



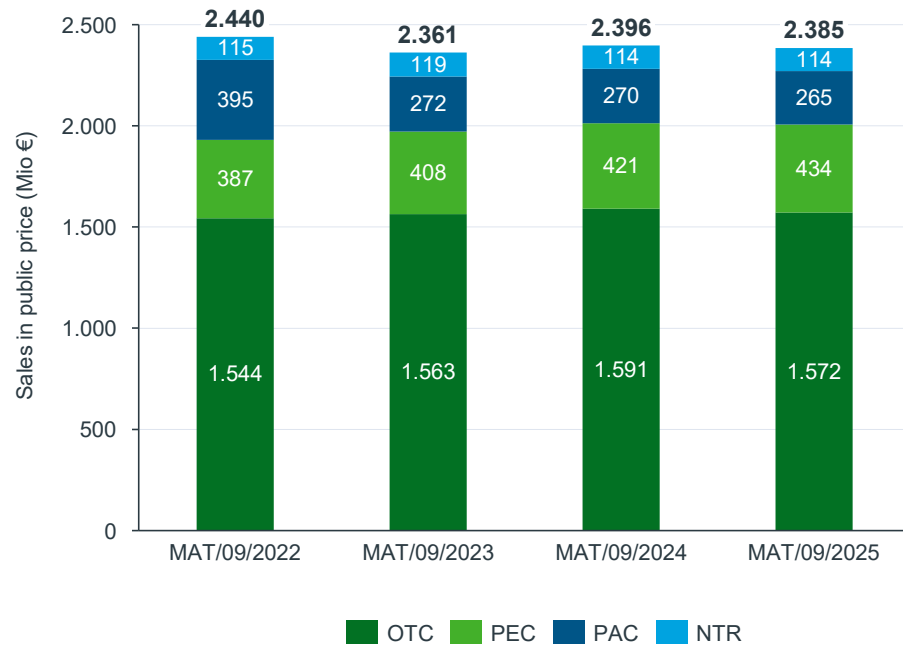
Monthly Belgium and Luxembourg Market Trends September 2025

