



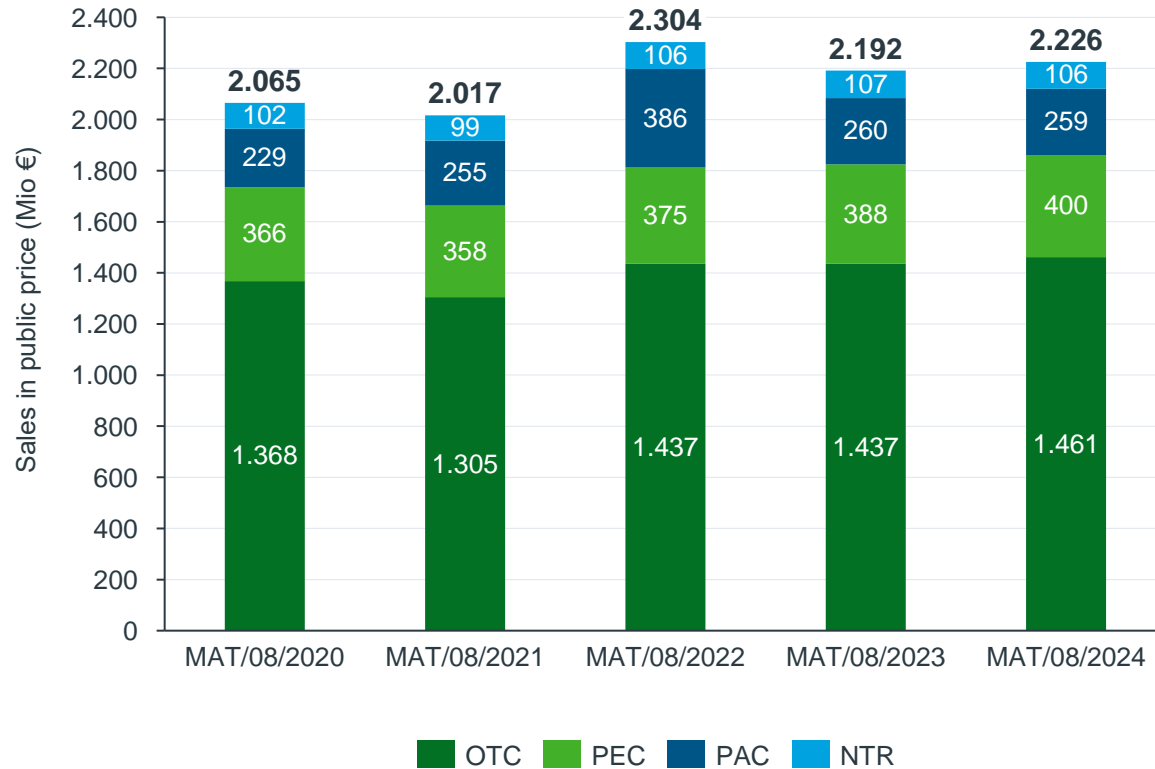
Monthly Belgium and Luxembourg Market Trends August 2024

