

Discounters in Austria

March 2023

Table of Contents

KEY DATA FINDINGS

2022 DEVELOPMENTS

Traffic through discounters grows in light of higher living costs
Hofer becomes the first discounter to offer its full product range online
E-commerce is used to underline Penny Markt's strengths

PROSPECTS AND OPPORTUNITIES

Discounters set to perform relatively well, but uncertainties remain
Lidl continues to adapt product ranges to cater to consumer needs
Investment focus to shift from expansion to modernisation

CHANNEL DATA

Table 1 - Discounters: Value Sales, Outlets and Selling Space 2017-2022
Table 2 - Discounters: Value Sales, Outlets and Selling Space: % Growth 2017-2022
Table 3 - Discounters GBO Company Shares: % Value 2018-2022
Table 4 - Discounters GBN Brand Shares: % Value 2019-2022
Table 5 - Discounters LBN Brand Shares: Outlets 2019-2022
Table 6 - Discounters Forecasts: Value Sales, Outlets and Selling Space 2022-2027
Table 7 - Discounters Forecasts: Value Sales, Outlets and Selling Space: % Growth 2022-2027

Retail in Austria - Industry Overview

EXECUTIVE SUMMARY

Retail in 2022: The big picture
Catch-up effects and high prices for foodservice generate some positive impulses
Self-service retail concepts are slowly gaining momentum
What next for retail?

OPERATING ENVIRONMENT

Informal retail
Opening hours for physical retail
Summary 1 - Standard Opening Hours by Channel Type 2022
Seasonality
Christmas
Back to School

MARKET DATA

Table 8 - Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2017-2022
Table 9 - Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2017-2022
Table 10 - Sales in Retail Offline by Channel: Value 2017-2022
Table 11 - Sales in Retail Offline by Channel: % Value Growth 2017-2022
Table 12 - Retail Offline Outlets by Channel: Units 2017-2022
Table 13 - Retail Offline Outlets by Channel: % Unit Growth 2017-2022
Table 14 - Sales in Retail E-Commerce by Product: Value 2017-2022
Table 15 - Sales in Retail E-Commerce by Product: % Value Growth 2017-2022
Table 16 - Grocery Retailers: Value Sales, Outlets and Selling Space 2017-2022
Table 17 - Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2017-2022
Table 18 - Sales in Grocery Retailers by Channel: Value 2017-2022
Table 19 - Sales in Grocery Retailers by Channel: % Value Growth 2017-2022
Table 20 - Grocery Retailers Outlets by Channel: Units 2017-2022
Table 21 - Grocery Retailers Outlets by Channel: % Unit Growth 2017-2022

Table 22 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space 2017-2022
Table 23 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2017-2022
Table 24 - Sales in Non-Grocery Retailers by Channel: Value 2017-2022
Table 25 - Sales in Non-Grocery Retailers by Channel: % Value Growth 2017-2022
Table 26 - Non-Grocery Retailers Outlets by Channel: Units 2017-2022
Table 27 - Non-Grocery Retailers Outlets by Channel: % Unit Growth 2017-2022
Table 28 - Retail GBO Company Shares: % Value 2018-2022
Table 29 - Retail GBN Brand Shares: % Value 2019-2022
Table 30 - Retail Offline GBO Company Shares: % Value 2018-2022
Table 31 - Retail Offline GBN Brand Shares: % Value 2019-2022
Table 32 - Retail Offline LBN Brand Shares: Outlets 2019-2022
Table 33 - Retail E-Commerce GBO Company Shares: % Value 2018-2022
Table 34 - Retail E-Commerce GBN Brand Shares: % Value 2019-2022
Table 35 - Grocery Retailers GBO Company Shares: % Value 2018-2022
Table 36 - Grocery Retailers GBN Brand Shares: % Value 2019-2022
Table 37 - Grocery Retailers LBN Brand Shares: Outlets 2019-2022
Table 38 - Non-Grocery Retailers GBO Company Shares: % Value 2018-2022
Table 39 - Non-Grocery Retailers GBN Brand Shares: % Value 2019-2022
Table 40 - Non-Grocery Retailers LBN Brand Shares: Outlets 2019-2022
Table 41 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2022-2027
Table 42 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2022-2027
Table 43 - Forecast Sales in Retail Offline by Channel: Value 2022-2027
Table 44 - Forecast Sales in Retail Offline by Channel: % Value Growth 2022-2027
Table 45 - Forecast Retail Offline Outlets by Channel: Units 2022-2027
Table 46 - Forecast Retail Offline Outlets by Channel: % Unit Growth 2022-2027
Table 47 - Forecast Sales in Retail E-Commerce by Product: Value 2022-2027
Table 48 - Forecast Sales in Retail E-Commerce by Product: % Value Growth 2022-2027
Table 49 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2022-2027
Table 50 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2022-2027
Table 51 - Forecast Sales in Grocery Retailers by Channel: Value 2022-2027
Table 52 - Forecast Sales in Grocery Retailers by Channel: % Value Growth 2022-2027
Table 53 - Forecast Grocery Retailers Outlets by Channel: Units 2022-2027
Table 54 - Forecast Grocery Retailers Outlets by Channel: % Unit Growth 2022-2027
Table 55 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2022-2027
Table 56 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2022-2027
Table 57 - Forecast Sales in Non-Grocery Retailers by Channel: Value 2022-2027
Table 58 - Forecast Sales in Non-Grocery Retailers by Channel: % Value Growth 2022-2027
Table 59 - Forecast Non-Grocery Retailers Outlets by Channel: Units 2022-2027
Table 60 - Forecast Non-Grocery Retailers Outlets by Channel: % Unit Growth 2022-2027

DISCLAIMER

SOURCES

Summary 2 - Research Sources

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/discounters-in-austria/report.