



Consumer Health in Austria

September 2025

Table of Contents

Consumer Health in Austria

EXECUTIVE SUMMARY

Consumer Health in 2025: The big picture

Key trends in 2025

Competitive landscape

Channel developments

What next for Consumer Health?

MARKET INDICATORS

Table 1 - Consumer Expenditure on Health Goods and Medical Services: Value 2020-2025

Table 2 - Life Expectancy at Birth 2020-2025

MARKET DATA

Table 3 - Sales of Consumer Health by Category: Value 2020-2025

Table 4 - Sales of Consumer Health by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Consumer Health: % Value 2021-2025

Table 6 - LBN Brand Shares of Consumer Health: % Value 2022-2025

Table 7 - Penetration of Private Label in Consumer Health by Category: % Value 2020-2025

Table 8 - Distribution of Consumer Health by Format: % Value 2020-2025

Table 9 - Distribution of Consumer Health by Format and Category: % Value 2025

Table 10 - Forecast Sales of Consumer Health by Category: Value 2025-2030

Table 11 - Forecast Sales of Consumer Health by Category: % Value Growth 2025-2030

APPENDIX

OTC registration and classification

Vitamins and dietary supplements registration and classification

Self-medication/self-care and preventive medicine

Switches

Summary 1 - OTC: Switches 2024-2025

DISCLAIMER

DEFINITIONS

SOURCES

Summary 2 - Research Sources

Analgesics in Austria

KEY DATA FINDINGS

2025 DEVELOPMENTS

Self-care culture and lifestyle factors sustaining demand

Established leaders and value-driven challengers defining competition

Pharmacies maintaining dominance as e-commerce edges forward

PROSPECTS AND OPPORTUNITIES

Self-care habits and demographic change underpinning demand

Limited innovation but gradual progress in packaging and product accessibility

Regulatory adjustments and supply chain stability shaping the outlook

CATEGORY DATA

Table 12 - Sales of Analgesics by Category: Value 2020-2025

Table 13 - Sales of Analgesics by Category: % Value Growth 2020-2025

Table 14 - NBO Company Shares of Analgesics: % Value 2021-2025

Table 15 - LBN Brand Shares of Analgesics: % Value 2022-2025

Table 16 - Forecast Sales of Analgesics by Category: Value 2025-2030

Table 17 - Forecast Sales of Analgesics by Category: % Value Growth 2025-2030

Sleep Aids in Austria

KEY DATA FINDINGS

2025 DEVELOPMENTS

- Consumer reliance on sleep aids stabilises after pandemic-driven surge
- Schwabe Austria maintains leadership as herbal brands gain traction
- Pharmacies dominate distribution, while e-commerce gains traction for repeat purchases

PROSPECTS AND OPPORTUNITIES

- Gradual growth supported by rising awareness and brand trust
- Innovation centred on natural formulations and incremental improvements
- Health and wellness trends create both opportunities and challenges

CATEGORY DATA

Table 18 - Sales of Sleep Aids: Value 2020-2025

Table 19 - Sales of Sleep Aids: % Value Growth 2020-2025

Table 20 - NBO Company Shares of Sleep Aids: % Value 2021-2025

Table 21 - LBN Brand Shares of Sleep Aids: % Value 2022-2025

Table 22 - Forecast Sales of Sleep Aids: Value 2025-2030

Table 23 - Forecast Sales of Sleep Aids: % Value Growth 2025-2030

Cough, Cold and Allergy (Hay Fever) Remedies in Austria

KEY DATA FINDINGS

2025 DEVELOPMENTS

- Strong self-care habits and a harsh cold season lifting demand
- Established leaders supported by trust while natural products gain momentum
- Pharmacies remain central as e-commerce gains gradual acceptance

PROSPECTS AND OPPORTUNITIES

- Seasonal variability and allergy prevalence sustaining demand
- Incremental innovation focused on convenience and natural positioning
- Health literacy and digital engagement creating opportunities

