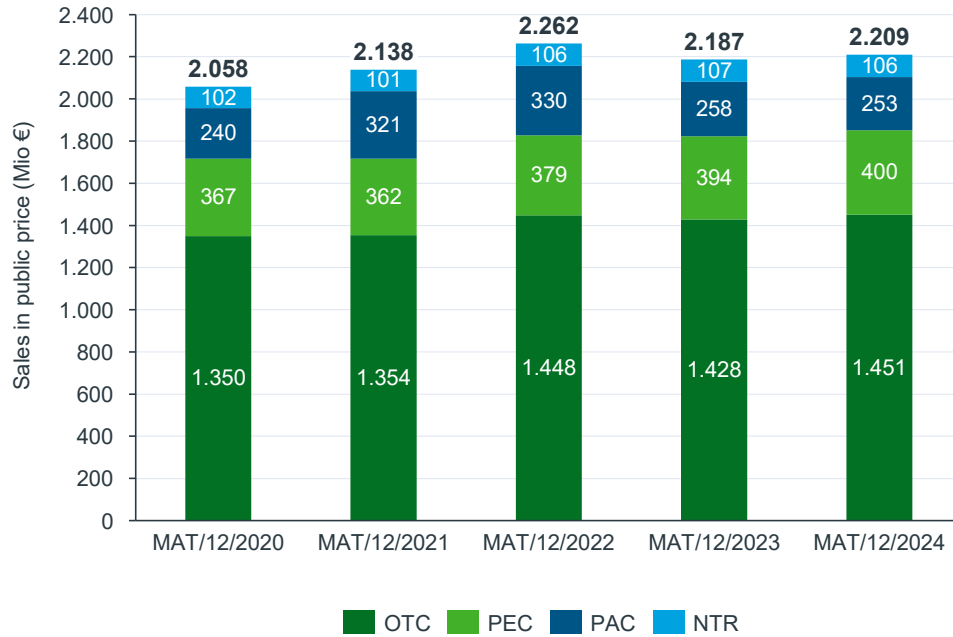


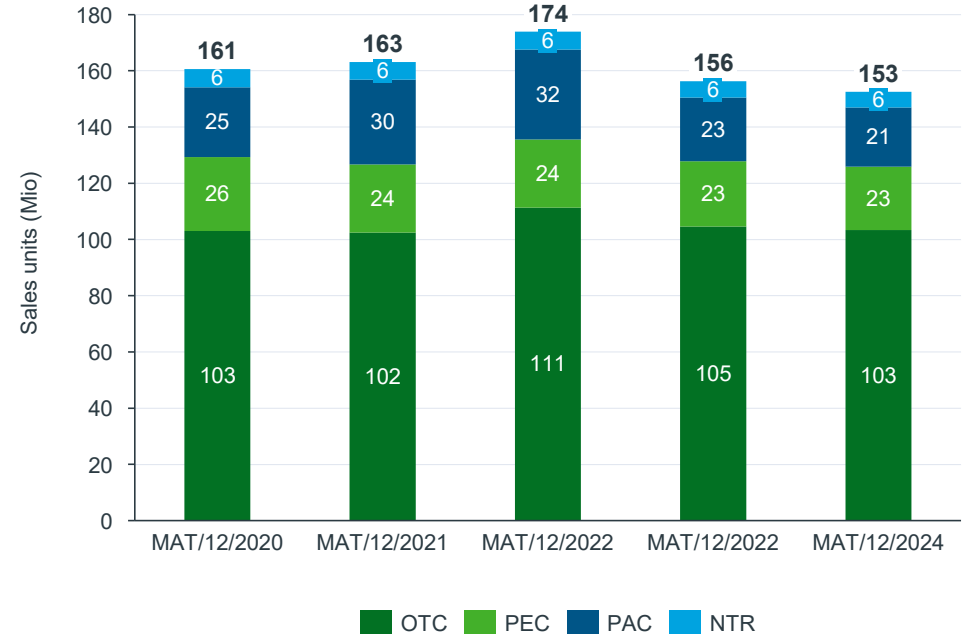


The Belgian retail market is worth € 2.2 billion

Sales Evolution VALUE



Sales Evolution UNITS



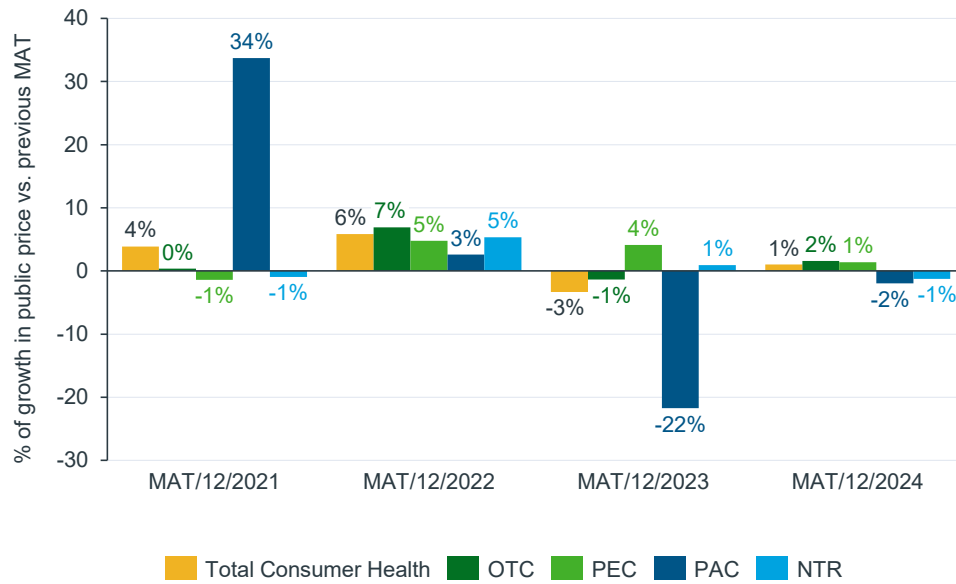


Consumer Health market growth evolution in Belgium

In the last MAT, in value, the total CH market shows an increase