THE NEW BEAUTY PLANET

Thierry Prévot



Haircare



Body hygiene



Hair colourants



Make-up



Skincare



Fragrances



Hair salons



Department stores



Perfumeries



Pharmacies



Supermarkets/hypermarkets



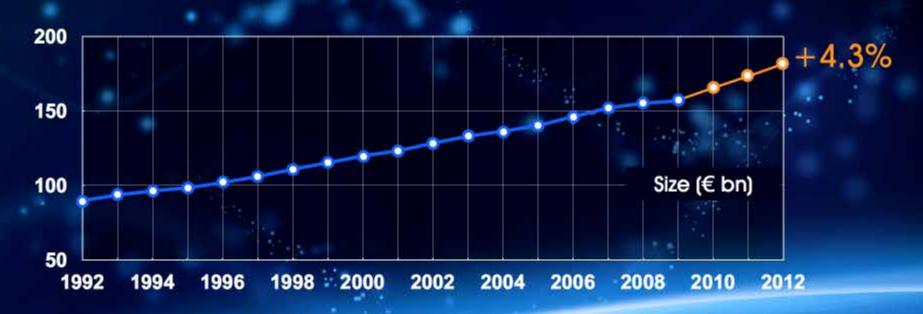
Small shops



e-commerce

180 billion € in 2012

Cosmetics market (manufacturer price -- L'Oréal definition - excluding razors, soap and oral hygiene)



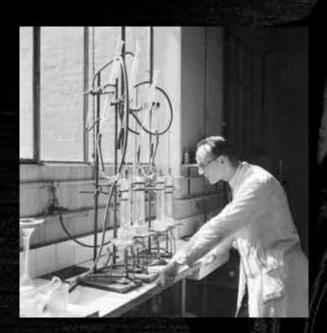
Cosmetics market (manufacturer price - L'Oréal definition - excluding razors, soap and oral hygiene)





A MARKET THAT IS 100,000 YEARS YOUNG L'ORÉAL

AN INDUSTRY THAT IS 100 YEARS YOUNG







AN INDUSTRY THAT IS 100 YEARS YOUNG

3 major dynamics:

- Constantly renewed consumer aspirations
- Evolution of social and cultural environment
- Innovation leaps in cosmetics made possible by technology









AN INDUSTRY THAT IS 100 YEARS YOUNG



AN INDUSTRY THAT IS 100 YEARS YOUNG Parlumes ves shevens en les lovers DOP Motes L'ORÉAL



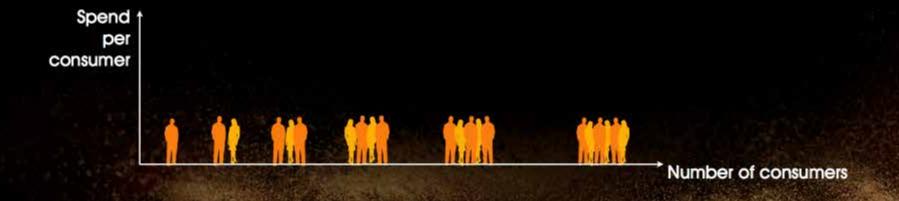






AN INDUSTRY THAT IS 100 YEARS YOUNG billion shampoos sold per year worldwide * * internal estimate L'ORÉAL





LOREAL





Internal estimate

LOREAL





LOREAL

Cosmetics spend per capita in €



Cosmetics consumption per capita (in 2012 in sell-in / Source: BMS L'Oréal





LOREAL







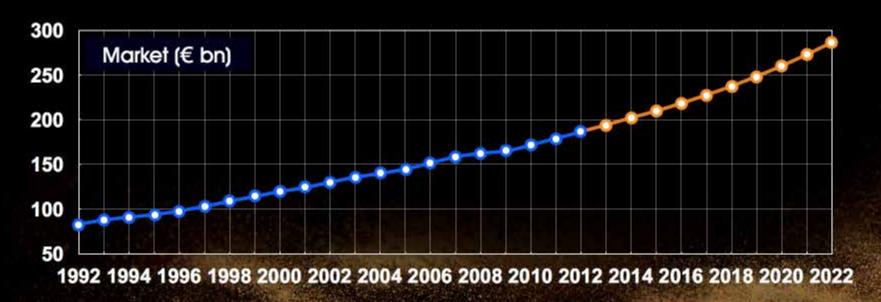


TOP 10 in 2025

Cosmetics market
(L'Oréal Beauty definition, excluding razors, soap and oral hygiene)



Internal estimate - L'Oréal BeautyScope study



Cosmetics market (manufacturer price - - L'Oréal definition - excluding razors, soap and oral hygiene)





LOREAL





More consumers in tropical zones



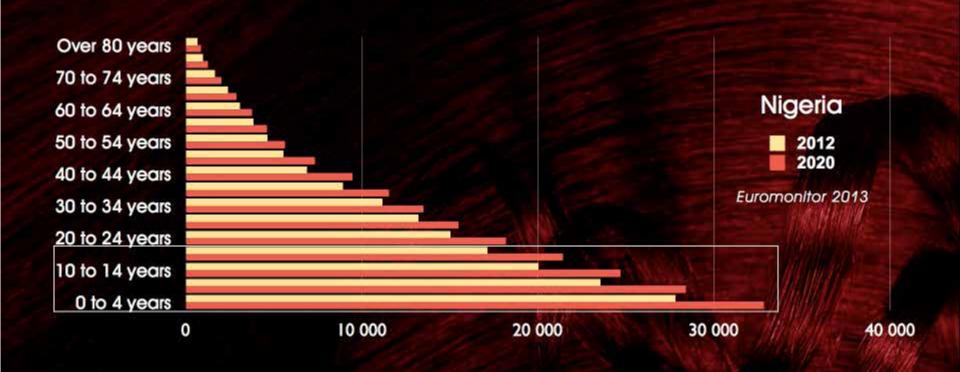
LOREAL



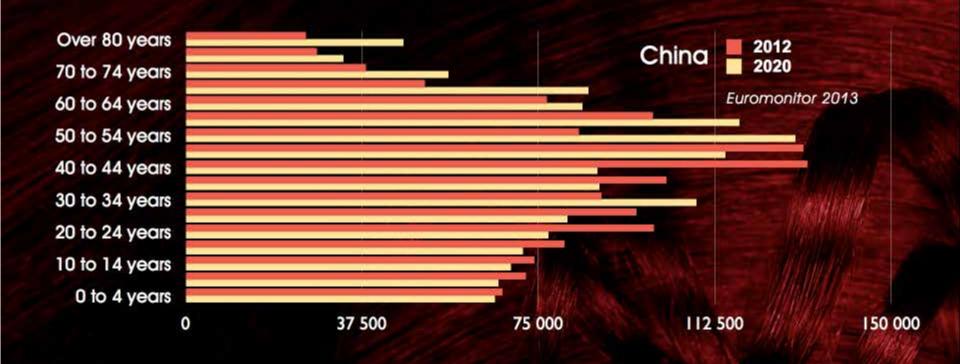




















































L'ORÉAL PARIS



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