

KEYNOTE

UNVEILING BEAUTY'S UNTAPPED POTENTIAL

IN

SAPMENA

South Asia Pacific, Middle East & North Africa

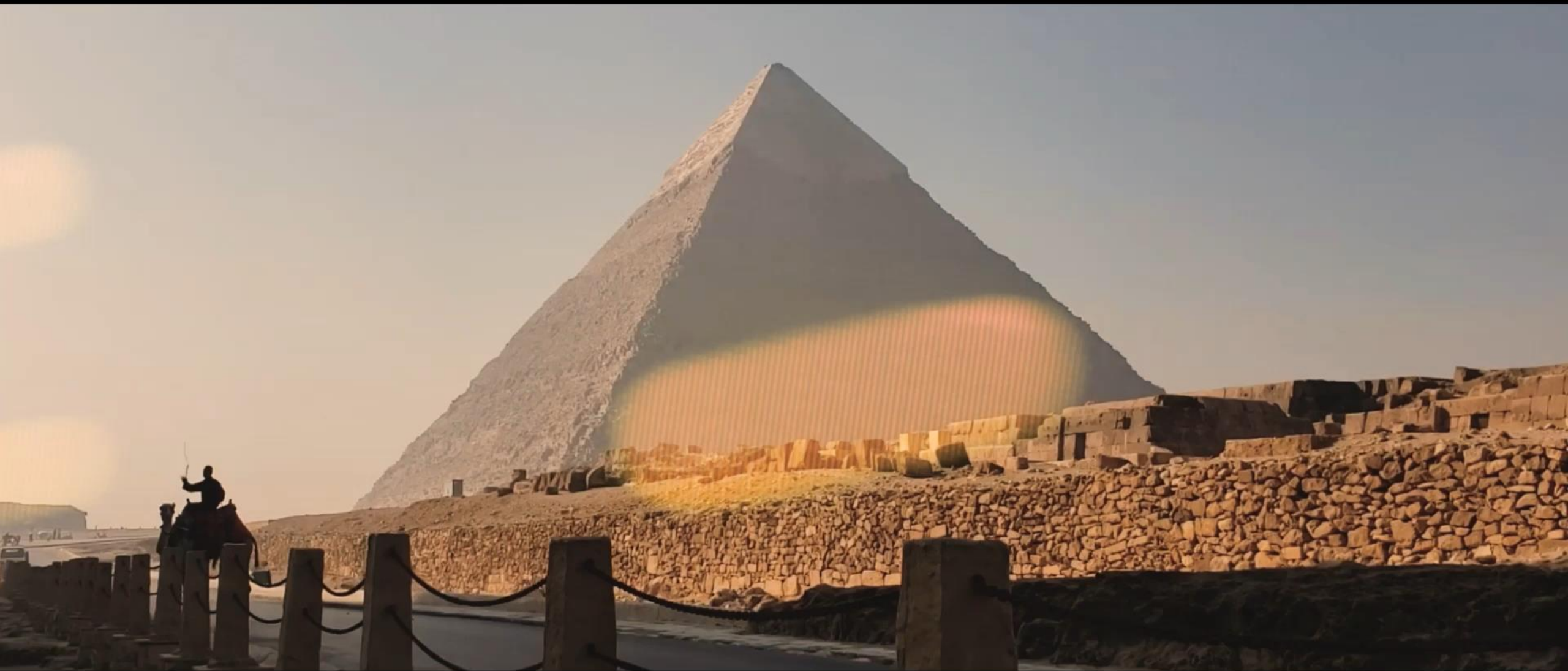
3rd December 2024



VISMAY SHARMA

PRESIDENT - L'ORÉAL SAPMENA

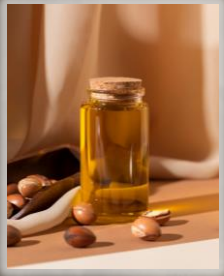
L'ORÉAL
SAPMENA





WHY SAPMENA

MEDIEVAL TRADING ROUTES



ARGAN OIL



HENNA

WHY SAPMENA

DESIRE FOR INGREDIENTS & BEAUTY



SAPMENA

MODERN INNOVATIONS SUCCEED ACROSS THE REGION

/ WHY SAPMENA


WORLD'S GROWTH ENGINE



STRONG &
GROWING
ECONOMIES



GROWING
CONSUMER CLASS
& ASPIRATIONS



GROWING
DIGITAL & ECOM
ECO-SYSTEM

/ SAPMENA BEAUTY MARKET

HUGE UNTAPPED POTENTIAL

WORLDWIDE

SAPMENA
40%

POPULATION

WORLDWIDE

SAPMENA
9%

BEAUTY MARKET

Source: WDL & BMS, FY 2023



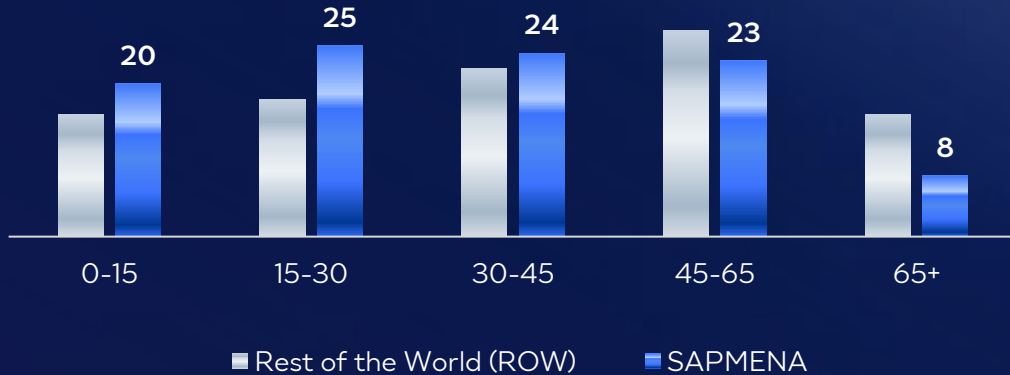
/ SAPMENA BEAUTY – KEY GROWTH DRIVERS

YOUNG CONSUMER & GROWING AFFLUENCE

YOUNG POPULATION