- + Belgium: Retail
- + **Belgium: Consumer Health**
- + Luxembourg: Retail

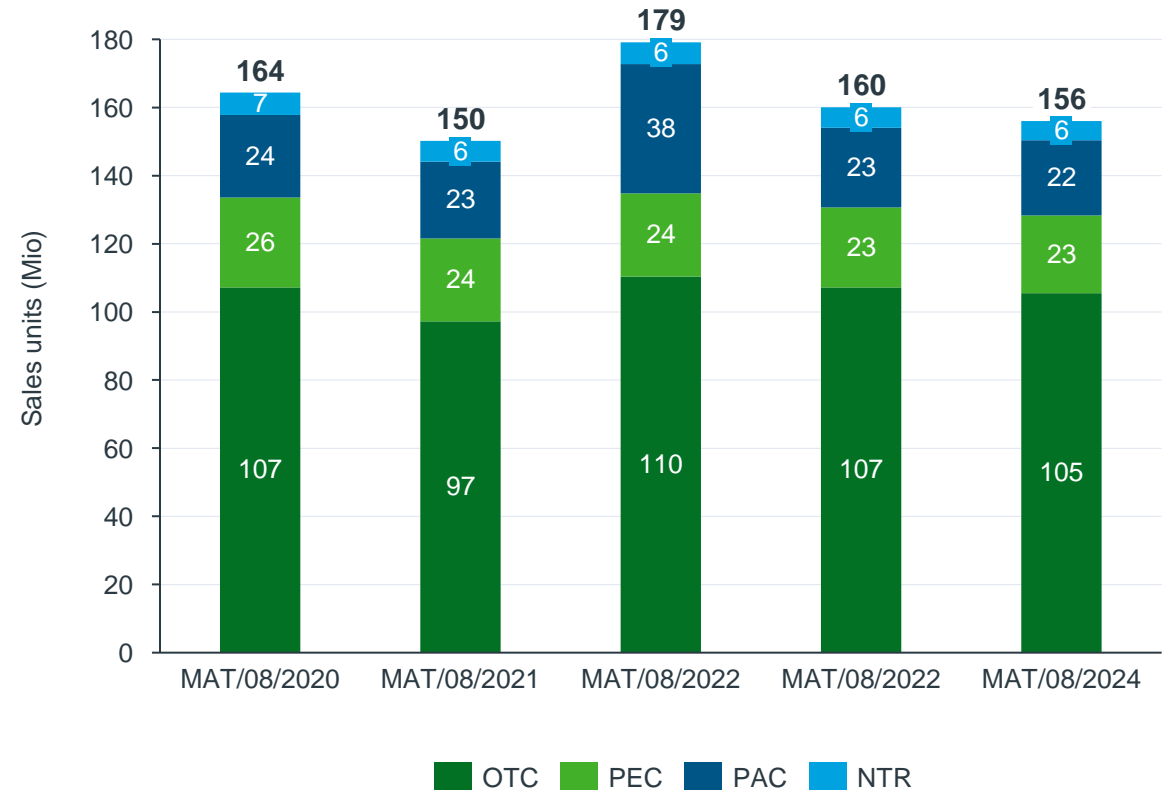


The Belgian retail market is worth € 2.2 billion

Sales Evolution VALUE



Sales Evolution UNITS



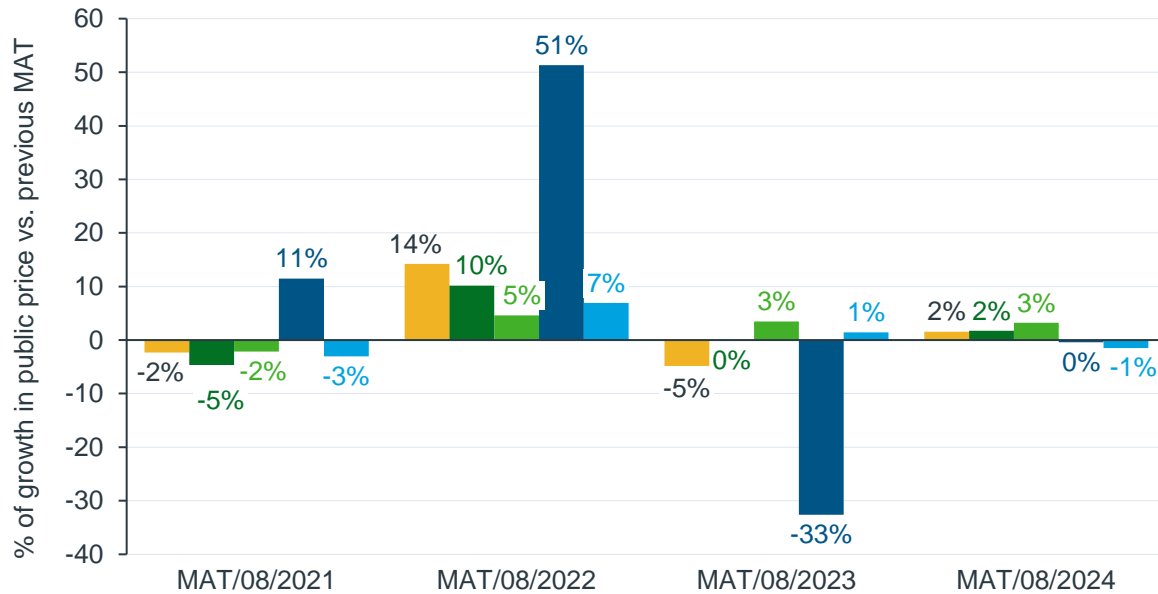


Consumer Health market growth evolution in Belgium

In the last MAT, in value, the total CH market shows an increase of 02%, while Patient Care decline with 00% and in units, the CH market shows a decrease of -03%, while the OTC declines with -02%

