseases.

Health system

In 2019, the UK spent approximately EUR 3290 per capita on health, which is close to the EU average. The National Health Service (NHS) provides universal health coverage and is primarily funded through public expenditure. Out-of-pocket spending is relatively low, accounting for around 16% of total health expenditure. The health system in the UK is centralized, with the NHS overseeing most aspects of healthcare planning, resource allocation, and service provision.



UK's e-pharmacy Market: innovation and expansion in digital healthcare

The UK e-pharmacy market reached €2.3 billion in 2023, growing at 8%. Major e-pharmacies and robust regulations, including e-prescriptions and mail order, drive this digital expansion.

e-pharmacy facts

Estimations as of 01/2023

2,3 bn €

Total e-pharmacy Sales 2023

8 %

Estimated Growth 2022/2023

Top e-pharmacies

Avg. monthly visitors

Rank	Domain	Monthly Visitors
1	Boots.com	25.2 mln
2	Superdrug.com	9.8 mln
3	Hollandandbarret.com	6.2 mln
4	Lloydspharmacy.com	2.1 mln
5	Pharmacy2u.co.uk	1.3 mln
6	Theindependentpharmacy.co.uk	1.1 mln
7	Chemist-4-u.com	881 k
8	Cocooncenter.co.uk	512 k
9	Naturesbest.co.uk	413 k
10	Oxfordonline-pharmacy.co.uk	365 k

Regulations

Current legal framework

OTC online



Rx online



e-prescription



Other specifics

The UK has invested £2 billion in NHS digitization, aiming for full electronic health records by 2025. The NHS App provides digital access to healthcare services. E-prescriptions are widespread, and regulations ensure safe mail order of prescription drugs.

Sweden





Sweden's Health & Economy:

Sweden exhibits a solid health status and economic strength

Sweden, with one of the highest life expectancies in the EU and a substantial healthcare expenditure per capita that exceeds the EU average, shows a strong commitment to healthcare that is reflected in stable population health.

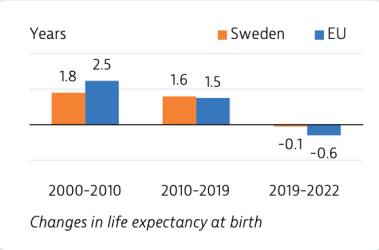
Demographic facts

	Sweden	EU
Population size (mid-year estimates)	10,452,326	446,735,291
Share of population over age 65 (%)	20.3%	21.1%
Fertility rate ¹ (2021)	1.7	1.5

Socioeconomic facts

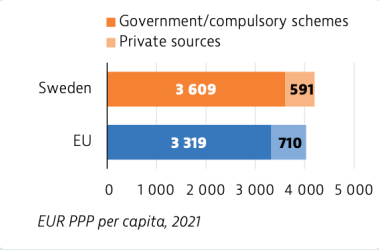
GDP per capita (EUR PPP ²)	42,264	35,219
Relative poverty rate ³ (% , 2021)	16.0%	16.5%
Unemployment rate (%)	7.5%	6.2%

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. Source: Eurostat database.



Health status

Life expectancy in Sweden was the second highest in the EU in 2022, reaching 83.1 years. Following a sharp fall in the first year of the pandemic, in 2021 and 2022 life expectancy rebounded to close to pre-pandemic levels. Inequalities in life expectancy by education level are significant in Sweden and have increased over the past two decades.



Health system

Health Sweden's health spending slightly surpasses the EU average: per capita spending was EUR 4200 in 2021 compared to EUR 4028 across the EU (adjusted for differences in purchasing power). Public funding covered 86% of health expenses, exceeding the EU average of 81%. As a share of GDP, health spending reached 11.2% in 2021 due to pandemic-related costs.



