



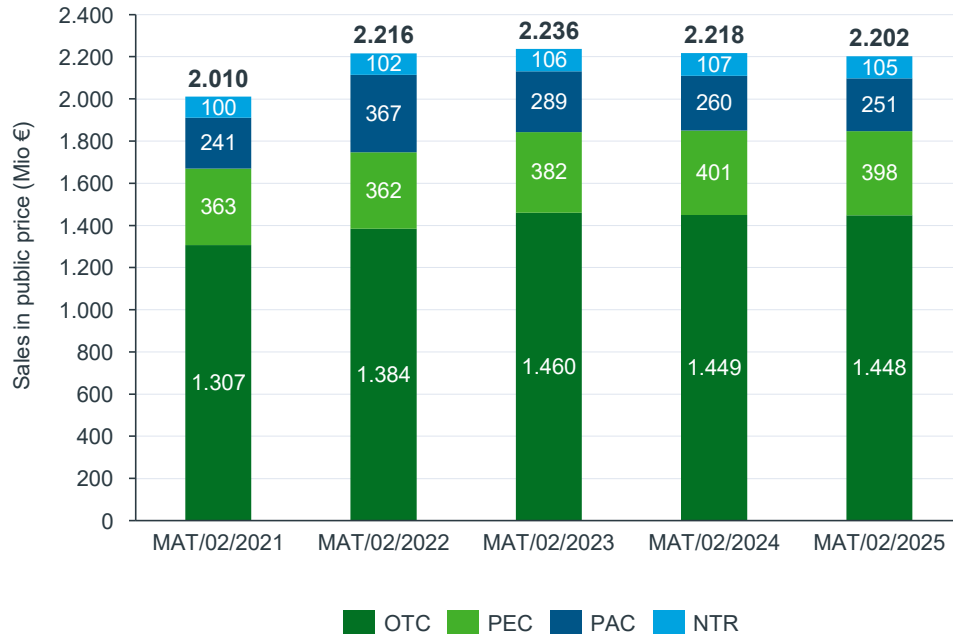
# Monthly Belgium and Luxembourg Market Trends February 2025

