



L'ORÉAL

CAPITAL MARKETS 2023

Barbara LAVERNOS, Deputy CEO, in charge of
Research, Innovation & Technology

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BEAUTY TECH



NEW PARADIGM



**CHAMPIONING
BEAUTY TECH
TODAY AND
TOMORROW**





**114 YEARS
OF LEGACY
DEDICATED
TO BEAUTY**



LANCÔME
e-SKIN EXPERT



78%
ANALYSIS IN PROGRESS



**OUR HERITAGE
THE RICHEST
BEAUTY DATA BASE**



OUR WORLD DISRUPTED BY DIGITAL & TECH



CLOUD



ARTIFICIAL INTELLIGENCE



5G



AR-VR-MR



IoT



BLOCKCHAIN



COMPUTING POWER

AT AN INCREDIBLE SPEED

¹
80%

companies' workload
in the cloud (2022)

²
100M

users reached by Chat GPT
in 2 months vs 9 months for TikTok
vs 2,3 years for Instagram

³
90%

of the world's big data
produced in the past 2 years

⁴
40Bn+

active IoT connections
in 2023

⁵
158M times faster

Is the Quantum Computer, compared to the
most sophisticated supercomputer in the world

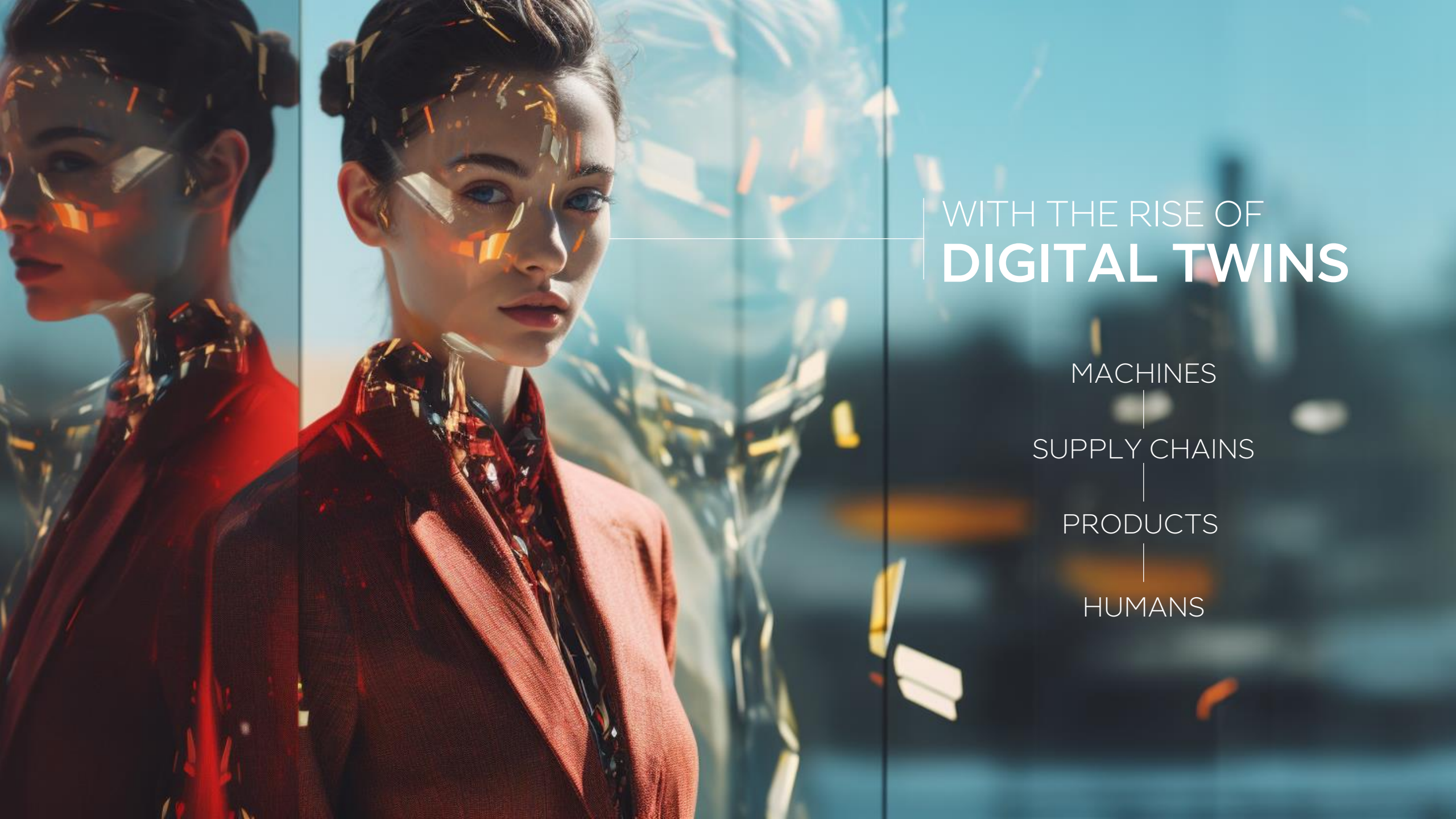
¹ EarthWeb - Cloud Computing

² The Guardian

³ Forbes

⁴ Forbes

⁵ Medium



WITH THE RISE OF
DIGITAL TWINS

MACHINES

SUPPLY CHAINS

PRODUCTS

HUMANS

WITH THE DEVELOPMENT OF
WEB 3.0

METAVERS DIRECT TO AVATAR

\$24.7B¹
NFT transactions
in 2022

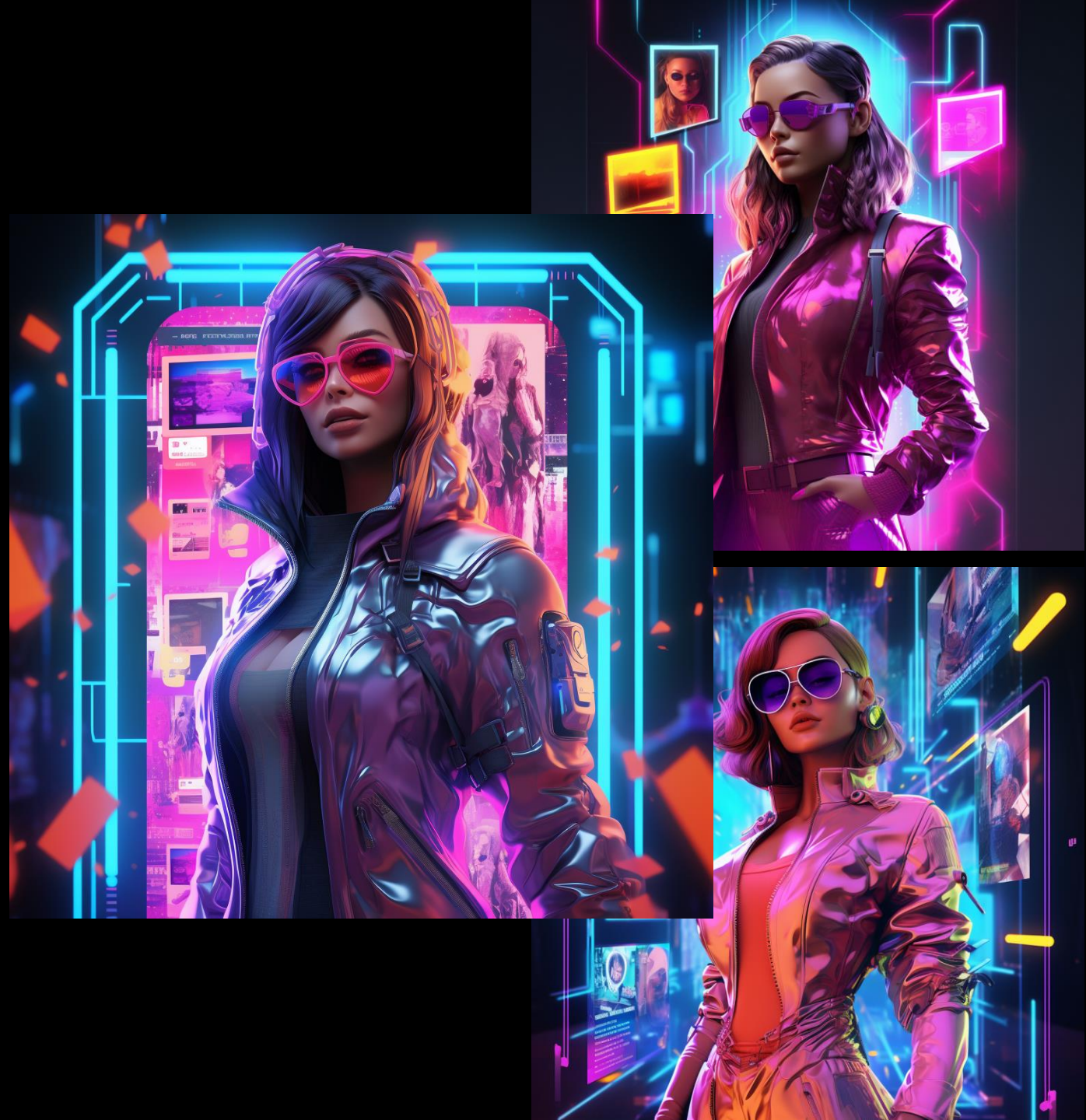


WITH THE EXPLOSION OF
GENERATIVE AI

GEN AI-DRIVEN CAMPAIGN

1st ART PRIZE
at the Colorado state fair
fine arts competition

TOP 10% AT THE BAR EXAM
compared to the other test-takers

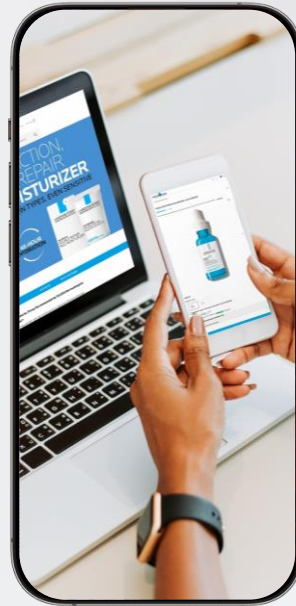


IMPACTING THE WAY PEOPLE LIVE



5Bn+¹

people connected
in 2023, with 4,5Bn
on social media



2/3²

of adults worldwide
make or receive
a digital payment



+6,300%³

for TikTok shopping
