

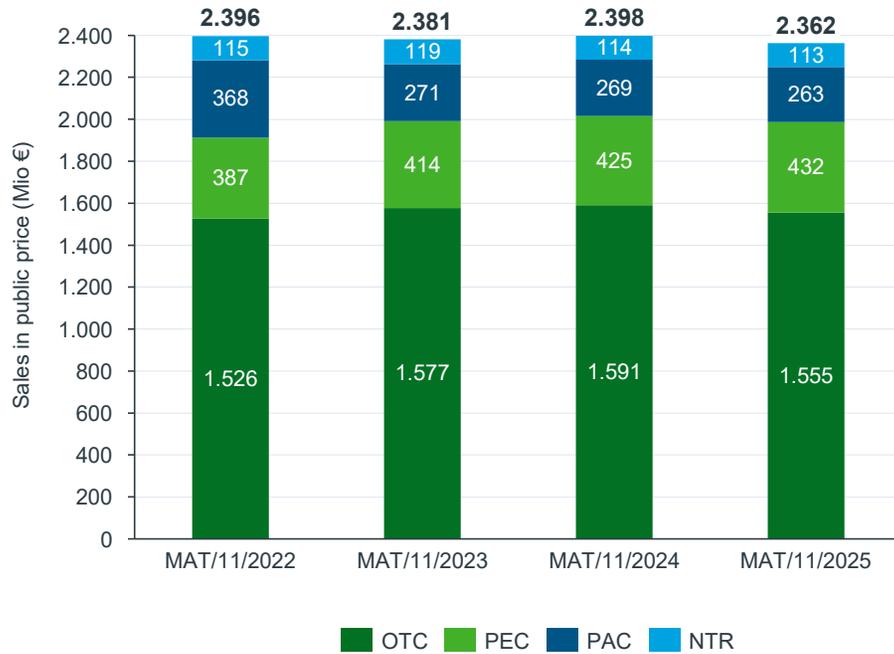
Monthly Belgium and Luxembourg Market Trends November 2025