MEDIAN AGE | ROW 33.6 Yrs | SAPMENA 28.3 Yrs

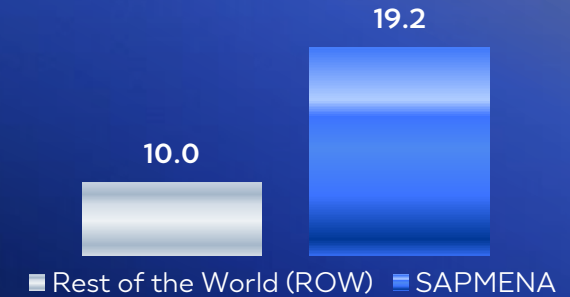
% POPULATION BY AGE



Source : World Data Lab – Sept 2024; PPP12+

HIGHER BEAUTY SPENDS

% GEN Z BEAUTY SPENDS (Vs. OTHERS)



OVER
>900 M
ADDRESSABLE CONSUMERS
BY 2030

1 IN 2
NEW CONSUMERS
WILL BE FROM SAPMENA

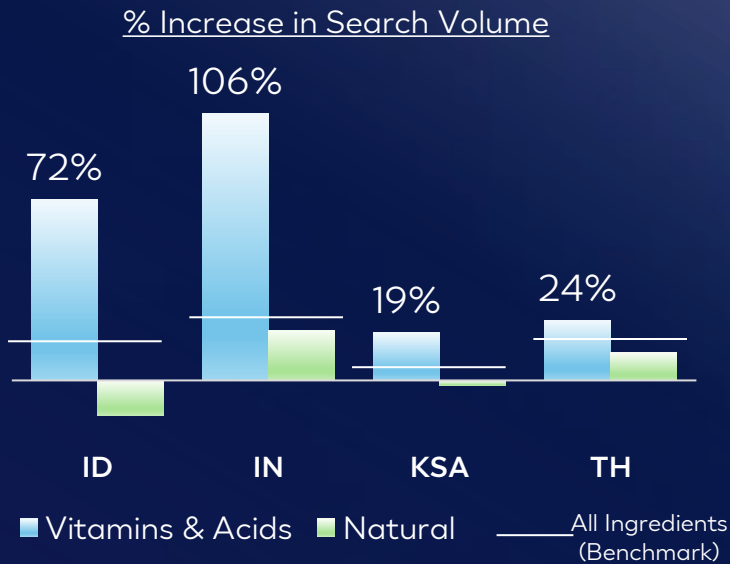
Source : World Data Lab – Sept 2024

NOTE : Addressable consumers = Daily spending > PPP \$20, All Gender, Age 15+
Gen Z = 15-25 Years, Other = 25+ Years

/ SAPMENA BEAUTY – KEY GROWTH DRIVERS

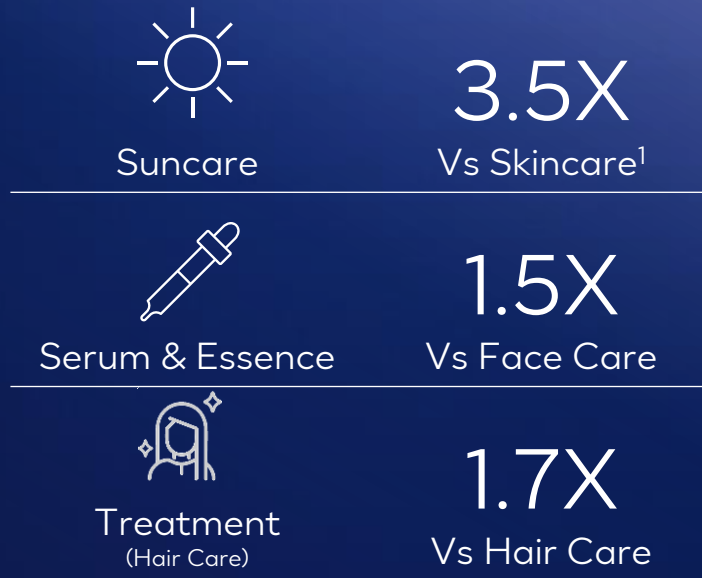
RISING SOPHISTICATION & PREMIUMISATION

RISING AWARENESS



Source : Emerging Search Trend Study 2022 (Kantar x Google)

RISING SOPHISTICATION



Source : Mass Universe NIQ Offline FY 2023
 Suncare & Serum : AU, ID, KSA, MY, TH, UAE
 Haircare : AU, EG, IN, ID, KSA, MY, PH, SG, TH, UAE, VN