Sweden’s e-pharmacy Market: rapid growth in digital healthcare services

Sweden’s e-pharmacy market reached €1.0 billion in 2023, with an impressive growth rate of 17%. Major e-pharmacies and comprehensive regulations, including e-prescriptions and mail order services, drive this digital expansion.

e-pharmacy facts

Estimations as of 01/2023

1,0 bn €

Total e-pharmacy Sales 2023

17 %

Estimated Growth 2022/2023

Top e-pharmacies

Avg. monthly visitors

Rank	Domain	Monthly Visitors
1	Apotea.se	7.0 mln
2	Apotekhjartat.se	3.0 mln
3	Apoteket.se	2.7 mln
4	Meds.se	2.0 mln
5	Kronansapotek.se	1.9 mln
6	Apohem.se	1.9 mln
7	Svenskhalsokost.se	641 k
8	Svensktkosttillskott.se	427 k
9	Buyersclub.se	365 k
10	Lifebutiken.se	244 k

Regulations

Current legal framework

OTC online



Rx online



e-prescription



Other specifics

In Sweden, the state-owned Apoteket AB started selling Rx medicines online in 2006. Following the 2009 reform, all registered pharmacies are allowed to offer Rx medicines online. e-prescriptions’ uptake is high (99%), first issued in 1980.

Italy





Italy's Health & Economy: a testament to resilience

Despite a GDP per capita below the EU average and economic challenges, Italy's life expectancy stands notably above EU average. The country's strength is evident, even amidst COVID-19 setbacks and constrained health spending.

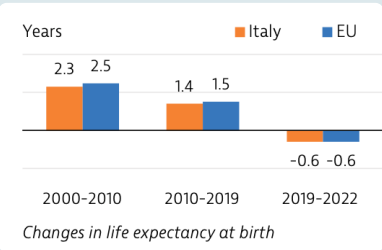
Demographic facts

	Italy	EU
Population size (mid-year estimates)	59,030,133	446,735,291
Share of population over age 65 (%)	23.8%	21.1%
Fertility rate ¹ (2021)	1.3	1.5

Socioeconomic facts

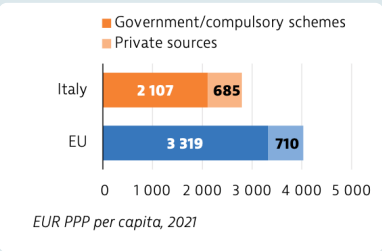
GDP per capita (EUR PPP ²)	33,688	35,219
Relative poverty rate ³ (% , 2019)	20.1%	16.5%
Unemployment rate (%)	8.1%	6.2%

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. Source: Eurostat database.



Health status

Over the two decades leading up to the pandemic, Italy's life expectancy at birth generally increased in line with the EU average. However, in 2020, life expectancy dropped by 1.3 years due to the pandemic. By 2022, it had partially recovered to 83.0 years—one of the highest levels in the EU—though it still remained six months below the pre-pandemic level. Circulatory diseases continue to be the leading cause of death in Italy, followed closely by cancer.



Health system

In 2021, Italy's health expenditure stood at 9.4% of GDP - over 1.5 percentage points below the EU average. Between 2019 and 2021, health expenditure per capita increased by nearly 7 %, driven exclusively by increased public expenditure to tackle the pandemic. Approximately three quarters of health expenditure is publicly funded - a lower proportion than the EU average of 81%.



Italy's e-pharmacy Market: steady growth amid regulatory limitations

Italy's fragmented e-pharmacy market reached €900 million in 2023 with 13% growth. Despite Rx online restrictions, Efarma.com and Redcare.it thrive by focusing on OTC and BPC sales, leveraging relaxed regulations and rising demand.

e-pharmacy facts

Estimations as of 01/2023

900 mln €

Total e-pharmacy Sales 2023

13 %

Estimated Growth 2022/2023

Top e-pharmacies

Avg. monthly visitors

Rank	Domain	Monthly Visitors
1	Efarma.com	3,0 mln
2	Redcare.it	2,5 mln
3	Farmasave.it	1,8 mln
4	Farmae.it	1,5 mln
5	Farmacialoreto.it	1,5 mln
6	1000farmacie.it	1,4 mln
7	Tuttofarma.it	0,9 mln
8	Topfarmacia.it	0,9 mln
9	Farmacosmo.it	0,9 mln
10	Drmax.it	0,8 mln

Regulations

Current legal framework

OTC online



Rx online



e-prescription



Other specifics

Italy has enabled patients to obtain their OTC medications online, enhancing consumer /patient value and convenience. Safety is ensured through registration and the use of an EU logo, although the sale of prescription drugs online remains prohibited.