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

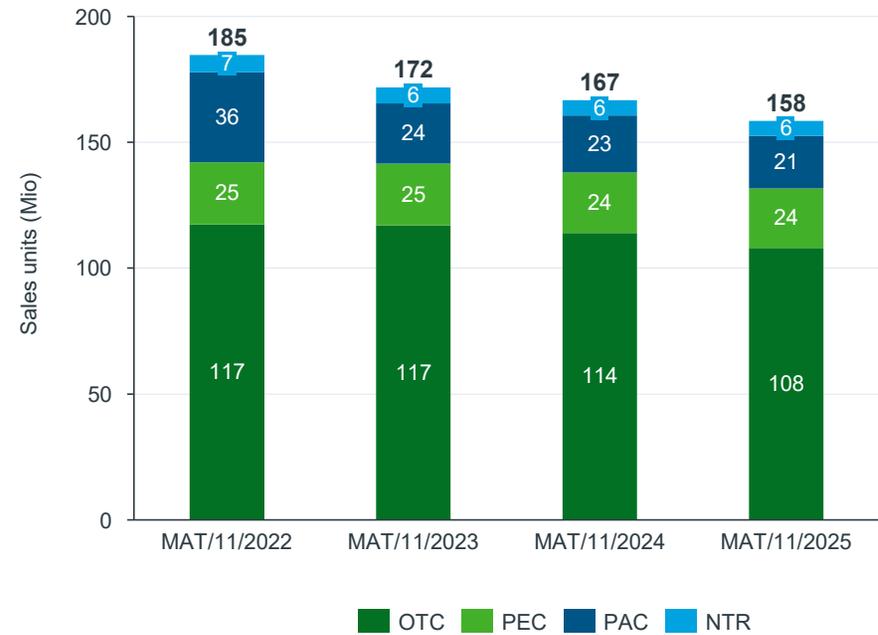


The Belgian retail market is worth € 2.4 billion

Sales Evolution VALUE



Sales Evolution UNITS



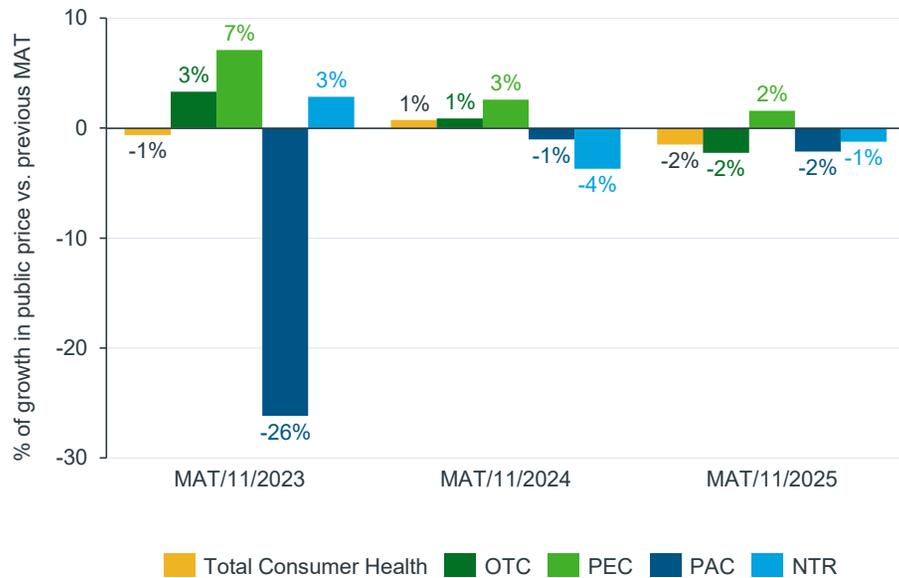


Consumer Health market growth evolution in Belgium

In the last MAT, in value, the total CH market shows a decrease of -02%, while Patient Care declines with -02% and in units, the CH market shows a decrease of -05%, while the OTC declines with -05%

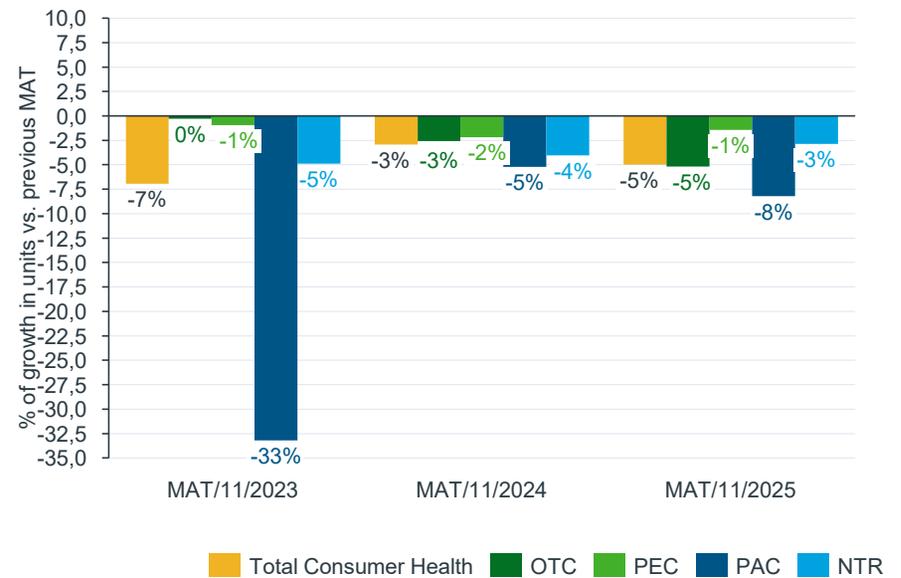
% of growth versus previous MAT

VALUE



% of growth versus previous MAT

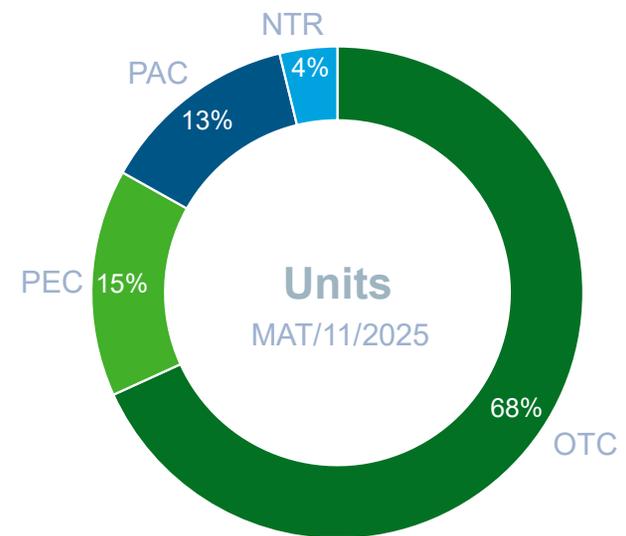
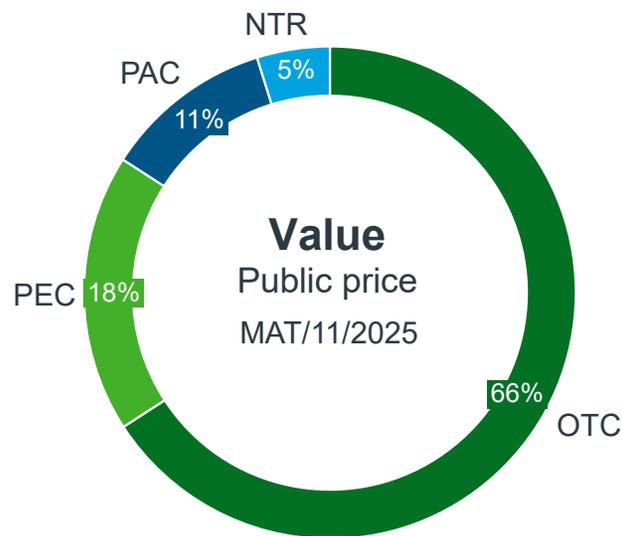
UNITS