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

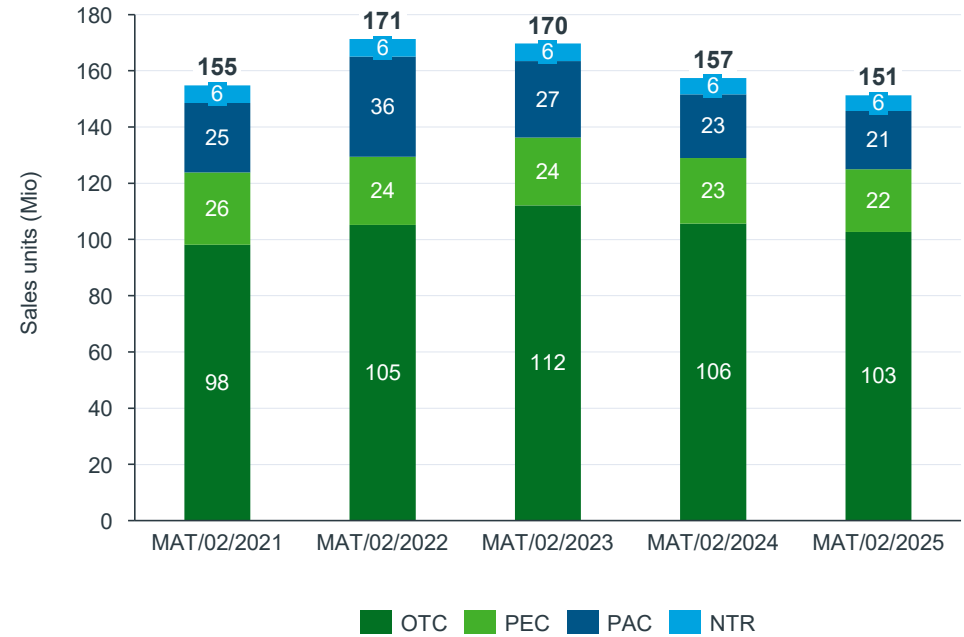


# The Belgian retail market is worth € 2.2 billion

### Sales Evolution VALUE



### Sales Evolution UNITS



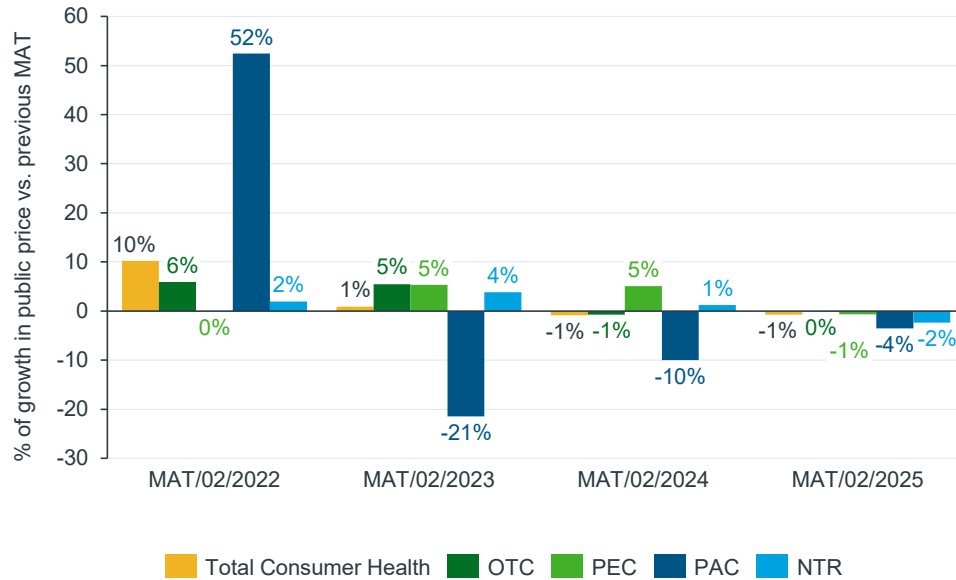


# Consumer Health market growth evolution in Belgium

In the last MAT, in value, the total CH market shows a decrease of -01%, while Patient Care declines with -04% and in units, the CH market shows a decrease of -04%, while the OTC declines with -03%