of 01%, while Patient Care decline with -02% and in units, the CH market shows a decrease of -02%, while the OTC declines with -01%

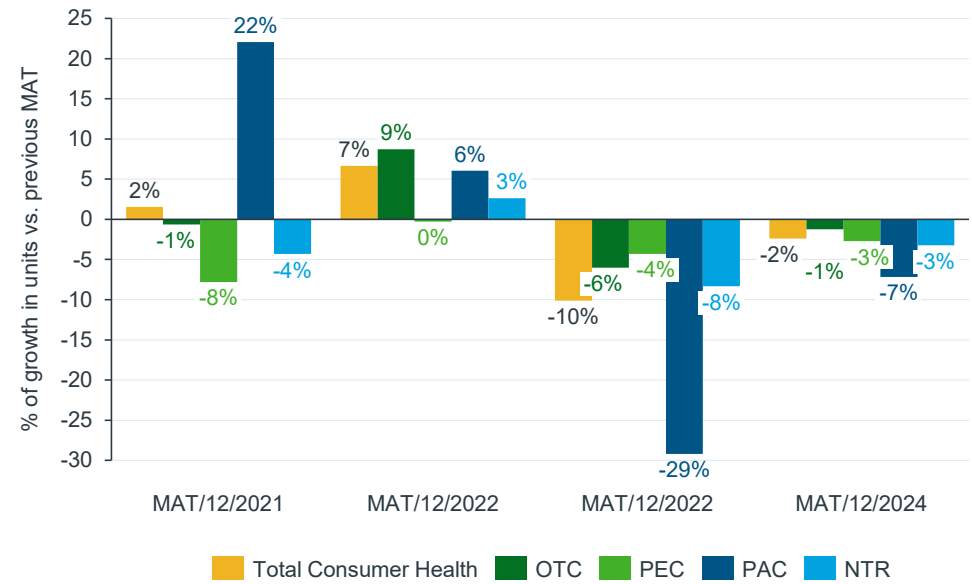
% of growth versus previous MAT

VALUE



% of growth versus previous MAT

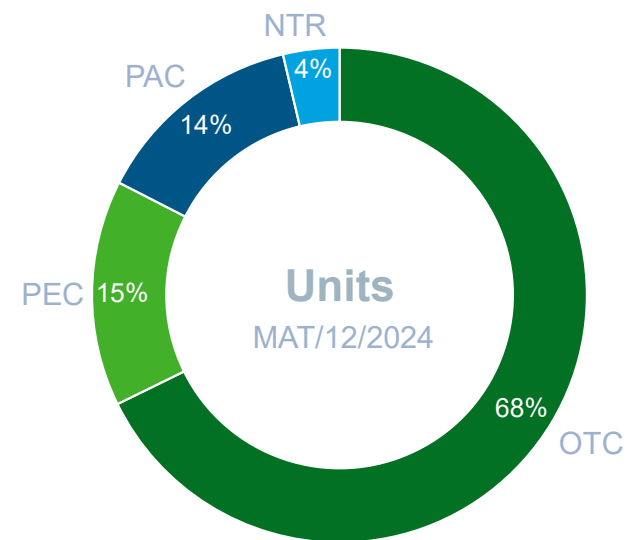
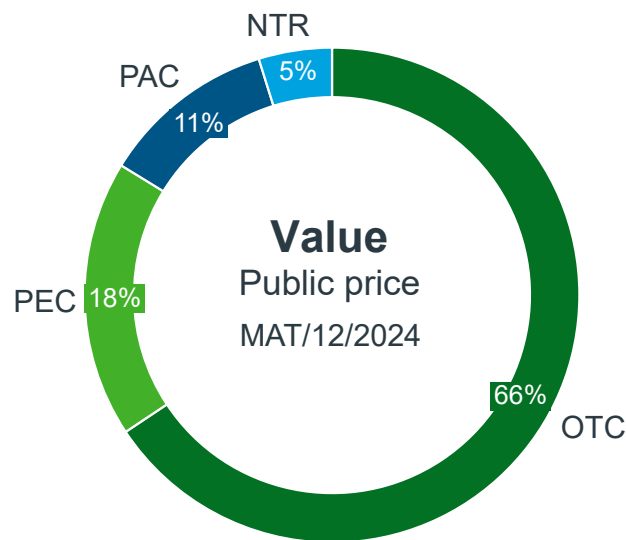
UNITS





