

HOW L'OREAL BNL

IS ELEVATING ITS E-COMMERCE STRATEGY

WITH

DATA-DRIVEN INSIGHTS

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9 OCTOBER 2024



L'ORÉAL
G R O U P E

OUR TOP BUSINESS SEGMENTS



SKINCARE
30%



HAIRCARE
25%



FRAGRANCES
20%



MAKEUP
15%

OUR DIVISIONS

WITH EACH DIVISION DEVELOPING A SPECIFIC VISION OF BEAUTY FOR ITS RESPECTIVE MARKET



L'Oréal Luxe



**Consumer
Products**



**Dermatological
Beauty**



**Professional
Products**

OUR PORTFOLIO OF BRANDS

RICHEST PORTFOLIO OF DIVERSE AND COMPLEMENTARY BRANDS

L'ORÉAL L U X E

LANCÔME YVES SAINT LAURENT ARMANI
Kiehl's HR BIOTHERM
shu uemura it COSMETICS
VALENTINO MUGLER RALPH LAUREN
PRADA VIKTOR&ROLF Maison Margiela
AZZARO DIESEL CARITA

L'ORÉAL Consumer Products

L'ORÉAL PARIS GARNIER
MAYBELLINE NEW YORK NYX
essie
Mixa

L'ORÉAL Dermatological Beauty

LA ROCHE POSAY CeraVe
SKINCEUTICALS VICHY

L'ORÉAL Professional Products

L'ORÉAL PROFESSIONNEL PARIS KÉRASTASE PARIS
REDKEN matrix

OUR BNL RETAIL LANDSCAPE

FROM LUXURY RETAIL

TO LOW END RETAIL



de Bijenkorf 

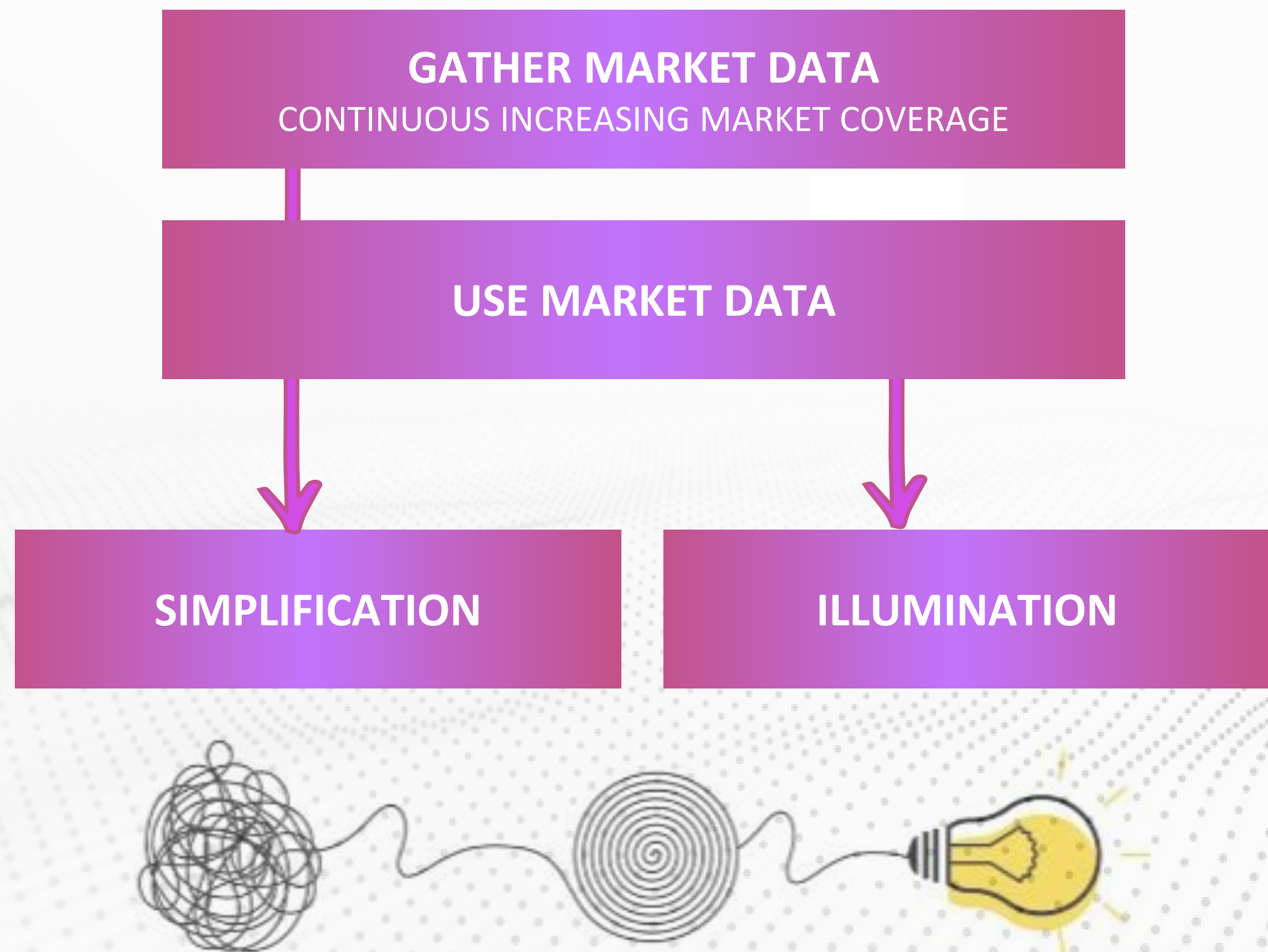




OBJECTIVE MARKET INTELLIGENCE