RISING PREMIUMISATION



Source : Multi Div : NIQ, Beaute Research, Online Trackers;
 * YTD Sept

/ SAPMENA BEAUTY – KEY GROWTH DRIVERS

SOPHISTICATION OF BEAUTY RETAIL LANDSCAPE

First wave

ERA OF
TRADITIONAL TRADE



DEEP
DISTRIBUTION

Second wave

RISE OF
MODERN TRADE &
DEPARTMENT STORES



BRANDS+
BEAUTY EXPRESSION

Third wave

EXPLOSION OF
E-COMMERCE



BRANDS +
SCALE

Fourth wave

NEXT REVOLUTION
SOCIAL COMMERCE,
QUICK COMMERCE,
LIVE STREAM SHOPPING



PROXIMITY
AGILITY
SCALE



/ BEAUTY LANDSCAPE

CHANGING ROLES OF CHANNELS

GROWING OFFLINE

- Growing Modern Trade
- Rise of Beauty/ Speciality store
- Boutiques

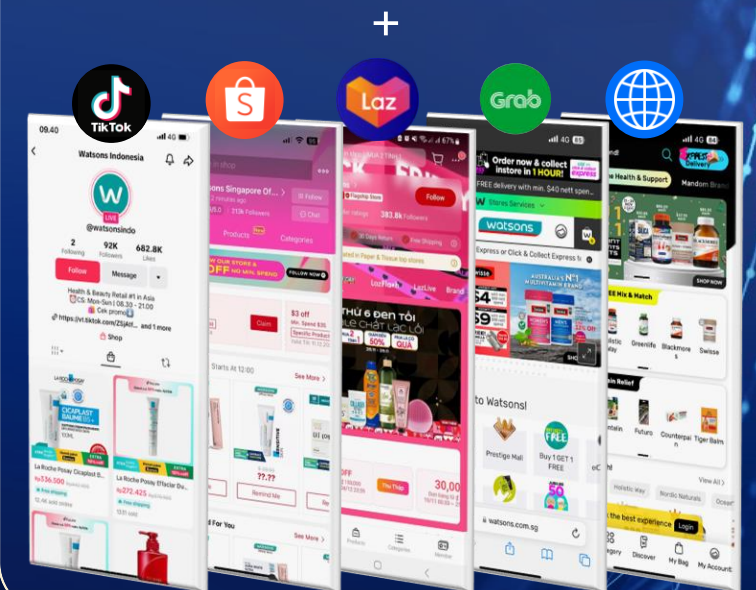


GROWING ONLINE

- Pure players
- Market places
- Quick Commerce
- Social Commerce



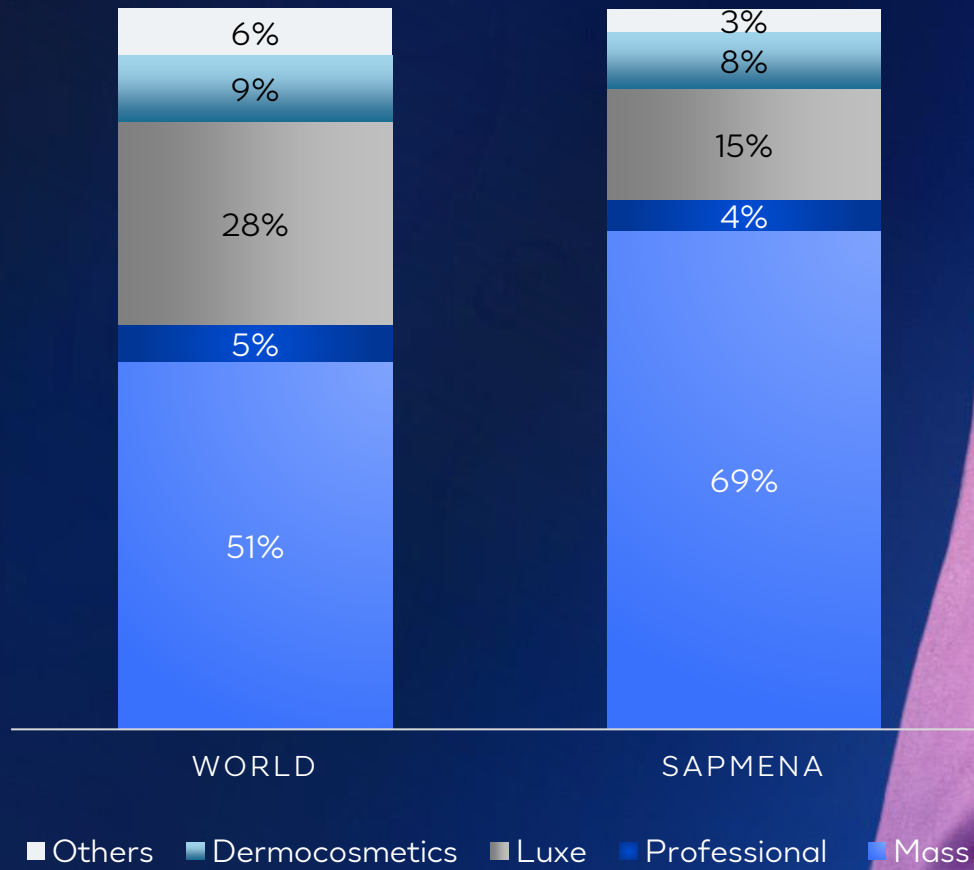
MERGING ONLINE & OFFLINE



/ BEAUTY LANDSCAPE

SAPMENA – MASS MARKET PLAY

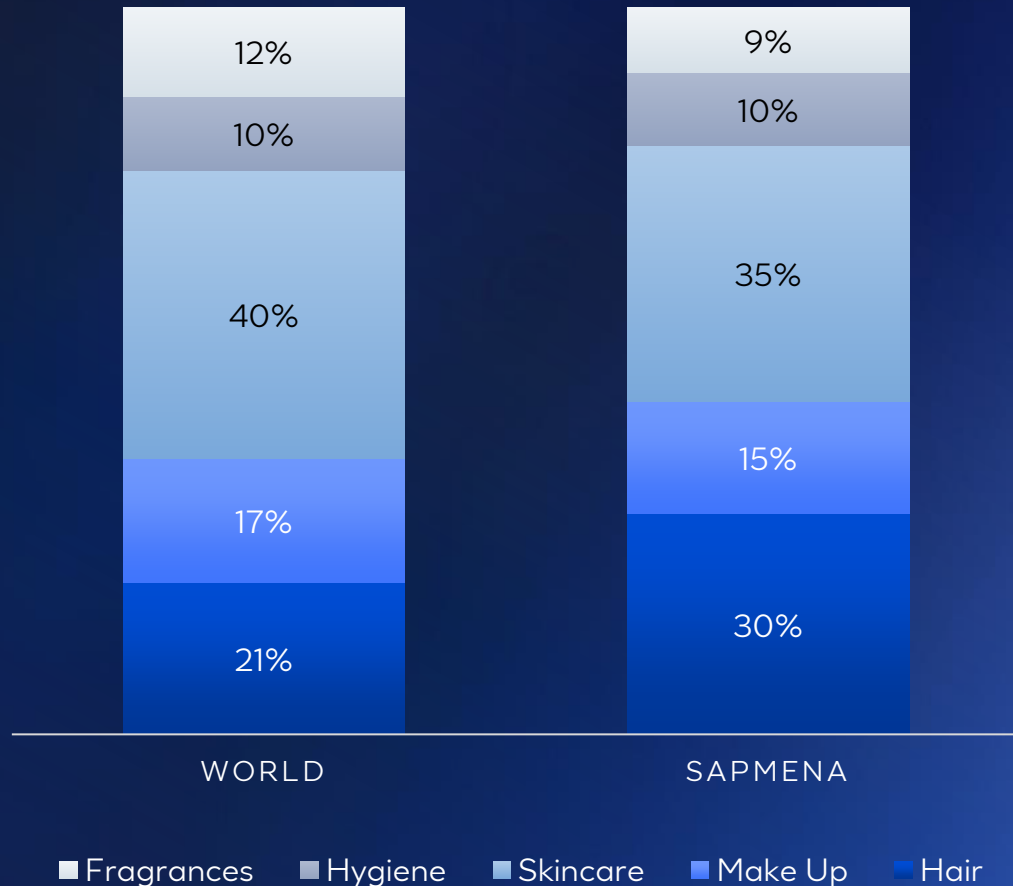
UNIVERSE



/ BEAUTY LANDSCAPE

SAPMENA- SKIN & HAIR MOST IMPORTANT

CATEGORY



Source: BMS, FY 2023



/ SAPMENA BEAUTY MARKET

RAPIDLY GROWING BEAUTY MARKET

ONE OF THE MOST DYNAMIC BEAUTY MARKETS

2x
BY
2030

~10%
CAGR
(2023 - 2030)