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

The Belgian retail market is worth € 2.4 billion

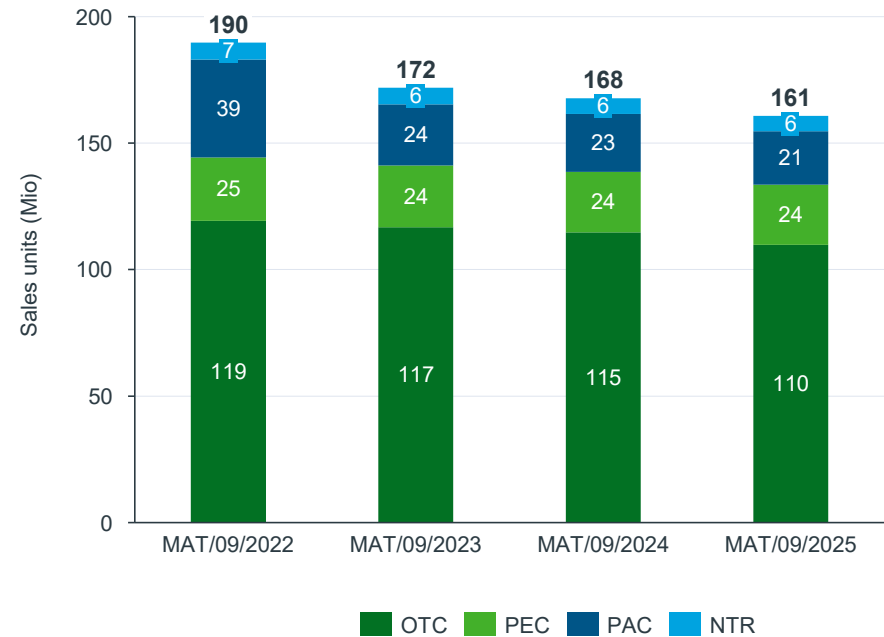
Sales Evolution

VALUE



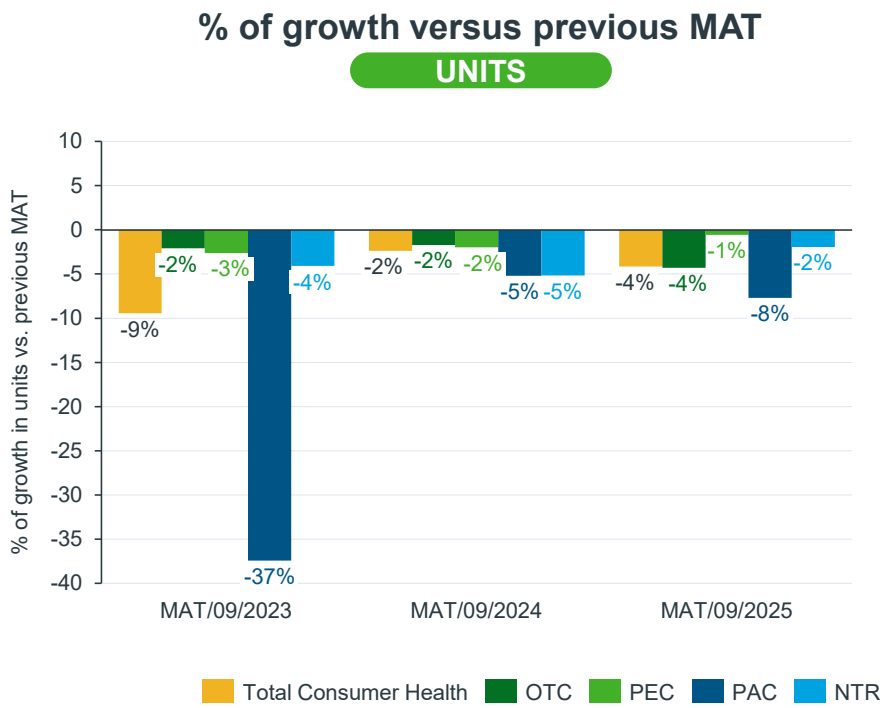
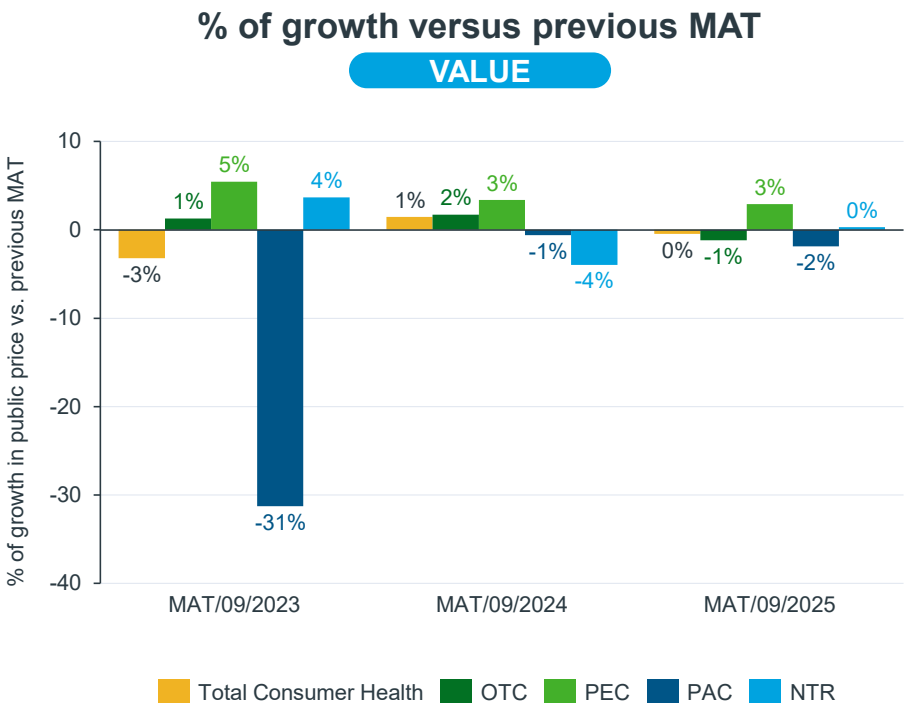
Sales Evolution

