

# Tissue and Hygiene in Austria

May 2025

**Table of Contents** 

## Tissue and Hygiene in Austria

## **EXECUTIVE SUMMARY**

Tissue and hygiene in 2024: The big picture

2024 key trends

Competitive landscape

Retail developments

What next for tissue and hygiene?

## MARKET INDICATORS

- Table 1 Birth Rates 2019-2024
- Table 2 Infant Population 2019-2024
- Table 3 Female Population by Age 2019-2024
- Table 4 Total Population by Age 2019-2024
- Table 5 Households 2019-2024
- Table 6 Forecast Infant Population 2024-2029
- Table 7 Forecast Female Population by Age 2024-2029
- Table 8 Forecast Total Population by Age 2024-2029
- Table 9 Forecast Households 2024-2029

#### MARKET DATA

- Table 10 Retail Sales of Tissue and Hygiene by Category: Value 2019-2024
- Table 11 Retail Sales of Tissue and Hygiene by Category: % Value Growth 2019-2024
- Table 12 NBO Company Shares of Retail Tissue and Hygiene: % Value 2020-2024
- Table 13 LBN Brand Shares of Retail Tissue and Hygiene: % Value 2021-2024
- Table 14 Penetration of Private Label in Retail Tissue and Hygiene by Category: % Value 2019-2024
- Table 15 Distribution of Retail Tissue and Hygiene by Format: % Value 2019-2024
- Table 16 Distribution of Retail Tissue and Hygiene by Format and Category: % Value 2024
- Table 17 Forecast Retail Sales of Tissue and Hygiene by Category: Value 2024-2029
- Table 18 Forecast Retail Sales of Tissue and Hygiene by Category: % Value Growth 2024-2029

## DISCLAIMER

## **SOURCES**

Summary 1 - Research Sources

# Away-From-Home Tissue and Hygiene in Austria

## **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Away-from-home value sales slow in post-pandemic era

Players focus on absorbency, comfort and sustainability

Ageing population drives growth in adult incontinence

## PROSPECTS AND OPPORTUNITIES

Tourism and hospitality industries to support category growth

E-commerce sales rise over the forecast period

Sustainability concerns are set to drive innovation

## **CATEGORY DATA**

- Table 19 Sales of Away-From-Home Tissue and Hygiene by Category: Value 2019-2024
- Table 20 Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2019-2024
- Table 21 Sales of Away-From-Home Paper Towels by Type: % Value 2019-2024

- Table 22 Distribution of Away-From-Home Tissue and Hygiene by Format: % Value 2019-2024
- Table 23 Distribution of Away-From-Home Tissue and Hygiene by Format and Category: % Value 2024
- Table 24 Forecast Sales of Away-From-Home Tissue and Hygiene by Category: Value 2024-2029
- Table 25 Forecast Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2024-2029

## Retail Adult Incontinence in Austria

## **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Retail adult incontinence posts solid growth in line with demands of ageing population

Essity Austria AB leads in retail adult incontinence

Health and beauty specialists leads as the primary channel

## PROSPECTS AND OPPORTUNITIES

Bright outlook as demand for retail adult incontinence expands

Customised and gender-specific products to gain traction

Sustainable focus will bring new products to market

## **CATEGORY DATA**

- Table 26 Sales of Retail Adult Incontinence by Category: Value 2019-2024
- Table 27 Sales of Retail Adult Incontinence by Category: % Value Growth 2019-2024
- Table 28 NBO Company Shares of Retail Adult Incontinence: % Value 2020-2024
- Table 29 LBN Brand Shares of Retail Adult Incontinence: % Value 2021-2024
- Table 30 Forecast Sales of Retail Adult Incontinence by Category: Value 2024-2029
- Table 31 Forecast Sales of Retail Adult Incontinence by Category: % Value Growth 2024-2029