% of growth versus previous MAT

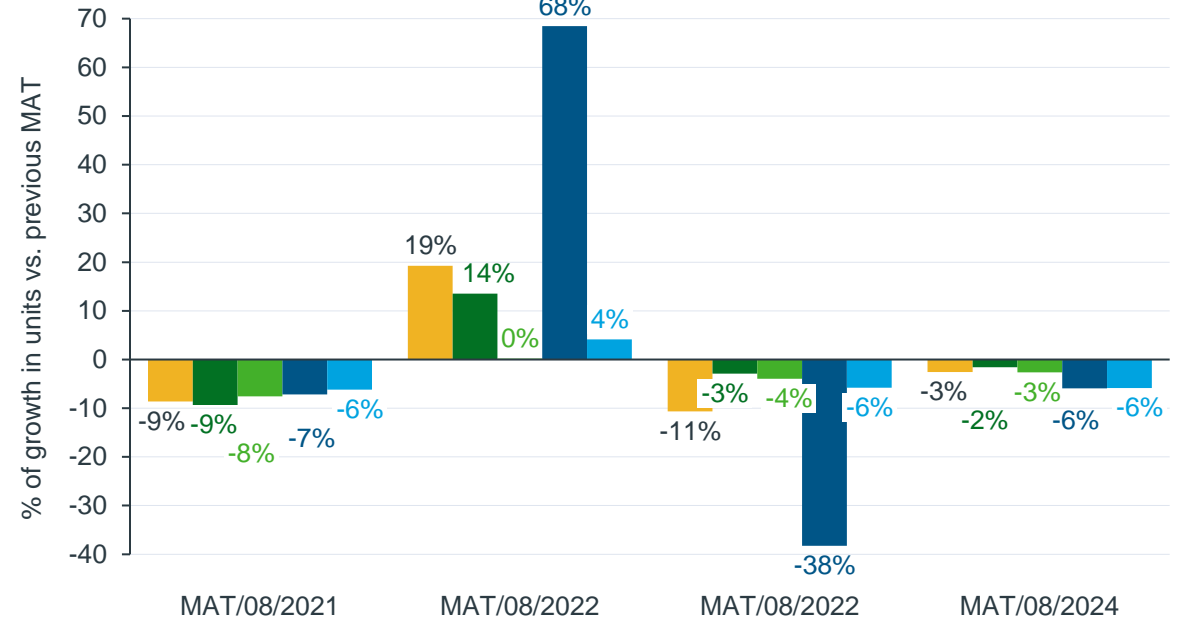
VALUE



Total Consumer Health OTC PEC PAC NTR

% of growth versus previous MAT

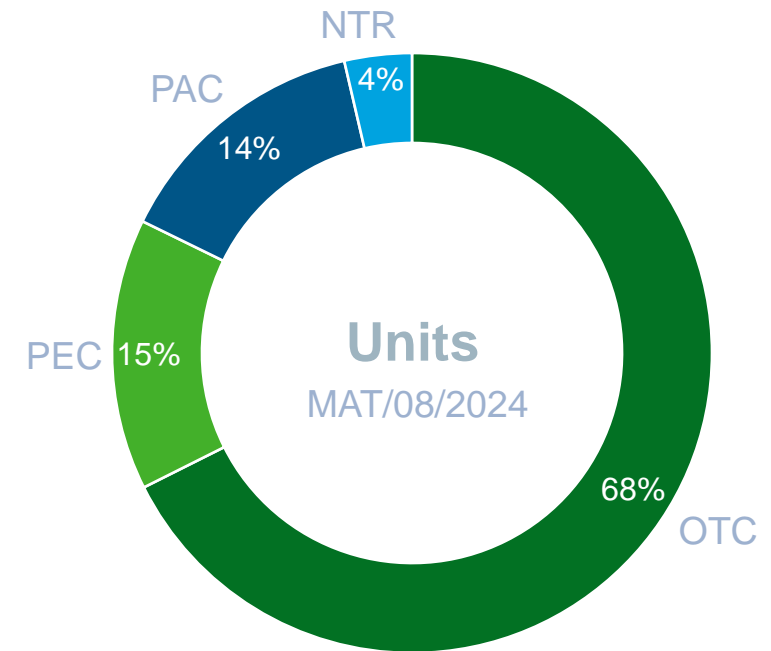
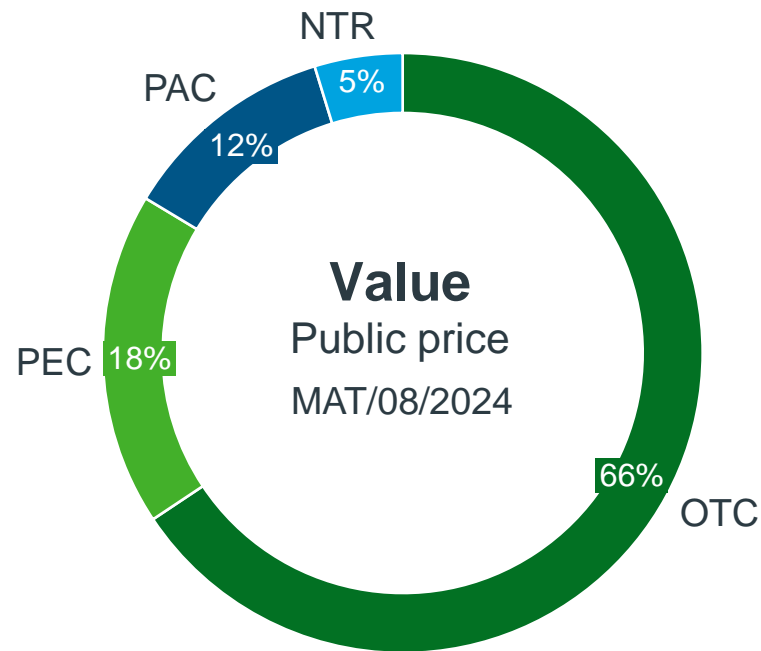
UNITS



Total Consumer Health OTC PEC PAC NTR

OTC segment has a market share of 68% in units and 66% in value of the total CH market