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

Market Share

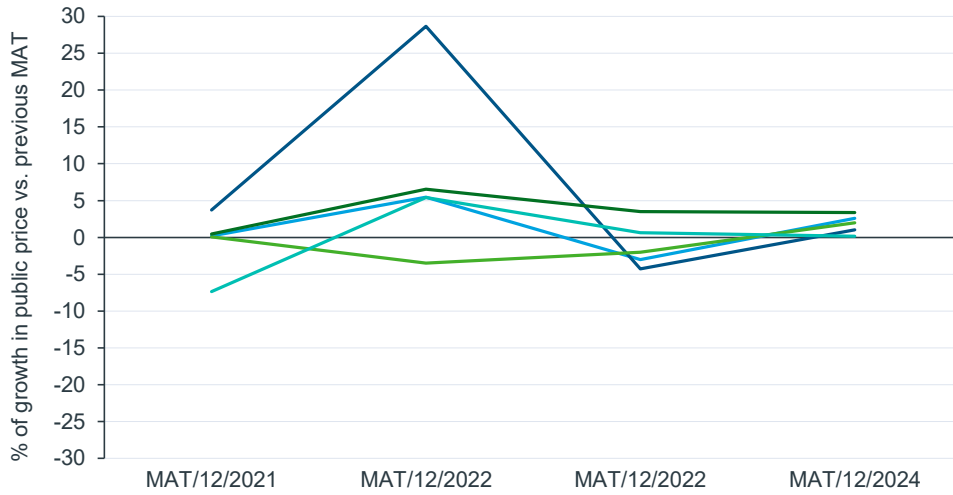




Top 5 classes sales evolution

% of growth versus last MAT

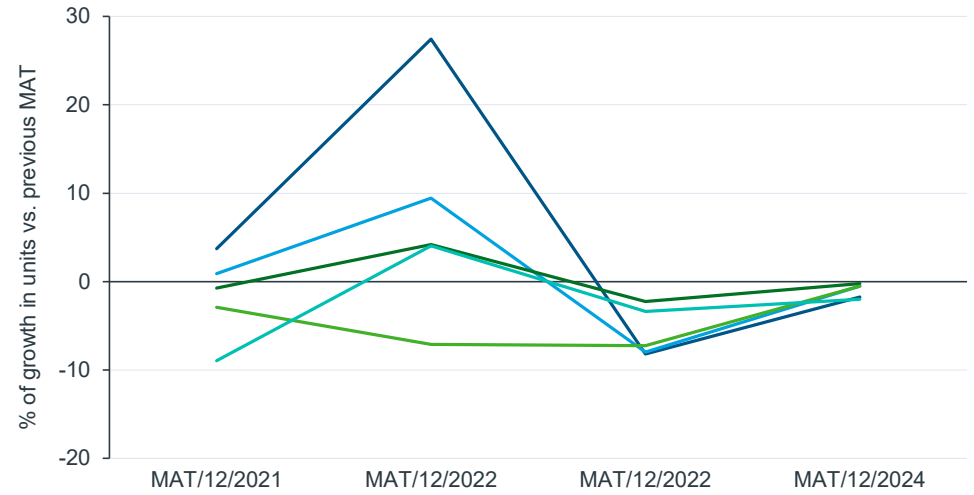
VALUE



- 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/12/2024	% of BE CH Market
02A GENERAL PAIN RELIEF	181 M €	8.2%
01B COLD REMEDIES	94 M €	4.2%
07A EYE CARE	76 M €	3.5%
01A COUGH PRODUCTS	74 M €	3.4%
04F MINERAL SUPPLEMENTS	71 M €	3.2%
35G MILK PRDS FOR CHILDREN	65 M €	2.9%
03C LAXATIVES	61 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 €	2.6%

