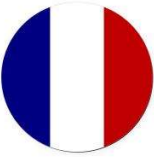


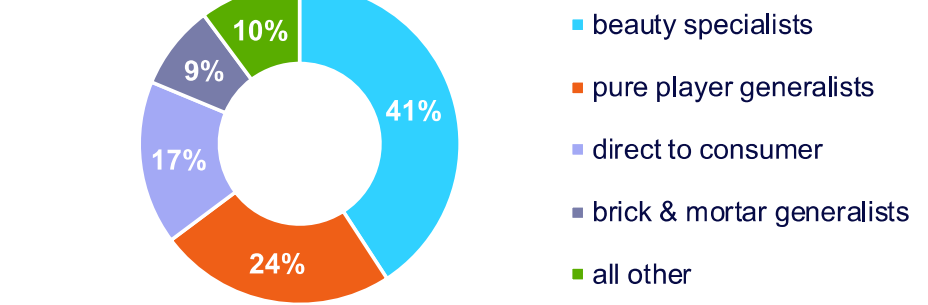
The Beauty E-commerce Landscape



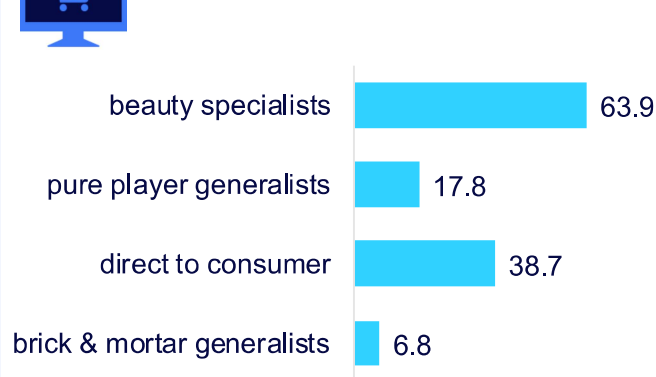
Top 10 E-commerce beauty merchants

1. **amazon**
2. **SEPHORA**
3. **NOCIBÉ**
4. **E.Leclerc**
5. **Marionnaud PARIS**
6. **Myorigines**
7. **Vinted**
8. **AROMA ZONE.COM**
EXPERT NATUREL EN SOINS & BEAUTE
9. **NOTINO**
10. **Typology.**

Value share of E-commerce beauty merchant types



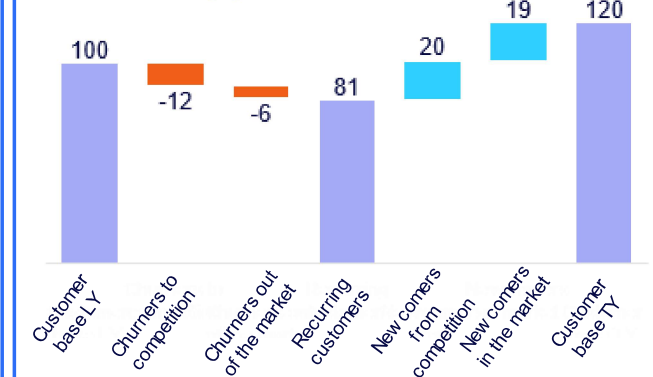
Average order size €



Shopper age

	beauty specialists	pure player generalists	direct to consumer	brick & mortar generalists	Other
<i>Market</i>	40.8%	23.9%	16.5%	8.5%	10.3%
Gen. B - [-1959]	46.8%	24.9%	13.9%	3.6%	10.9%
Gen. X - [1960-1979]	42.2%	24.4%	14.8%	7.9%	10.8%
Gen. Y - [1980-1994]	36.5%	24.8%	16.8%	11.2%	10.7%
Gen. Z - [1995-]	45.1%	20.4%	20.6%	5.5%	8.4%

Evolution of Amazon beauty shoppers (Latest 12 months vs YAGO)



Source : Foxintelligence by NielsenIQ, France Calibrated Beauty E-commerce read - MAT data to 9th April 2023