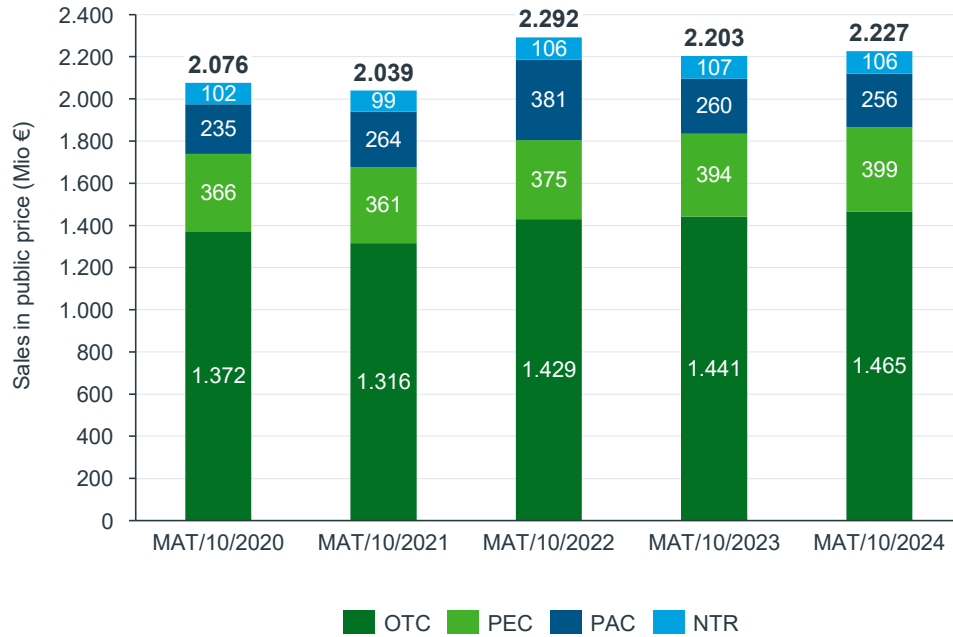


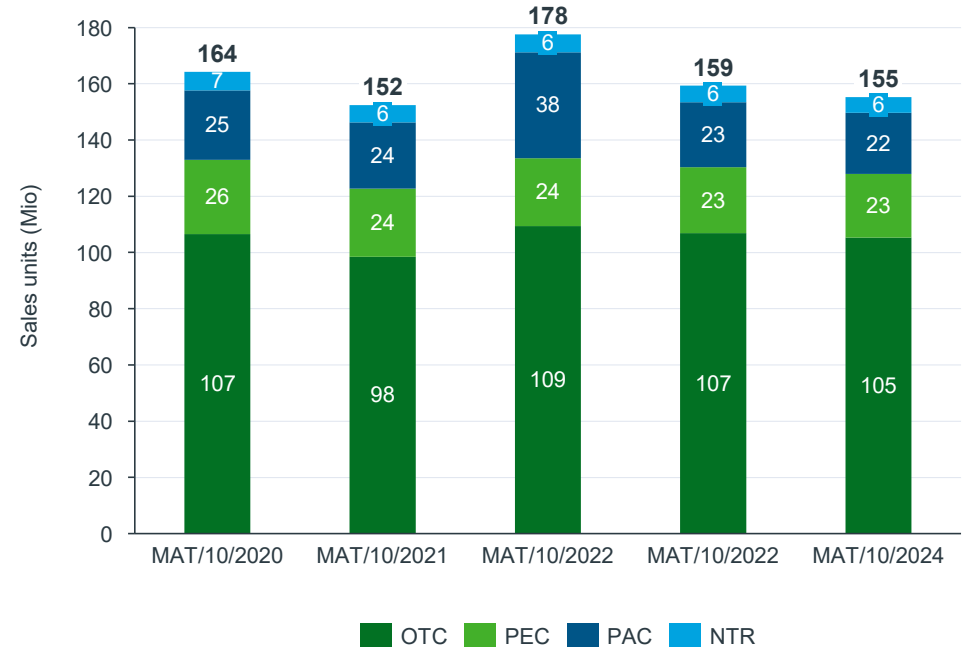


# The Belgian retail market is worth € 2.2 billion

### Sales Evolution VALUE



### Sales Evolution UNITS



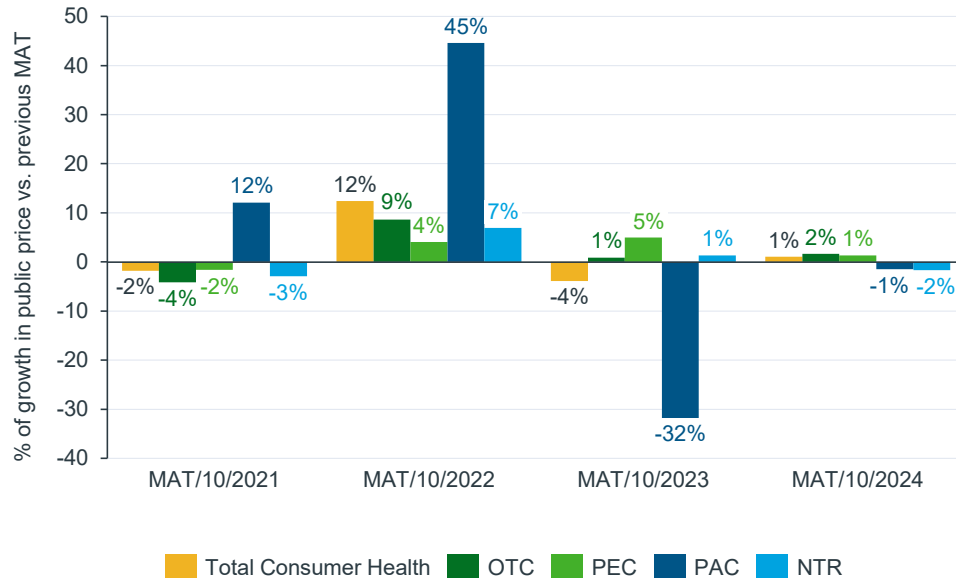


# Consumer Health market growth evolution in Belgium

In the last MAT, in value, the total CH market shows an increase of 01%, while Patient Care decline with -01% and in units, the CH market shows a decrease of -03%, while the OTC declines with -01%