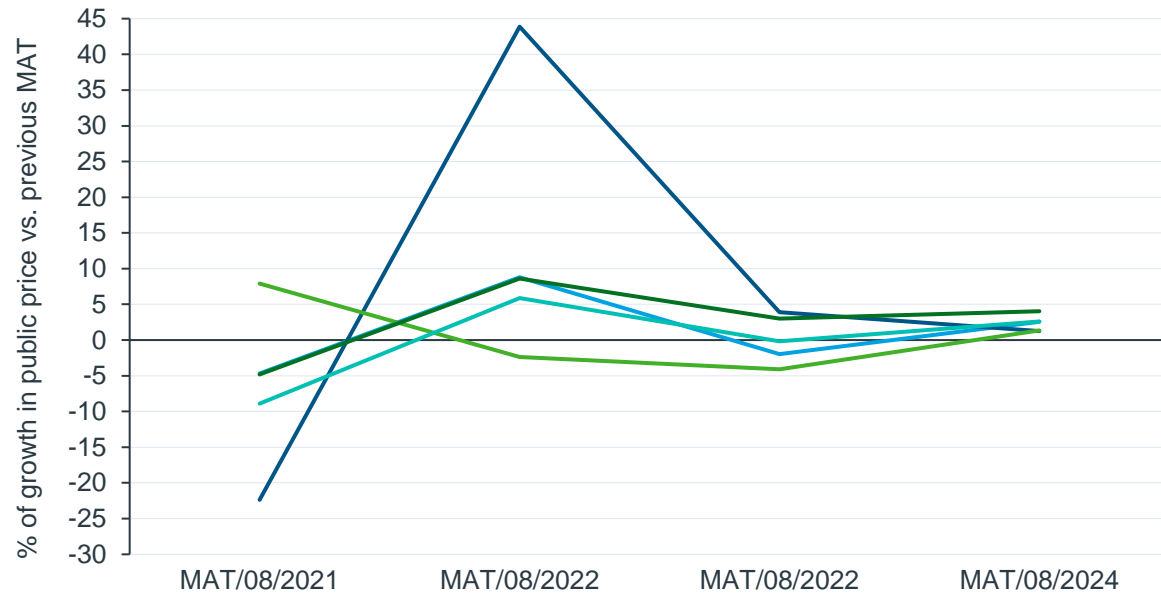
Market Share



Top 5 classes sales evolution

% of growth versus last MAT

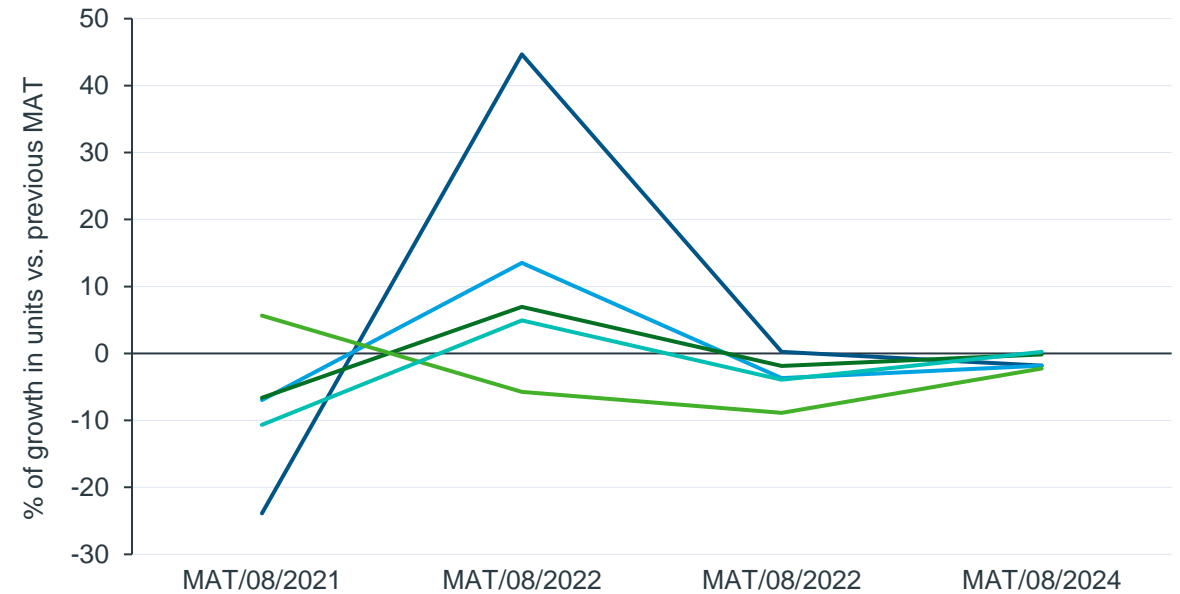
VALUE



- 02 PAIN RELIEF
- 01 COUGH COLD&OTH RESP PROD
- 04 VIT/MINERALS/NUTRIT.SUPPL
- 03 DIGEST & OTH INTEST PROD
- 06 SKIN TREATMENT

% of growth versus last MAT

UNITS



- 01 COUGH COLD&OTH RESP PROD
- 02 PAIN RELIEF
- 03 DIGEST & OTH INTEST PROD
- 04 VIT/MINERALS/NUTRIT.SUPPL
- 06 SKIN TREATMENT

The top 10 best selling OTC2 classes in CH in units and value

Top 10 Best Selling OTC2 classes in retail VALUE public price



	Pub/EUR MAT/08/2024	% of BE CH Market
02A GENERAL PAIN RELIEF	182 M €	8.2%
01B COLD REMEDIES	97 M €	4.4%
01A COUGH PRODUCTS	76 M €	3.4%
07A EYE CARE	76 M €	3.4%
04F MINERAL SUPPLEMENTS	71 M €	3.2%
35G MILK PRDS FOR CHILDREN	65 M €	2.9%
03C LAXATIVES	62 M €	2.8%
02E MUSCULAR PAIN RELIEF	60 M €	2.7%
04E OTHER SPECIFIC VITAMINS	58 M €	2.6%
13A CALMING AND SLEEPING PROD	57 M €	2.5%

Top 10 Best Selling OTC2 classes in retail UNITS (= number of packs)



	UN MAT/08/2024	% of BE CH Market
02A GENERAL PAIN RELIEF	18,559,941	11.9%
01B COLD REMEDIES	11,120,781	7.1%
01A COUGH PRODUCTS	7,409,217	4.7%
01C SORE THROAT REMEDIES	5,887,670	3.8%
03C LAXATIVES	4,595,560	2.9%
07A EYE CARE	4,496,645	2.9%
04E OTHER SPECIFIC VITAMINS	3,791,307	2.4%
02E MUSCULAR PAIN RELIEF	3,103,474	2.0%
03D ANTIDIARRHOEALS	2,949,470	1.9%
06B HAND SKIN WOUND DISINFECT	2,680,437	1.7%

