

European Online Pharmacy Market: Analysis By Type (OTC and Rx), By Region Size And Trends With Impact Of COVID-19 And Forecast up to 2027

<https://marketpublishers.com/r/E7273E006649EN.html>

Date: December 2022

Pages: 103

Price: US\$ 2,250.00 (Single User License)

ID: E7273E006649EN

Abstracts

The European online pharmacy market was valued at US\$17.26 billion in 2021 and is expected to reach US\$44.18 billion by 2027. An online pharmacy is a website offering to deliver, distribute or dispense medication on the internet directly to consumers. The online pharmacy market is a growing market with potentially new market entries who are striving to participate in the e-script market potential. This could potentially lead to pressure in the OTC business with more competitors in the Rx business along with an end to the post-covid boom in online pharmacy sales due to the diminishing impact from the pandemic and the return of the normal flu/cold season.

Several well-known brick and mortar pharmacy stores in Eastern Europe are shifting their focus to online sales channels in an effort to increase their customers. The market growth is also being driven by the growing consumer knowledge of the numerous additional advantages of online pharmacy services, including express delivery alternatives, open payment methods, cashback, discounted deals, etc. The European online pharmacy market is determined to grow at a CAGR of 16.95% over the forecasted period of 2022-2027.

Market Segmentation Analysis:

By Type: The report provides the bifurcation of online pharmacy market based on the type: Online OTC and Online Rx. Online OTC lead the market with the maximum share in 2021 owing to the increasing internet penetration and increasing knowledge of the benefits of online services, particularly for over-the-counter (OTC) medications.

By Region: In the report, the European online OTC pharmacy market is divided into the

following regions: Germany, the UK, Italy, France, Spain, Netherlands, Belgium, Austria, and Rest of the Europe. Germany held the major share in the market owing to the increasing demand for online medications and doorstep delivery. The German retail pharma market stands out as the most significant market for online pharmacies in Europe given its size and regulation. While several large European markets are much less relevant as they have not opened prescription drugs (Rx) to mail-order.

The German online OTC pharmacy can be further divided into two segments based on type namely, BP (Beauty Products), HP (Healthcare Products), Nutrition, and Medicine-related OTC products. The BP, HP, Nutrition segment held the major share in the market.

Moreover, the report also provides the analysis of German Online Rx market. The online Rx pharmacy market is growing in Germany in the past few years driven by the convenience and cheaper costs of purchasing prescription drugs online, especially under the lockdown situation.

Market Dynamics:

Growth Drivers: The European online pharmacy market has been growing over the past few years, due to factors such as the aging population, an increasing number of internet users, increasing healthcare e-commerce, convenience & lower pricing, increasing value-added services, etc. Value-added products/services are being offered by online pharmacies to widen their customer base, like e-Diagnostic services, appointments for a doctor consultation, e-Consultation, etc. In addition to online doctor services for consultations over the web, online pharmacies also strive to provide useful information about medications, diseases, and a healthy lifestyle. These services have widened the customer base of online pharmacies in the past few years, thus resulting in market growth.

Challenges: However, some challenges are impeding the growth of the market such as the regulatory environment, cyber threats & data security, increasing practice of illegal online pharmacies, concerns with inappropriate self-diagnosis, etc.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various market trends like integration of AI in the pharmacy sector, rising implementation of e-prescriptions, escalating adoption of new technology, etc. Artificial intelligence improves the quality of services. It provides operational efficiency, accurate diagnosis, effective disease prevention, and daily health prevention to increase trust

and customer loyalty.

Impact Analysis of COVID-19 and Way Forward:

The COVID-19 pandemic has significantly fueled growth in the European online pharmacy market. Due to the travel bans and lockdowns, as well as the concern over contracting SARS-CoV2, more people were turning to online pharmacies to buy both prescription and OTC medications. Additionally, virtual-based teleconsultation was replacing in-person doctor appointments, which resulted in the development of digital prescriptions and further boosted the European online pharmacy market. Practices such as electronic transfer of prescriptions, and services such as the home delivery of medicines are expected to continue to some extent in the post-COVID era, thus driving the market growth.