LET'S TALK

L'ORÉAL SAPMENA

/ L'ORÉAL SAPMENA

STRONG FOOTPRINT FOR INNOVATION



35

MARKETS



RESEARCH CENTRES

13

SUBSIDIARIES



EVALUATION CENTRES

4



FACTORIES

1



REGIONAL R&I HUB

/ L'ORÉAL SAPMENA GROWTH FRAME
OUR GROWTH PILLARS



CONSUMER
ACQUISITION



TALENT
HUB

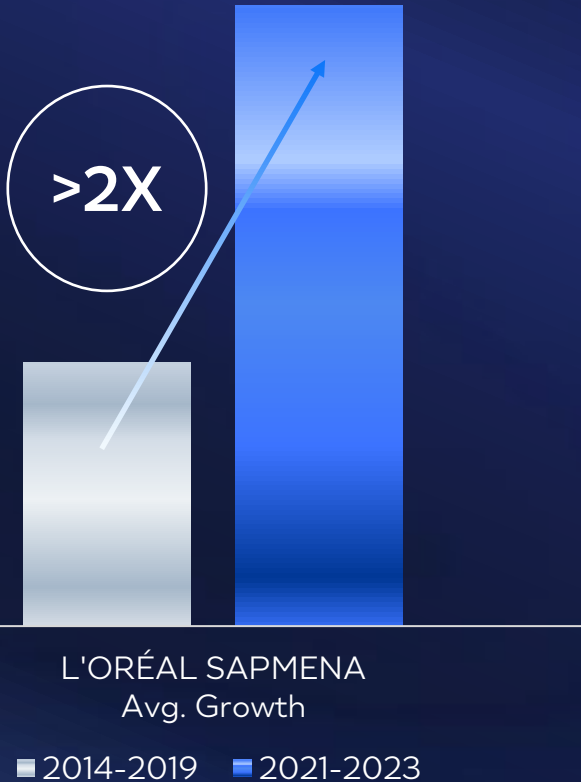


PEOPLE &
PLANET

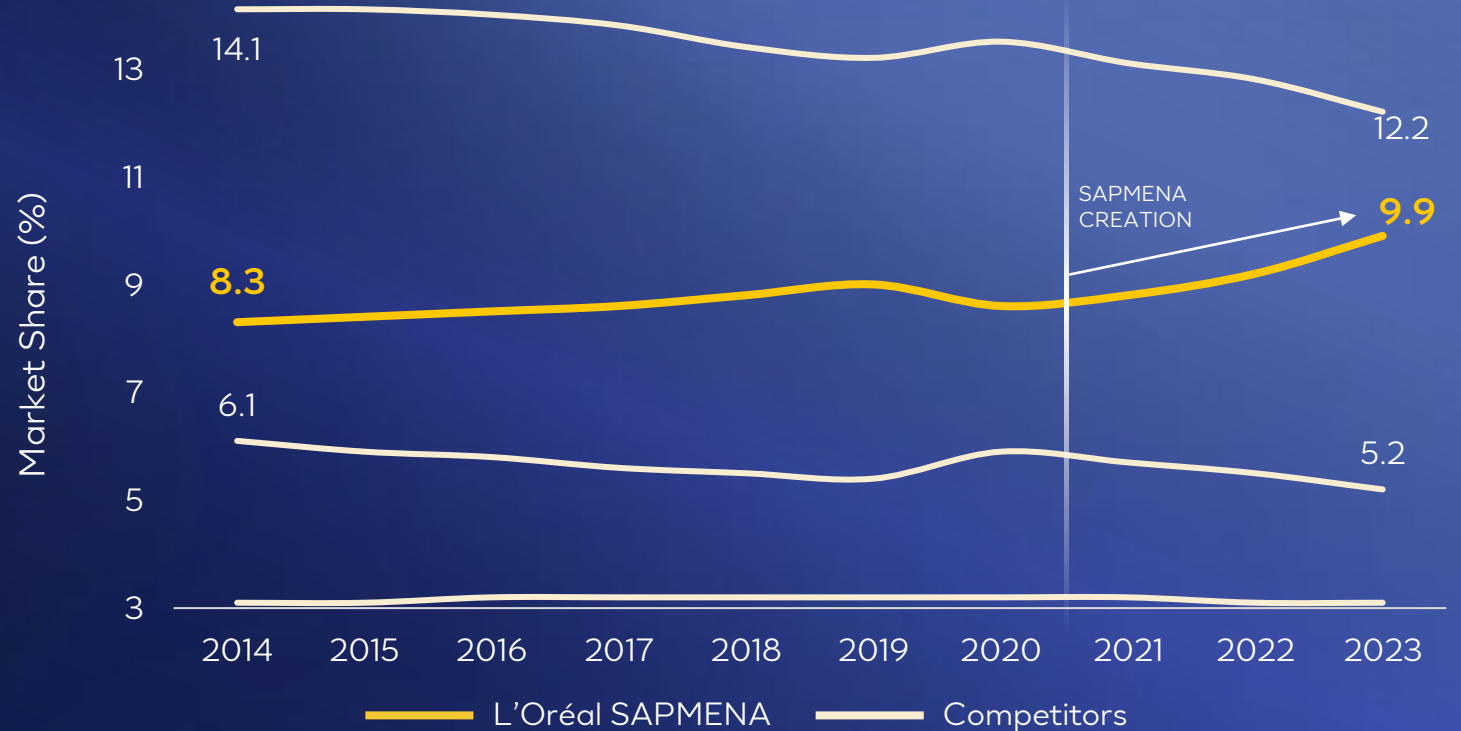
INNOVATION

STRONG GROWTH SINCE CREATION OF SAPMENA

GROWTH INDEX



TOP BPC MANUFACTURERS
MARKET SHARE SAPMENA



Source: 1. Sell-In evolution Index
2. Euromonitor extract Sept 2024;

SAPMENA = Algeria, Australia, Bangladesh, Cambodia, Egypt, India, Indonesia, Iraq, Jordan, Kuwait, Laos, Lebanon, Malaysia, Morocco, Myanmar, New Zealand, Oman, Pakistan, Philippines, Qatar, Saudi Arabia, Singapore, Sri Lanka, Thailand, Tunisia, United Arab Emirates, Vietnam
Categories : Baby and Child-specific Hair Care, Baby and Child-specific Skin Care, Baby and Child-specific Sun Care, Baby and Child-specific Toiletries, Bath Additives, Body Powder, Body Wash/Shower Gel, Colour Cosmetics, Deodorants, Hair Care, Hair Removers/Bleaches, Intimate Hygiene, Mass Fragrances, Men's Post-Shave, Men's Pre-Shave, Premium Fragrances, Skin Care, Sun Care, Women's Pre-Shave

/ L'ORÉAL SAPMENA

LEADING THE BEAUTY MARKET IN MOST KEY MARKETS



Source : Euromonitor, FY 2023;

Categories : Baby and Child-specific Hair Care, Baby and Child-specific Skin Care, Baby and Child-specific Sun Care, Baby and Child-specific Toiletries, Bath Additives, Body Powder, Body Wash/Shower Gel, Colour Cosmetics, Deodorants, Hair Care, Hair Removers/Bleaches, Intimate Hygiene, Mass Fragrances, Men's Post-Shave, Men's Pre-Shave, Premium Fragrances, Skin Care, Sun Care, Women's Pre-Shave

/ RESEARCH & INNOVATION

RELEVANT INNOVATION FOR THE MOST DEMANDING BEAUTY CONSUMERS



DECODING
HAIR & SKIN



BLOCKBUSTER
INNOVATIONS

SUPPORTING HIGH GROWTH IN A VOLATILE ENVIRONMENT



RESILIENT SUPPLY
CHAIN



COST OPTIMIZED
MANUFACTURING

/ DIGITAL & MARKETING

NAVIGATING THE FUTURE

O+O
EXPERIENCE

RIGHT CONTENT
AT SCALE

OMNI
PRESENCE
(SOCIAL, QUICK, E-
COMMERCE)

MEDIA
OPTIMISATION

PERSONALISATION

POWERED BY SCALED DATA & TECH

E-COMMERCE SERVICE CENTRE



BEST* FOR FINANCE & HR



DATA & ANALYTICS COE

SCALE TO OUR ADVANTAGE

*BUSINESS EXPERTISE AND TECHNOLOGY SERVICES.

