

Monthly Belgium and Luxembourg Market Trends

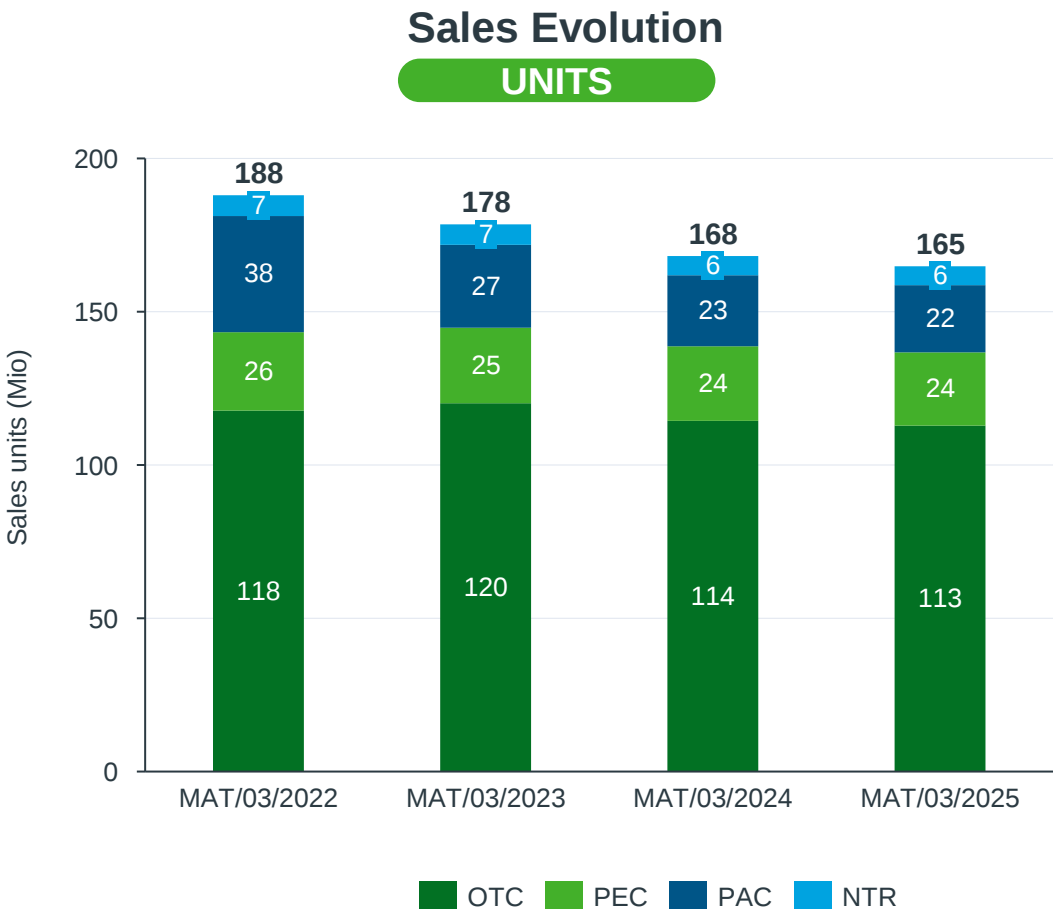
