

Europe Telemedicine - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Europe Telemedicine Market size is estimated at USD 48.72 billion in 2025, and is expected to reach USD 115.29 billion by 2030, at a CAGR of 18.8% during the forecast period (2025-2030).

The Europe Telemedicine Market is undergoing substantial growth, driven by critical factors transforming the healthcare sector across the continent. These forces are reshaping how healthcare is delivered and addressing pivotal challenges within European healthcare systems.

Megatrends and Macro Growth Drivers: Digital healthcare transformation, the need for cost-efficient solutions, and the shift towards patient-centered care models are driving the European Telemedicine Market. These trends are intertwined with other specific growth drivers, fueling the expansion of telemedicine in Europe.

Rising Healthcare Costs: Rising healthcare expenditures across Europe are propelling telemedicine adoption. As governments increase spending to enhance healthcare standards, there is a growing demand for cost-effective solutions. For example, countries like France, Denmark, Austria, the Netherlands, and Norway allocate 8-10% of their GDP to healthcare. Telemedicine helps mitigate costs linked to chronic disease management, reduce patient travel, and shorten hospital stays, offering a practical solution to escalating healthcare expenses.

Technological Innovations: The rapid digital transformation, accelerated by the COVID-19 pandemic, is significantly impacting healthcare delivery in Europe. The European Union and member states are spearheading initiatives to promote digital health. For instance, the EU4Health program allocates EUR5.1 billion to support healthcare's digital evolution. Meanwhile, investments in digital health startups are surging, with over 600 funded companies active across Europe. This innovation wave enhances

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telemedicine's accessibility, efficiency, and integration within healthcare systems.

Increasing Remote Patient Monitoring: Remote patient monitoring (RPM) has emerged as a valuable tool in improving disease management. Products like MicroPort CRM's Bluetooth-enabled Alizea and Borea pacemakers exemplify the technological advancements fueling RPM growth. In the UK, Smith+Nephew and Huma launched an RPM service for orthopedic surgeries, optimizing preoperative care and outcomes. These innovations improve care quality while reducing strain on healthcare systems.

Growing Burden of Chronic Diseases: Chronic diseases represent a significant challenge for healthcare systems in Europe, with telemedicine offering solutions to mitigate this burden. One-third of the European population over 15 lives with a chronic condition. Telemedicine facilitates continuous monitoring and access to care, especially for diseases like diabetes, which affects 59 million adults in Europe. The technology enables early diagnosis and personalized care, making it invaluable for managing chronic conditions across the continent.

In summary, the Europe Telemedicine Market is driven by rising economic pressures, technological advances, changing healthcare demands, and the chronic disease burden. As these forces reshape the healthcare landscape, telemedicine will continue playing a crucial role in delivering high-quality, accessible healthcare.

Europe Telemedicine Market Trends

Software: Driving Innovation in Europe's Telemedicine Market

Segment Overview: Software solutions are at the core of the European telemedicine market, enabling remote consultations and diagnoses via digital platforms. This segment accounts for roughly 45% of the market, driven by its ability to streamline patient-provider communication and integrate into broader healthcare systems.

Growth Drivers: The software segment benefits from megatrends like the rise in chronic diseases and technological advancements in artificial intelligence (AI) and data analytics. The COVID-19 pandemic triggered a significant increase in teleconsultations across Europe. In France, weekly teleconsultations skyrocketed from 40,000 in early 2020 to nearly 1 million at the pandemic's peak. AI-powered tools and real-time analytics are transforming telemedicine software, offering personalized care and predictive diagnostics.

Competitive Landscape: As companies vie for market dominance, developing comprehensive software platforms that offer broad functionality is a priority. Collaborations and acquisitions, like HealthHero's acquisition of Fernarzt.com, are enabling companies to expand their service offerings. Leading players focus on optimizing user experience, ensuring data security, and integrating AI-driven features. This trend is driving the future growth of Europe's telemedicine software market.

Germany: Spearheading Telemedicine Adoption in Europe

Regional Dynamics: Germany has emerged as a fast-growing telemedicine market within Europe, driven by robust healthcare infrastructure and progressive health policies. The market is expected to experience double-digit growth, outpacing other European countries due to Germany's focus on healthcare digitization and addressing care gaps in rural regions.