France





France's Health & Economy: solid healthcare expenditure and higher life expectancy

With a population of nearly 68 million, France's life expectancy surpasses the EU average despite recent declines. Health expenditure is substantial at 12.3% of GDP, just behind Germany.

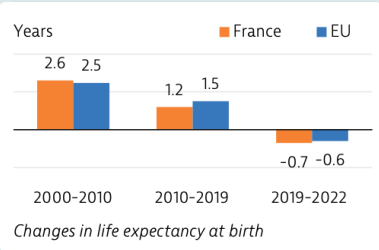
Demographic facts

	France	EU
Population size (mid-year estimates)	67,871,925	446,735,291
Share of population over age 65 (%)	21.0%	21.1%
Fertility rate ¹ (2021)	1.8	1.5

Socioeconomic facts

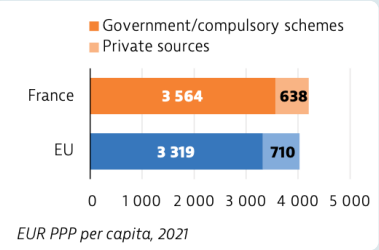
GDP per capita (EUR PPP ²)	35,769	35,219
Relative poverty rate ³ (% , 2021)	15.6%	16.5%
Unemployment rate (%)	7.3%	6.2%

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. Source: Eurostat database.



Health status

Life expectancy in France exceeded the EU average by over 1.5 years in 2022, even though it fell by more than half a year between 2019 and 2022 mainly due to COVID-19, bad flu seasons and heatwaves. Even before the pandemic, gains in life expectancy had slowed considerably between 2010 and 2019. The gender gap in life expectancy remains large, with men living on average nearly 6 years less than women.



Health system

Health spending per capita in France is only slightly higher than the EU average. Adjusted for differences in purchasing power, it reached about EUR 4200 in 2021 compared to an EU average of EUR 4030. As a share of GDP, health spending reached 12.3 % of GDP in 2021 - the second highest share in the EU after Germany - and more than 1 percentage point higher than before the pandemic.



France's e-pharmacy Market: growth and innovation driving the industry forward

The French e-pharmacy market, estimated at 600 million euros, is growing at a rate of 7%. Major e-pharmacies and digital health initiatives drive this thriving market.

e-pharmacy facts

Estimations as of 01/2023

600 mln €

Total e-pharmacy Sales 2023

6 %

Estimated Growth 2022/2023

Top e-pharmacies

Avg. monthly visitors

Rank	Domain	Monthly Visitors
1	Pharma-gdd.com	1,8 mln
2	Atida.fr	1,4 mln
3	Newpharma.fr	1,1 mln
4	Pharmashopi.com	992 k
5	Pharmaciedesdrakkars.com	898 k
6	Lasante.net	732 k
7	Easypara.fr	561 k
8	Redcare-pharmacie.fr	531 k
9	Mesoigner.fr	485 k
10	Cocooncenter.com	484 k

Regulations

Current legal framework

OTC online



Rx online



e-prescription*



Other specifics

France has permitted online sales of OTC medications, ensuring consumer/patient convenience and safety through strict regulations, including the use of an EU logo. The Plan Ma Santé 2022 accelerates healthcare digitalisation, although France lags behind here.

Belgium





Belgium's Health & Economy: High life expectancy and economic strength

In 2022, Belgium's life expectancy was 81.8 years, above the EU average. Health expenditure was 11% of GDP. The pandemic's impact was moderate. With a GDP per capita of €42,213 and a low unemployment rate, Belgium's resilience is notable.

