

Press release

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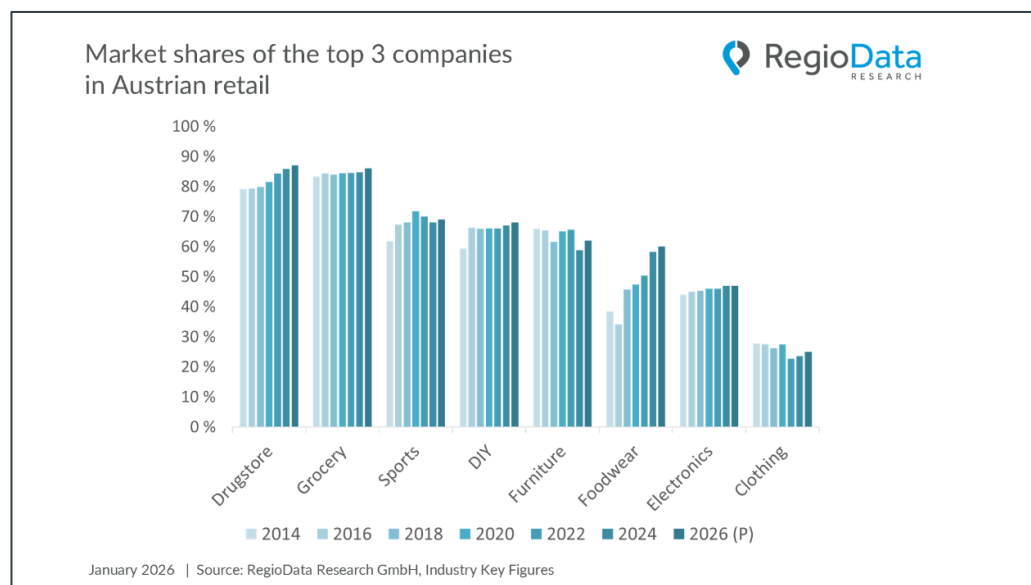
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Retail in Austria: Market Concentration Reaches a Record High

Austria's retail sector is increasingly dominated by a small number of large companies. Particularly in grocery and drugstore retail, the largest providers continue to consolidate ever higher market shares. In a European comparison, Austria therefore exhibits an above-average level of market concentration—a trend that is also reflected in other retail sectors. RegioData Research expects these concentration tendencies to continue in the coming years.



Few Companies Shape Retail: Market Power Solidifies Over a Decade

Austria's retail sector is characterized by high and steadily increasing market concentration in its key industries. A recent long-term analysis by RegioData Research shows that between 2014 and 2024, market shares in many retail segments increasingly concentrated among a few large companies. Over the past ten years, the market leadership has remained remarkably stable.

This development is particularly pronounced in the drugstore sector and is also becoming increasingly evident in footwear retail. In grocery retail, a clear long-term consolidation of market structures can be observed. Three retail groups control the majority of the Austrian grocery

market—a concentration level that is significantly above the European average. Current analyses by RegioData Research show that the Spar Group and REWE Austria dominate the market and together account for around two-thirds of total grocery retail turnover.

Very High Concentration as a Structural Feature of Retail

Even at the beginning of the observation period, large parts of market volume in several retail sectors were already concentrated among a small number of leading companies. Over the past ten years, this concentration has intensified further. Market share gains have occurred primarily within the leading corporate groups, while smaller providers and new market entrants have achieved only limited shares.

In grocery retail, the combined market share of the three largest companies was already 83.3% in 2014. By 2024, this figure had increased further to 87.4%. Over the ten-year period, the Austrian grocery retail market has thus shown remarkable stability at the top.

Drugstore Retail: Particularly Strong Concentration Among Few Providers

Market concentration is especially pronounced in Austria's drugstore sector. Throughout the entire period from 2014 to 2024, very few companies have accounted for the vast majority of market volume. The market structure is characterized by exceptionally stable leadership positions, while alternative formats or smaller market participants have gained little relevance.

During this period, the market share of the top three companies rose from 79.1% in 2014 to around 85.8% in 2024. The main driver of this development is dm Drogeriemarkt, which increased its market share from 29% to over 36%. Together with BIPA, these two providers already account for more than two-thirds of the total drugstore market. The expansion of Müller has further reinforced concentration, with nearly 90% of consumer spending in the drugstore segment now going to dm, BIPA, and Müller.