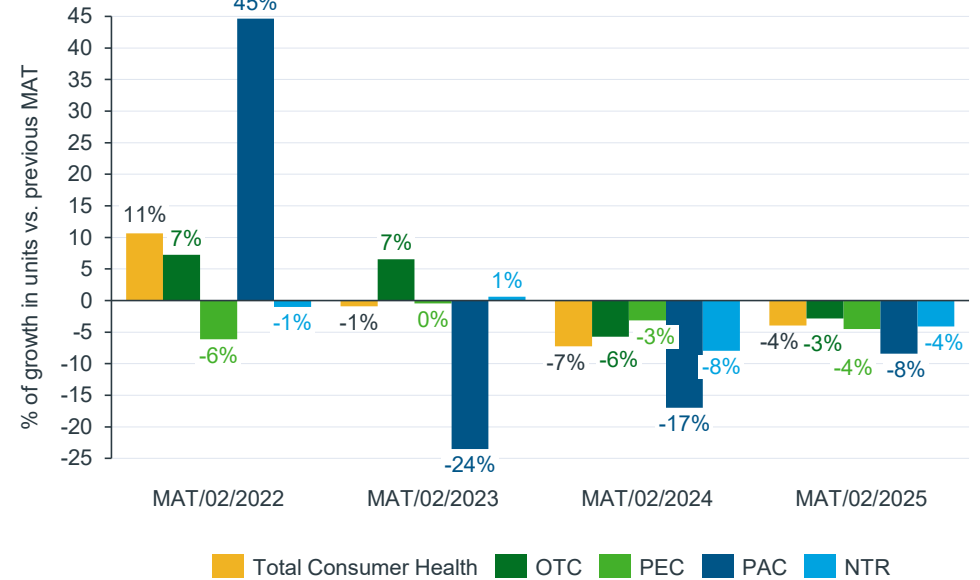
% of growth versus previous MAT

VALUE



% of growth versus previous MAT

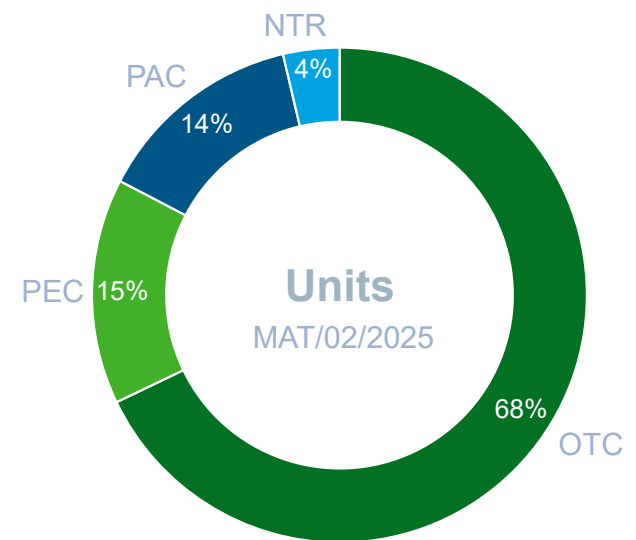
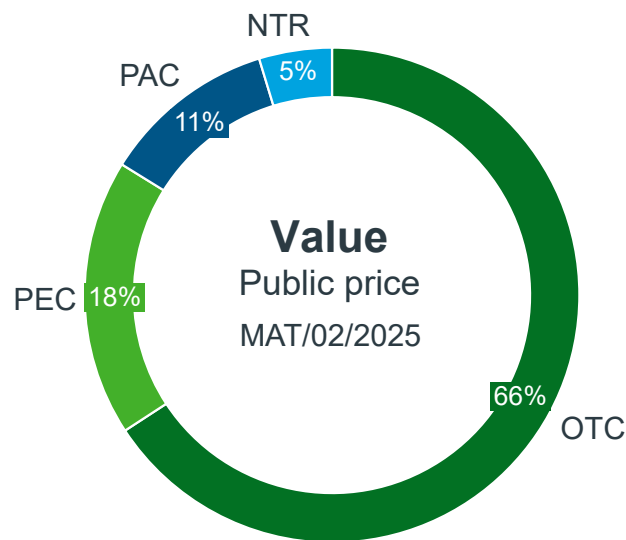
UNITS