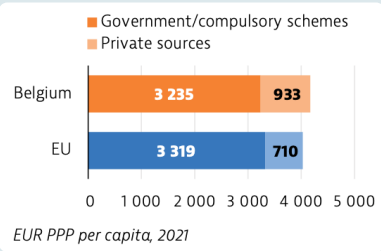
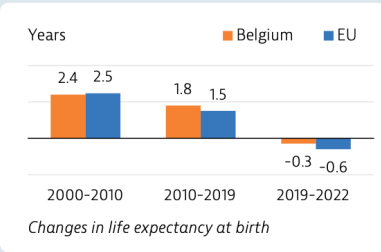
Demographic facts

	Belgium	EU
Population size (mid-year estimates)	11,617,623	446,735,291
Share of population over age 65 (%)	19.5%	21.1%
Fertility rate ¹ (2021)	1.6	1.5

Socioeconomic facts

GDP per capita (EUR PPP ₂)	42,213	35,219
Relative poverty rate ₃ (% , 2019)	13.2%	16.5%
Unemployment rate (%)	5.6%	6.2%

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. Source: Eurostat database.



Health status

Life expectancy in Belgium increased in line with the EU average in the two decades preceding the COVID-19 pandemic, and its reduction throughout the pandemic was comparatively less severe. Following a steep drop in 2020, life expectancy rebounded strongly in 2021, but remained 0.3 years below its pre-pandemic level in 2022, at 81.8 years. Cardiovascular diseases were the leading cause of death in 2020, followed by cancer and COVID-19.

Health system

Health spending reached EUR 4168 per capita in 2021, which was slightly above the EU average. Health spending accounted for 11 % of GDP - a share equal to the EU average. Public spending made up 77.6% of overall health expenditure, while out-of-pocket payments accounted for nearly 18% of total spending - a share above the EU average of 14.5 %.



Belgium's e-pharmacy Market: Integrating Digital Sales with National Policy

Belgium’s e-pharmacy sales reach €450 million in 2023, with a solid 8% growth from the previous year, as OTC mail orders thrive under supportive regulations.

e-pharmacy facts

Estimations as of 01/2024

450 mln €

Total e-pharmacy Sales 2023

11 %

Estimated Growth 2022/2023

Top e-pharmacies

Avg. monthly visitors

Rank	Domain	Monthly Visitors
1	Farmaline.be	2.5 mln
2	Newpharma.be	1.6 mln
3	Medi-market.be	568 k
4	Pharmamarket.be	313 k
5	Avogel.be	170 k
6	Multipharma.be	168 k
7	Viata.be	126 k
8	Pazzox.be	119 k
9	24pharma.be	103 k
10	Pharmacy-medi-market.be	95 k

Regulations

Current legal framework

OTC online



Rx online



e-prescription



Other specifics

E-prescriptions are live since 2013 and mandatory since 2020. Rx mail order is prohibited. OTC mail order is allowed since 2009.

Poland





Poland's Health & Economy: Healthcare under economic tensions

Poland's life expectancy decreased slightly between 2019 and 2022, remaining below the EU average. While healthcare spending is lower than the EU average, comprehensive coverage exists, with significant private financing.

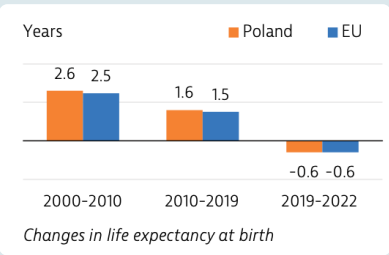
Demographic facts

	Poland	EU
Population size (mid-year estimates)	37,654,247	446,735,291
Share of population over age 65 (%)	19.1%	21.1%
Fertility rate ¹ (2021)	1.3	1.5

Socioeconomic facts

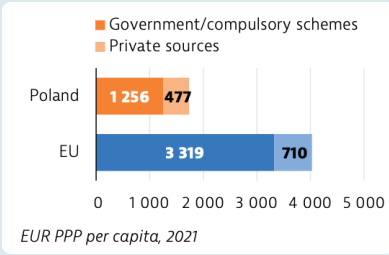
GDP per capita (EUR PPP ²)	28,044	35,219
Relative poverty rate ³ (% , 2021)	13.7%	16.5%
Unemployment rate (%)	2.9%	6.2%

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. Source: Eurostat database.