UNITS



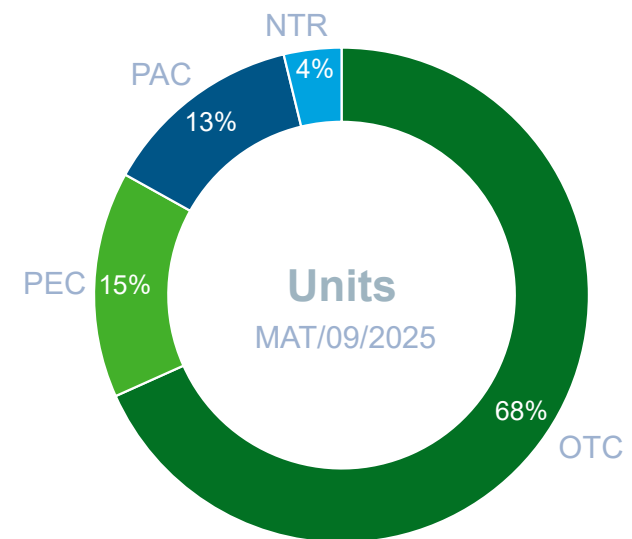
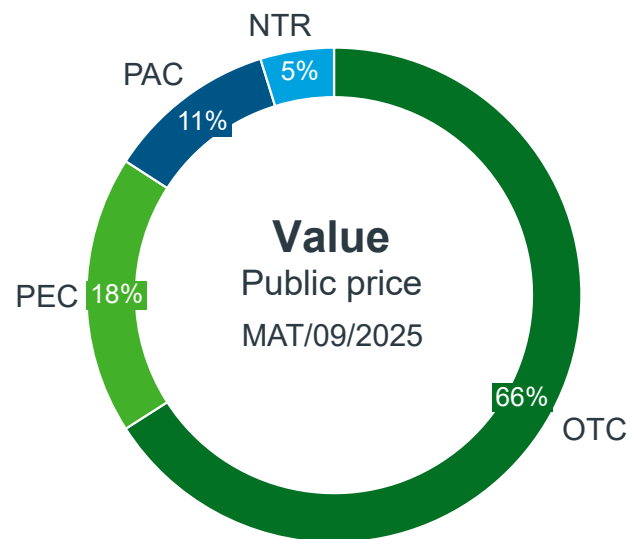
Consumer Health market growth evolution in Belgium

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



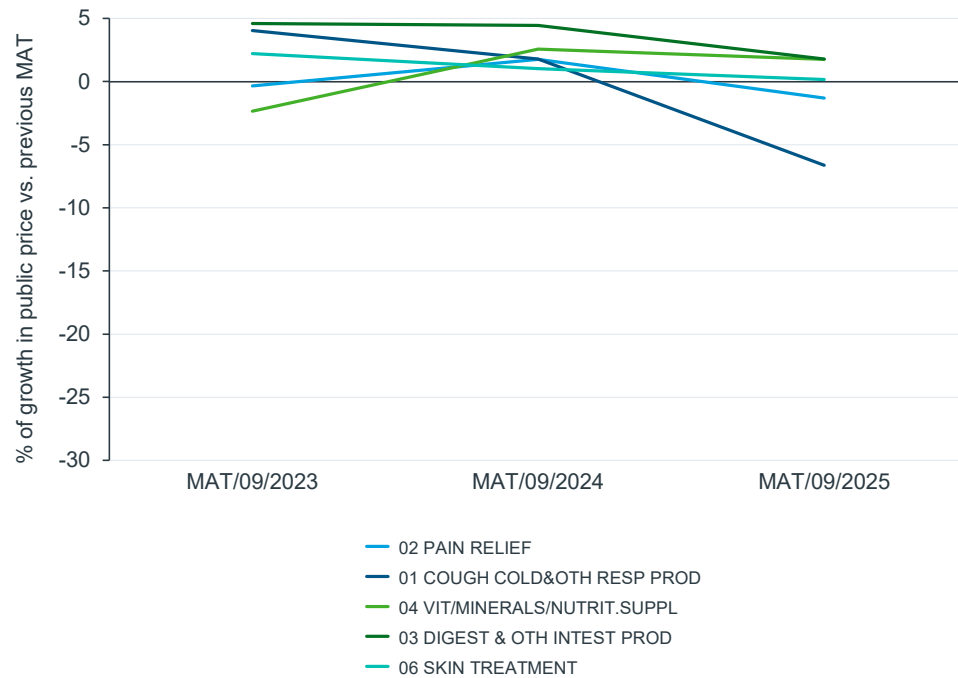
OTC segment has a market share of 68% in units and 66% in value of the total CH market

