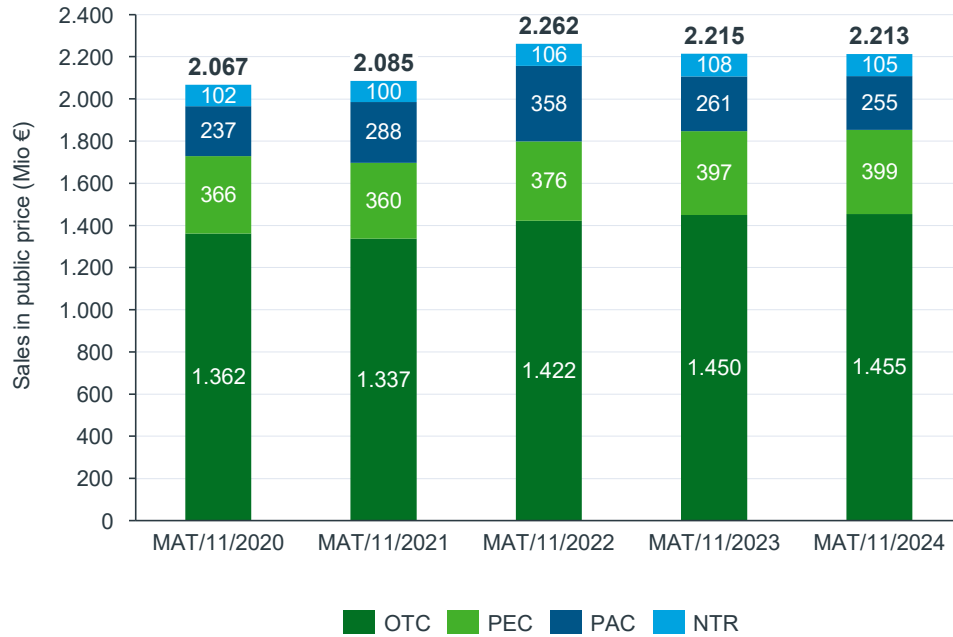


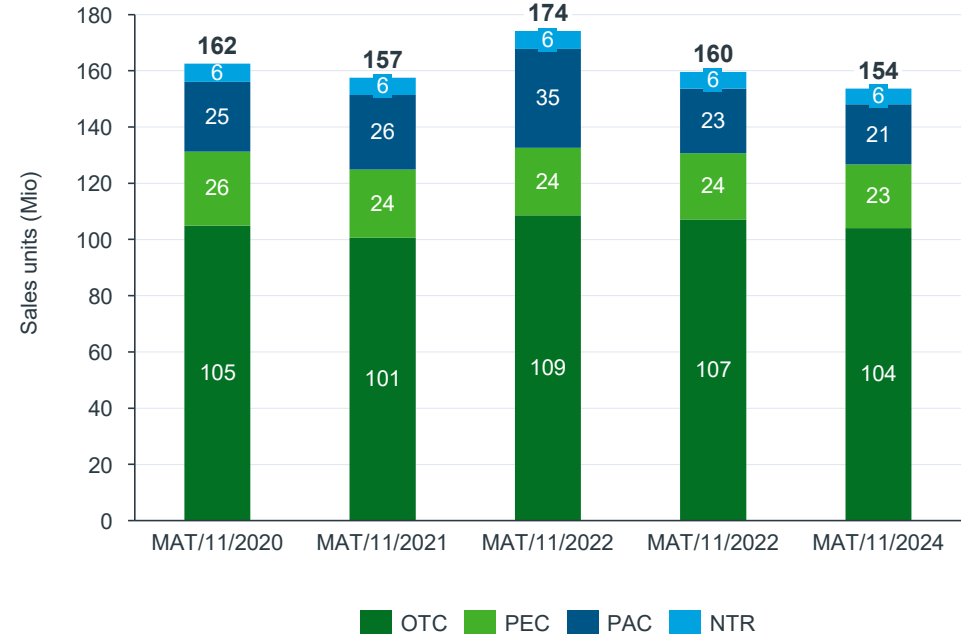


The Belgian retail market is worth € 2.2 billion

Sales Evolution VALUE



Sales Evolution UNITS



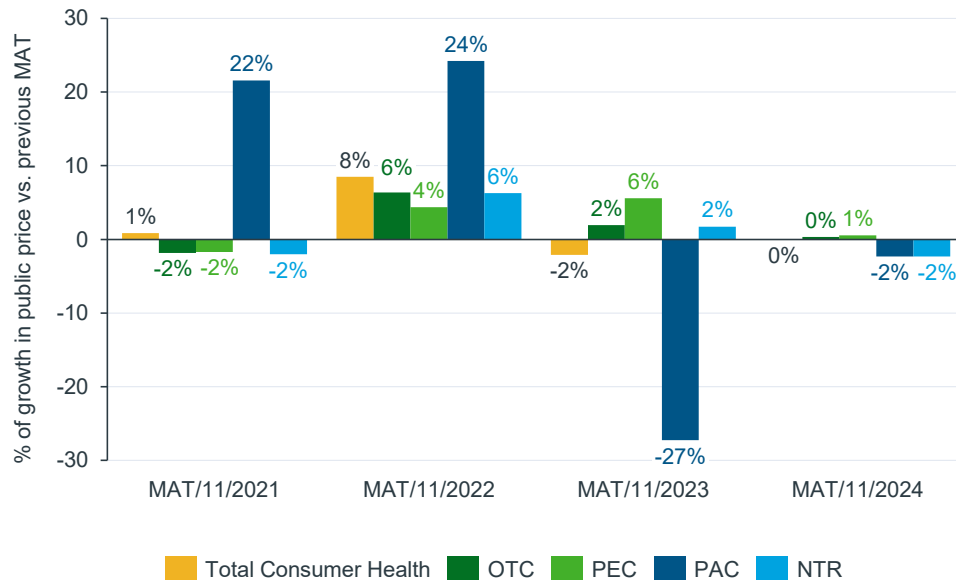


Consumer Health market growth evolution in Belgium

In the last MAT, in value, the total CH market shows an increase of 00%, while Patient Care decline with -02% and in units, the CH market shows a decrease of -04%, while the OTC declines with -03%