Health status

Life expectancy at birth in Poland fell by 0.6 years between 2019 and 2022, and at 77.4 years it was 3.3 years below the EU average in 2022. Circulatory diseases and cancers accounted for more than half of all deaths in 2021, followed by COVID-19.



Health system

While Poland's health expenditure is well below the EU average, it provides universal coverage and a broad package of benefits. The share of private spending is relatively high, at 28% compared to 19% across the EU. The majority of this spending is in the form of out-of-pocket payments (20 %), with nearly two-thirds of it spent on medicines.



Poland’s e-pharmacy Market: strong growth with evolving regulations

Poland’s e-pharmacy market reached €450 million in 2023, growing by 19%. Major e-pharmacies lead the market, supported by comprehensive regulations allowing OTC and e-prescriptions, though Rx mail order is restricted.

e-pharmacy facts

Estimations as of 01/2023

450 mln €

Total e-pharmacy Sales 2023

19 %

Estimated Growth 2022/2023

Top e-pharmacies

Avg. monthly visitors

Rank	Domain	Monthly Visitors
1	Doz.pl	10 mln
2	Superpharm.pl	3.2 mln
3	Apotekaolmed.pl	3.1 mln
4	Wapteka.pl	2.5 mln
5	Gemini.pl	2.0 mln
6	Apoteka-melissa.pl	1.9 mln
7	Apteline.pl	1.8 mln
8	E-zikoapoteka.pl	1.4 mln
9	Allecco.pl	1.3 mln
10	Drmax.pl	1.3 mln

Regulations

Current legal framework

OTC online



Rx online



e-prescription



Other specifics

Mail order for Rx medications is not permitted; however, certified pharmacies can sell and deliver OTC medications online. E-prescriptions have been mandatory since 2015, simplified by the PEM app since 2019.

Spain





Spain's Health & Economy: high life expectancy despite lower healthcare expenditure

Spain, with one of the EU's highest life expectancies (83.2), faces a higher poverty rate and lower healthcare spending per capita than the EU average, yet maintains universal health coverage.

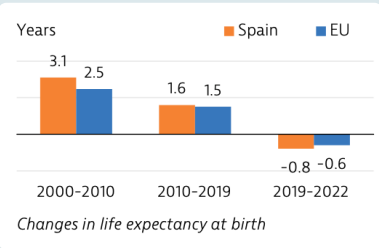
Demographic facts

	Spain	EU
Population size (mid-year estimates)	47,432,893	446,735,291
Share of population over age 65 (%)	20.1%	21.1%
Fertility rate ¹ (2021)	1.2	1.5

Socioeconomic facts

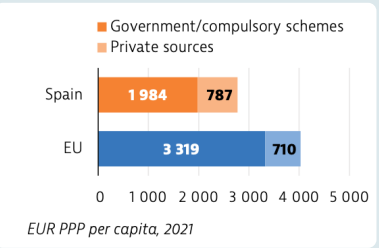
GDP per capita (EUR PPP ²)	29,808	35,219
Relative poverty rate ³ (% , 2021)	20.4%	16.5%
Unemployment rate (%)	12.9%	6.2%

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. Source: Eurostat database.



Health status

Spain has the highest life expectancy in the EU (83.2) in 2022. The country experienced a temporary, steep decrease in life expectancy between 2019 and 2020 due to COVID-19 deaths before levels rebounded in subsequent years. Overall, life expectancy declined in Spain by 0.8 years over the pandemic period, slightly more than the EU average.



Health system

While Spain's health expenditure - at EUR 2771 per capita - falls below the EU average, the health system provides universal health coverage. Public expenditure is the primary source of financing, but levels of out-of-pocket spending (21 %) are higher than the EU average (15 %). The system is decentralised, and regional health authorities have jurisdiction over operational planning, resource allocation, and purchasing and provision decisions.