Competitive Landscape:

The European online pharmacy market is fragmented. The key players in the European online pharmacy market are:

Zur Rose Group

Shop Apotheke Europe

Chemist4U

Apotea

ChemistDirect

Parafarmacia-Online

Meds Apotek AB

LloydsPharmacy

MedExpress

UK Meds Direct Ltd.

Euro-Pharmas

Medikamente-per-klick

Some of the strategies among key players in the market for online pharmacies are mergers, acquisitions, and collaborations. For instance, in 2022, the Zur Rose Group announced that the group had completed the operational integration of the Medpex brand at the Heerlen facility. On the other hand, Shop Apotheke Europe announced the successful opening of the company's new distribution center in Milan, Italy. In 2021, Shop Apotheke was the major player in the German online pharmacy market followed by DocMorris.

Contents

1. EXECUTIVE SUMMARY

2. INTRODUCTION

2.1 Online Pharmacy: An Analysis

2.1.1 Introduction to Online Pharmacy

2.1.2 Online Pharmacy Vs. Local Pharmacy

2.2 Online Pharmacy Segmentation: An Analysis

2.2.1 Online Pharmacy Segmentation

3. EUROPEAN MARKET ANALYSIS

3.1 European Online Pharmacy Market: An Analysis

3.1.1 European Online Pharmacy Market: An Overview

3.1.2 European Online Pharmacy Market by Value

3.1.3 European Online Pharmacy Market by Type (Online OTC and Online Rx)

3.2 European Online Pharmacy Market: Type Analysis

3.2.1 European Online Pharmacy Market by Type: An Overview

3.2.2 European Online OTC Pharmacy Market by Value

3.2.3 European Online OTC Pharmacy Market by Region (Germany, the UK, Italy, France, Spain, Netherlands, Belgium, Austria, and Rest of the Europe)

3.2.4 European Online OTC Pharmacy Penetration by Region

3.2.5 European Online Rx Pharmacy Market by Value

3.2.6 European Online Rx Pharmacy Market by Region (Germany and Rest of the Europe)

4. REGIONAL MARKET ANALYSIS

4.1 Germany Online OTC Pharmacy Market: An Analysis

4.1.1 Germany Online OTC Pharmacy Market: An Overview

4.1.2 Germany Online OTC Pharmacy Market by Value

4.1.3 Germany Online OTC Pharmacy Market by Type (BP, HP, Nutrition and Medicine-related OTC products)

4.2 Germany Online Rx Pharmacy Market: An Analysis

4.2.1 Germany Online Rx Pharmacy Market: An Overview

4.2.2 Germany Online Rx Pharmacy Market by Value

4.2.3 Germany Online Rx Pharmacy by Penetration

- 4.3 UK Online OTC Pharmacy Market: An Analysis
 - 4.3.1 UK Online OTC Pharmacy Market: An Overview
 - 4.3.2 UK Online OTC Pharmacy Market by Value
- 4.4 Italy Online OTC Pharmacy Market: An Analysis
 - 4.4.1 Italy Online OTC Pharmacy Market: An Overview
 - 4.4.2 Italy Online OTC Pharmacy Market by Value
- 4.5 France Online OTC Pharmacy Market: An Analysis
 - 4.5.1 France Online OTC Pharmacy Market: An Overview
 - 4.5.2 France Online OTC Pharmacy Market by Value
- 4.6 Spain Online OTC Pharmacy Market: An Analysis
 - 4.6.1 Spain Online OTC Pharmacy Market: An Overview
 - 4.6.2 Spain Online OTC Pharmacy Market by Value
- 4.7 Netherlands Online OTC Pharmacy Market: An Analysis
 - 4.7.1 Netherlands Online OTC Pharmacy Market: An Overview
 - 4.7.2 Netherlands Online OTC Pharmacy Market by Value
- 4.8 Belgium Online OTC Pharmacy Market: An Analysis
 - 4.8.1 Belgium Online OTC Pharmacy Market: An Overview
 - 4.8.2 Belgium Online OTC Pharmacy Market by Value
- 4.9 Austria Online OTC Pharmacy Market: An Analysis
 - 4.9.1 Austria Online OTC Pharmacy Market: An Overview
 - 4.9.2 Austria Online OTC Pharmacy Market by Value
- 4.10 Rest of Europe Online OTC Pharmacy Market: An Analysis
 - 4.10.1 Rest of Europe Online OTC Pharmacy Market: An Overview
 - 4.10.2 Rest of Europe Online OTC Pharmacy Market by Value

