



Euromonitor
International

Estée Lauder Cos Inc in Beauty and Personal Care

September 2023

INTRODUCTION

Scope

Key findings

STATE OF PLAY

Estée Lauder Cos Inc maintains its fourth position globally in 2022

North America reclaims position as largest region, following decline in Asia Pacific sales

US and China remain Estée Lauder Cos Inc's largest markets in 2022

Estée Lauder Cos Inc benefits from market momentum, offsetting decline from other areas

E-commerce platforms become increasingly specialised in personalisation and virtual try-on

EXPOSURE TO FUTURE GROWTH

Estée Lauder Cos Inc's price increases are targeted at specific brands and SKUs

Anti-agers' prices fluctuate with market trends, but Origins' prices steadily increasing

Skin care in Asia Pacific is the most significant growth opportunity in the forecast period

US regains position as most significant market as China fails to deliver expected growth

Technology continues to play an important role in Estée Lauder's strategy

Estée Lauder Cos Inc maintains position as fourth largest beauty and personal care company

COMPETITIVE POSITIONING

Estée Lauder Cos Inc share drops slightly in 2022 but benefits from key consumer trends

Estée Lauder Cos Inc overlaps considerably with L'Oréal reflecting strategy similarities

Estée Lauder Cos Inc experiences deceleration, along with the rest of the industry

Estée Lauder Cos Inc maintains strong market share in key categories, fragrances and facial care

Estée Lauder, Clinique and Mac continue to maintain a significant share in the global market

Estée Lauder Cos Inc makes tangible progress in growth of sustainable product sales

Green chemistry and animal welfare are key focuses for 2022

Consumer perceptions of top Estée Lauder Cos Inc brands

SKIN CARE

Broad portfolio benefits Estée Lauder Cos Inc skin care

Considerable growth in Clinique and La Mer boosts company's facial care trajectory

Facial skin care is the main growth area for Estée Lauder, focusing on premium efficacy

COLOUR COSMETICS

Colour cosmetics sees conservative growth in historic period as lockdown changes behaviour

Face and eye make-up remain popular despite reduced routines

Make-up renaissance to provide opportunities for Estée Lauder Cos Inc in the US

FRAGRANCES

Fragrances is one of the fastest growing categories for Estée Lauder

Gender-neutral fragrances in China are a key opportunity for growth

"Neuroscint" science is present in Estée Lauder's fragrances portfolio

KEY FINDINGS

Executive summary

APPENDIX

Projected company sales: FAQs

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Overview of Beauty Survey: Product and brand coverage

Overview of Beauty Survey

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