

Home Care in Austria

April 2025

Table of Contents

Home Care in Austria

EXECUTIVE SUMMARY

Home care in 2024: The big picture

2024 key trends

Competitive landscape

Retailing developments

What next for home care?

MARKET INDICATORS

Table 1 - Households 2019-2024

MARKET DATA

- Table 2 Sales of Home Care by Category: Value 2019-2024
- Table 3 Sales of Home Care by Category: % Value Growth 2019-2024
- Table 4 NBO Company Shares of Home Care: % Value 2020-2024
- Table 5 LBN Brand Shares of Home Care: % Value 2021-2024
- Table 6 Penetration of Private Label in Home Care by Category: % Value 2019-2024
- Table 7 Distribution of Home Care by Format: % Value 2019-2024
- Table 8 Distribution of Home Care by Format and Category: % Value 2024
- Table 9 Forecast Sales of Home Care by Category: Value 2024-2029
- Table 10 Forecast Sales of Home Care by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Air Care in Austria

KEY DATA FINDINGS

2024 DEVELOPMENTS

Minimal growth for air care in 2024, as price-conscious local consumers forego non-essential spending Liquid air fresheners registers the best performance in 2024

International players retain the top three positions

PROSPECTS AND OPPORTUNITIES

Improving economic climate bodes well for air care in Austria in the years ahead

Desire for increased ambience within the home will drive sales of liquid air fresheners

Preference for in-store testing will continue to favour brick and mortar retailers

CATEGORY DATA

- Table 11 Sales of Air Care by Category: Value 2019-2024
- Table 12 Sales of Air Care by Category: % Value Growth 2019-2024
- Table 13 Sales of Air Care by Fragrance: Value Ranking 2022-2024
- Table 14 NBO Company Shares of Air Care: % Value 2020-2024
- Table 15 LBN Brand Shares of Air Care: % Value 2021-2024
- Table 16 Forecast Sales of Air Care by Category: Value 2024-2029
- Table 17 Forecast Sales of Air Care by Category: % Value Growth 2024-2029

Bleach in Austria

KEY DATA FINDINGS

2024 DEVELOPMENTS

Declining sales for bleach, as local consumers shun harmful chemicals

Highly consolidated competitive landscape discourages new entrants

Supermarkets retains the lead, but discounters enjoys healthy share of sales

PROSPECTS AND OPPORTUNITIES

Volume decline predicted for bleach in the years ahead

Colgate-Palmolive expected to retain its dominance

Distribution landscape unlikely to witness change over the forecast period

CATEGORY DATA

Table 18 - Sales of Bleach: Value 2019-2024

Table 19 - Sales of Bleach: % Value Growth 2019-2024

Table 20 - NBO Company Shares of Bleach: % Value 2020-2024

Table 21 - LBN Brand Shares of Bleach: % Value 2021-2024

Table 22 - Forecast Sales of Bleach: Value 2024-2029

Table 23 - Forecast Sales of Bleach: % Value Growth 2024-2029

Dishwashing in Austria

KEY DATA FINDINGS

2024 DEVELOPMENTS

Modest current value growth for dishwashing in 2024, while volume sales decline

Convenience, efficiency and sustainability remain key selling points

Reckitt Benckiser maintains lead thanks to strong presence across subcategories

PROSPECTS AND OPPORTUNITIES

Growth predicted for dishwashing over the forecast period

Competition set to intensify as players vie for share

Supermarkets will remain the leading distribution channel for the foreseeable future

CATEGORY INDICATORS

Table 24 - Household Possession of Dishwashers 2019-2024

CATEGORY DATA

Table 25 - Sales of Dishwashing by Category: Value 2019-2024

Table 26 - Sales of Dishwashing by Category: % Value Growth 2019-2024

Table 27 - NBO Company Shares of Dishwashing: % Value 2020-2024

Table 28 - LBN Brand Shares of Dishwashing: % Value 2021-2024

Table 29 - Forecast Sales of Dishwashing by Category: Value 2024-2029

Table 30 - Forecast Sales of Dishwashing by Category: % Value Growth 2024-2029

Home Insecticides in Austria

KEY DATA FINDINGS

2024 DEVELOPMENTS

Moderate current value growth in 2024, thanks to price increases

Home insecticides' fortunes are partly driven by changes in climate

Local Vandal brand retains its category dominance

PROSPECTS AND OPPORTUNITIES

Weather and climate vagaries will influence sales of home insecticides over the forecast period Local consumers will likely opt for more natural solutions, favouring innovation in terms of sustainability

Competitive and distribution landscapes set to remain largely unchanged

CATEGORY DATA

- Table 31 Sales of Home Insecticides by Category: Value 2019-2024
- Table 32 Sales of Home Insecticides by Category: % Value Growth 2019-2024
- Table 33 Sales of Spray/Aerosol Insecticides by Type: % Value 2019-2024
- Table 34 NBO Company Shares of Home Insecticides: % Value 2020-2024
- Table 35 LBN Brand Shares of Home Insecticides: % Value 2021-2024
- Table 36 Forecast Sales of Home Insecticides by Category: Value 2024-2029
- Table 37 Forecast Sales of Home Insecticides by Category: % Value Growth 2024-2029