5. IMPACT OF COVID-19

- 5.1 Impact of COVID-19 on European Online Pharmacy Market
- 5.2 Increasing Use of Telemedicine
- 5.3 Post COVID-19 Impact on European Online Pharmacy Market

6. MARKET DYNAMICS

- 6.1 Growth Drivers
 - 6.1.1 Aging Population
 - 6.1.2 Increasing Number of Internet Users
 - 6.1.3 Increasing Health Care E-Commerce
 - 6.1.4 Convenience & Lower Pricing
 - 6.1.5 Increasing Value Added Services

6.2 Challenges

- 6.2.1 Regulatory Environment
- 6.2.2 Cyber Threats and Data Security
- 6.2.3 Increasing Practice of Illegal Online Pharmacy
- 6.2.4 Concerns with Inappropriate Self-Diagnosis

6.3 Market Trends

- 6.3.1 Integration of AI in Pharmacy Sector
- 6.3.2 Rising Implementation of E-Prescriptions
- 6.3.3 Escalating Adoption of New Technology

7. COMPETITIVE LANDSCAPE

- 7.1 European Online Pharmacy Market Players : Key Comparison
- 7.2 European Online Pharmacy Market Players by Digital Comparison
- 7.3 Germany Online Pharmacy Players by Market Share
- 7.4 Germany Online Pharmacy Players by Discount Offered

8. COMPANY PROFILES

- 8.1 Zur Rose Group
 - 8.1.1 Business Overview
 - 8.1.2 Operating Segments
 - 8.1.3 Business Strategy
- 8.2 Shop Apotheke Europe
 - 8.2.1 Business Overview
 - 8.2.2 Operating Segments
 - 8.2.3 Business Strategy
- 8.3 Chemist4U
 - 8.3.1 Business Overview
 - 8.3.2 Business Strategy
- 8.4 Apotea
 - 8.4.1 Business Overview
 - 8.4.2 Business Strategy
- 8.5 ChemistDirect
 - 8.5.1 Business Overview
- 8.6 Parafarmacia-Online
 - 8.6.1 Business Overview
- 8.7 Meds Apotek AB
 - 8.7.1 Business Overview

8.8 LloydsPharmacy

8.8.1 Business Overview

8.9 MedExpress Enterprises Ltd.

8.9.1 Business Overview

8.10 UK Meds Direct Ltd.

8.10.1 Business Overview

8.11 Euro-Pharmas

8.11.1 Business Overview

8.12 Medikamente-per-klick

8.12.1 Business Overview

List Of Figures

LIST OF FIGURES

Figure 1: Online Pharmacy Segmentation by Type

Figure 2: European Online Pharmacy Market by Value; 2017-2021 (US\$ Billion)

Figure 3: European Online Pharmacy Market by Value; 2022-2027 (US\$ Billion)

Figure 4: European Online Pharmacy Market by Type; 2021 (Percentage, %)

Figure 5: European Online OTC Pharmacy Market by Value; 2017-2021 (US\$ Billion)

Figure 6: European Online OTC Pharmacy Market by Value; 2022-2027 (US\$ Billion)