Market Catalysts: Germany's aging population and rising incidence of chronic diseases contribute to the growing demand for telemedicine services. The Digital Healthcare Act (DVG) of 2019 paved the way for integrating digital health into mainstream care. The COVID-19 crisis further accelerated telemedicine adoption, with German patients and healthcare providers rapidly embracing virtual care services.

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Competitive Strategies: Companies eyeing the German telemedicine market are focusing on localization and compliance with stringent healthcare regulations. Collaborations with local healthcare providers are crucial for market entry, and investments in German-language platforms are key for user engagement. The market is expected to see increased competition between domestic startups and international players, fostering innovation and driving consolidation.

Europe Telemedicine Industry Overview

Market Dominance: Global Players and Specialized Companies Lead

The Europe Telemedicine Market is a mix of global healthcare conglomerates and specialized telemedicine providers. This moderately consolidated market sees major players like Koninklijke Philips NV, Medtronic PLC, and Teladoc Health Inc. dominate due to their strong technological expertise, broad healthcare portfolios, and significant resources.

Market Leaders: Technological Innovation and Comprehensive Solutions

Leading companies distinguish themselves through their commitment to innovation and comprehensive service offerings. Koninklijke Philips NV has developed integrated telehealth platforms, while Medtronic PLC offers remote monitoring for chronic diseases. Teladoc Health Inc., following its acquisition of InTouch Technologies, now offers an extensive suite of virtual care services. These leaders provide telemedicine solutions across multiple specialties, including telecardiology, teleradiology, and telepathology, catering to Europe's diverse healthcare needs.

Strategies for Future Success: Integration and Regulatory Compliance

Looking ahead, telemedicine companies must integrate AI and machine learning technologies into their platforms to enhance diagnostics and deliver personalized care. Solutions that ensure seamless integration with existing healthcare infrastructure will likely secure a competitive edge. Adherence to Europe's evolving regulatory frameworks, such as GDPR, is also critical for building trust and maintaining compliance. Firms that prioritize cybersecurity and demonstrate cost-effectiveness while improving patient outcomes are better positioned to capture market share and secure government support across Europe.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

4.1 Market Overview

4.2 Market Drivers

4.2.1 Increasing Remote Patient Monitoring

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4.2.2 Growing Burden of Chronic Diseases

4.3 Market Restraints

4.3.1 Legal and Reimbursement Issues

4.4 Porter's Five Forces Analysis

4.4.1 Bargaining Power of Suppliers

4.4.2 Bargaining Power of Buyers/Consumers

4.4.3 Bargaining Power of Suppliers

4.4.4 Threat of Substitute Products

4.4.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION (Market Size by Value -USD)

5.1 By Type

5.1.1 Telehospitals

5.1.2 Telehomes

5.1.3 mHealth (Mobile Health)

5.2 By Component

5.2.1 By Products

5.2.1.1 Hardware

5.2.1.2 Software

5.2.1.3 Other Products

5.2.2 By Services

5.2.2.1 Telepathology

5.2.2.2 Telecardiology

5.2.2.3 Teleradiology

5.2.2.4 Teledermatology

5.2.2.5 Telepsychiatry

5.2.2.6 Other Services

5.3 By Mode of Delivery

5.3.1 On-premise Delivery

5.3.2 Cloud-based Delivery

5.4 Geography

5.4.1 Germany

5.4.2 United Kingdom

5.4.3 France

5.4.4 Italy

5.4.5 Spain

5.4.6 Rest of Europe

6 COMPETITIVE LANDSCAPE

6.1 Company Profiles

6.1.1 Aerotel Medical Systems (1998) Ltd

6.1.2 Veradigm LLC

6.1.3 AMD Global Telemedicine

6.1.4 OTH.IO

6.1.5 International Business Machinery Corporation (IBM)

6.1.6 Teladoc Health Inc.

6.1.7 Resideo Technologies Inc.

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- 6.1.8 Koninklijke Philips NV
- 6.1.9 Medtronic PLC
- 6.1.10 SHL Telemedicine

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

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