searches over the last 4 years



¹ Statista ² World Bank ³ Exploding topics

81%¹

of retail shoppers conduct **online research** before buying.

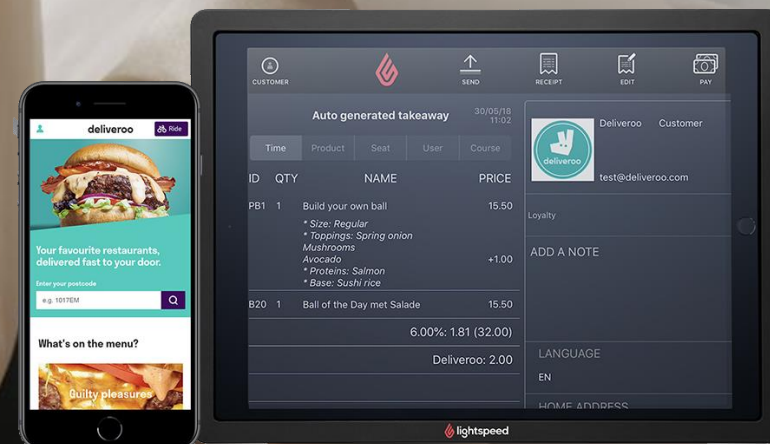
59%³

of shoppers **use their mobile devices in-store** to compare costs or research deals and coupons.

IMPACTING THE WAY
PEOPLE SHOP

41%²

of global shoppers said they hoped **to receive their online shopping within 24h.**



¹ Invoca

² Statista

³ Invoca

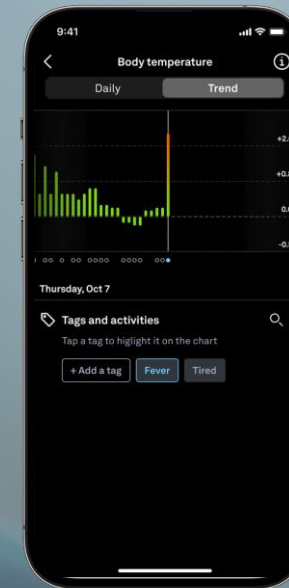
IMPACTING THE WAY PEOPLE MONITOR THEIR HEALTH

1
6/10

households in the US market
own a wearable device

2
+150

types of health data
stored from Apple Watch and iPhone



IMPACTING BUSINESS MODELS

ENERGY AS A SERVICE

FROM CAR OWNERSHIP TO
MOBILITY SUBSCRIPTION MODEL

FIN-TECH

HEALTH INSURANCE-TECH

TELE-MEDICINE

BIO-TECH

GREEN-TECH...





