

Tissue and Hygiene in Austria

March 2024

Table of Contents

EXECUTIVE SUMMARY

Tissue and hygiene in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for tissue and hygiene?

MARKET INDICATORS

Table 1 - Birth Rates 2018-2023

Table 2 - Infant Population 2018-2023

Table 3 - Female Population by Age 2018-2023

Table 4 - Total Population by Age 2018-2023

Table 5 - Households 2018-2023

Table 6 - Forecast Infant Population 2023-2028

Table 7 - Forecast Female Population by Age 2023-2028

Table 8 - Forecast Total Population by Age 2023-2028

Table 9 - Forecast Households 2023-2028

MARKET DATA

Table 10 - Retail Sales of Tissue and Hygiene by Category: Value 2018-2023

Table 11 - Retail Sales of Tissue and Hygiene by Category: % Value Growth 2018-2023

Table 12 - NBO Company Shares of Retail Tissue and Hygiene: % Value 2019-2023

Table 13 - LBN Brand Shares of Retail Tissue and Hygiene: % Value 2020-2023

Table 14 - Penetration of Private Label in Retail Tissue and Hygiene by Category: % Value 2018-2023

Table 15 - Distribution of Retail Tissue and Hygiene by Format: % Value 2018-2023

Table 16 - Distribution of Retail Tissue and Hygiene by Format and Category: % Value 2023

Table 17 - Forecast Retail Sales of Tissue and Hygiene by Category: Value 2023-2028

Table 18 - Forecast Retail Sales of Tissue and Hygiene by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Away-From-Home Tissue and Hygiene in Austria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Inflationary pressures lead manufacturers to increase their prices

Return of celebrations in foodservice establishments boosts sales

Players focus on more sustainable solutions

PROSPECTS AND OPPORTUNITIES

Continued growth expected, supported by return to busy lifestyles

Away-from-home toilet paper will generate largest share of value sales

Eco-friendly concerns will shape new product developments

CATEGORY DATA

Table 19 - Sales of Away-From-Home Tissue and Hygiene by Category: Value 2018-2023

Table 20 - Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2018-2023

Table 21 - Sales of Away-From-Home Paper Towels by Type: % Value 2018-2023

Table 22 - Distribution of Away-From-Home Tissue and Hygiene by Format: % Value 2018-2023

Table 23 - Distribution of Away-From-Home Tissue and Hygiene by Format and Category: % Value 2023

Table 24 - Forecast Sales of Away-From-Home Tissue and Hygiene by Category: Value 2023-2028

Table 25 - Forecast Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2023-2028

Retail Adult Incontinence in Austria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demographic factors favour adult incontinence products
Convenience and skin-friendly ingredients shape new product developments
Essity Austria retains its solid lead, thanks to established Tena brand

PROSPECTS AND OPPORTUNITIES

Ageing population and further development of e-commerce will boost demand over the forecast period
Growth potential for products targeted at men
Growing sustainability concerns will drive new product launches

CATEGORY DATA

Table 26 - Sales of Retail Adult Incontinence by Category: Value 2018-2023
Table 27 - Sales of Retail Adult Incontinence by Category: % Value Growth 2018-2023
Table 28 - NBO Company Shares of Retail Adult Incontinence: % Value 2019-2023
Table 29 - LBN Brand Shares of Retail Adult Incontinence: % Value 2020-2023
Table 30 - Forecast Sales of Retail Adult Incontinence by Category: Value 2023-2028
Table 31 - Forecast Sales of Retail Adult Incontinence by Category: % Value Growth 2023-2028

Nappies/Diapers/Pants in Austria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Higher demand in 2023
Sustainable options gain traction, although many consumers favour convenience
Private label players gain share, while e-commerce gains further traction

PROSPECTS AND OPPORTUNITIES

Low birth rate will challenge sales, with growth driven by disposable pants
Rising sustainability trend will shape new product development
Procter & Gamble Austria will retain its lead, while focusing on its eco-friendly goals