Market Share

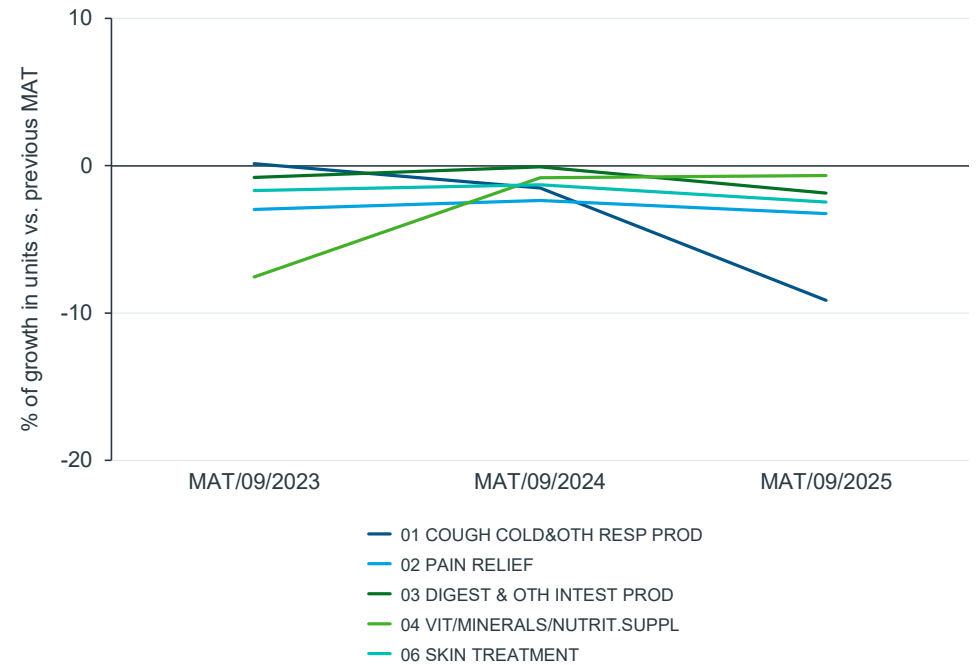


Top 5 classes sales evolution

% 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/09/2025	% of BE CH Market
02A GENERAL PAIN RELIEF	192 M €	8.1%
01B COLD REMEDIES	95 M €	4.0%
07A EYE CARE	87 M €	3.7%
04F MINERAL SUPPLEMENTS	81 M €	3.4%
01A COUGH PRODUCTS	79 M €	3.3%
35G MILK PRDS FOR CHILDREN	69 M €	2.9%
13A CALMING AND SLEEPING PRODUCTS	67 M €	2.8%
03C LAXATIVES	66 M €	2.8%
02E MUSCULAR PAIN RELIEF	64 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/09/2025	% of BE CH Market
02A GENERAL PAIN RELIEF	19,131,294	11.9%
01B COLD REMEDIES	10,532,691	6.6%
01A COUGH PRODUCTS	7,205,497	4.5%
01C SORE THROAT REMEDIES	5,625,867	3.5%
07A EYE CARE	5,143,759	3.2%
03C LAXATIVES	4,795,085	3.0%
04E OTHER SPECIFIC VITAMINS	3,953,901	2.5%
02E MUSCULAR PAIN RELIEF	3,251,193	2.0%
04F MINERAL SUPPLEMENTS	3,104,040	1.9%
13A CALMING AND SLEEPING PRODUCTS	2,975,018	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 ex-mnf