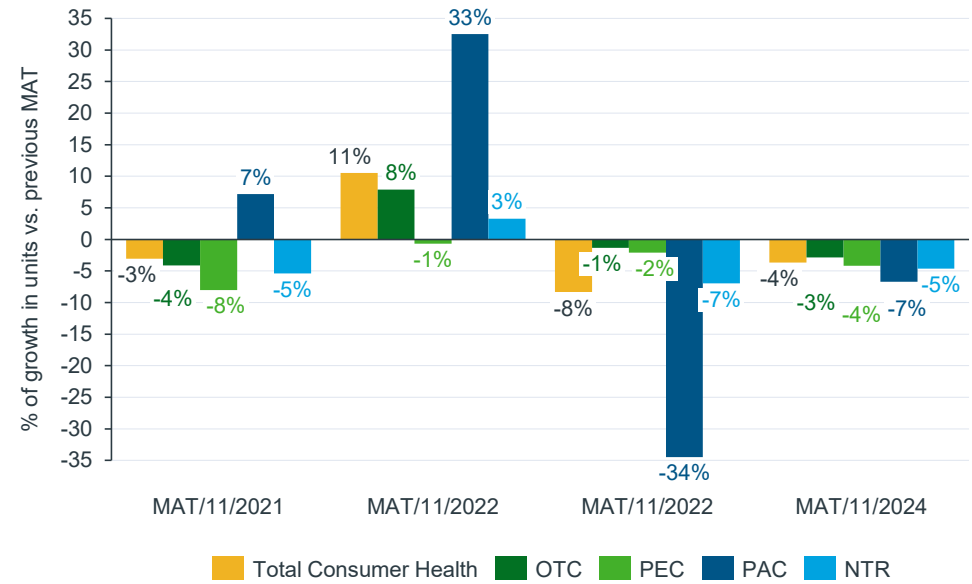
% of growth versus previous MAT

VALUE



% of growth versus previous MAT

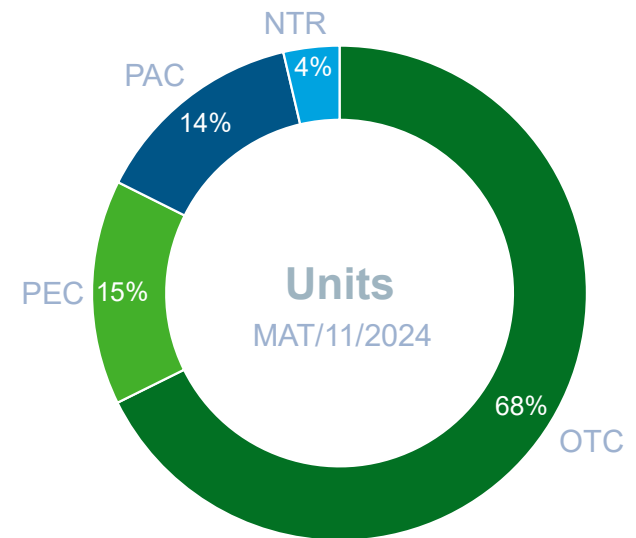
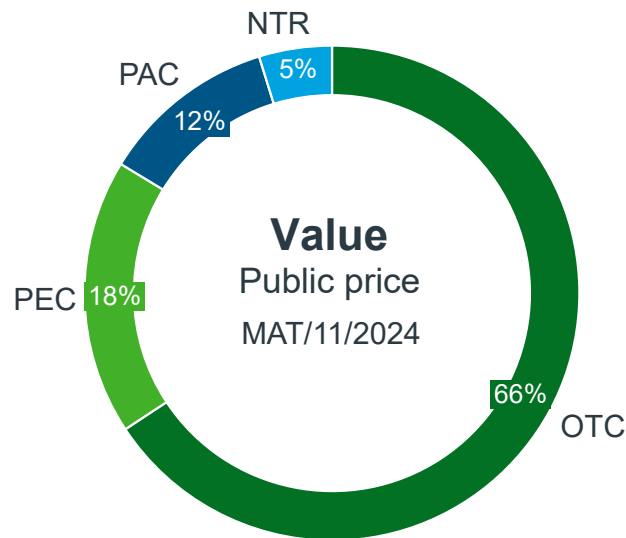
UNITS