Laundry Care in Austria

KEY DATA FINDINGS

2024 DEVELOPMENTS

Robust current value growth in 2024 as a result of higher prices and new product development Consolidated landscape favours international brands with trusted profiles

Supermarkets remains the leading distribution channel sales of laundry care

PROSPECTS AND OPPORTUNITIES

Performance and sustainability features will drive current value growth in the coming years Increased activity and demand for specialist products set to boost volume sales Brighter economic outlook favours well-known international brands

CATEGORY INDICATORS

Table 38 - Household Possession of Washing Machines 2019-2024

CATEGORY DATA

- Table 39 Sales of Laundry Care by Category: Value 2019-2024
- Table 40 Sales of Laundry Care by Category: % Value Growth 2019-2024
- Table 41 Sales of Laundry Aids by Category: Value 2019-2024
- Table 42 Sales of Laundry Aids by Category: % Value Growth 2019-2024
- Table 43 Sales of Laundry Detergents by Category: Value 2019-2024
- Table 44 Sales of Laundry Detergents by Category: % Value Growth 2019-2024
- Table 45 Sales of In-Wash Spot and Stain Removers by Type: % Value Breakdown 2019-2024
- Table 46 NBO Company Shares of Laundry Care: % Value 2020-2024
- Table 47 LBN Brand Shares of Laundry Care: % Value 2021-2024
- Table 48 NBO Company Shares of Laundry Aids: % Value 2020-2024
- Table 49 LBN Brand Shares of Laundry Aids: % Value 2021-2024
- Table 50 NBO Company Shares of Laundry Detergents: % Value 2020-2024
- Table 51 LBN Brand Shares of Laundry Detergents: % Value 2021-2024
- Table 52 Forecast Sales of Laundry Care by Category: Value 2024-2029
- Table 53 Forecast Sales of Laundry Care by Category: % Value Growth 2024-2029

Polishes in Austria

KEY DATA FINDINGS

2024 DEVELOPMENTS

Minimal current value growth for polishes, thanks only to average unit price increases Supermarkets remains the leading distribution channel in 2024 Competitive landscape remains unchanged, with Erdal retaining a strong lead

PROSPECTS AND OPPORTUNITIES

Volume decline predicted across the forecast period as consumer preferences evolve

Little change expected in terms of key players and distribution

Multi-functional cleaners will reduce the need for separate polish products

CATEGORY DATA

Table 54 - Sales of Polishes by Category: Value 2019-2024

Table 55 - Sales of Polishes by Category: % Value Growth 2019-2024

Table 56 - NBO Company Shares of Polishes: % Value 2020-2024

Table 57 - LBN Brand Shares of Polishes: % Value 2021-2024

Table 58 - Forecast Sales of Polishes by Category: Value 2024-2029

Table 59 - Forecast Sales of Polishes by Category: % Value Growth 2024-2029

Surface Care in Austria

KEY DATA FINDINGS

2024 DEVELOPMENTS

Current value growth outperforms volume growth in 2024 as average unit prices increase Premiumisation helps boost growth as consumers seek better efficacy International players maintain the lead in surface care

PROSPECTS AND OPPORTUNITIES

Positive growth forecast for surface care in both volume and current value terms

Traditional scouring agents and disinfectants are set to register some decline

Supermarkets will remain the leading distribution channel for the foreseeable future

CATEGORY DATA

Table 60 - Sales of Surface Care by Category: Value 2019-2024

Table 61 - Sales of Surface Care by Category: % Value Growth 2019-2024

Table 62 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: Value 2019-2024

Table 63 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: % Value Growth 2019-2024

Table 64 - NBO Company Shares of Surface Care: % Value 2020-2024

Table 65 - LBN Brand Shares of Surface Care: % Value 2021-2024

Table 66 - NBO Company Shares of Home Care Wipes and Floor Cleaning Systems: % Value 2020-2024

Table 67 - LBN Brand Shares of Home Care Wipes and Floor Cleaning Systems: % Value 2021-2024

Table 68 - Forecast Sales of Surface Care by Category: Value 2024-2029

Table 69 - Forecast Sales of Surface Care by Category: % Value Growth 2024-2029

Toilet Care in Austria

KEY DATA FINDINGS

2024 DEVELOPMENTS

Volume decline but current value sales benefit from higher prices in 2024

Henkel retains its strong lead thanks to ongoing innovation

Supermarkets continues to benefit from convenience factor and wide product range

PROSPECTS AND OPPORTUNITIES

Economic improvements will boost growth for toilet care in the coming years

In-cistern devices will see decline as toilet systems evolve

Sustainability will remain important, but efficacy will be the priority

CATEGORY DATA

Table 70 - Sales of Toilet Care by Category: Value 2019-2024

Table 71 - Sales of Toilet Care by Category: % Value Growth 2019-2024

Table 72 - NBO Company Shares of Toilet Care: % Value 2020-2024

Table 73 - LBN Brand Shares of Toilet Care: % Value 2021-2024

Table 74 - Forecast Sales of Toilet Care by Category: Value 2024-2029

Table 75 - Forecast Sales of Toilet Care by Category: % Value 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 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/home-care-in-austria/report.