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

Market Share

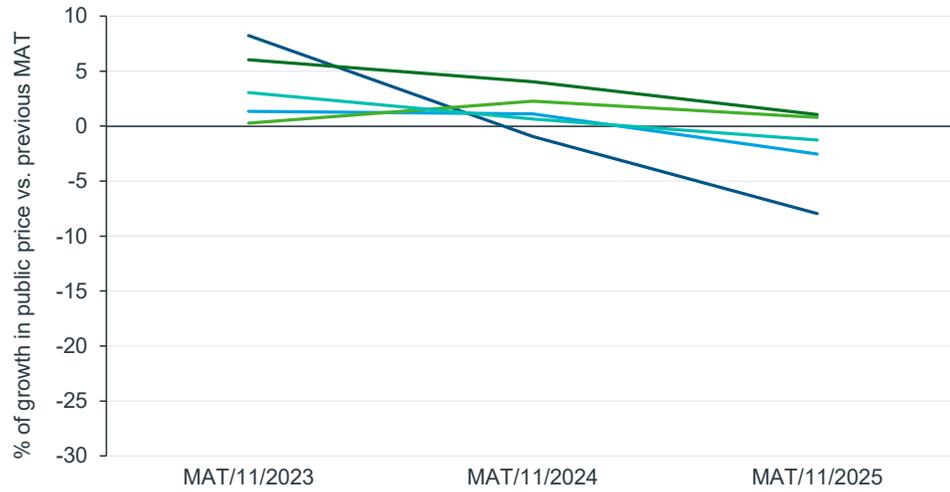




Top 5 classes sales evolution

% of growth versus last MAT

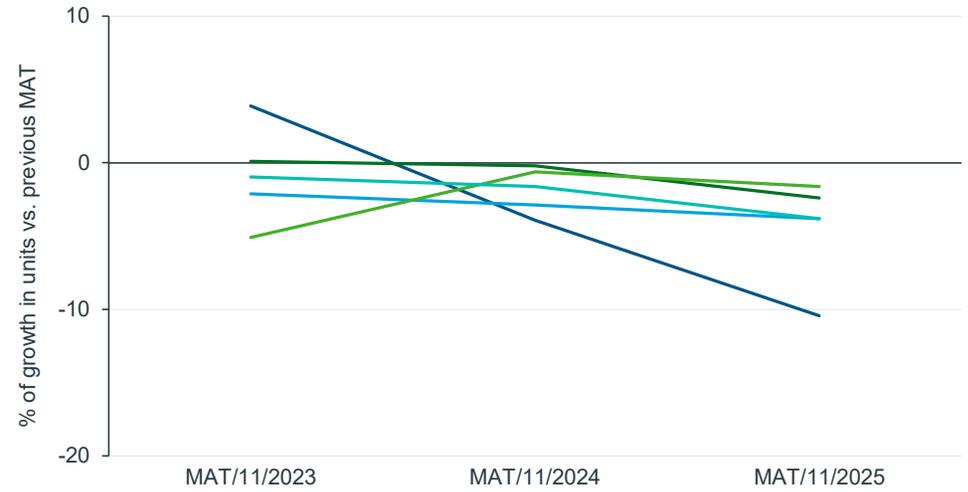
VALUE



- 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/11/2025	% of BE CH Market
02A GENERAL PAIN RELIEF	190 M €	8.0%
01B COLD REMEDIES	91 M €	3.9%
07A EYE CARE	87 M €	3.7%
04F MINERAL SUPPLEMENTS	81 M €	3.4%
01A COUGH PRODUCTS	77 M €	3.2%
35G MILK PRDS FOR CHILDREN	68 M €	2.9%
13A CALMING AND SLEEPING PRODUCTS	68 M €	2.9%
03C LAXATIVES	66 M €	2.8%
02E MUSCULAR PAIN RELIEF	63 M €	2.7%
04E OTHER SPECIFIC VITAMINS	62 M €	2.6%