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

Market Share

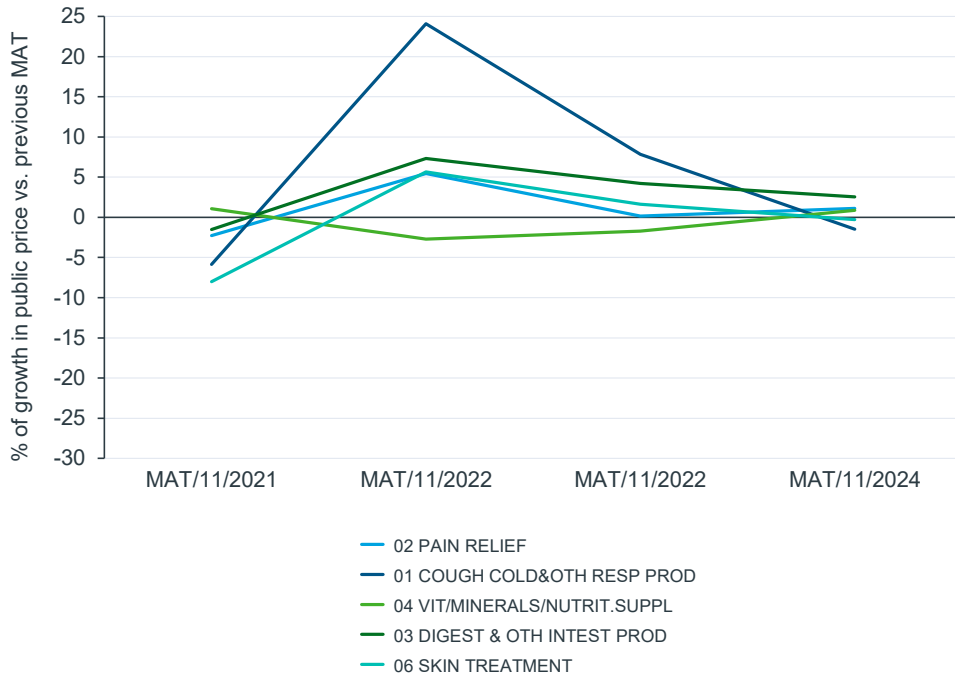




Top 5 classes sales evolution

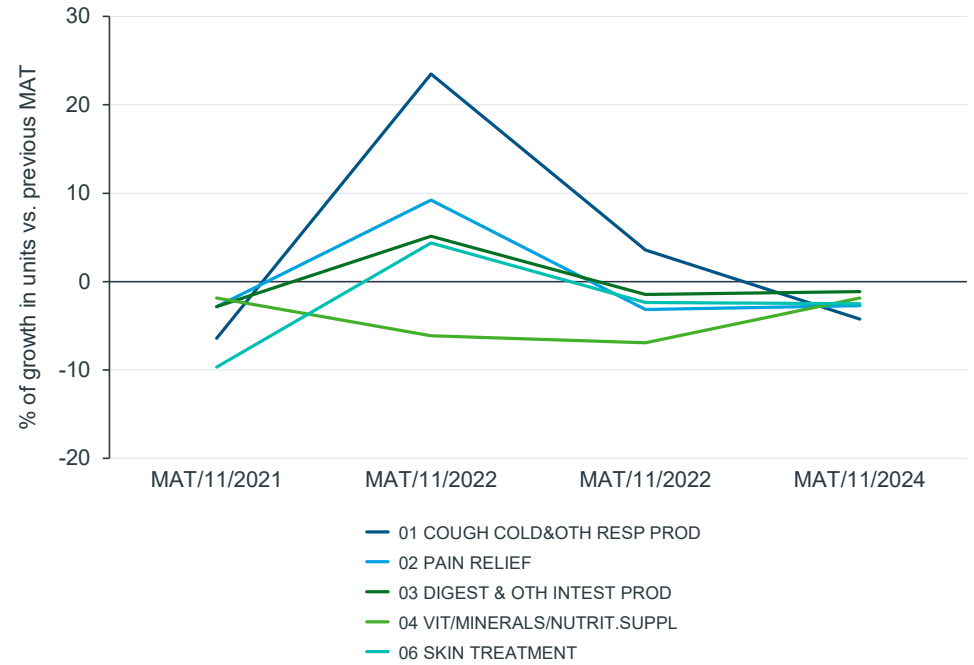
% of growth versus last MAT

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/11/2024	% of BE CH Market
02A GENERAL PAIN RELIEF	181 M €	8.2%
01B COLD REMEDIES	97 M €	4.4%
07A EYE CARE	76 M €	3.4%
01A COUGH PRODUCTS	75 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/11/2024	% of BE CH Market
02A GENERAL PAIN RELIEF	18,310,837	11.9%
01B COLD REMEDIES	10,975,722	7.1%
01A COUGH PRODUCTS	7,150,590	4.7%
01C SORE THROAT REMEDIES	5,766,020	3.8%
03C LAXATIVES	4,533,898	2.9%
07A EYE CARE	4,479,047	2.9%
04E OTHER SPECIFIC VITAMINS	3,791,884	2.5%
02E MUSCULAR PAIN RELIEF	3,099,266	2.0%
03D ANTIDIARRHOEALS	2,924,771	1.9%
04F MINERAL SUPPLEMENTS	2,658,919	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/10/2024	Absolute growth in value	% growth
39 OTH NUTRITIONAL PRODUCTS	4 K €	2 K €	49.0%
52 INCONTINENCE CARE PRDS	1031 K €	127 K €	12.3%
82 BEAUTY PRODUCTS FOR WOMEN	3347 K €	374 K €	11.2%
33 FIBRE FOOD PRODUCTS	5 K €	1 K €	10.6%
79 OTHER PATIENT CARE PRODS	3259 K €	338 K €	10.4%
09 MOUTH TREATMENT PRODUCTS	2685 K €	275 K €	10.2%
44 PRESSURE SORE PREVENTION	31 K €	3 K €	8.9%
81 BEAUTY PRODUCTS FOR MEN	24 K €	2 K €	8.9%
37 CONFECTIONERY	23 K €	2 K €	8.7%
91 PERSONAL HYGIENE ACCESSOR	22 K €	2 K €	8.3%

Fastest Growing OTC1 in Rx sales in % growth in UNITS



	UN MAT/10/2024	Absolute growth in units	% growth
