

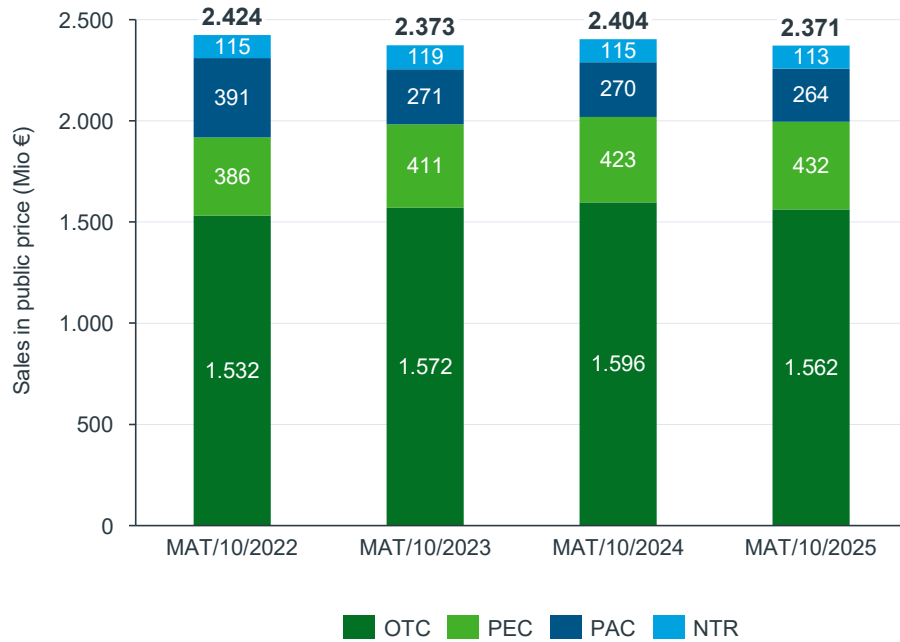


Monthly Belgium and Luxembourg Market Trends October 2025

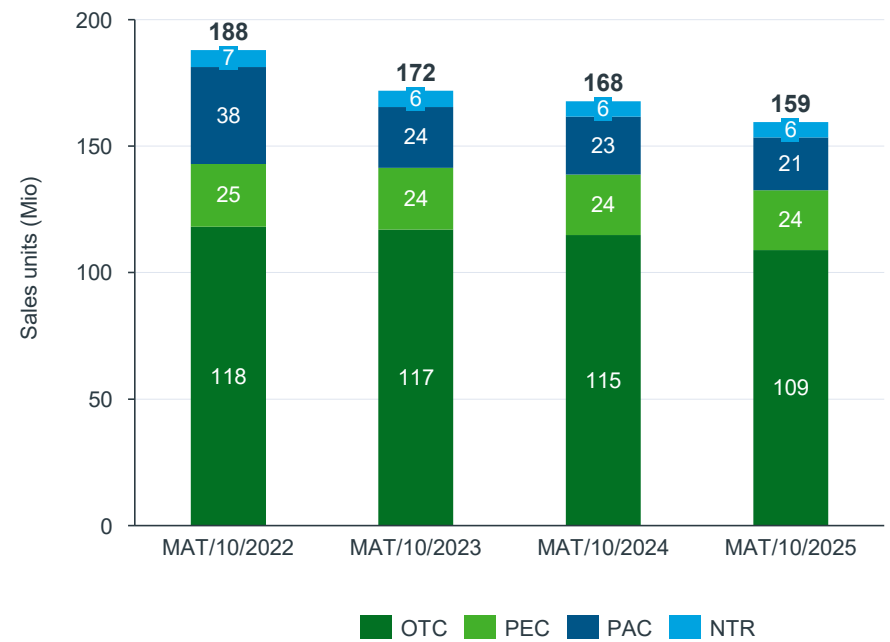
- + Belgium: Retail
- + **Belgium: Consumer Health**
- + Luxembourg: Retail