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



	UN MAT/12/2024	% of BE CH Market
02A GENERAL PAIN RELIEF	18,196,343	11.9%
01B COLD REMEDIES	10,622,532	7.0%
01A COUGH PRODUCTS	7,005,278	4.6%
01C SORE THROAT REMEDIES	5,674,446	3.7%
03C LAXATIVES	4,527,328	3.0%
07A EYE CARE	4,481,061	2.9%
04E OTHER SPECIFIC VITAMINS	3,804,901	2.5%
02E MUSCULAR PAIN RELIEF	3,109,185	2.0%
03D ANTIDIARRHOEALS	2,928,004	1.9%
06B HAND SKIN WOUND DISINFECT	2,661,931	1.7%



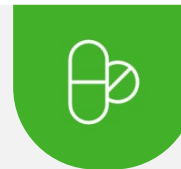
Emerging Trends: Top 10 Consumer Health classes showing Growth in Units and Value

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



	Pub/EUR MAT/12/2024	Absolute growth in value	% growth
39 OTH NUTRITIONAL PRODUCTS	4 K €	1 K €	26.1%
33 FIBRE FOOD PRODUCTS	6 K €	2 K €	24.8%
52 INCONTINENCE CARE PRDS	1079 K €	164 K €	15.2%
82 BEAUTY PRODUCTS FOR WOMEN	3374 K €	341 K €	10.1%
09 MOUTH TREATMENT PRODUCTS	2701 K €	262 K €	9.7%
91 PERSONAL HYGIENE ACCESSOR	22 K €	2 K €	9.1%
79 OTHER PATIENT CARE PRODS	3267 K €	266 K €	8.2%
07 EYE CARE	16681 K €	1196 K €	7.2%
11 ANTINAUSEANTS	1321 K €	79 K €	6.0%
04 VIT. MIN. & NUTRIT. SUPPS	67947 K €	4026 K €	5.9%

Fastest Growing OTC1 in Rx sales in % growth in UNITS



	UN MAT/12/2024	Absolute growth in units	% growth
33 FIBRE FOOD PRODUCTS	510	130	25.5%
89 OTHER PERSONAL CARE PRODS	84	13	15.5%
39 OTH NUTRITIONAL PRODUCTS	306	43	14.1%
94 ACCESSORIES FOR BABIES	6,063	755	12.5%
82 BEAUTY PRODUCTS FOR WOMEN	125,350	7,528	6.0%
65 BABY+NURSING ACCESSORIES	1,809	96	5.3%
11 ANTINAUSEANTS	104,442	4,994	4.8%
04 VIT. MIN. & NUTRIT. SUPPS	3,383,611	137,554	4.1%
53 PRDS FOR BLADDER PROBLEMS	361,309	14,475	4.0%
37 CONFECTIONERY	3,423	118	3.4%



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/12/2024	Absolute growth in value	% growth
04 VIT. MIN. & NUTRIT. SUPPS	67.9 M €	4.0 M €	5.9%
03 DIGEST & OTH INTEST PROD	49.8 M €	1.9 M €	3.8%
02 PAIN RELIEF	57.8 M €	1.9 M €	3.2%
53 PRDS FOR BLADDER PROBLEMS	27.0 M €	1.6 M €	5.9%
07 EYE CARE	16.7 M €	1.2 M €	7.2%
13 CALM/SLEEP&MOOD ENHANC PD	12.4 M €	0.6 M €	4.7%
10 CIRCULATORY PRODS.	34.4 M €	0.6 M €	1.7%
06 SKIN TREATMENT	18.6 M €	0.4 M €	2.1%
83 UNISEX BEAUTY PRODUCTS	8.1 M €	0.4 M €	4.7%
12 URINARY AND REPRODUCT CAR	10.9 M €	0.4 M €	3.3%

Fastest Growing OTC1 in Rx sales in % growth in UNITS



	UN MAT/12/2024	Absolute growth in units	% growth
04 VIT. MIN. & NUTRIT. SUPPS	3,383,611	137,554	4.1%
53 PRDS FOR BLADDER PROBLEMS	361,309	14,475	4.0%
13 CALM/SLEEP&MOOD ENHANC PD	541,876	13,470	2.5%
82 BEAUTY PRODUCTS FOR WOMEN	125,350	7,528	6.0%
09 MOUTH TREATMENT PRODUCTS	292,141	6,538	2.2%
11 ANTINAUSEANTS	104,442	4,994	4.8%
06 SKIN TREATMENT	1,864,299	4,409	0.2%
08 EAR CARE	172,587	4,204	2.4%
12 URINARY AND REPRODUCT CAR	545,032	3,731	0.7%
07 EYE CARE	963,975	3,553	0.4%