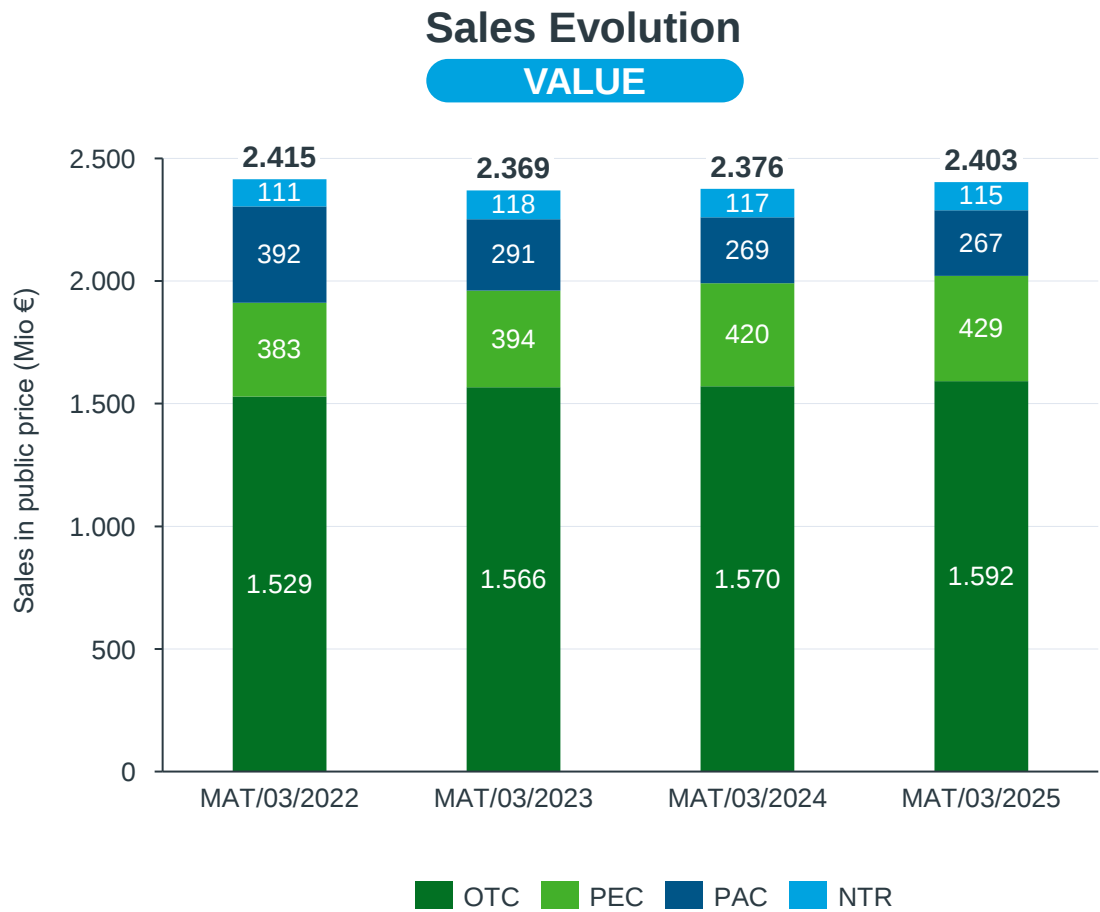
March 2025