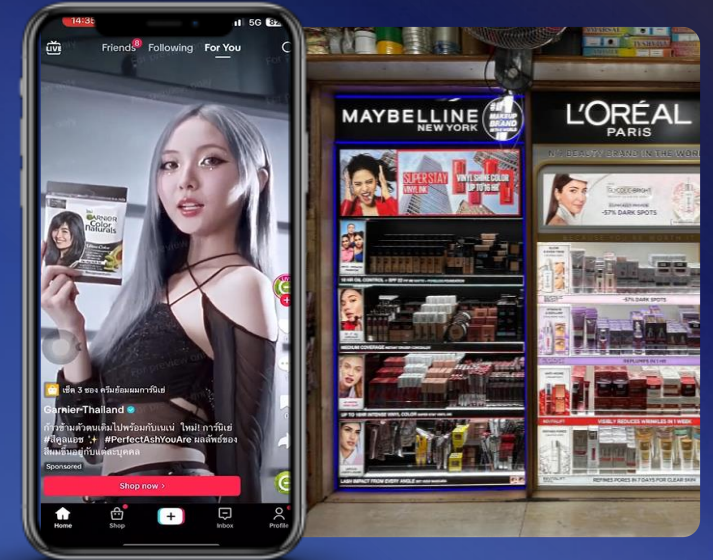
/ L'ORÉAL CONSUMER DIVISION DEMOCRATISING THE BEST OF BEAUTY INNOVATION



BLOCKBUSTER
INNOVATIONS



STRONG
LOCAL RELEVANCE



LEADING
OMNI CHANNEL

/ L'ORÉAL PROFESSIONAL DIVISION ELEVATING PRO BEAUTY

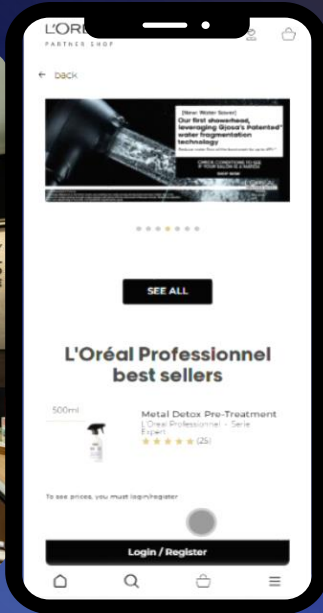
#1



EDUCATION



INSPIRATION



CONTINUOUS
MODERNISATION

/ L'ORÉAL LUXE DIVISION REDEFINING LUXURY EXPERIENCE

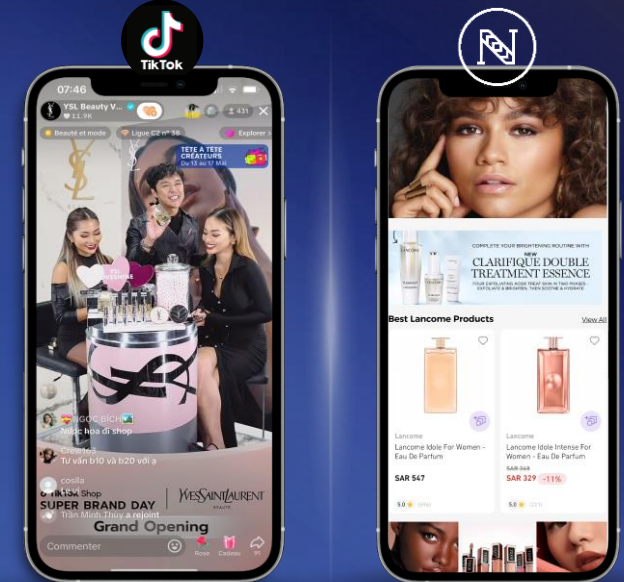
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ELEVATING SERVICE+
EDUCATION



ELEVATING BRAND
EXPRESSION



CONQUERING
DIGITAL FRONTIER

/ L'ORÉAL DERMATOLOGICAL BEAUTY MAKING SKIN HEALTH ACCESSIBLE TO ALL

#1



MEDICAL
ANCHORAGE



LIFE CHANGING
INNOVATIONS



BUILDING
DERMOCOSMETICS
CATEGORY

/ TALENT HUB

A DIVERSE TALENT INCUBATOR AND EXPORTER



7,400+
Beauty Experts

45:55M
M / F Ratio

~88
Nationalities

~54%
Women in senior
leadership roles

200+
Management Trainees

BUILDING SUSTAINABLY

100%
RENEWABLE ENERGY*
(EXIT 2023)