CATEGORY DATA

Table 24 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2020-2025

Table 25 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2020-2025

Table 26 - NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2021-2025

Table 27 - LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2022-2025

Table 28 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2025-2030

Table 29 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2025-2030

Dermatologicals in Austria

KEY DATA FINDINGS

2025 DEVELOPMENTS

- Everyday lifestyles and health factors sustaining demand

Established players strengthened by trusted portfolios
Pharmacies dominant while e-commerce expands for discretion

PROSPECTS AND OPPORTUNITIES

Demographic and environmental factors to sustain demand
Research and technology expanding treatment options
Wellness trends and blurred lines with dermo-cosmetics

CATEGORY DATA

Table 30 - Sales of Dermatologicals by Category: Value 2020-2025
Table 31 - Sales of Dermatologicals by Category: % Value Growth 2020-2025
Table 32 - NBO Company Shares of Dermatologicals: % Value 2021-2025
Table 33 - LBN Brand Shares of Dermatologicals: % Value 2022-2025
Table 34 - LBN Brand Shares of Hair Loss Treatments: % Value 2022-2025
Table 35 - Forecast Sales of Dermatologicals by Category: Value 2025-2030
Table 36 - Forecast Sales of Dermatologicals by Category: % Value Growth 2025-2030

Digestive Remedies in Austria

KEY DATA FINDINGS

Stressful lifestyles and ageing population sustaining demand
Leading players benefiting from trusted portfolios and innovation
Pharmacies retaining dominance while e-commerce edges ahead

PROSPECTS AND OPPORTUNITIES

Persistent lifestyle patterns sustaining demand
Incremental product development and focus on prevention
Health and wellness trends shaping consumer expectations

CATEGORY DATA

Table 37 - Sales of Digestive Remedies by Category: Value 2020-2025
Table 38 - Sales of Digestive Remedies by Category: % Value Growth 2020-2025
Table 39 - NBO Company Shares of Digestive Remedies: % Value 2021-2025
Table 40 - LBN Brand Shares of Digestive Remedies: % Value 2022-2025
Table 41 - Forecast Sales of Digestive Remedies by Category: Value 2025-2030
Table 42 - Forecast Sales of Digestive Remedies by Category: % Value Growth 2025-2030

Eye Care in Austria

KEY DATA FINDINGS

2025 DEVELOPMENTS

Allergy season and lifestyle factors continue to support demand
Established brands maintain strong positions while Johnson & Johnson drives growth
Pharmacies remain dominant as e-commerce expands through repeat purchases

PROSPECTS AND OPPORTUNITIES

Ageing, lifestyle and allergy trends to sustain growth
Advances in diagnostics and smart technologies to support more personalised eye care
Growing health awareness to encourage preventative approaches

CATEGORY DATA

Table 43 - Sales of Eye Care by Category: Value 2020-2025
Table 44 - Sales of Eye Care by Category: % Value Growth 2020-2025

Table 45 - NBO Company Shares of Eye Care: % Value 2021-2025

Table 46 - LBN Brand Shares of Eye Care: % Value 2022-2025

Table 47 - Forecast Sales of Eye Care by Category: Value 2025-2030

Table 48 - Forecast Sales of Eye Care by Category: % Value Growth 2025-2030

NRT Smoking Cessation Aids in Austria

KEY DATA FINDINGS

2025 DEVELOPMENTS

- Consumer demand for support in quitting sustains steady growth
- Concentrated competitive landscape led by Nicorette
- Pharmacies remain dominant despite gradual online growth

PROSPECTS AND OPPORTUNITIES

- Gradual decline in smoking population to limit growth potential
- Mature market limits scope for innovation
- Broader health and wellness trends reduce reliance on NRT