39 OTH NUTRITIONAL PRODUCTS	344	131	38.1%
94 ACCESSORIES FOR BABIES	6,310	1,073	17.0%
89 OTHER PERSONAL CARE PRODS	77	11	14.3%
33 FIBRE FOOD PRODUCTS	444	43	9.7%
82 BEAUTY PRODUCTS FOR WOMEN	125,008	7,534	6.0%
65 BABY+NURSING ACCESSORIES	1,801	106	5.9%
11 ANTINAUSEANTS	104,651	5,612	5.4%
79 OTHER PATIENT CARE PRODS	89,561	4,797	5.4%
17 HABIT TREATMENT	41,670	2,026	4.9%
53 PRDS FOR BLADDER PROBLEMS	360,112	13,215	3.7%



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/10/2024	Absolute growth in value	% growth
04 VIT. MIN. & NUTRIT. SUPPS	67.6 M €	3.9 M €	5.7%
03 DIGEST & OTH INTEST PROD	49.7 M €	2.1 M €	4.2%
02 PAIN RELIEF	58.0 M €	1.8 M €	3.1%
53 PRDS FOR BLADDER PROBLEMS	26.7 M €	1.5 M €	5.8%
07 EYE CARE	16.6 M €	1.3 M €	7.8%
01 COUGH COLD&OTH RESP PROD	64.9 M €	1.1 M €	1.7%
06 SKIN TREATMENT	19.0 M €	0.9 M €	4.5%
13 CALM/SLEEP&MOOD ENHANC PD	12.4 M €	0.7 M €	5.4%
12 URINARY AND REPRODUCT CAR	10.9 M €	0.4 M €	4.0%
83 UNISEX BEAUTY PRODUCTS	8.1 M €	0.4 M €	5.0%

Fastest Growing OTC1 in Rx sales in % growth in UNITS



	UN MAT/10/2024	Absolute growth in units	% growth
04 VIT. MIN. & NUTRIT. SUPPS	3,367,994	102,711	3.0%
06 SKIN TREATMENT	1,912,783	48,691	2.5%
07 EYE CARE	970,384	16,059	1.7%
13 CALM/SLEEP&MOOD ENHANC PD	540,505	14,988	2.8%
53 PRDS FOR BLADDER PROBLEMS	360,112	13,215	3.7%
82 BEAUTY PRODUCTS FOR WOMEN	125,008	7,534	6.0%
12 URINARY AND REPRODUCT CAR	547,533	6,072	1.1%
08 EAR CARE	174,557	5,712	3.3%
11 ANTINAUSEANTS	104,651	5,612	5.4%
79 OTHER PATIENT CARE PRODS	89,561	4,797	5.4%