	Pub/EUR MAT/09/2025	Absolute growth in value	% growth
52 INCONTINENCE CARE PRDS	1394 K €	387 K €	27.8%
54 BABY DISPOSABLE & CH ENU	3 K €	1 K €	25.0%
45 FIRST AID KITS	4 K €	1 K €	24.6%
55 INJECTION DEVICES	1719 K €	232 K €	13.5%
35 BABY FOODS	10374 K €	1350 K €	13.0%
06 SKIN TREATMENT	22165 K €	2362 K €	10.7%
36 FOOD FOR ADULTS	164 K €	16 K €	9.7%
97 ALL OTHER MISCELLANEOUS	1889 K €	135 K €	7.1%
13 CALM SLEEP MOOD ENHANCING PROD	16193 K €	1155 K €	7.1%
79 OTHER PATIENT ARE PRODS	3538 K €	202 K €	5.7%

Fastest Growing OTC1 in Rx sales in % growth in UNITS



	UN MAT/09/2025	Absolute growth in units	% growth
54 BABY DISPOSABLE & CH ENU	173	76	44.2%
45 FIRST AID KITS	259	86	33.4%
35 BABY FOODS	253,110	48,392	19.1%
06 SKIN TREATMENT	2,168,043	179,033	8.3%
65 BABY+NURSING ACCESSORIES	2,086	150	7.2%
55 INJECTION DEVICES	147,863	6,163	4.2%
39 OTH NUTRITIONAL PRODUCTS	314	11	3.4%
13 CALM SLEEP MOOD ENHANCING PROD	755,726	24,068	3.2%
04 VIT/MINERALS/NUTRIT.SUPPL	3,799,858	108,069	2.8%
79 OTHER PATIENT ARE PRODS	92,431	2,606	2.8%

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/09/2025	Absolute growth in value	% growth
04 VIT/MINERALS/NUTRIT.SUPPL	76.4 M €	3.6 M €	4.7%
06 SKIN TREATMENT	22.2 M €	2.4 M €	10.7%
03 DIGEST & OTH INTEST PROD	52.9 M €	1.4 M €	2.7%
35 BABY FOODS	10.4 M €	1.3 M €	13.0%
10 CIRCULATORY PRODUCTS	36.7 M €	1.3 M €	3.6%
13 CALM SLEEP MOOD ENHANCING PROD	16.2 M €	1.2 M €	7.1%
53 PRDS FOR BLADDER PROBLEM	27.9 M €	1.0 M €	3.7%
83 UNISEX BEAUTY PRODUCTS	8.7 M €	0.4 M €	4.7%
52 INCONTINENCE CARE PRDS	1.4 M €	0.4 M €	27.8%
07 EYE CARE	22.4 M €	0.3 M €	1.6%

Fastest Growing OTC1 in Rx sales in % growth in UNITS



	UN MAT/09/2025	Absolute growth in units	% growth
06 SKIN TREATMENT	2,168,043	179,033	8.3%
04 VIT/MINERALS/NUTRIT.SUPPL	3,799,858	108,069	2.8%
35 BABY FOODS	253,110	48,392	19.1%
13 CALM SLEEP MOOD ENHANCING PROD	755,726	24,068	3.2%
53 PRDS FOR BLADDER PROBLEM	366,739	8,501	2.3%
12 URINARY AND REPRUDUCT CARE	981,001	8,299	0.8%
55 INJECTION DEVICES	147,863	6,163	4.2%
83 UNISEX BEAUTY PRODUCTS	445,391	5,373	1.2%
09 MOUTH TREATMENT PRODUCTS	303,323	5,034	1.7%
79 OTHER PATIENT ARE PRODS	92,431	2,606	2.8%