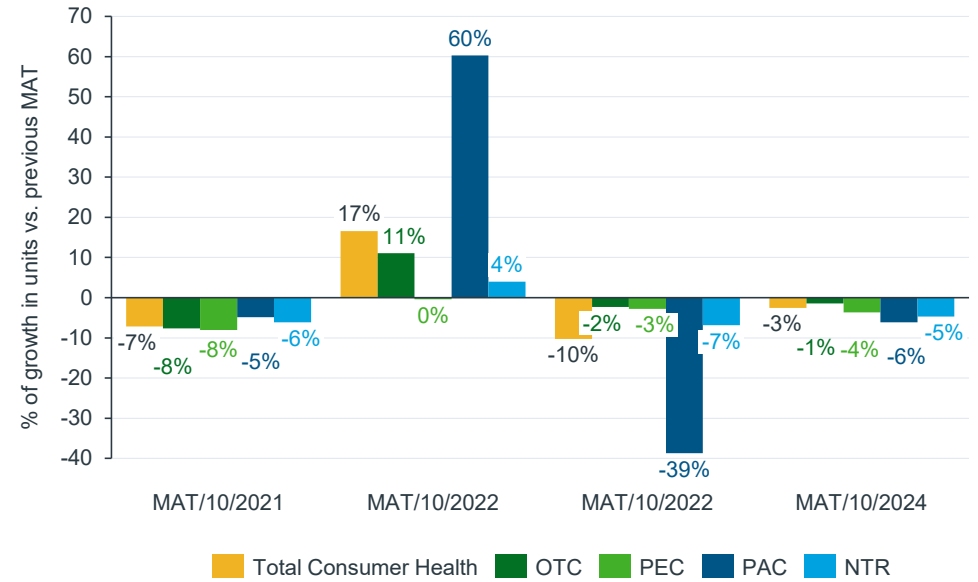
% of growth versus previous MAT

VALUE



% of growth versus previous MAT

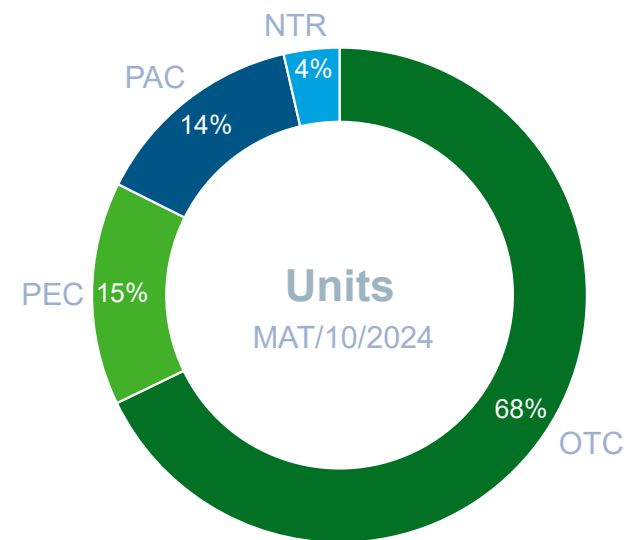
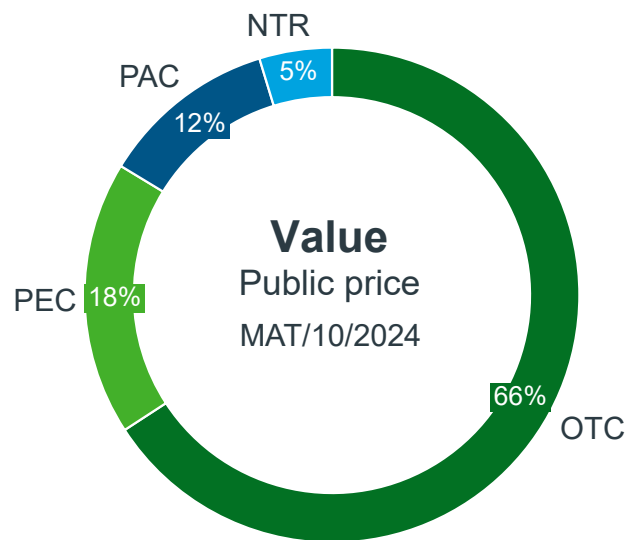
UNITS