ALL 23 SITES

*Excluding safety & security installations

100%
R-PET

ACROSS SAPMENA
FACTORIES

-50%
TRANSPORT CO₂
INTENSITY WHILE

DOUBLING
VOLUME

FUND FOR NATURE



Great Barrier
Reef Foundation



Mangroves
Now
www.mangrovesnow.fund

GREEN PARCELS

FOR
E-COMMERCE

100%
ECO-DESIGN

POSM

/ PEOPLE & PLANET

SUPPORTING OUR COMMUNITIES

INCLUSIVE SOURCING

25 K+
BENEFICIARIES

BRAND CAUSES

STANDUP
against street harassment
by L'ORÉAL
PARIS



ABUSE IS NOT LOVE

HeadUp
FOR HAIR PROS' MENTAL HEALTH

BRAVE TOGETHER



CANCER SUPPORT
BY LA ROCHE-POSAY

POWER TALKS
KÉRASTASE
PARIS

EYES UP
MAYBELLINE
NEW YORK

Beauty for
a better Life

FONDATION
L'ORÉAL

10,000+
BENEFICIARIES

FUND FOR WOMEN

Supporting NGOs to uplift
vulnerable women

L'ORÉAL
FUND FOR WOMEN

CLIMATE EMERGENCY FUND

50K +

Launched women's climate shock
insurance and livelihood initiative



GLOBAL
RESILIENCE
PARTNERSHIP



SEWA
SELF EMPLOYED WOMEN'S ASSOCIATION

WOMEN CLIMATE COLLECTIVE

Piloted in India, and ready to scale in
SAPMENA & beyond



**WOMEN
CLIMATE
COLLECTIVE**



FONDATION
L'ORÉAL

The background is a dark blue gradient. Two large, glowing circles are positioned on the left and right sides. The left circle is yellow and the right one is blue. At the bottom, there is a white line-art silhouette of a city skyline with various buildings and a dome. The text 'SAPMENA' and 'Q&A' is centered in the upper half of the image.