Figure 7: European Online OTC Pharmacy Market by Region; 2021 (Percentage, %)

Figure 8: European Online OTC Pharmacy Penetration by Region; 2021 (Percentage, %)

Figure 9: European Online Rx Pharmacy Market by Value; 2017-2021 (US\$ Billion)

Figure 10: European Online Rx Pharmacy Market by Value; 2022-2027 (US\$ Billion)

Figure 11: European Online Rx Pharmacy Market by Region; 2021 (Percentage, %)

Figure 12: Germany Online OTC Pharmacy Market by Value; 2017-2021 (US\$ Billion)

Figure 13: Germany Online OTC Pharmacy Market by Value; 2022-2027 (US\$ Billion)

Figure 14: Germany Online OTC Pharmacy Market by Type; 2021 (Percentage, %)

Figure 15: Germany Online Rx Pharmacy Market by Value; 2020-2021 (US\$ Million)

Figure 16: Germany Online Rx Pharmacy Market by Value; 2022-2027 (US\$ Billion)

Figure 17: Germany Online Rx Pharmacy by Penetration; 2020-2026 (Percentage, %)

Figure 18: UK Online OTC Pharmacy Market by Value; 2017-2021 (US\$ Billion)

Figure 19: UK Online OTC Pharmacy Market by Value; 2022-2027 (US\$ Billion)

Figure 20: Italy Online OTC Pharmacy Market by Value; 2017-2021 (US\$ Million)

Figure 21: Italy Online OTC Pharmacy Market by Value; 2022-2027 (US\$ Billion)

Figure 22: France Online OTC Pharmacy Market by Value; 2017-2021 (US\$ Million)

Figure 23: France Online OTC Pharmacy Market by Value; 2022-2027 (US\$ Billion)

Figure 24: Spain Online OTC Pharmacy Market by Value; 2017-2021 (US\$ Million)

Figure 25: Spain Online OTC Pharmacy Market by Value; 2022-2027 (US\$ Million)

Figure 26: Netherlands Online OTC Pharmacy Market by Value; 2017-2021 (US\$ Million)

Figure 27: Netherlands Online OTC Pharmacy Market by Value; 2022-2027 (US\$ Million)

Figure 28: Belgium Online OTC Pharmacy Market by Value; 2017-2021 (US\$ Million)

Figure 29: Belgium Online OTC Pharmacy Market by Value; 2022-2027 (US\$ Million)

Figure 30: Austria Online OTC Pharmacy Market by Value; 2017-2021 (US\$ Million)

Figure 31: Austria Online OTC Pharmacy Market by Value; 2022-2027 (US\$ Million)

Figure 32: Rest of Europe Online OTC Pharmacy Market by Value; 2017-2021 (US\$

Billion)

Figure 33: Rest of Europe Online OTC Pharmacy Market by Value; 2022-2027 (US\$ Billion)

Figure 34: European Share of People who Received Telemedicine Consultation; April 2020-March 2021 (Percentage, %)

Figure 35: European Population Ages 65 and Above; 2017-2021 (Percentage, %)

Figure 36: European Internet Users; 2017-2025 (Million)

Figure 37: European Health Care E-Commerce Revenue; 2019-2027 (US\$ Billion)

Figure 38: European AI Spending; 2019-2023 (US\$ Billion)

Figure 39: Germany Online Pharmacy Players by Market Share; 2021 (Percentage, %)

Figure 40: Germany Online Pharmacy Players by Discount Offered; Q1 2022 (Percentage, %)

Figure 41: Zur Rose Group Net Revenue by Segment; 2021 (Percentage, %)

Figure 42: Shop Apotheke Europe Revenue by Segment; 2021 (Percentage, %)

Table 1: Online Pharmacy Vs. Local Pharmacy

Table 2: European Regulation For Online Pharmacies

Table 3: European Online Pharmacy Market Players : Key Comparison

Table 4: European Online Pharmacy Market Players by Digital Comparison

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