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

## Market Share

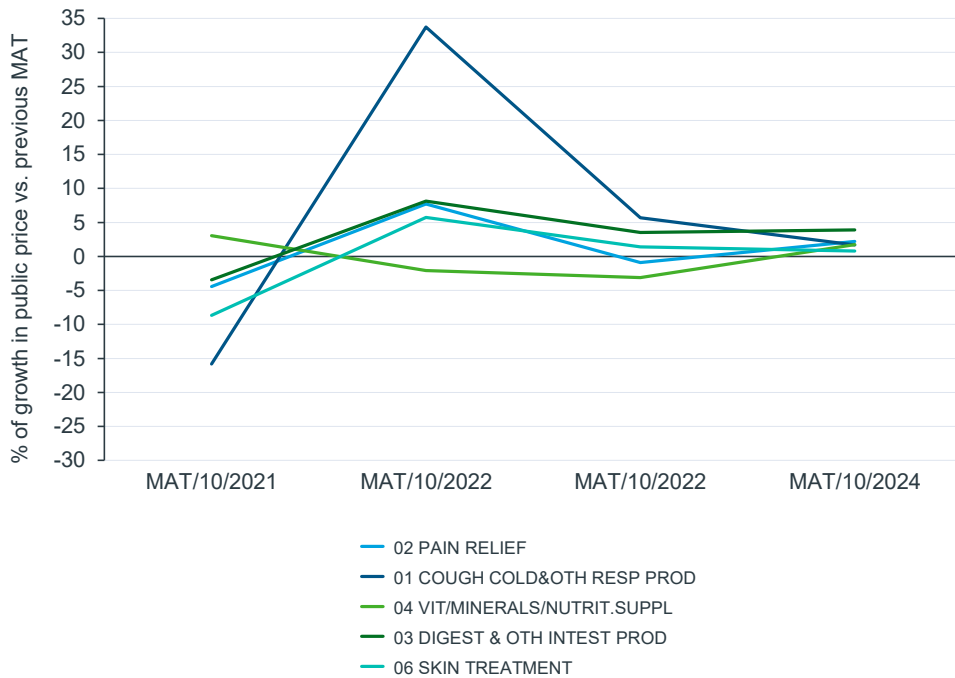




# Top 5 classes sales evolution

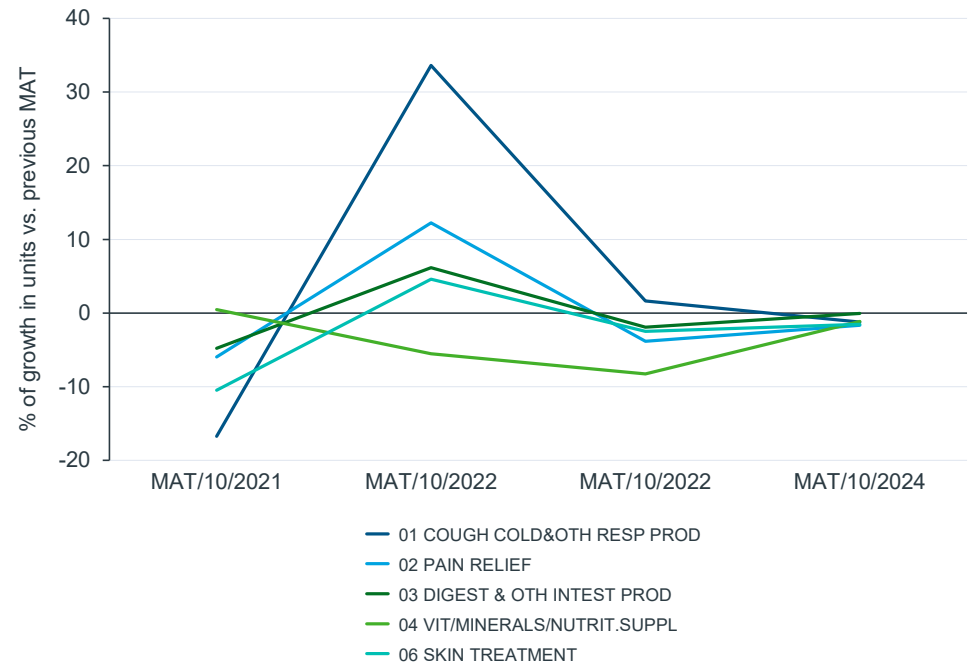
### % of growth versus last MAT

VALUE



### % of growth versus last MAT

UNITS



## 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/10/2024	% of BE CH Market
02A GENERAL PAIN RELIEF	183 M €	8.2%
01B COLD REMEDIES	99 M €	4.5%
01A COUGH PRODUCTS	77 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 €	2.6%