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



	UN MAT/11/2025	% of BE CH Market
02A GENERAL PAIN RELIEF	18,889,195	11.9%
01B COLD REMEDIES	10,107,673	6.4%
01A COUGH PRODUCTS	6,915,526	4.4%
01C SORE THROAT REMEDIES	5,493,942	3.5%
07A EYE CARE	5,113,727	3.2%
03C LAXATIVES	4,780,259	3.0%
04E OTHER SPECIFIC VITAMINS	3,905,365	2.5%
02E MUSCULAR PAIN RELIEF	3,209,957	2.0%
04F MINERAL SUPPLEMENTS	3,082,364	1.9%
13A CALMING AND SLEEPING PRODUCTS	2,971,243	1.9%



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

Fastest Growing OTC1 in Rx sales in % growth in VALUE public price



	Pub/EUR MAT/11/2025	Absolute growth in value	% growth
65 BABY+NURSING ACCESSORIES	39 K €	12 K €	31.7%
52 INCONTINENCE CARE PRDS	1442 K €	389 K €	26.9%
45 FIRST AID KITS	4 K €	1 K €	21.9%
35 BABY FOODS	11218 K €	2024 K €	18.0%
55 INJECTION DEVICES	1740 K €	277 K €	15.9%
31 DIABETIC FOOD PRODUCTS	0 K €	0 K €	15.5%
36 FOOD FOR ADULTS	164 K €	14 K €	8.5%
06 SKIN TREATMENT	22058 K €	1826 K €	8.3%
54 BABY DISPOSABLE & CH ENU	3 K €	0 K €	7.8%
13 CALM SLEEP MOOD ENHANCING PROD	16328 K €	1157 K €	7.1%

Fastest Growing OTC1 in Rx sales in % growth in UNITS



	UN MAT/11/2025	Absolute growth in units	% growth
45 FIRST AID KITS	271	93	34.4%
54 BABY DISPOSABLE & CH ENU	169	54	32.2%
35 BABY FOODS	292,333	84,429	28.9%
31 DIABETIC FOOD PRODUCTS	88	11	12.7%
65 BABY+NURSING ACCESSORIES	2,144	254	11.8%
06 SKIN TREATMENT	2,150,320	125,085	5.8%
55 INJECTION DEVICES	148,083	6,084	4.1%
13 CALM SLEEP MOOD ENHANCING PROD	757,039	22,374	3.0%
79 OTHER PATIENT ARE PRODS	92,824	2,128	2.3%
50 STOMACARE PRODUCTS	23,019	469	2.0%



The top 10 fastest growing Consumer Health classes in growth (units and value)

Fastest Growing OTC1 in Rx sales in % growth in VALUE public price



	Pub/EUR MAT/11/2025	Absolute growth in value	% growth
04 VIT/MINERALS/NUTRIT.SUPPL	76.5 M €	2.8 M €	3.7%
35 BABY FOODS	11.2 M €	2.0 M €	18.0%
06 SKIN TREATMENT	22.1 M €	1.8 M €	8.3%
03 DIGEST & OTH INTEST PROD	53.2 M €	1.3 M €	2.5%
13 CALM SLEEP MOOD ENHANCING PROD	16.3 M €	1.2 M €	7.1%
10 CIRCULATORY PRODUCTS	36.5 M €	0.9 M €	2.4%
53 PRDS FOR BLADDER PROBLEM	28.0 M €	0.8 M €	3.0%
52 INCONTINENCE CARE PRDS	1.4 M €	0.4 M €	26.9%
07 EYE CARE	22.5 M €	0.4 M €	1.7%
83 UNISEX BEAUTY PRODUCTS	8.7 M €	0.3 M €	3.4%

Fastest Growing OTC1 in Rx sales in % growth in UNITS



	UN MAT/11/2025	Absolute growth in units	% growth
06 SKIN TREATMENT	2,150,320	125,085	5.8%
35 BABY FOODS	292,333	84,429	28.9%
04 VIT/MINERALS/NUTRIT.SUPPL	3,789,224	59,425	1.6%
13 CALM SLEEP MOOD ENHANCING PROD	757,039	22,374	3.0%
55 INJECTION DEVICES	148,083	6,084	4.1%
53 PRDS FOR BLADDER PROBLEM	366,465	4,188	1.1%
09 MOUTH TREATMENT PRODUCTS	303,456	3,069	1.0%
79 OTHER PATIENT ARE PRODS	92,824	2,128	2.3%
50 STOMACARE PRODUCTS	23,019	469	2.0%
83 UNISEX BEAUTY PRODUCTS	445,784	361	0.1%