SAPMENA

Q&A

CLOSING

UNVEILING BEAUTY'S UNTAPPED POTENTIAL

IN

SAPMENA

South Asia Pacific, Middle East & North Africa

3rd December 2024

VISMAY SHARMA

PRESIDENT - L'ORÉAL SAPMENA

L'ORÉAL
SAPMENA



AFFLUENCE

AWARENESS

ACCESS

SAPMENA

A REGION WITH HUGE OPPORTUNITY

~200m

Consumer Acquisition Opportunity

/ SAPMENA

HOME TO THE MOST DEMANDING CONSUMERS

VALUE

INNOVATION

LOCAL
RELEVANCE

EXPERIENTIAL

RESPONSIBILITY

L'ORÉAL
SAPMENA



/ L'ORÉAL SAPMENA

ALREADY AN ENGINE FOR GROWTH

VALUE



INNOVATION



LOCAL RELEVANCE



NEW SHADE EXPERIENTIAL SAVE



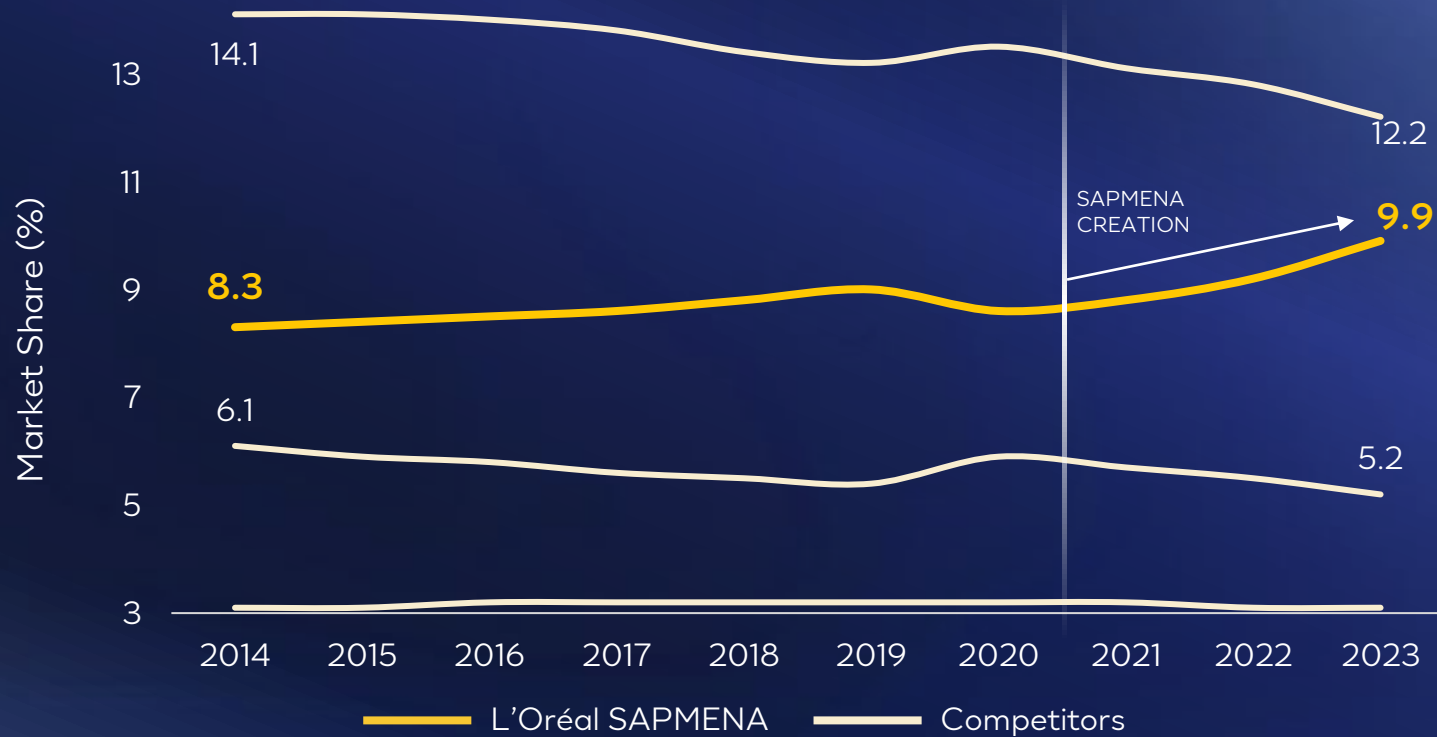
RESPONSIBILITY



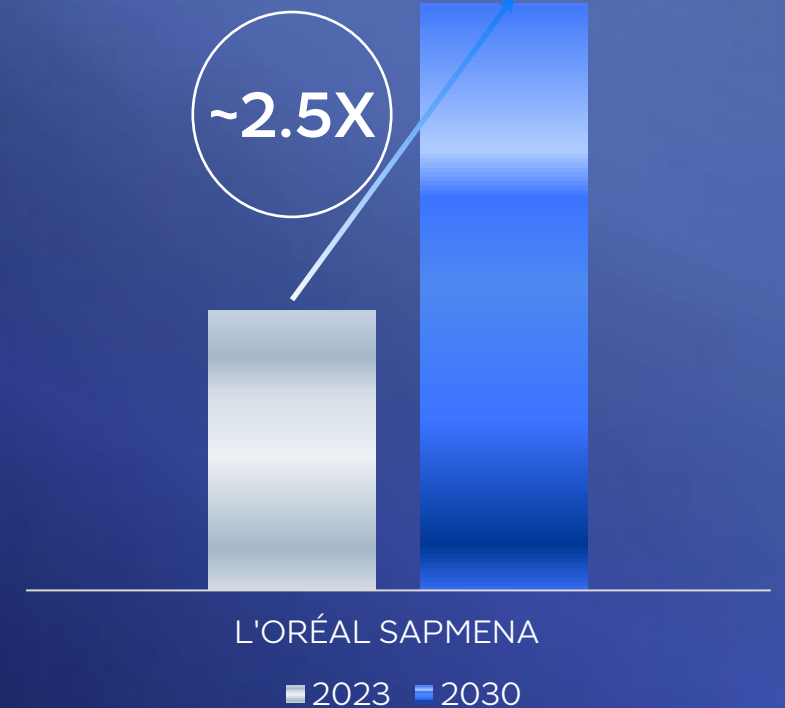
/ L'ORÉAL SAPMENA

ON OUR WAY TO #1 IN SAPMENA

TOP BPC MANUFACTURERS
MARKET SHARE SAPMENA



OPPORTUNITY TO >DOUBLE TURNOVER



Source:

1. Euromonitor extract Sept 2024;

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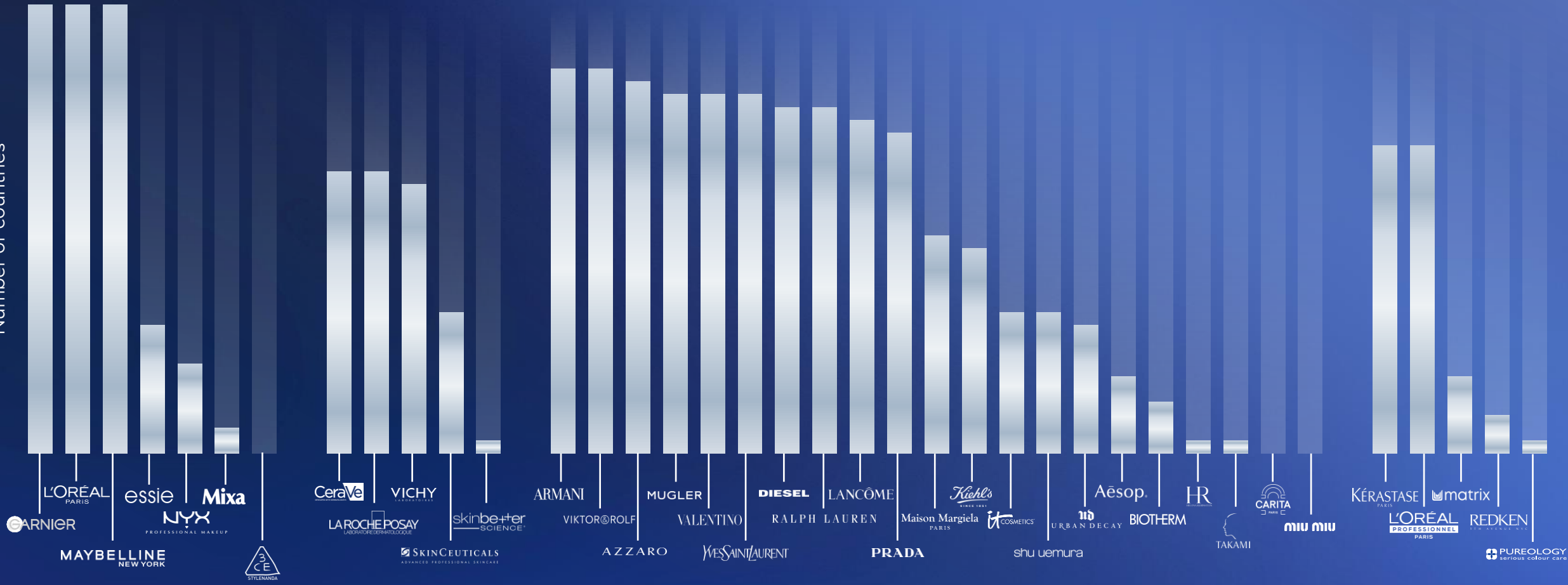
/ L'ORÉAL SAPMENA

AND WE ARE JUST GETTING STARTED...

2025
EXPANSION



Number of countries



Source: Internal data



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SAPMENA

Q&A

THANK YOU