Spain’s e-pharmacy Market: thriving through strong OTC regulation and digital engagement

With estimated sales of 300 million euros and 10% growth in 2023, Spain’s e-pharmacies capitalize on OTC mail order, while Rx mail order remains restricted under stringent regulations.

e-pharmacy facts

Estimations as of 01/2023

300 mln €

Total e-pharmacy Sales 2023

10 %

Estimated Growth 2022/2023

Top e-pharmacies

Avg. monthly visitors

Rank	Domain	Monthly Visitors
1	Promofarma.com	2.1 mln
2	Atida.com	1.3 mln
3	Naturitas.es	1.1 mln
4	nutritienda.com	0,8 mln
5	Dosfarma.com	0,8 mln
6	Farmaciasdirect.com	0,7 mln
7	Farmavazquez.com	0,5 mln
8	Pharmacius.com	0,4 mln
9	Farmasoler.com	0,4 mln
10	Farmaciaecontracontreras.com	0,4 mln

Regulations

Current legal framework

OTC online



Rx online



e-prescription



Other specifics

In Spain, mail order of prescription drugs is prohibited for reasons of patient safety. OTC mail order is exclusive to licensed pharmacies. E-prescriptions are a mandatory component of the national e-health strategy.

Austria





Austria's Health & Economy: sustained health & economic growth amid pandemic

Austria, has a GDP per capita higher than the EU average, while its aging trends and fertility rates align with those seen across the EU. Austrians enjoy higher life expectancy and substantial healthcare investment.

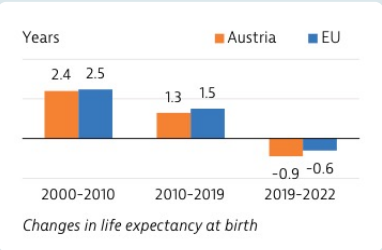
Demographic facts

	Austria	EU
Population size (mid-year estimates)	8,978,929	446,735,291
Share of population over age 65 (%)	19.4%	21.1%
Fertility rate ¹ (2021)	1.5	1.5

Socioeconomic facts

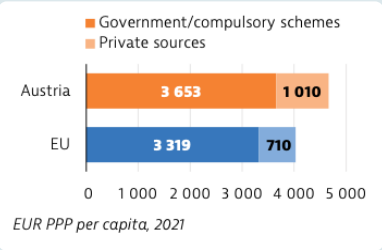
GDP per capita (EUR PPP ²)	44,065	35,219
Relative poverty rate ³ (% , 2021)	14.8%	16.5%
Unemployment rate (%)	4.8%	6.2%

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. Source: Eurostat database.



Health status

Despite a nearly 1-year drop in life expectancy in Austria from 2019 to 2022, it remained slightly above the EU average in 2022 (81.1). Gains in life expectancy had already slowed down from 2010 to 2019. Socioeconomic disparities are significant: in 2019, highly educated Austrian men lived 5.6 years longer than the least educated, with a 3.8-year gap for women.



Health system

Health expenditure per capita was among the highest in the EU in 2021. Despite a declining trend, expenditure on inpatient care remains higher than the EU average. Three quarters of health expenditure come from public and compulsory schemes, which is less than the EU average, while the share of out-of-pocket spending is above the average. Despite high physician density, there are regional imbalances and few general practitioners.



Austria's e-pharmacy Market: digital transformation in healthcare retail

Rising to €250 million in 2023, Austria's e-pharmacies mark a 14% growth, blending healthcare and digital services within a transforming regulatory framework.

e-pharmacy facts

Estimations as of 01/2024

250 mln €

Total e-pharmacy Sales 2023

14 %

Estimated Growth 2022/2023

Top e-pharmacies

Avg. monthly visitors

Rank	Domain	Monthly Visitors
1	Shop-apotheke.at	3.0 mln
2	Apotheke.at	240 k
3	Vamida.at	174 k
4	Gurkerl.at	155 k
5	Zurrose.at	116 k
6	Servusapotheke.at	62 k
7	Medistore.at	61 k
8	Uniapotheke.de	30 k
9	Medpex.at	3,2 k

Regulations

Current legal framework

OTC online



Rx online



e-prescription



Other specifics

Mail order of prescription drugs is prohibited, but liberalisation is supported by the competition authority. In the aftermaths of Covid-19, the e-prescription system was launched, with widespread use planned.