**GROWING
QUEST
FOR BEAUTY**

600 MILLION
NEW CONSUMERS

A BEAUTY THAT PROTECTS

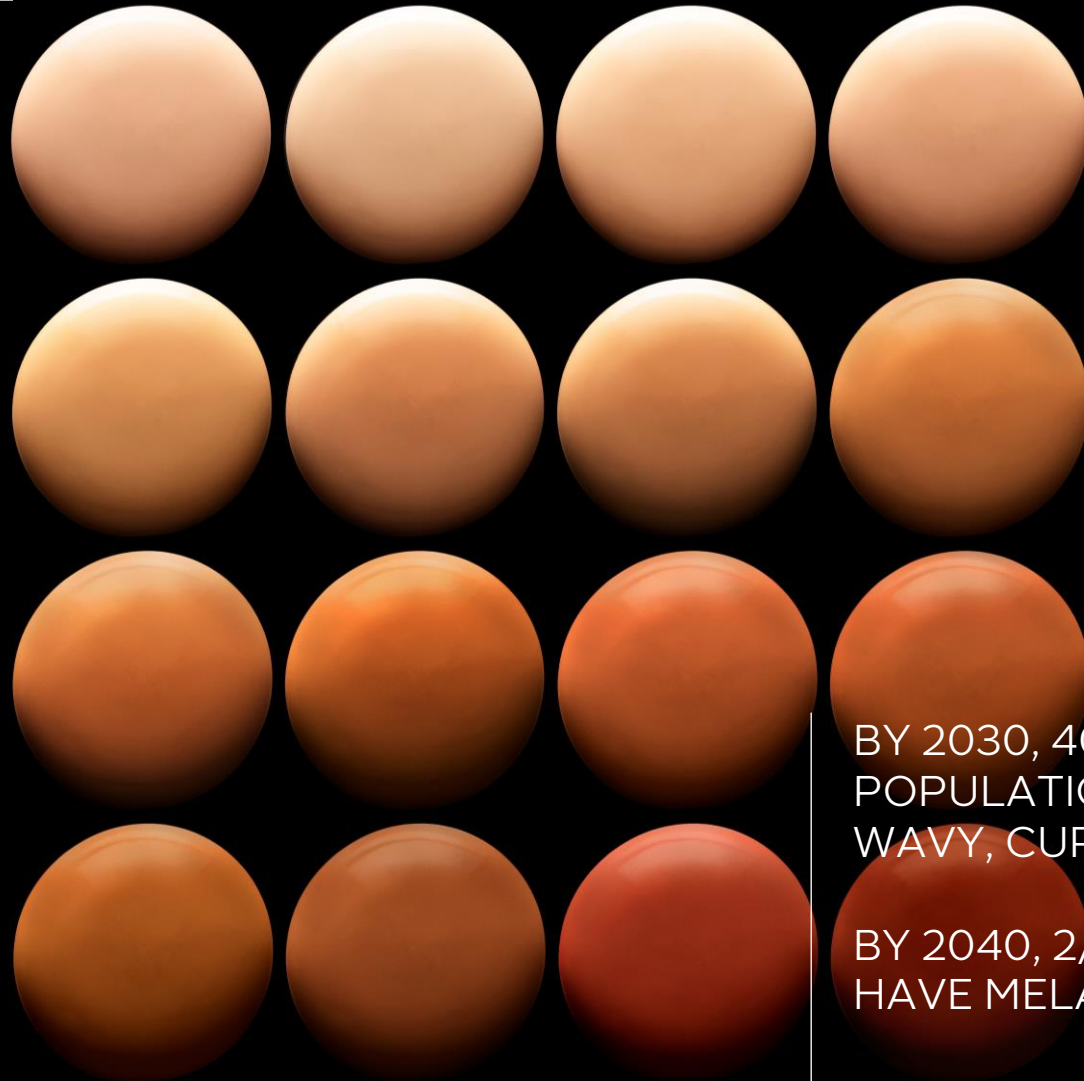


2,3Bn PEOPLE LIVE IN WATER
STRESSED COUNTRIES

BY 2050, 7 OUT OF 10 PEOPLE
WILL LIVE IN CITIES

SKIN CANCER LINKED TO THE
UV + POLLUTION ARE
INCREASING EVERYWHERE

A BEAUTY THAT IS INCLUSIVE



BY 2030, 40% OF THE
POPULATION WILL HAVE
WAVY, CURLY OR COILY HAIR

BY 2040, 2/3 OF MANKIND WILL
HAVE MELANIN RICH SKIN

BY 2030, THE GEOGRAPHICS
OF BEAUTY MARKET WILL
TREMENDOUSLY CHANGE

AN ULTRA PERSONALIZED BEAUTY



TAILOR-MADE BEAUTY
SOLUTIONS & SERVICES

WILLINGNESS FOR LONGEVITY
PREVENTIVE CARE, WELL-
AGING AND MENTAL HEALTH