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

## Market Share

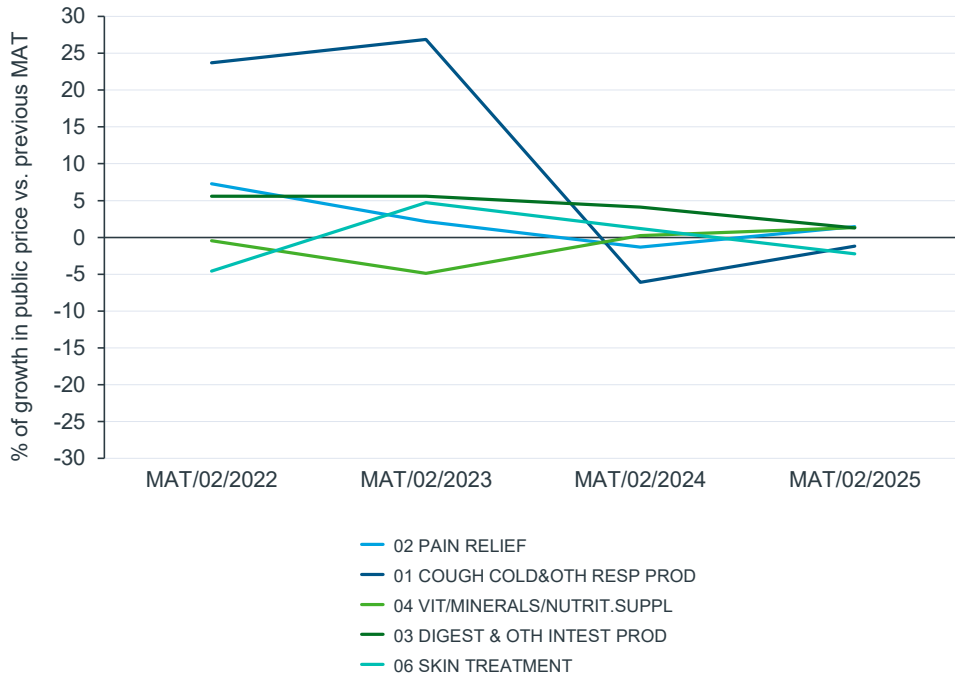




# Top 5 classes sales evolution

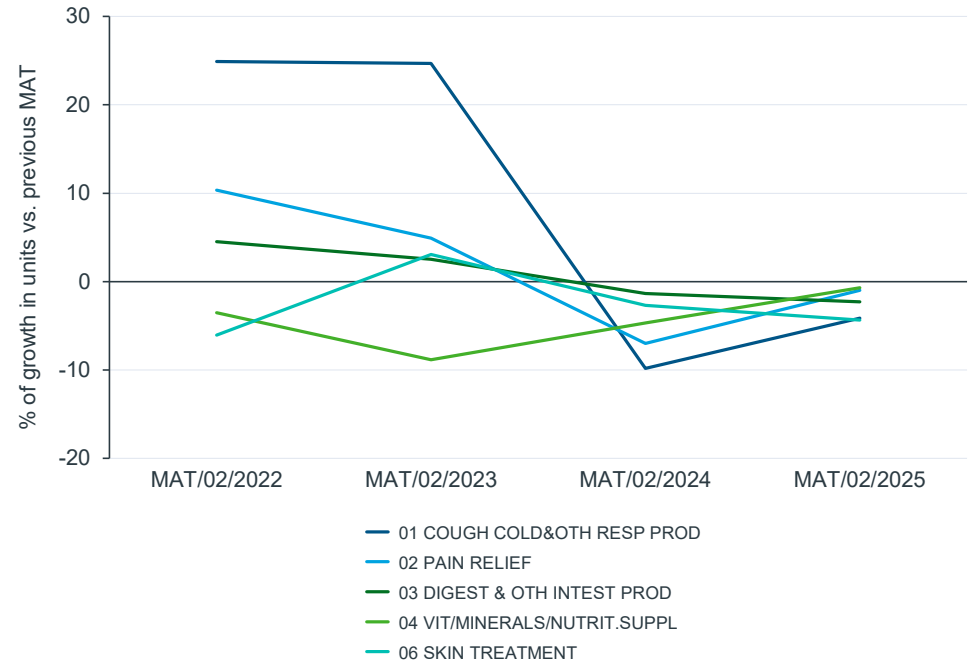
% of growth versus last MAT

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/02/2025	% of BE CH Market
02A GENERAL PAIN RELIEF	183 M €	8.3%
01B COLD REMEDIES	92 M €	4.2%
07A EYE CARE	76 M €	3.5%
01A COUGH PRODUCTS	75 M €	3.4%
04F MINERAL SUPPLEMENTS	72 M €	3.3%
35G MILK PRDS FOR CHILDREN	64 M €	2.9%
03C LAXATIVES	61 M €	2.8%
02E MUSCULAR PAIN RELIEF	60 M €	2.7%
04E OTHER SPECIFIC VITAMINS	59 M €	2.7%
13A CALMING AND SLEEPING PROD	57 M €	2.6%

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



	UN MAT/02/2025	% of BE CH Market
02A GENERAL PAIN RELIEF	18,331,691	12.1%
01B COLD REMEDIES	10,338,366	6.8%
01A COUGH PRODUCTS	7,003,241	4.6%
01C SORE THROAT REMEDIES	5,707,845	3.8%
03C LAXATIVES	4,456,527	2.9%
07A EYE CARE	4,437,371	2.9%
04E OTHER SPECIFIC VITAMINS	3,810,583	2.5%
02E MUSCULAR PAIN RELIEF	3,079,023	2.0%
03D ANTIDIARRHOEALS	2,840,330	1.9%
04F MINERAL SUPPLEMENTS	2,689,541	1.8%