## Nappies/Diapers/Pants in Austria

## KEY DATA FINDINGS

## 2024 DEVELOPMENTS

Nappies/diapers/pants post robust growth

Procter & Gamble Austria leads in nappies/diapers/pants

Modern retailers account for bulk of sales

## PROSPECTS AND OPPORTUNITIES

Nappies/diapers/pants record steady performance

Sustainability and eco-friendly alternatives will gain traction

Premiumisation trend likely to gather momentum

## **CATEGORY DATA**

- Table 32 Retail Sales of Nappies/Diapers/Pants by Category: Value 2019-2024
- Table 33 Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2019-2024
- Table 34 NBO Company Shares of Retail Nappies/Diapers/Pants: % Value 2020-2024
- Table 35 LBN Brand Shares of Retail Nappies/Diapers/Pants: % Value 2021-2024
- Table 36 Forecast Retail Sales of Nappies/Diapers/Pants by Category: Value 2024-2029
- Table 37 Forecast Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2024-2029

## Menstrual Care in Austria

## KEY DATA FINDINGS

## 2024 DEVELOPMENTS

Volume sales pick up in menstrual care

Johnson & Johnson GmbH sustains its leading position

Health and beauty specialists lose ground to modern grocery retailers

## PROSPECTS AND OPPORTUNITIES

Menstrual care sales face steady growth

Sustainable credentials will remain top of mind for Austrians

Technology to bring new personalised products to market

#### CATEGORY DATA

- Table 38 Retail Sales of Menstrual Care by Category: Value 2019-2024
- Table 39 Retail Sales of Menstrual Care by Category: % Value Growth 2019-2024
- Table 40 Retail Sales of Tampons by Application Format: % Value 2019-2024
- Table 41 NBO Company Shares of Retail Menstrual Care: % Value 2020-2024
- Table 42 LBN Brand Shares of Retail Menstrual Care: % Value 2021-2024
- Table 43 Forecast Retail Sales of Menstrual Care by Category: Value 2024-2029
- Table 44 Forecast Retail Sales of Menstrual Care by Category: % Value Growth 2024-2029

## Wipes in Austria

## **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Healthy growth is observed in wipes

Procter & Gamble Austria holds prominent position

Grocery retailers lead in wipes distribution

## PROSPECTS AND OPPORTUNITIES

Healthy outlook for wipes category

E-commerce development to provide growth stimulus

Sustainability to remain a key influence in wipes

## **CATEGORY DATA**

- Table 45 Retail Sales of Wipes by Category: Value 2019-2024
- Table 46 Retail Sales of Wipes by Category: % Value Growth 2019-2024
- Table 47 NBO Company Shares of Retail Wipes: % Value 2020-2024
- Table 48 LBN Brand Shares of Retail Wipes: % Value 2021-2024
- Table 49 Forecast Retail Sales of Wipes by Category: Value 2024-2029
- Table 50 Forecast Retail Sales of Wipes by Category: % Value Growth 2024-2029

## Retail Tissue in Austria

## KEY DATA FINDINGS

## 2024 DEVELOPMENTS

Mixed performance in retail tissue category

Essity Austria asserts its leads in value terms

Grocery retailers hold largest share in distribution

## PROSPECTS AND OPPORTUNITIES

Retail tissue faces buoyant growth prospects

Grocery retailers to capitalise on competitive advantage

Sustainability agenda will fuel new innovations

## CATEGORY DATA

Table 51 - Retail Sales of Tissue by Category: Value 2019-2024

Table 52 - Retail Sales of Tissue by Category: % Value Growth 2019-2024

Table 53 - NBO Company Shares of Retail Tissue: % Value 2020-2024

Table 54 - LBN Brand Shares of Retail Tissue: % Value 2021-2024

Table 55 - Forecast Retail Sales of Tissue by Category: Value 2024-2029

Table 56 - Forecast Retail Sales of Tissue by Category: % Value Growth 2024-2029

## Rx/Reimbursement Adult Incontinence in Austria

## **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Ageing population drives growth of reimbursed adult incontinence Players cater to needs of diverse consumer base E-commerce is changing the distribution landscape

## PROSPECTS AND OPPORTUNITIES

Rx/reimbursement to grow at modest rate in upcoming years Product development to focus on efficacy and sustainability Retail e-commerce will influence distribution mix

#### **CATEGORY DATA**

Table 57 - Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2019-2024

Table 58 - Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP Growth 2019-2024

Table 59 - Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2024-2029

Table 60 - Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP Growth 2024-2029

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focusing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer
  trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with
  country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/tissue-and-hygiene-in-austria/report.