Long-term comparisons show that market shares in the drugstore sector not only remain at a high level, but that concentration has continued to solidify over time. Competition therefore takes place primarily among the leading companies.

Three Corporations Dominate Grocery Retail: High Concentration at a Sustained Level

Market concentration in grocery retail has been high for years. Even in 2014, the largest retail companies already controlled a significant share of the market. By 2024, this share had increased further. The top three companies—Spar, REWE, and Hofer—now account for nearly 90% of the market, with a slight upward trend driven primarily by the strong performance of the Spar Group.

Austria's grocery retail market is therefore one of the most highly concentrated in Europe. Spar and REWE Austria alone already account for around two-thirds of the total market, firmly placing Austrian grocery retail in the hands of just a few retail groups.

Other Retail Sectors – Different Dynamics

In addition to grocery and drugstore retail, other retail sectors also show notable structural changes. In the sporting goods sector, Intersport and Sport 2000 have dominated for years, while the third-largest market participant has changed several times. Currently, Hervis ranks third, while the former market leader Sports Direct (formerly Intersport Eybl) is no longer relevant.

In the DIY retail sector, market leadership has also shifted. Following the market exit of Baumax, Obi has emerged as the clear market leader, although overall concentration trends remain moderate. In furniture retail, the well-known turbulence following the collapse of the Kika/Leiner Group led to a market reorganization, benefiting primarily XXXLutz and IKEA. No further concentration surges are currently evident.

The footwear sector is particularly volatile, marked by numerous market exits. The top three companies have changed multiple times, with the Deichmann Group currently dominating, followed by Leder & Schuh AG. In electronics retail, a slight increase in market concentration can be observed, with MediaMarkt holding a clear lead.

Traditionally, the lowest level of market concentration is found in clothing retail. Despite a wide variety of concepts, the three largest providers—H&M, Peek & Cloppenburg, and the Inditex Group—have gained market share since the COVID-19 shock.

Austria's Position in a European Comparison

In a European context, Austria ranks among the more highly concentrated retail markets. International comparison data show that while market shares in many European countries are distributed among several large providers, the leading companies in Austria command an above-average share of the total market.

Retail concentration in Austria has already reached a very high level, which is remarkable even by international standards and places the country among the top ranks in Europe. This is particularly true in the drugstore sector, where market concentration is significantly above the European average and therefore unique.

In Germany, Italy, and France, market shares are spread across several large retail groups, resulting in less concentrated markets. A similar concentration level to Austria is observed mainly in Switzerland, where Migros and Coop—just two providers—control around 80% of the grocery market. Smaller markets therefore tend to exhibit higher market shares for leading

retailers, supported by smaller market size, high store density among fewer chains, and long-established market leaders.

Outlook: No Reversal in Trend Expected

From today's perspective, no fundamental dissolution of existing market structures is expected in the coming years. Long-term developments indicate that store networks and strong brands will continue to secure the market position of large retail companies. The market power of a small number of companies is expected to increase further.

Particularly in grocery retail, REWE and Spar have expressed interest in acquiring a large number of Unimarkt locations. As a result, further increases in market concentration are expected in 2026 and the near future. The market has been highly concentrated for years, and this concentration is likely to continue to solidify going forward.

About the Study

The analysis by RegioData Research is based on industry key figures for Austrian retail and examines the development of market concentration across multiple retail sectors between 2014 and 2024. The study is based on market share calculations, revenue data, and long-term evaluations.

The "Industry Key Figures" study is available from RegioData for €860,- per sector (plus 20% VAT). Further information can be found at: <https://www.regiodata.eu/en/market-intelligence/key-industry-figures/>

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RegioData Research GmbH

RegioData Research GmbH, headquartered in Vienna and Munich, specializes in regional economic data in Europe. For over 20 years, we have been dedicated to researching, calculating, and analyzing data and structures in European consumer and real estate markets. We provide well-founded decision-making foundations for companies in the retail, real estate, and financial sectors. Up-to-date, clear, and reliable.