# 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/02/2025	Absolute growth in value	% growth
33 FIBRE FOOD PRODUCTS	7 K €	2 K €	26.5%
54 BABY DISPOSABLE & CH ENU	4 K €	1 K €	24.4%
52 INCONTINENCE CARE PRDS	1156 K €	230 K €	19.9%
37 CONFECTIONERY	25 K €	3 K €	11.2%
82 BEAUTY PRODUCT FOR WOMEN	3531 K €	320 K €	9.1%
09 MOUTH TREATMENT PRODUCTS	2813 K €	244 K €	8.7%
06 SKIN TREATMENT	20964 K €	1594 K €	7.6%
30 SPEC ENTERAL NUTRITION PRD	5467 K €	374 K €	6.9%
04 VIT/MINERALS/NUTRIT.SUPPL	75015 K €	4483 K €	6.0%
49 PLASTERS	357 K €	20 K €	5.7%

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



	UN MAT/02/2025	Absolute growth in units	% growth
33 FIBRE FOOD PRODUCTS	585	158	27.1%
65 BABY+NURSING ACCESSORIES	1,973	180	9.1%
06 SKIN TREATMENT	2,085,853	123,832	5.9%
37 CONFECTIONERY	3,622	210	5.8%
82 BEAUTY PRODUCT FOR WOMEN	130,689	7,237	5.5%
04 VIT/MINERALS/NUTRIT.SUPPL	3,791,633	173,648	4.6%
79 OTHER PATIENT ARE PRODS	91,359	2,818	3.1%
53 PRDS FOR BLADDER PROBLEM	362,553	8,441	2.3%
09 MOUTH TREATMENT PRODUCTS	302,789	6,579	2.2%
13 CALM SLEEP MOOD ENHANCING PROD	740,537	12,894	1.7%



# 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/02/2025	Absolute growth in value	% growth
04 VIT/MINERALS/NUTRIT.SUPPL	75.0 M €	4.5 M €	6.0%
01 COUGH COLD&OTH RESP PROD	74.5 M €	2.4 M €	3.3%
03 DIGEST & OTH INTEST PROD	52.0 M €	1.8 M €	3.5%
02 PAIN RELIEF	63.7 M €	1.6 M €	2.6%
06 SKIN TREATMENT	21.0 M €	1.6 M €	7.6%
53 PRDS FOR BLADDER PROBLEM	27.4 M €	1.3 M €	4.7%
07 EYE CARE	22.3 M €	0.9 M €	3.9%
10 CIRCULATORY PRODUCTS	36.1 M €	0.7 M €	2.0%
13 CALM SLEEP MOOD ENHANCING PROD	15.5 M €	0.7 M €	4.4%
83 UNISEX BEAUTY PRODUCTS	8.4 M €	0.4 M €	4.5%

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



	UN MAT/02/2025	Absolute growth in units	% growth
04 VIT/MINERALS/NUTRIT.SUPPL	3,791,633	173,648	4.6%
06 SKIN TREATMENT	2,085,853	123,832	5.9%
01 COUGH COLD&OTH RESP PROD	7,297,277	45,714	0.6%
13 CALM SLEEP MOOD ENHANCING PROD	740,537	12,894	1.7%
53 PRDS FOR BLADDER PROBLEM	362,553	8,441	2.3%
12 URINARY AND REPRUDUCT CARE	976,989	7,455	0.8%
82 BEAUTY PRODUCT FOR WOMEN	130,689	7,237	5.5%
09 MOUTH TREATMENT PRODUCTS	302,789	6,579	2.2%
35 BABY FOODS	213,813	3,329	1.6%
79 OTHER PATIENT ARE PRODS	91,359	2,818	3.1%