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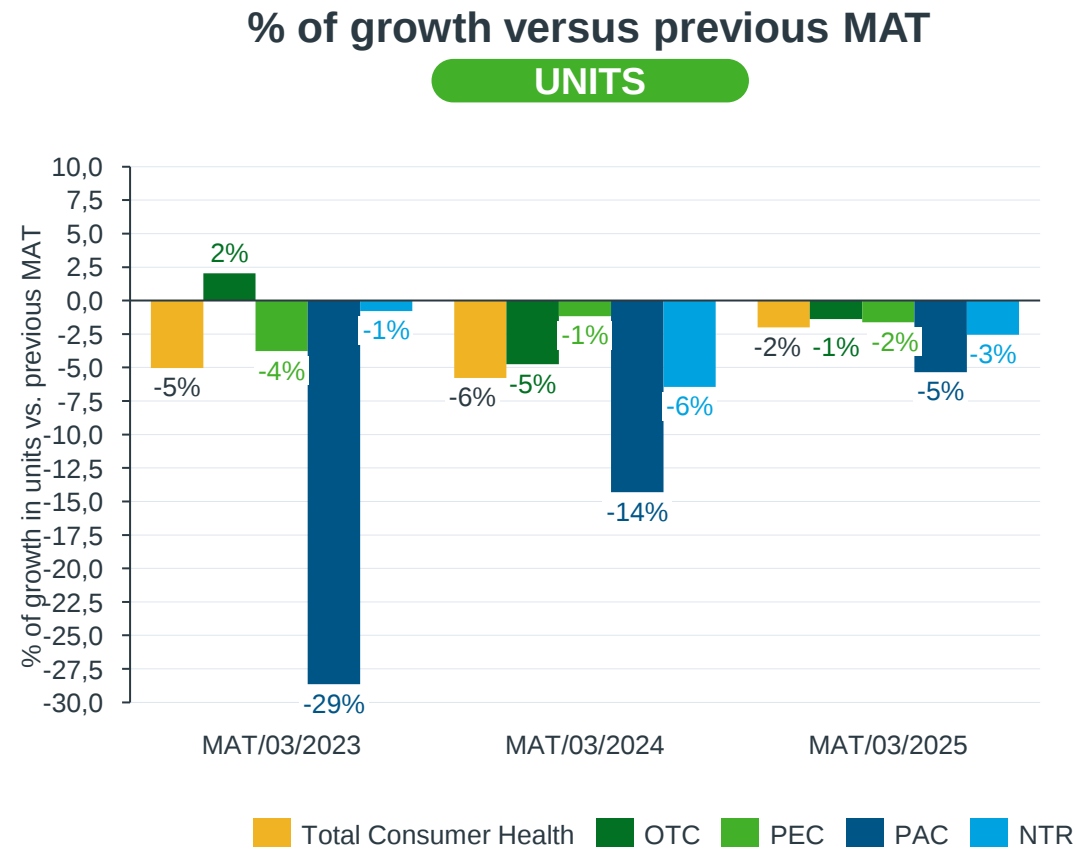
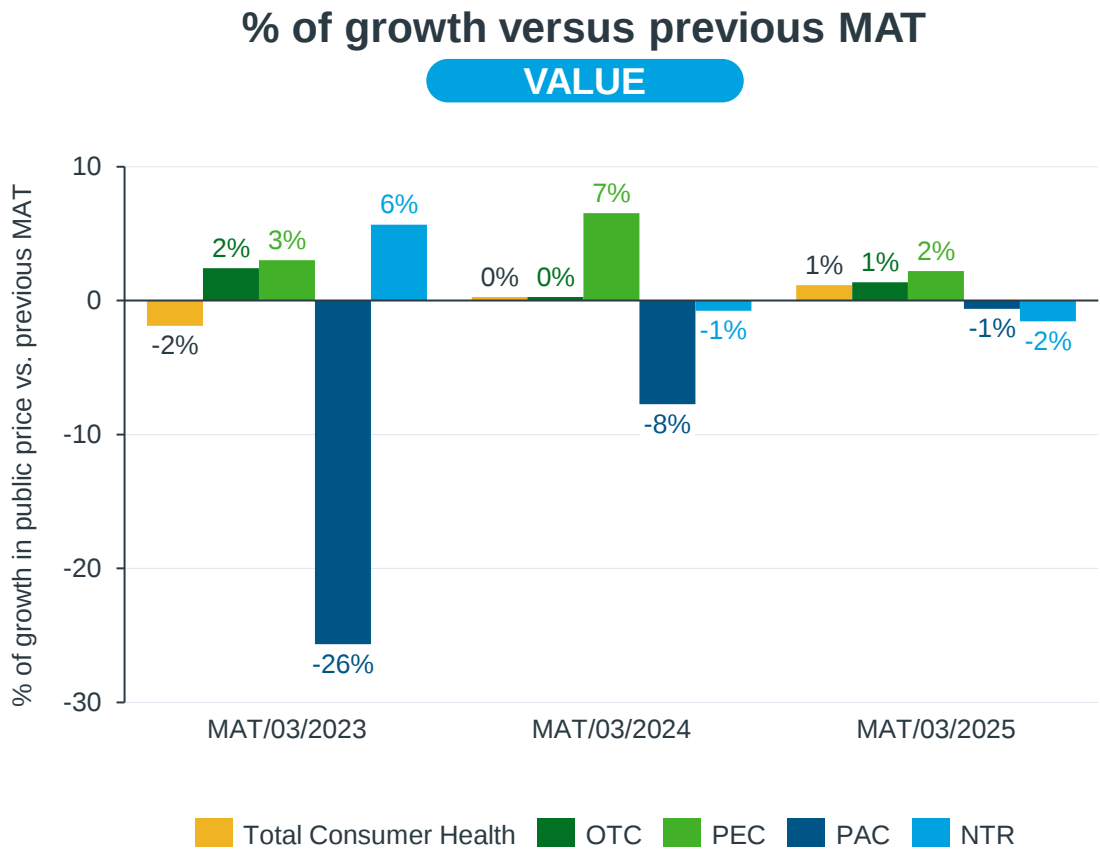
- + Belgium: Retail
- + **Belgium: Consumer Health**
- + Luxembourg: Retail