The Belgian retail market is worth € 2.4 billion

Sales Evolution
VALUE

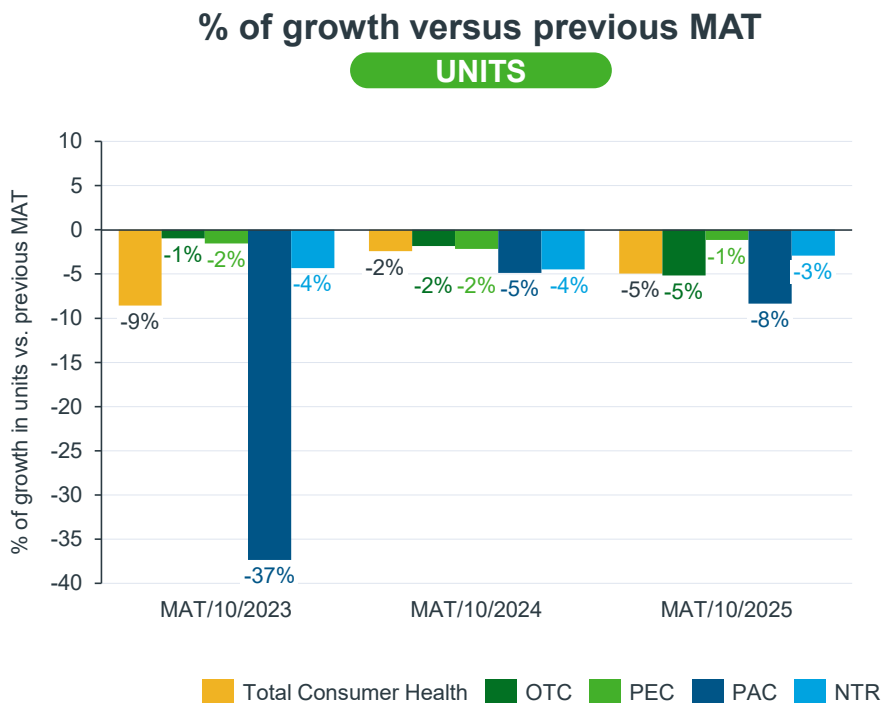
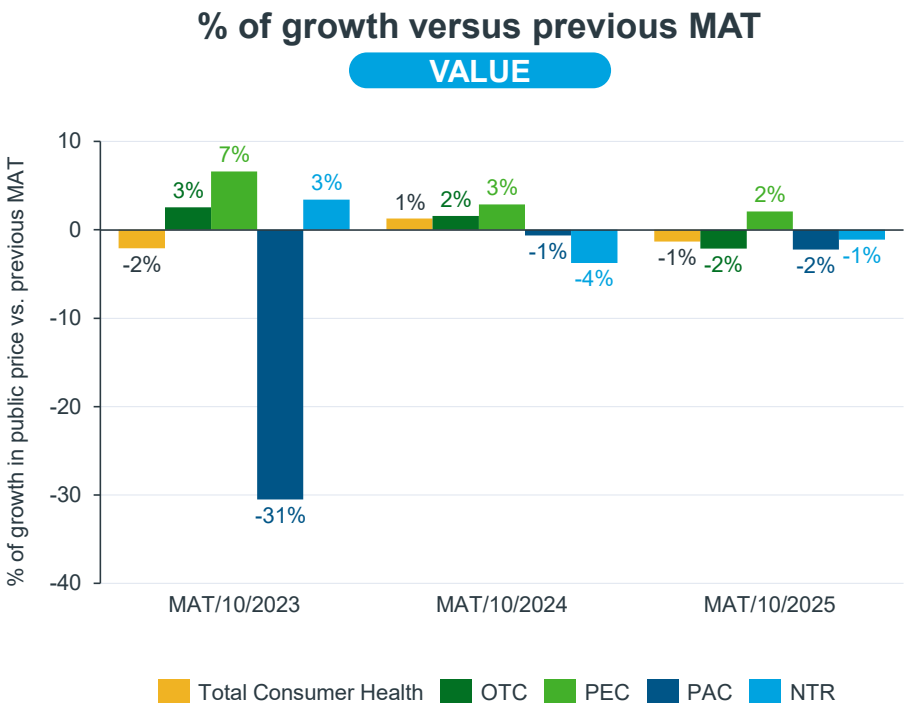