CATEGORY INDICATORS

Table 49 - Number of Smokers by Gender 2020-2025

CATEGORY DATA

Table 50 - Sales of NRT Smoking Cessation Aids by Category: Value 2020-2025

Table 51 - Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2020-2025

Table 52 - NBO Company Shares of NRT Smoking Cessation Aids: % Value 2021-2025

Table 53 - LBN Brand Shares of NRT Smoking Cessation Aids: % Value 2022-2025

Table 54 - Forecast Sales of NRT Smoking Cessation Aids by Category: Value 2025-2030

Table 55 - Forecast Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2025-2030

Wound Care in Austria

KEY DATA FINDINGS

2025 DEVELOPMENTS

- Everyday use and ageing trends sustain demand for wound care
- Competitive landscape shaped by local trust and international innovation
- Pharmacies dominate while e-commerce gradually gains ground

PROSPECTS AND OPPORTUNITIES

- Steady growth supported by demographic and lifestyle factors
- Product refinements and lifestyle-driven designs to shape innovation
- Stable regulatory environment with sustainability influencing the future

CATEGORY DATA

Table 56 - Sales of Wound Care by Category: Value 2020-2025

Table 57 - Sales of Wound Care by Category: % Value Growth 2020-2025

Table 58 - NBO Company Shares of Wound Care: % Value 2021-2025

Table 59 - LBN Brand Shares of Wound Care: % Value 2022-2025

Table 60 - Forecast Sales of Wound Care by Category: Value 2025-2030

Table 61 - Forecast Sales of Wound Care by Category: % Value Growth 2025-2030

Sports Nutrition in Austria

KEY DATA FINDINGS

2025 DEVELOPMENTS

Active lifestyles and mainstream availability widen the user base
Tripoint holds the lead while local champions amplify visibility
E-commerce anchors distribution as supermarkets and discounters accelerate

PROSPECTS AND OPPORTUNITIES

Everyday usage and broader positioning to support steady expansion
Practical innovation, personalisation and the blurring line with functional foods
Wellness culture, social coaching and disciplined claims shaping the ceiling for growth

CATEGORY DATA

Table 62 - Sales of Sports Nutrition by Category: Value 2020-2025
Table 63 - Sales of Sports Nutrition by Category: % Value Growth 2020-2025
Table 64 - NBO Company Shares of Sports Nutrition: % Value 2021-2025
Table 65 - LBN Brand Shares of Sports Nutrition: % Value 2022-2025
Table 66 - Forecast Sales of Sports Nutrition by Category: Value 2025-2030
Table 67 - Forecast Sales of Sports Nutrition by Category: % Value Growth 2025-2030

Dietary Supplements in Austria

KEY DATA FINDINGS

2025 DEVELOPMENTS

Targeted self-care and broader use cases sustaining demand
Perrigo consolidates leadership as specialists and private label gain ground
Pharmacies anchor the channel mix while e-commerce widens choice

PROSPECTS AND OPPORTUNITIES

Prevention mindset and self-reliance to underpin steady demand
Incremental innovation focused on formats, tolerability and targeted blends
Wellness trade-offs, regulation and sustainability shaping the ceiling for growth

CATEGORY DATA

Table 68 - Sales of Dietary Supplements by Category: Value 2020-2025
Table 69 - Sales of Dietary Supplements by Category: % Value Growth 2020-2025
Table 70 - Sales of Dietary Supplements by Positioning: % Value 2020-2025
Table 71 - NBO Company Shares of Dietary Supplements: % Value 2021-2025
Table 72 - LBN Brand Shares of Dietary Supplements: % Value 2022-2025
Table 73 - Forecast Sales of Dietary Supplements by Category: Value 2025-2030
Table 74 - Forecast Sales of Dietary Supplements by Category: % Value Growth 2025-2030

Vitamins in Austria

KEY DATA FINDINGS

2025 DEVELOPMENTS

Preventative health focus sustains steady demand
Perrigo strengthens its leadership position
Expanding role of e-commerce in distribution

PROSPECTS AND OPPORTUNITIES

Prevention mindset to sustain demand amid a mature landscape
Incremental innovation focused on formats, combinations and usability
Wellness trade-offs and adjacent solutions shaping the ceiling for growth