The Belgian retail market is worth € 2.4 billion



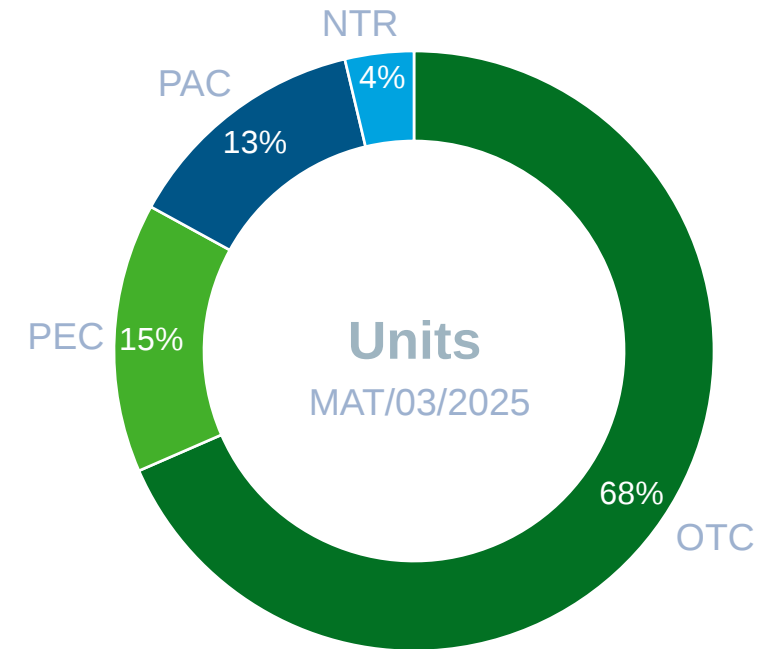
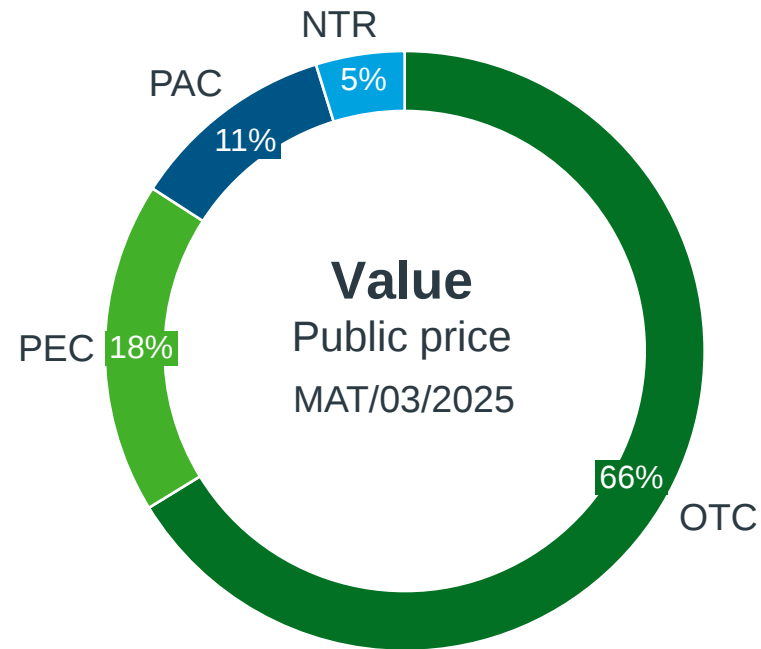
Consumer Health market growth evolution in Belgium