Sales Evolution
UNITS



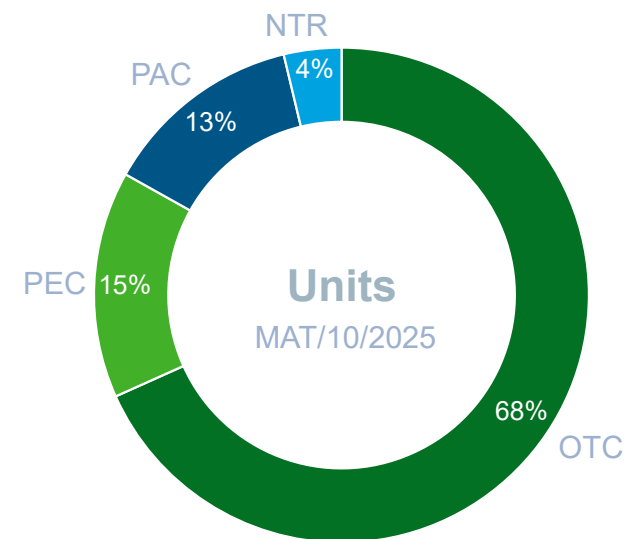
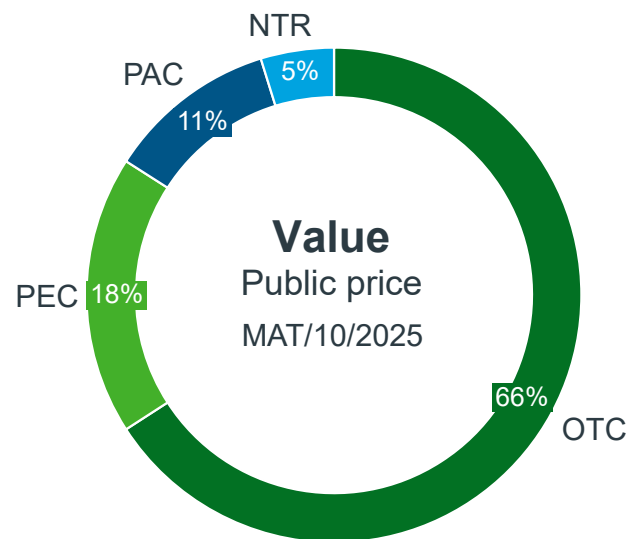
Consumer Health market growth evolution in Belgium

In the last MAT, in value, the total CH market shows a decrease of -01%, while Patient Care declines with -02% and in units, the CH market shows a decrease of -05%, while the OTC declines with -05%