WHENEVER, WHEREVER,
WHATEVER

LEADING L'ORÉAL TO EVOLVE THROUGH AGES

UNIVERSALIZATION

90s



BEAUTY FOR ALL

2010s



BEAUTY FOR EACH

2023



UNIVERSALIZATION

90s



BEAUTY FOR ALL

2010s



BEAUTY FOR EACH

2023



MODEL _____

THE MUSE _____

STANDARD _____

MANAGING _____

REACTIVE HEALTH _____

CONSUMERISM _____

OFFLINE _____

INCLUSIVE _____

THE 'WE' _____

COLLECTIVE _____

PREVENTING _____

MENTAL & EMOTIONAL HEALTH _____

GREEN AWARENESS _____

OFFLINE + ONLINE _____

INDIVIDUAL _____

THE 'ME, MYSELF AND I' _____

PLURAL COMMUNITIES _____

LONGEVITY _____

HEALTH IS THE NEW WEALTH _____

SUSTAINABLE BY DESIGN _____

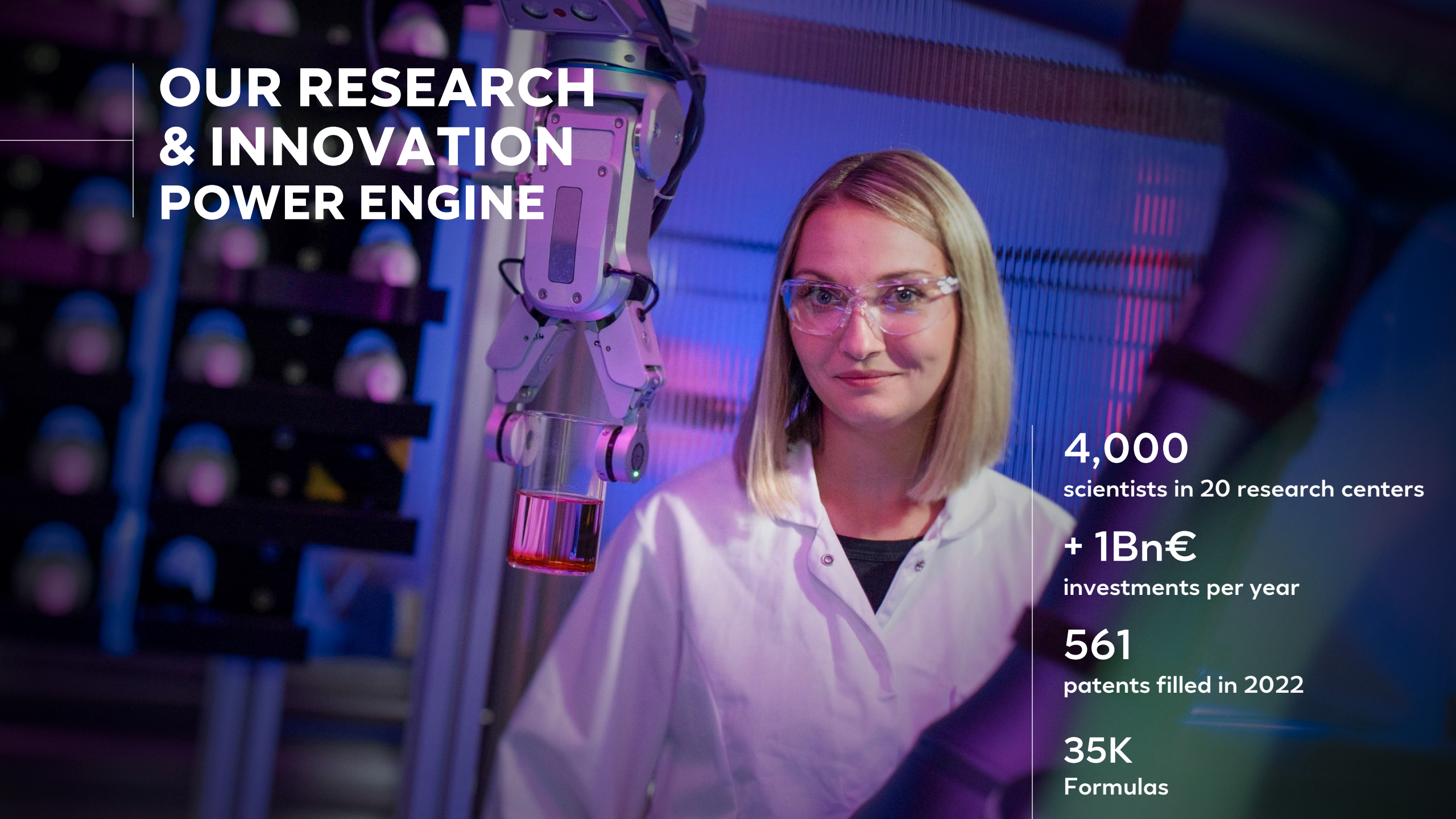
O+O+O SERVICES _____



**BEAUTY FOR EACH
POWERED BY BEAUTY TECH**

**OUR UNEQUALLED
SCIENTIFIC &
TECHNOLOGICAL
EXPERTISE**





OUR RESEARCH & INNOVATION POWER ENGINE

4,000

scientists in 20 research centers

+ 1Bn€

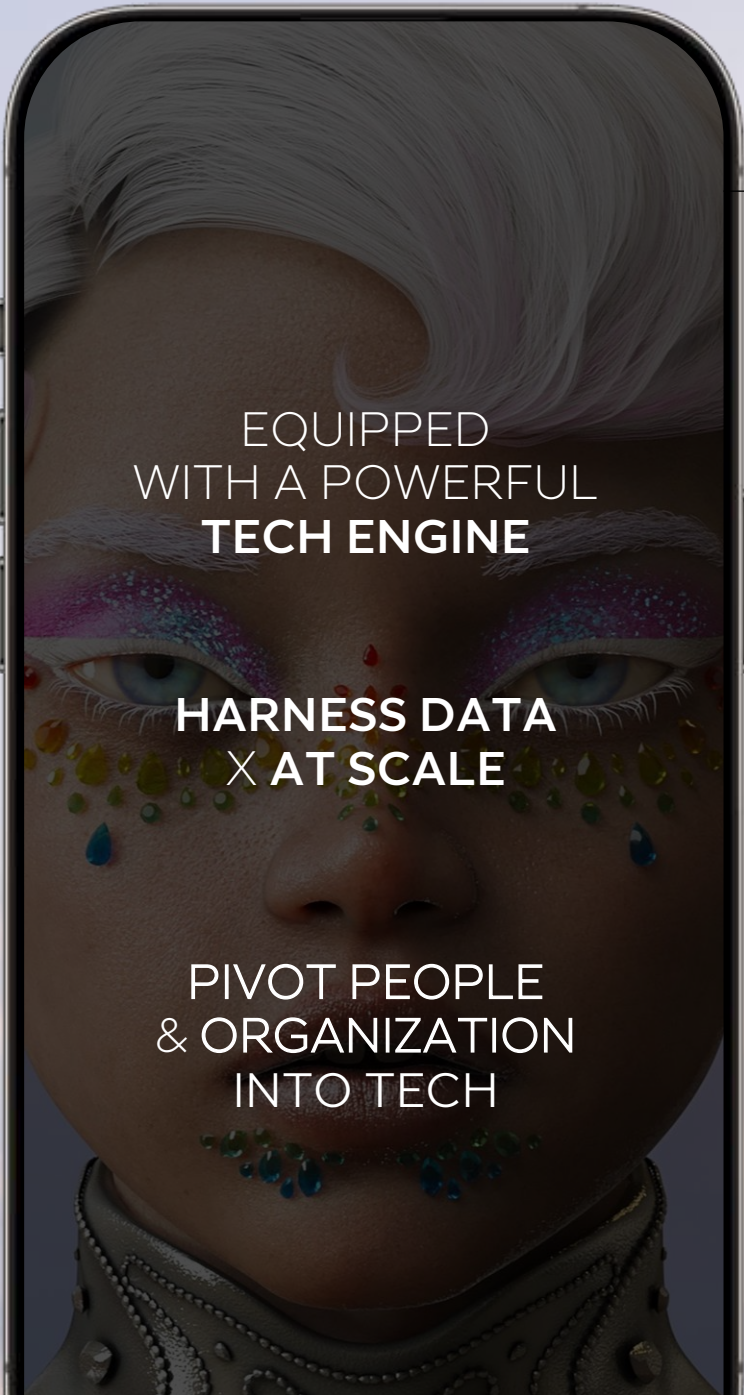
investments per year

561

patents filled in 2022

35K

Formulas



EQUIPPED
WITH A POWERFUL
TECH ENGINE

**HARNESS DATA
X AT SCALE**

PIVOT PEOPLE
& ORGANIZATION
INTO TECH

OUR TECH POWER ENGINE

5,900

Tech & Data talents

+ 1 Bn€

investments per year

75%

On the public CLOUD

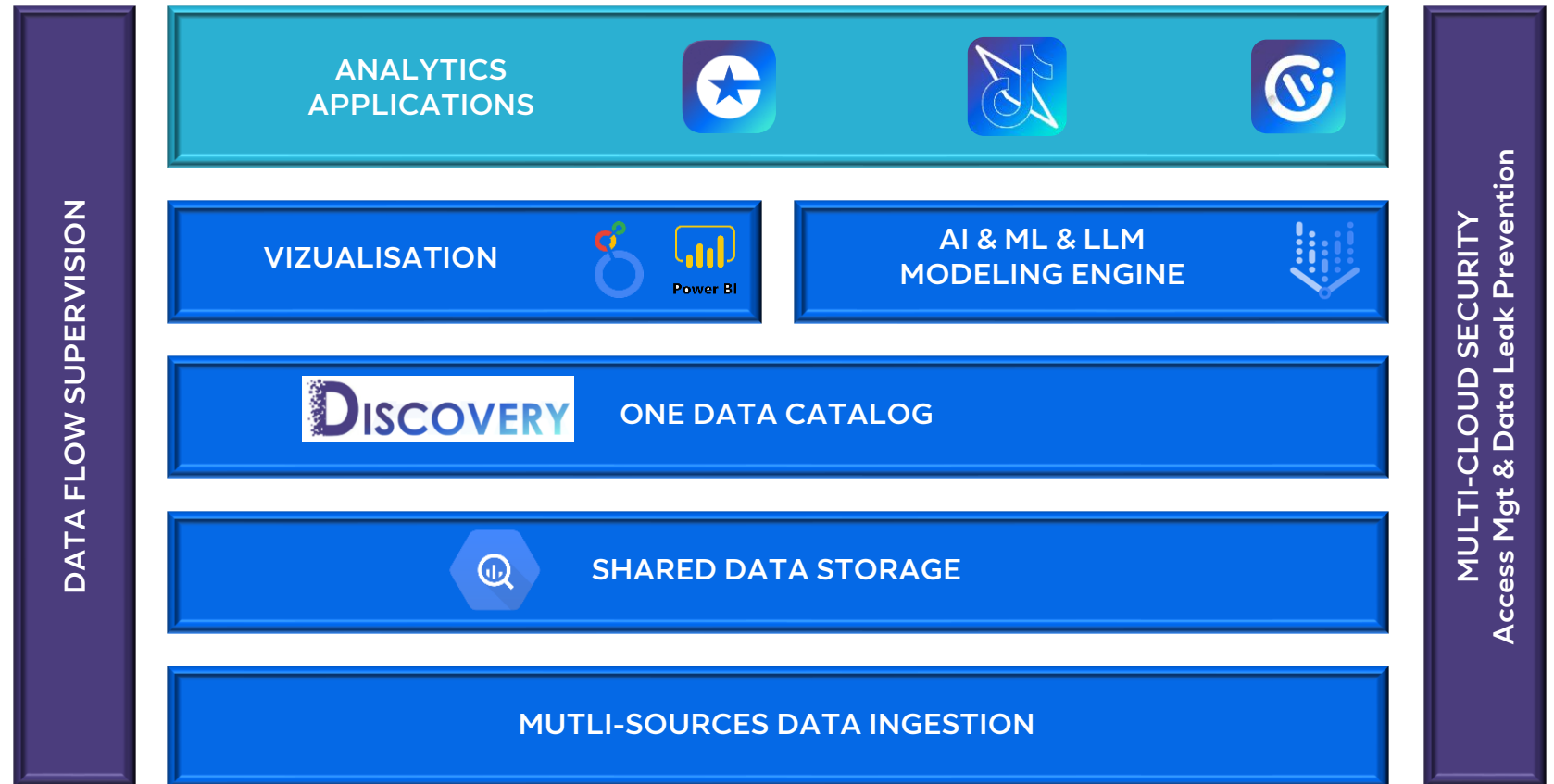
228 K-hours

Tech & data learnings

OUR BEAUTY TECH DATA PLATFORM



BEAUTY TECH DATA
PLATFORM




10

TERRABYTES OF DATA

20,000

ACTIVE USERS



**THE POWER OF
“CO.” & OPEN
INNOVATION**

COMMITTED TO
PARTNER WITH
CUTTING-EDGE
START-UPS &
TECH GIANTS

A photograph of a young man and woman in a close embrace, their eyes closed, against a dark background. The woman is on the left, wearing a black, sheer, high-necked top. The man is on the right, wearing a black suit jacket. The lighting is dramatic, highlighting their profiles. The text 'TO ANTICIPATE AND ANSWER CONSUMERS' EXPECTATIONS' is overlaid on the right side of the image in a bold, white, sans-serif font.