CATEGORY DATA

Table 75 - Sales of Vitamins by Category: Value 2020-2025

Table 76 - Sales of Vitamins by Category: % Value Growth 2020-2025

Table 77 - Sales of Multivitamins by Positioning: % Value 2020-2025

Table 78 - NBO Company Shares of Vitamins: % Value 2021-2025

Table 79 - LBN Brand Shares of Vitamins: % Value 2022-2025

Table 80 - Forecast Sales of Vitamins by Category: Value 2025-2030

Table 81 - Forecast Sales of Vitamins by Category: % Value Growth 2025-2030

Weight Management and Wellbeing in Austria

KEY DATA FINDINGS

2025 DEVELOPMENTS

Convenience-first weight loss solutions gain traction amid lifestyle pressures

Herbalife's ecosystem sustains leadership while new entrants broaden appeal

Direct selling remains central as supermarkets and e-commerce expand access

PROSPECTS AND OPPORTUNITIES

Lifestyle pressures and quality-of-life goals to underpin steady demand

Practical innovation focused on formats, flavour and easier access

Health and wellness momentum balanced by lifestyle change and substitutes

CATEGORY DATA

Table 82 - Sales of Weight Management and Wellbeing by Category: Value 2020-2025

Table 83 - Sales of Weight Management and Wellbeing by Category: % Value Growth 2020-2025

Table 84 - NBO Company Shares of Weight Management and Wellbeing: % Value 2021-2025

Table 85 - LBN Brand Shares of Weight Management and Wellbeing: % Value 2022-2025

Table 86 - Forecast Sales of Weight Management and Wellbeing by Category: Value 2025-2030

Table 87 - Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2025-2030

Herbal/Traditional Products in Austria

KEY DATA FINDINGS

2025 DEVELOPMENTS

Natural preference tempered by stick-with-what-works behaviour

Leadership rooted in cough/cold heritage as value-led options gain ground

Pharmacies anchor distribution while e-commerce and mass retail broaden access

PROSPECTS AND OPPORTUNITIES

Preference for gentle solutions to support steady, selective growth

Incremental innovation and food-supplement convergence to shape development

Wellness behaviours, responsible claims and sustainability to define the ceiling for growth

CATEGORY DATA

Table 88 - Sales of Herbal/Traditional Products by Category: Value 2020-2025

Table 89 - Sales of Herbal/Traditional Products by Category: % Value Growth 2020-2025

Table 90 - NBO Company Shares of Herbal/Traditional Products: % Value 2021-2025

Table 91 - LBN Brand Shares of Herbal/Traditional Products: % Value 2022-2025

Table 92 - Forecast Sales of Herbal/Traditional Products by Category: Value 2025-2030

Table 93 - Forecast Sales of Herbal/Traditional Products by Category: % Value Growth 2025-2030

Paediatric Consumer Health in Austria

KEY DATA FINDINGS

2025 DEVELOPMENTS

Smaller child population but steady self-care keeps demand resilient
Local trust gives Apomedica the lead while modernised heritage brands gain pace
Pharmacies dominate access as e-commerce expands with parent-friendly services

PROSPECTS AND OPPORTUNITIES

Steady demand despite a smaller child population
Incremental innovation and digital support rather than breakthroughs
Wellness habits, responsible claims and private label to shape the ceiling for growth

CATEGORY DATA

Table 94 - Sales of Paediatric Consumer Health by Category: Value 2020-2025

Table 95 - Sales of Paediatric Consumer Health by Category: % Value Growth 2020-2025

Table 96 - NBO Company Shares of Paediatric Consumer Health: % Value 2021-2025

Table 97 - LBN Brand Shares of Paediatric Consumer Health: % Value 2022-2025

Table 98 - Forecast Sales of Paediatric Consumer Health by Category: Value 2025-2030

Table 99 - Forecast Sales of Paediatric Consumer Health by Category: % Value Growth 2025-2030

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/consumer-health-in-austria/report.