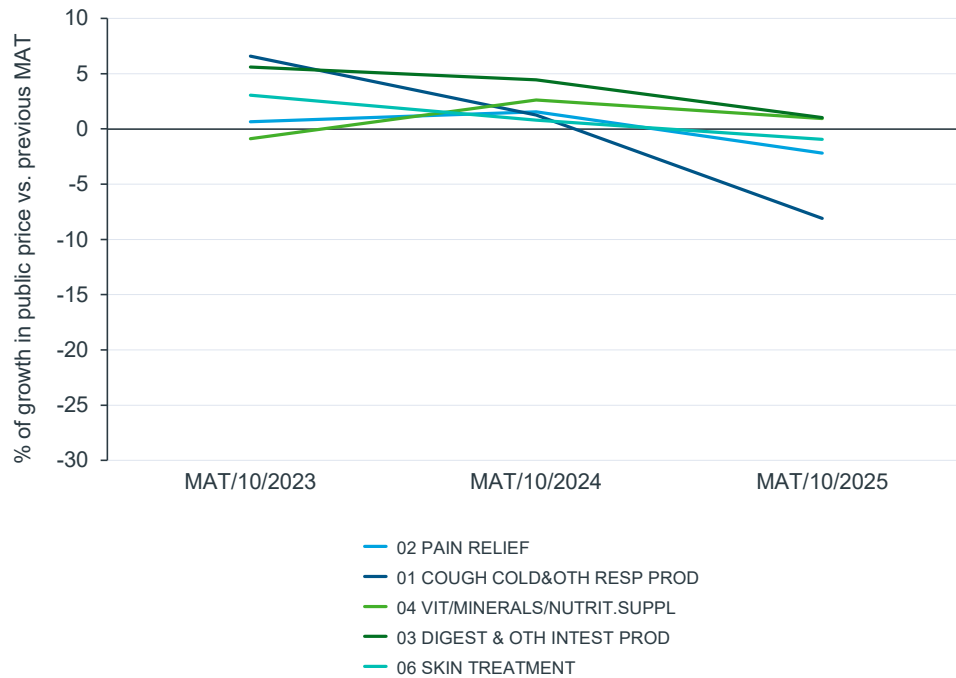
OTC segment has a market share of 68% in units and 66% in value of the total CH market