Emerging Trends: Top 10 Consumer Health classes showing Growth in Units and Value

Fastest Growing OTC1 in Rx sales in % growth in VALUE ex-mnf



	Pub/EUR MAT/08/2024	Absolute growth in value	% growth
89 OTHER PERSONAL CARE PRODS	1 K €	1 K €	48.4%
39 OTH NUTRITIONAL PRODUCTS	4 K €	2 K €	43.9%
33 FIBRE FOOD PRODUCTS	5 K €	1 K €	19.4%
91 PERSONAL HYGIENE ACCESSOR	22 K €	4 K €	16.5%
82 BEAUTY PRODUCTS FOR WOMEN	3322 K €	394 K €	11.9%
65 BABY+NURSING ACCESSORIES	27 K €	3 K €	11.8%
79 OTHER PATIENT CARE PRODS	3213 K €	345 K €	10.7%
52 INCONTINENCE CARE PRDS	1.0 M €	103 K €	10.5%
09 MOUTH TREATMENT PRODUCTS	2.6 M €	270 K €	10.2%
70 HOUSE DISINFECTANTS ETC	0.2 M €	18 K €	8.5%

Fastest Growing OTC1 in Rx sales in % growth in UNITS



	UN MAT/08/2024	Absolute growth in units	% growth
89 OTHER PERSONAL CARE PRODS	94	52	55.3%
39 OTH NUTRITIONAL PRODUCTS	327	114	34.9%
94 ACCESSORIES FOR BABIES	6,634	1,399	21.1%
33 FIBRE FOOD PRODUCTS	445	85	19.1%
45 FIRST AID KITS	197	19	9.6%
65 BABY+NURSING ACCESSORIES	1,849	177	9.6%
79 OTHER PATIENT CARE PRODS	89,492	6,119	6.8%
82 BEAUTY PRODUCTS FOR WOMEN	124,678	7,547	6.1%
17 HABIT TREATMENT	41,728	2,513	6.0%
70 HOUSE DISINFECTANTS ETC	10,044	549	5.5%

The top 10 fastest growing Consumer Health classes in growth (units and value)

Fastest Growing OTC1 in Rx sales in % growth in VALUE ex-mnf



	Pub/EUR MAT/08/2024	Absolute growth in value	% growth
04 VIT. MIN. & NUTRIT. SUPPS	66.9 M €	3.8 M €	5.7%
03 DIGEST & OTH INTEST PROD	49.4 M €	2.2 M €	4.4%
01 COUGH COLD&OTH RESP PROD	65.1 M €	2.0 M €	3.1%
02 PAIN RELIEF	57.8 M €	1.8 M €	3.1%
53 PRDS FOR BLADDER PROBLEMS	26.6 M €	1.5 M €	5.6%
07 EYE CARE	16.4 M €	1.4 M €	8.4%
06 SKIN TREATMENT	18.9 M €	1.1 M €	5.6%
13 CALM/SLEEP&MOOD ENHANC PD	12.3 M €	0.8 M €	6.4%
12 URINARY AND REPRODUCT CAR	10.9 M €	0.6 M €	5.5%
83 UNISEX BEAUTY PRODUCTS	8.0 M €	0.5 M €	5.6%

Fastest Growing OTC1 in Rx sales in % growth in UNITS



	UN MAT/08/2024	Absolute growth in units	% growth
04 VIT. MIN. & NUTRIT. SUPPS	3,342,296	71,835	2.1%
06 SKIN TREATMENT	1,908,510	68,691	3.6%
07 EYE CARE	971,192	26,378	2.7%
01 COUGH COLD&OTH RESP PROD	6,547,616	24,367	0.4%
03 DIGEST & OTH INTEST PROD	2,717,949	21,541	0.8%
13 CALM/SLEEP&MOOD ENHANC PD	538,895	17,766	3.3%
53 PRDS FOR BLADDER PROBLEMS	360,095	13,965	3.9%
12 URINARY AND REPRODUCT CAR	550,035	13,354	2.4%
82 BEAUTY PRODUCTS FOR WOMEN	124,678	7,547	6.1%
08 EAR CARE	174,910	7,293	4.2%