

# Press release

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## Retail Locations 2026: Expansion vs. Retrenchment – Self-Service Booms, Traditional Formats Lose Ground

RegioData Research's annual expansion analysis shows that Austria's retail landscape continues to undergo significant transformation—at times even in seemingly contradictory ways. While some companies are markedly expanding their presence, others are reducing their store networks or are increasingly disappearing from the urban retail landscape.

Change in the Number of Retail Stores, 2024–2025  
 (Selected retail chains / store formats)



February 2026 | Source: RegioData Research GmbH, "Who Is Expanding in Austria" – 2026 Edition

## Retail Locations in Transition: Who Is Expanding, Who Is Closing – and Who Remains Stable?

The Austrian retail sector continues to undergo profound structural change. RegioData Research's annual expansion analysis, based on more than 680 active retail chains, illustrates how the retail landscape is evolving as a result of changing consumer behavior, rising cost pressure, and new retail concepts. While some companies are significantly expanding their store networks, others are withdrawing on a massive scale.

## Self-Service and Discount Emerge as Clear Winners

A key finding of the analysis is the continued boom of efficient, standardized and often self-service-based concepts. An increasing number of retail, gastronomy and service offerings are relying on reduced staffing models, automated processes and independent customer use. Self-service stores, partially automated foodservice formats, self-service bakeries, pick-up stations and digital service offerings are gaining significant importance. Self-service is thus evolving from a niche solution into a new standard for many modern retail and service concepts.

The non-food discount segment continues to show particularly strong momentum. Several operators are sending clear expansion signals, steadily growing their store networks and benefiting from price-sensitive demand as well as standardized location concepts. New locations are being developed not only in metropolitan areas but increasingly also in smaller cities and peripheral locations. Woolworth, for example, expanded its store network by 48 locations during the observation period, making it one of the strongest expanders in the Austrian market. NKD also recorded growth (+16 locations), while Action continued its market entry strategy with a net increase of 7 stores.

## Big Players Get Bigger – Market Concentration Continues to Increase

The expansion figures underline a central trend: growth is increasingly driven by large, well-capitalized retail groups. Expansion is concentrated among a small number of major players, while small and medium-sized operators are losing both market share and locations. This trend is particularly evident in grocery retailing, where additional stores and network densification further reinforce an already high level of market concentration. Growth is most visible at SPAR, which opened a net total of 17 new locations, further strengthening its dominant market position. The simultaneous withdrawal of smaller chains is accelerating this development.

## Significant Downsizing Among Traditional Concepts

On the downside, the picture is equally clear. Traditional non-food formats, book and media retailers, as well as regional grocery concepts are particularly affected.

The expansion analysis reveals substantial location losses among several established chains. Unimarkt stands out in particular, having reduced its store network by 53 locations during the observation period. In the non-food discount segment, KiK recorded a net loss of 23 locations, while Flying Tiger also significantly reduced its footprint, closing 9 stores. The bakery chain Baguette (MPreis) shut down 14 locations during the observation period.

These figures clearly demonstrate that not every established or formerly successful concept remains viable under current market conditions. Undifferentiated and easily substitutable formats are increasingly coming under pressure—even if they were widely represented in the past.

## Short-Lived Hypes Lose Momentum

Beyond structural shifts, the analysis also highlights growing disillusionment with short-term trend and hype concepts. Formats such as bubble tea stores or food trend pop-ups, which expanded rapidly in recent years, are now scaling back their location networks or disappearing from the market altogether.

This development underlines a key insight: not every hype can be translated into a sustainable business model.

## Apparel, Footwear and Furniture Remain Under Pressure

Store closures are particularly pronounced in the apparel and footwear segments, which continue to rank among the biggest losers in terms of location development. The situation is also notable for mono-brand concepts: while some expanded selectively in the previous year, a clear reversal is now evident, with an increasing number of store closures.

In furniture retailing, well-known structural changes are continuing, with no strong expansion trends currently emerging. Following the turbulence of recent years, overall expansion in this segment remains subdued.

Within the price-oriented fashion segment, the picture is more nuanced. While the market as a whole remains under pressure, some operators are still managing to expand selectively. NKD increased its store network by 16 locations, while s'Oliver opened a net total of 8 new stores. These developments show that it is not the segment itself that determines success or failure, but rather positioning, assortment strategy and location-related factors.

## Same Concepts, Different Outcomes

One striking finding for 2025 is that even comparable concepts are developing very differently. While some retailers with similar assortments and target groups are expanding, others are withdrawing from the market at the same time. This polarization is particularly evident in the non-food and apparel segments: expansions by Woolworth, NKD and s'Oliver stand in sharp contrast to significant store closures at KiK, LIBRO and Flying Tiger.

The analysis makes it clear that success is not determined by the concept alone, but by execution, cost structures, location quality and brand strength. The market is becoming increasingly selective, leaving little room for mediocrity.

## Conclusion: Efficiency Outperforms Tradition

The 2026 expansion analysis sends a clear message: Austria's retail sector is becoming more concentrated, more efficient and more standardized. Growth is primarily taking place where concepts are clearly defined and cost structures tightly controlled. Traditional, labor-intensive or weakly differentiated formats, by contrast, are coming under increasing pressure and continue to lose ground.

The structural transformation of retail locations is therefore no longer a short-term phenomenon, but a long-term process that is set to continue.

## About the Study

The annually published RegioData study "Who Is Expanding in Austria?" provides a detailed overview of chain-based retail and service companies (including franchise systems and marketing/sales cooperations) and their retail brands that have expanded in the past and may continue to expand or plan to optimize their locations in the future.

The study "Who Is Expanding – 2026 Edition" is available from RegioData at a price of €420 per sector (plus 20% VAT).

Further information can be found at: <https://www.regiodata.eu/market-intelligence/wer-expandiert>

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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.