Market Share

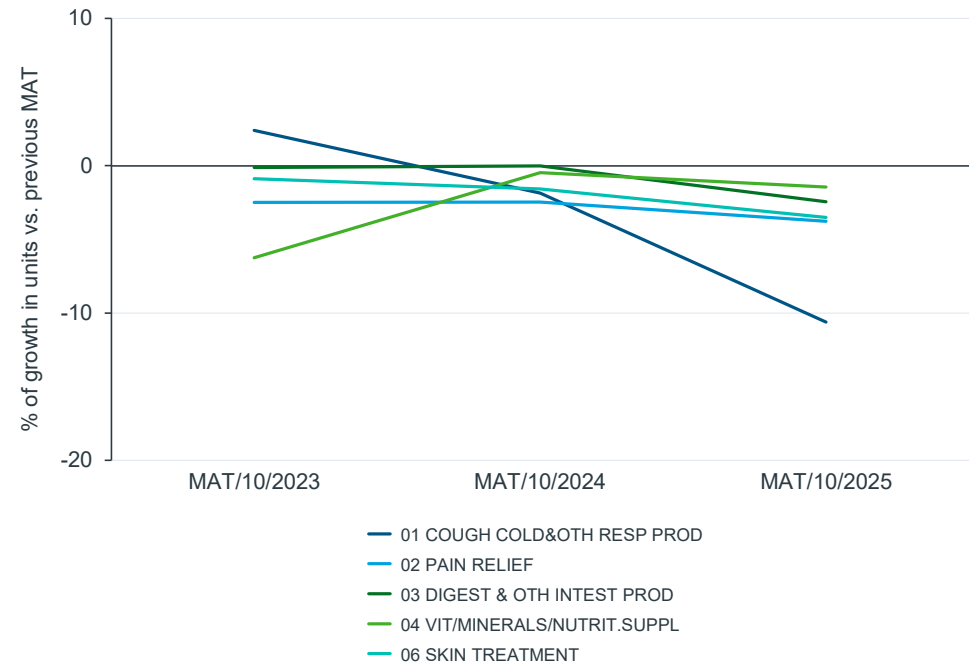


Top 5 classes sales evolution

% 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/10/2025	% of BE CH Market
02A GENERAL PAIN RELIEF	191 M €	8.0%
01B COLD REMEDIES	92 M €	3.9%
07A EYE CARE	87 M €	3.7%
04F MINERAL SUPPLEMENTS	81 M €	3.4%
01A COUGH PRODUCTS	78 M €	3.3%
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/10/2025	% of BE CH Market
02A GENERAL PAIN RELIEF	19,010,237	11.9%
01B COLD REMEDIES	10,246,916	6.4%
01A COUGH PRODUCTS	7,081,719	4.4%
01C SORE THROAT REMEDIES	5,571,221	3.5%
07A EYE CARE	5,131,171	3.2%
03C LAXATIVES	4,784,615	3.0%
04E OTHER SPECIFIC VITAMINS	3,933,194	2.5%
02E MUSCULAR PAIN RELIEF	3,229,989	2.0%
04F MINERAL SUPPLEMENTS	3,095,175	1.9%
13A CALMING AND SLEEPING PRODUCTS	2,974,377	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/10/2025	Absolute growth in value	% growth
52 INCONTINENCE CARE PRDS	1434 K €	404 K €	28.2%
45 FIRST AID KITS	4 K €	1 K €	25.1%
55 INJECTION DEVICES	1743 K €	274 K €	15.7%
35 BABY FOODS	10769 K €	1622 K €	15.1%
54 BABY DISPOSABLE & CH ENU	3 K €	0 K €	13.5%
31 DIABETIC FOOD PRODUCTS	0 K €	0 K €	9.9%
06 SKIN TREATMENT	22127 K €	2079 K €	9.4%
36 FOOD FOR ADULTS	164 K €	14 K €	8.8%
13 CALM SLEEP MOOD ENHANCING PROD	16281 K €	1154 K €	7.1%
97 ALL OTHER MISCELLANEOUS	1895 K €	128 K €	6.8%

Fastest Growing OTC1 in Rx sales in % growth in UNITS



	UN MAT/10/2025	Absolute growth in units	% growth
54 BABY DISPOSABLE & CH ENU	171	68	39.9%
45 FIRST AID KITS	274	90	32.9%
35 BABY FOODS	271,310	64,576	23.8%
65 BABY+NURSING ACCESSORIES	2,106	208	9.9%
31 DIABETIC FOOD PRODUCTS	87	6	7.3%
06 SKIN TREATMENT	2,160,052	150,119	6.9%
55 INJECTION DEVICES	149,289	7,541	5.1%
79 OTHER PATIENT ARE PRODS	93,379	2,781	3.0%
13 CALM SLEEP MOOD ENHANCING PROD	756,365	21,280	2.8%
04 VIT/MINERALS/NUTRIT.SUPPL	3,794,441	69,617	1.8%

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/10/2025	Absolute growth in value	% growth
04 VIT/MINERALS/NUTRIT.SUPPL	76.4 M €	2.9 M €	3.8%
06 SKIN TREATMENT	22.1 M €	2.1 M €	9.4%
35 BABY FOODS	10.8 M €	1.6 M €	15.1%
13 CALM SLEEP MOOD ENHANCING PROD	16.3 M €	1.2 M €	7.1%
03 DIGEST & OTH INTEST PROD	53.0 M €	1.1 M €	2.0%
10 CIRCULATORY PRODUCTS	36.6 M €	1.0 M €	2.6%
53 PRDS FOR BLADDER PROBLEM	27.9 M €	0.7 M €	2.6%
52 INCONTINENCE CARE PRDS	1.4 M €	0.4 M €	28.2%
83 UNISEX BEAUTY PRODUCTS	8.7 M €	0.3 M €	3.6%
07 EYE CARE	22.5 M €	0.3 M €	1.3%

Fastest Growing OTC1 in Rx sales in % growth in UNITS



	UN MAT/10/2025	Absolute growth in units	% growth
06 SKIN TREATMENT	2,160,052	150,119	6.9%
04 VIT/MINERALS/NUTRIT.SUPPL	3,794,441	69,617	1.8%
35 BABY FOODS	271,310	64,576	23.8%
13 CALM SLEEP MOOD ENHANCING PROD	756,365	21,280	2.8%
55 INJECTION DEVICES	149,289	7,541	5.1%
09 MOUTH TREATMENT PRODUCTS	303,295	2,808	0.9%
79 OTHER PATIENT ARE PRODS	93,379	2,781	3.0%
53 PRDS FOR BLADDER PROBLEM	364,648	1,525	0.4%
83 UNISEX BEAUTY PRODUCTS	444,073	787	0.2%
50 STOMACARE PRODUCTS	23,056	374	1.6%