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



	UN MAT/10/2024	% of BE CH Market
02A GENERAL PAIN RELIEF	18,506,080	11.9%
01B COLD REMEDIES	11,292,527	7.3%
01A COUGH PRODUCTS	7,345,057	4.7%
01C SORE THROAT REMEDIES	5,872,588	3.8%
03C LAXATIVES	4,572,005	2.9%
07A EYE CARE	4,490,626	2.9%
04E OTHER SPECIFIC VITAMINS	3,816,269	2.5%
02E MUSCULAR PAIN RELIEF	3,105,963	2.0%
03D ANTIDIARRHOEALS	2,938,590	1.9%
04F MINERAL SUPPLEMENTS	2,672,067	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/09/2024	Absolute growth in value	% growth
39 OTH NUTRITIONAL PRODUCTS	4 K €	3 K €	57.9%
33 FIBRE FOOD PRODUCTS	5 K €	1 K €	15.5%
65 BABY+NURSING ACCESSORIES	27 K €	3 K €	11.8%
82 BEAUTY PRODUCTS FOR WOMEN	3323 K €	377 K €	11.4%
52 INCONTINENCE CARE PRDS	1011 K €	115 K €	11.3%
79 OTHER PATIENT CARE PRODS	3235 K €	344 K €	10.6%
09 MOUTH TREATMENT PRODUCTS	2661 K €	271 K €	10.2%
44 PRESSURE SORE PREVENTION	0.0 M €	2 K €	8.1%
07 EYE CARE	16.5 M €	1313 K €	8.0%
89 OTHER PERSONAL CARE PRODS	0.0 M €	0 K €	7.0%

## Fastest Growing OTC1 in Rx sales in % growth in UNITS



	UN MAT/09/2024	Absolute growth in units	% growth
39 OTH NUTRITIONAL PRODUCTS	351	163	46.4%
89 OTHER PERSONAL CARE PRODS	80	23	28.8%
94 ACCESSORIES FOR BABIES	6,513	1,297	19.9%
33 FIBRE FOOD PRODUCTS	443	66	14.9%
65 BABY+NURSING ACCESSORIES	1,845	201	10.9%
79 OTHER PATIENT CARE PRODS	89,451	5,528	6.2%
82 BEAUTY PRODUCTS FOR WOMEN	124,350	7,268	5.8%
17 HABIT TREATMENT	41,615	1,918	4.6%
11 ANTINAUSEANTS	104,157	4,689	4.5%
08 EAR CARE	174,727	6,305	3.6%



# 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/09/2024	Absolute growth in value	% growth
04 VIT. MIN. & NUTRIT. SUPPS	67.1 M €	3.6 M €	5.4%
01 COUGH COLD&OTH RESP PROD	65.2 M €	1.9 M €	2.8%
03 DIGEST & OTH INTEST PROD	49.4 M €	1.8 M €	3.7%
02 PAIN RELIEF	57.8 M €	1.7 M €	2.9%
07 EYE CARE	16.5 M €	1.3 M €	8.0%
53 PRDS FOR BLADDER PROBLEMS	26.5 M €	1.3 M €	4.8%
06 SKIN TREATMENT	18.9 M €	0.9 M €	4.5%
13 CALM/SLEEP&MOOD ENHANC PD	12.3 M €	0.7 M €	5.9%
12 URINARY AND REPRODUCT CAR	10.9 M €	0.5 M €	4.5%
83 UNISEX BEAUTY PRODUCTS	8.1 M €	0.4 M €	5.0%

## Fastest Growing OTC1 in Rx sales in % growth in UNITS



	UN MAT/09/2024	Absolute growth in units	% growth
04 VIT. MIN. & NUTRIT. SUPPS	3,344,603	76,538	2.3%
06 SKIN TREATMENT	1,904,561	49,137	2.6%
07 EYE CARE	969,310	19,490	2.0%
13 CALM/SLEEP&MOOD ENHANC PD	539,318	16,133	3.0%
01 COUGH COLD&OTH RESP PROD	6,546,363	8,719	0.1%
53 PRDS FOR BLADDER PROBLEMS	357,252	8,700	2.4%
12 URINARY AND REPRODUCT CAR	547,903	7,696	1.4%
82 BEAUTY PRODUCTS FOR WOMEN	124,350	7,268	5.8%
08 EAR CARE	174,727	6,305	3.6%
79 OTHER PATIENT CARE PRODS	89,451	5,528	6.2%