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



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

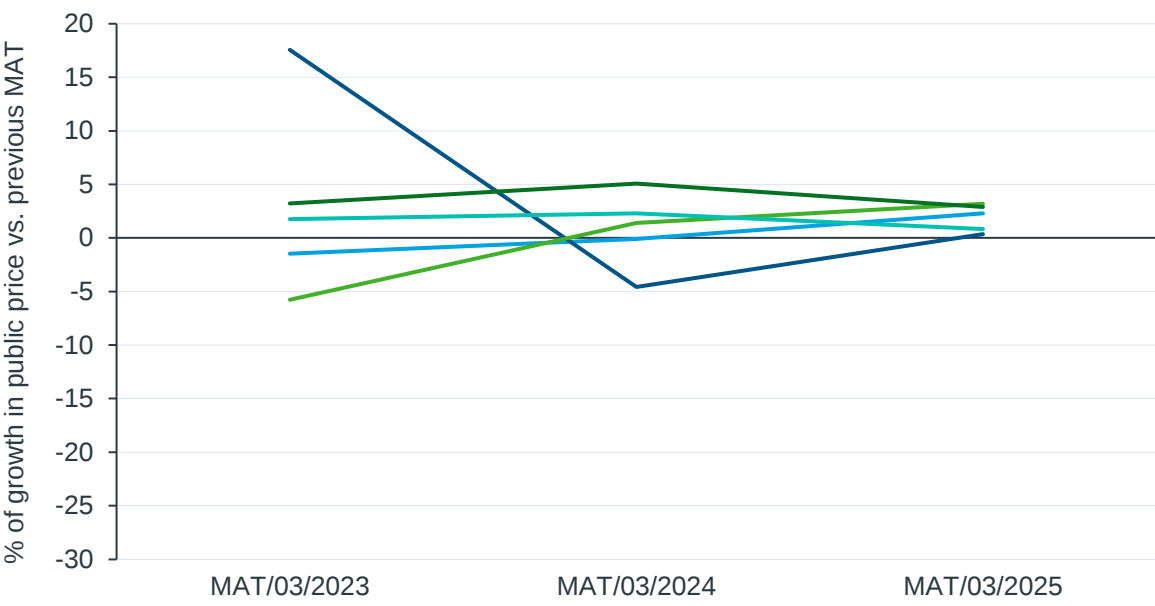
Market Share



Top 5 classes sales evolution

% of growth versus last MAT

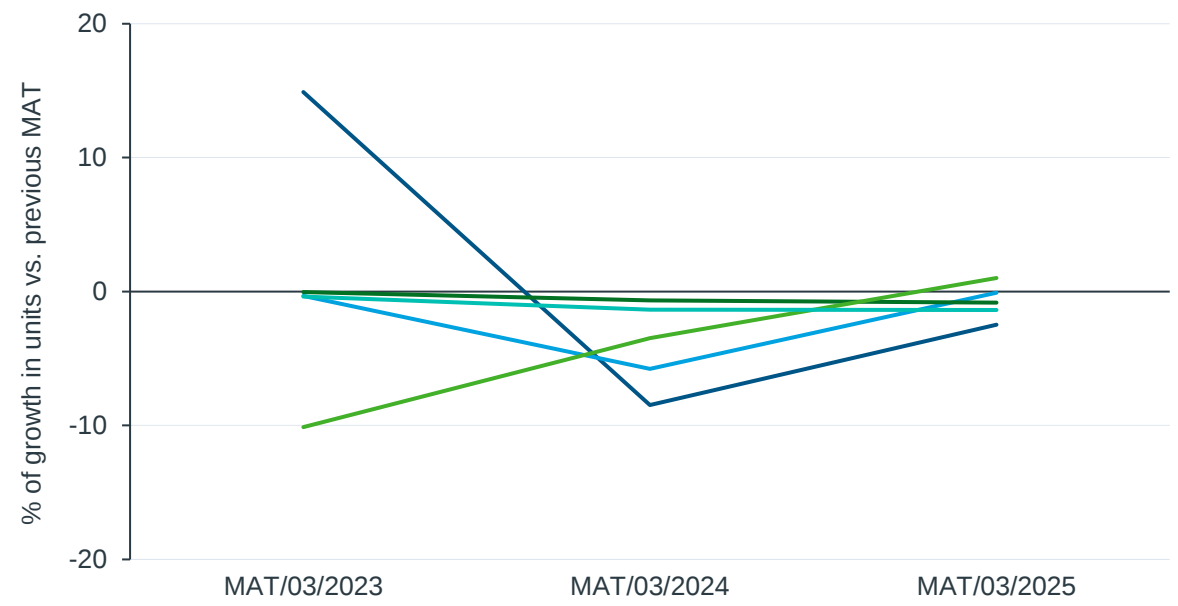
VALUE



- 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/03/2025	% of BE CH Market
02A GENERAL PAIN RELIEF	196 M €	8.1%
01B COLD REMEDIES	100 M €	4.2%
07A EYE CARE	86 M €	3.6%
01A COUGH PRODUCTS	85 M €	3.5%
04F MINERAL SUPPLEMENTS	80 M €	3.3%
35G MILK PRDS FOR CHILDREN	69 M €	2.9%
03C LAXATIVES	66 M €	2.8%
13A CALMING AND SLEEPING PRODUCTS	65 M €	2.7%
02E MUSCULAR PAIN RELIEF	65 M €	2.7%
04E OTHER SPECIFIC VITAMINS	63 M €	2.6%

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



	UN MAT/03/2025	% of BE CH Market
02A GENERAL PAIN RELIEF	19,665,126	11.9%
01B COLD REMEDIES	11,170,998	6.8%
01A COUGH PRODUCTS	7,799,924	4.7%
01C SORE THROAT REMEDIES	5,967,265	3.6%
07A EYE CARE	5,171,018	3.1%
03C LAXATIVES	4,827,969	2.9%
04E OTHER SPECIFIC VITAMINS	4,076,362	2.5%
02E MUSCULAR PAIN RELIEF	3,327,212	2.0%
04F MINERAL SUPPLEMENTS	3,079,550	1.9%