**TO ANTICIPATE
AND ANSWER
CONSUMERS'
EXPECTATIONS**



**BEAUTY EXPERIENCES
THAT ARE INCLUSIVE**

TO EMPOWER EVERY
INDIVIDUAL TO EXPRESS
WHO THEY ARE OR WHO
THEY WANT TO BE



**BEAUTY EXPERIENCES
THAT ARE ALWAYS
A STEP AHEAD**

BRINGING BEAUTY,
HEALTH AND WELL-
BEING TO PEOPLE OF
THE WORLD



**BEAUTY EXPERIENCES
THAT ARE SUSTAINABLE**

TO MAKE A POSITIVE
IMPACT ON PEOPLES'
LIVES WHILE
PRESERVING THE
PLANET

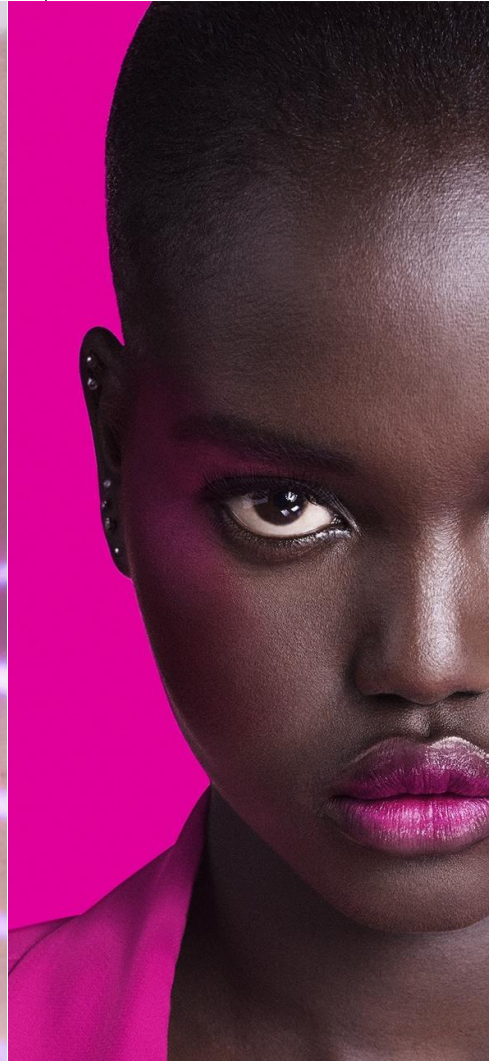
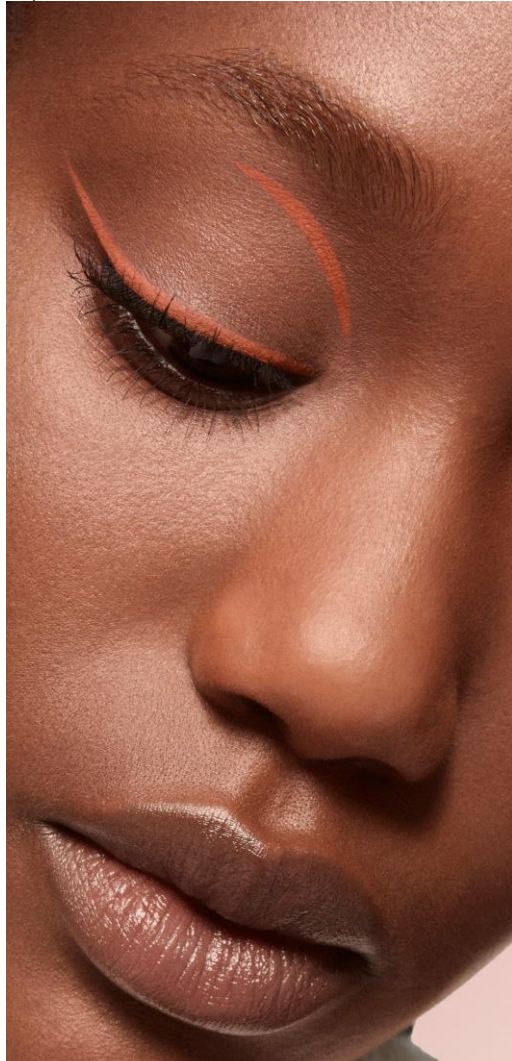
THE
NEW
CONSUMERS'
ERA

TO
KNOW
CONSUMERS
INTIMATELY

TO
ASTONISH
CONSUMERS WITH
TRAILBLAZING
INNOVATIONS

TO
EMPOWER
CONSUMERS
WITH ELEVATED
BEAUTY
EXPERIENCES

TO
AUGMENT
BEAUTY
CONSUMERS'
JOURNEYS





L'ORÉAL

CAPITAL MARKETS DAY 1

2023

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