CATEGORY DATA

Table 32 - Retail Sales of Nappies/Diapers/Pants by Category: Value 2018-2023
Table 33 - Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2018-2023
Table 34 - NBO Company Shares of Retail Nappies/Diapers/Pants: % Value 2019-2023
Table 35 - LBN Brand Shares of Retail Nappies/Diapers/Pants: % Value 2020-2023
Table 36 - Forecast Retail Sales of Nappies/Diapers/Pants by Category: Value 2023-2028
Table 37 - Forecast Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2023-2028

Menstrual Care in Austria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Pantyliners continue to lead sales, thanks to their versatility

Growing competition from reusable options challenges sales of tampons
Johnson & Johnson retains its lead, thanks to its well-established brands

PROSPECTS AND OPPORTUNITIES

Ageing population and growing interest in reusable products will challenge sales
Sustainability will remain a core issue, shaping new product development
New EU legislation to impact sanitary protection products

CATEGORY DATA

Table 38 - Retail Sales of Menstrual Care by Category: Value 2018-2023
Table 39 - Retail Sales of Menstrual Care by Category: % Value Growth 2018-2023
Table 40 - Retail Sales of Tampons by Application Format: % Value 2018-2023
Table 41 - NBO Company Shares of Retail Menstrual Care: % Value 2019-2023
Table 42 - LBN Brand Shares of Retail Menstrual Care: % Value 2020-2023
Table 43 - Forecast Retail Sales of Menstrual Care by Category: Value 2023-2028
Table 44 - Forecast Retail Sales of Menstrual Care by Category: % Value Growth 2023-2028

Wipes in Austria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Baby wipes continue as key driver of growth
EU Directive spurs manufacturers to launch plastic-free products
Procter & Gamble maintains its lead

PROSPECTS AND OPPORTUNITIES

Manufacturers will focus on more sustainable alternatives
Moist toilet wipes will post fastest growth
Private label will gain further momentum

CATEGORY DATA

Table 45 - Retail Sales of Wipes by Category: Value 2018-2023
Table 46 - Retail Sales of Wipes by Category: % Value Growth 2018-2023
Table 47 - NBO Company Shares of Retail Wipes: % Value 2019-2023
Table 48 - LBN Brand Shares of Retail Wipes: % Value 2020-2023
Table 49 - Forecast Retail Sales of Wipes by Category: Value 2023-2028
Table 50 - Forecast Retail Sales of Wipes by Category: % Value Growth 2023-2028

Retail Tissue in Austria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising prices boost value growth
Players align their products to the growing sustainability trend
Supermarkets continue as key distribution channel

PROSPECTS AND OPPORTUNITIES

Players will attempt to add value through further differentiation, with boxed facial tissues leading growth
Sustainability will continue as a key trend
Private label will gain share, as price sensitivity continues

CATEGORY DATA

Table 51 - Retail Sales of Tissue by Category: Value 2018-2023

Table 52 - Retail Sales of Tissue by Category: % Value Growth 2018-2023

Table 53 - NBO Company Shares of Retail Tissue: % Value 2019-2023

Table 54 - LBN Brand Shares of Retail Tissue: % Value 2020-2023

Table 55 - Forecast Retail Sales of Tissue by Category: Value 2023-2028

Table 56 - Forecast Retail Sales of Tissue by Category: % Value Growth 2023-2028

Rx/Reimbursement Adult Incontinence in Austria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Inflation leads to higher prices but strict reimbursement regulations restrict volume sales

Ageing population continues to drive demand

PROSPECTS AND OPPORTUNITIES

Ageing population will continue to boost growth in the coming years

Strict reimbursement rules will lead to a rise in retail sales

CATEGORY DATA

Table 57 - Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2018-2023

Table 58 - Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP Growth 2018-2023

Table 59 - Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2023-2028

Table 60 - Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP Growth 2023-2028

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 focussing 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.