03D ANTIDIARRHOEALS	3,003,875	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/03/2025	Absolute growth in value	% growth
54 BABY DISPOSABLE & CH ENU	4 K €	1 K €	39.7%
33 FIBRE FOOD PRODUCTS	7 K €	2 K €	27.5%
52 INCONTINENCE CARE PRDS	1193 K €	264 K €	22.2%
82 BEAUTY PRODUCT FOR WOMEN	3545 K €	325 K €	9.2%
09 MOUTH TREATMENT PRODUCTS	2814 K €	240 K €	8.5%
06 SKIN TREATMENT	21142 K €	1802 K €	8.5%
37 CONFECTIONERY	24 K €	2 K €	6.7%
49 PLASTERS	358 K €	23 K €	6.3%
04 VIT/MINERALS/NUTRIT.SUPPL	75158 K €	4652 K €	6.2%
97 ALL OTHER MISCELLANEOUS	1824 K €	109 K €	6.0%

Fastest Growing OTC1 in Rx sales in % growth in UNITS



	UN MAT/03/2025	Absolute growth in units	% growth
54 BABY DISPOSABLE & CH ENU	193	58	30.3%
33 FIBRE FOOD PRODUCTS	573	157	27.4%
31 DIABETIC FOOD PRODUCTS	92	8	8.7%
65 BABY+NURSING ACCESSORIES	1,956	159	8.1%
06 SKIN TREATMENT	2,099,180	143,644	6.8%
82 BEAUTY PRODUCT FOR WOMEN	130,956	7,566	5.8%
04 VIT/MINERALS/NUTRIT.SUPPL	3,791,410	186,756	4.9%
79 OTHER PATIENT ARE PRODS	91,904	3,534	3.8%
35 BABY FOODS	214,651	6,022	2.8%
09 MOUTH TREATMENT PRODUCTS	302,142	8,048	2.7%