Czechia



Czechia's Health & Economy: Stable growth with comprehensive healthcare

Czechia's life expectancy (79.1), is below the EU average. Healthcare spending is moderate, yet the country provides comprehensive coverage, with a high percentage of public funding.

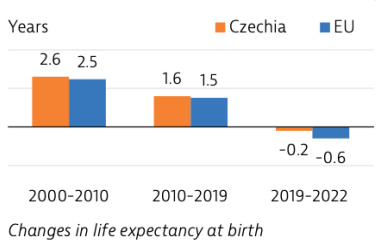
Demographic facts

	Czechia	EU
Population size (mid-year estimates)	10,516,707	446,735,291
Share of population over age 65 (%)	20.6%	21.1%
Fertility rate ¹ (2019)	1.8	1.5

Socioeconomic facts

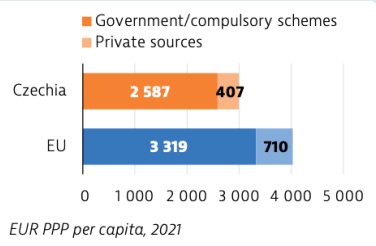
GDP per capita (EUR PPP ₂)	31,953	35,219
Relative poverty rate ₃ (% , 2019)	10.2%	1.5%
Unemployment rate (%)	2.2%	6.2%

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. Source: Eurostat database.



Health status

Life expectancy in Czechia grew at about the same rate as the EU average in the two decades before the pandemic; it fell between 2019 and 2021, before rebounding slightly to 79.1 years in 2022 - 1.6 years below the EU average of 80.7 years. Circulatory diseases, cancer and COVID-19 were the main causes of death in 2021, accounting for over 70% of all deaths.



Health system

In 2021, Czechia spent EUR 2994 per capita on health (adjusted for differences in purchasing power) - about a quarter less than the EU average of EUR 4 029. Health spending accounted for 9.5% of GDP, a higher share than in pre-pandemic years but still below the EU average of 11.0%. Most health spending in Czechia (86 %) came from public funds - the highest share in the EU and over 5 percentage points above the EU average



Czech Republic's e-pharmacy Surge: E-Commerce Meets Health Innovation

e-pharmacy revenues in Czechia soar to €230 million with a robust 20% growth in 2023, reflecting a tech-savvy approach to OTC sales and expanding digital health infrastructure.

e-pharmacy facts

Estimations as of 01/2024

230 mln €

Total e-pharmacy Sales 2023

20 %

Estimated Growth 2022/2023

Top e-pharmacies

Avg. monthly visitors

Rank	Domain	Monthly Visitors
1	Drmax.cz	5.8 mln
2	Benu.cz	3.1 mln
3	Lekarna.cz	2.1 mln
4	Pilulka.cz	1.5 mln
5	Gigalekarna.cz	509 k
6	Euclekarna.cz	204 k
7	Lekarna-bella.cz	158 k
8	Prozdravi.cz	139 k
9	Lekarnaave.cz	88 k
10	Klubzdravi.cz	71 k

Regulations

Current legal framework

OTC online



Rx online



e-prescription



Other specifics

Rx mail order is forbidden. OTC mail order sales by registered Pharmacies are permitted. Of the 6% of pharmaceutical sales made through online orders, the majority are collected from local Pharmacies. E-Rx is mandatory, introduced as part of the national e-health strategy.

A light blue silhouette map of Europe serves as the background for the entire slide.

eaep⁺

EUROPEAN ASSOCIATION OF
E-PHARMACIES

In cooperation with

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