DETERMINE THE SIZE OF THE BNL BEAUTY MARKET FROM A CONSUMER PURCHASE OF VIEW

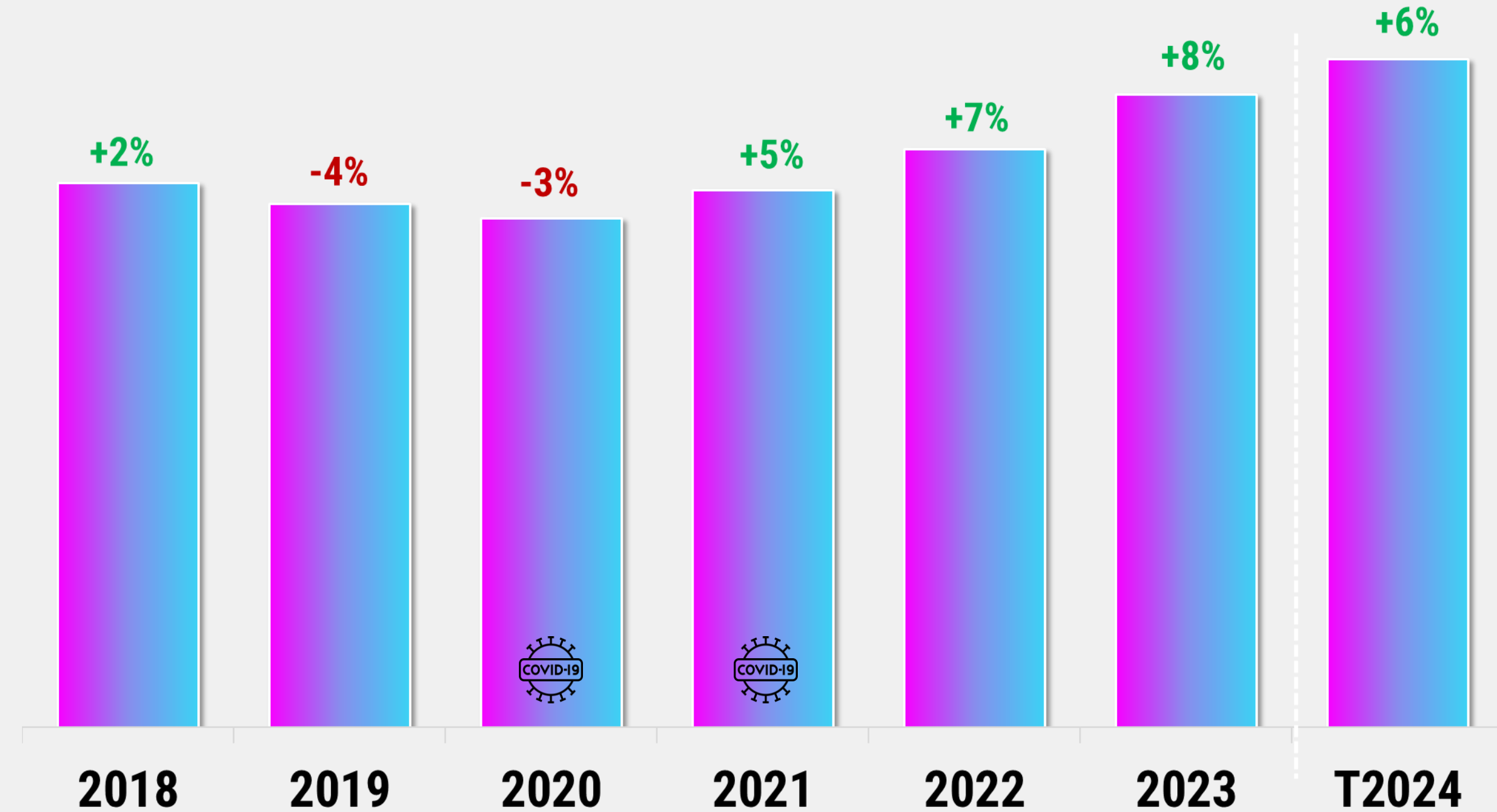
OUR AMBITION



ANALYTICS & INSIGHTS

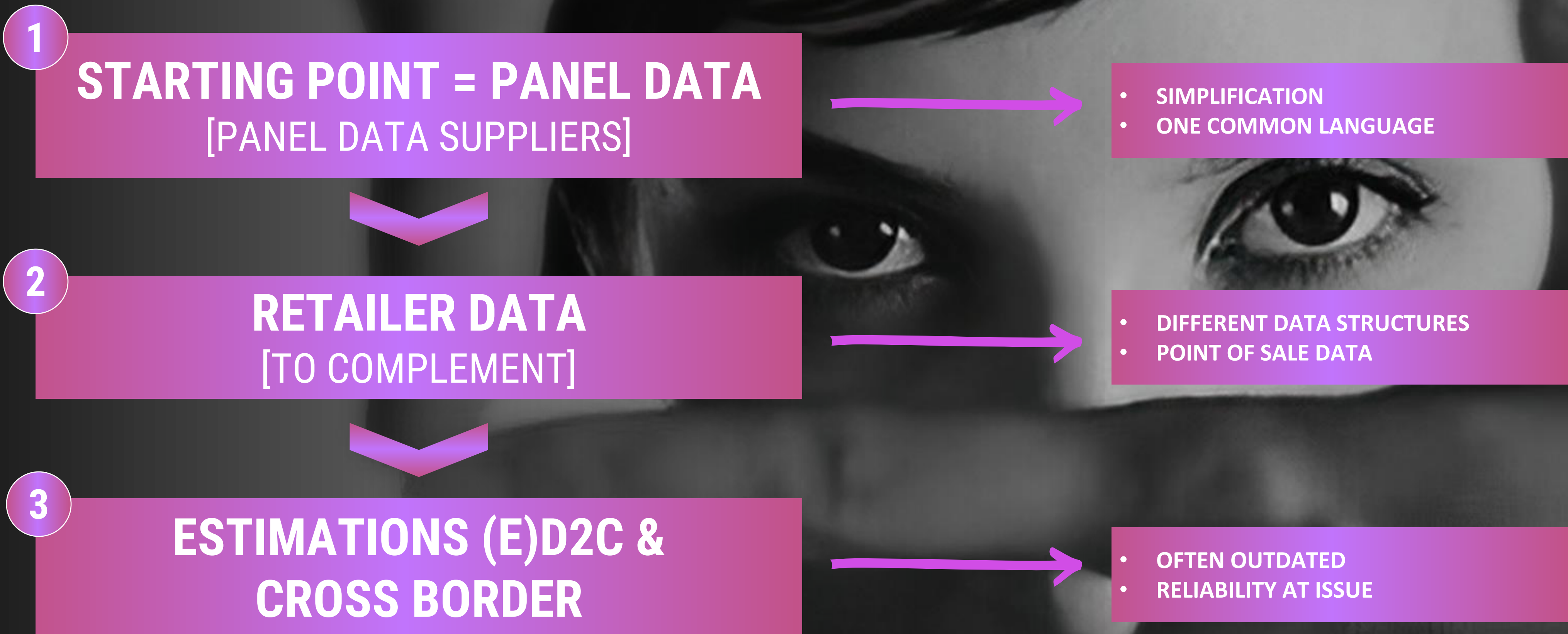


DEVELOPMENT BNL BEAUTY MARKET



GUIDING PRINCIPLES TO ESTIMATE BNL BEAUTY MARKET

PIECEMEAL TOGETHER DIFFERENT SOURCES OURSELVES



REASONABLE HIGH PANEL DATA COVERAGE BNL BEAUTY MARKET O+O, BUT...

VISIBILITY IN PANEL DATA

OFFLINE

DOUGLAS



de Bijenkorf 



Etos

 Kruidvat

ICI PARIS XL

April



DELHAIZE  GROUP

VISIBILITY IN PANEL DATA

ONLINE

bol.com 

amazon 

DOUGLAS

Etos

ICI PARIS XL

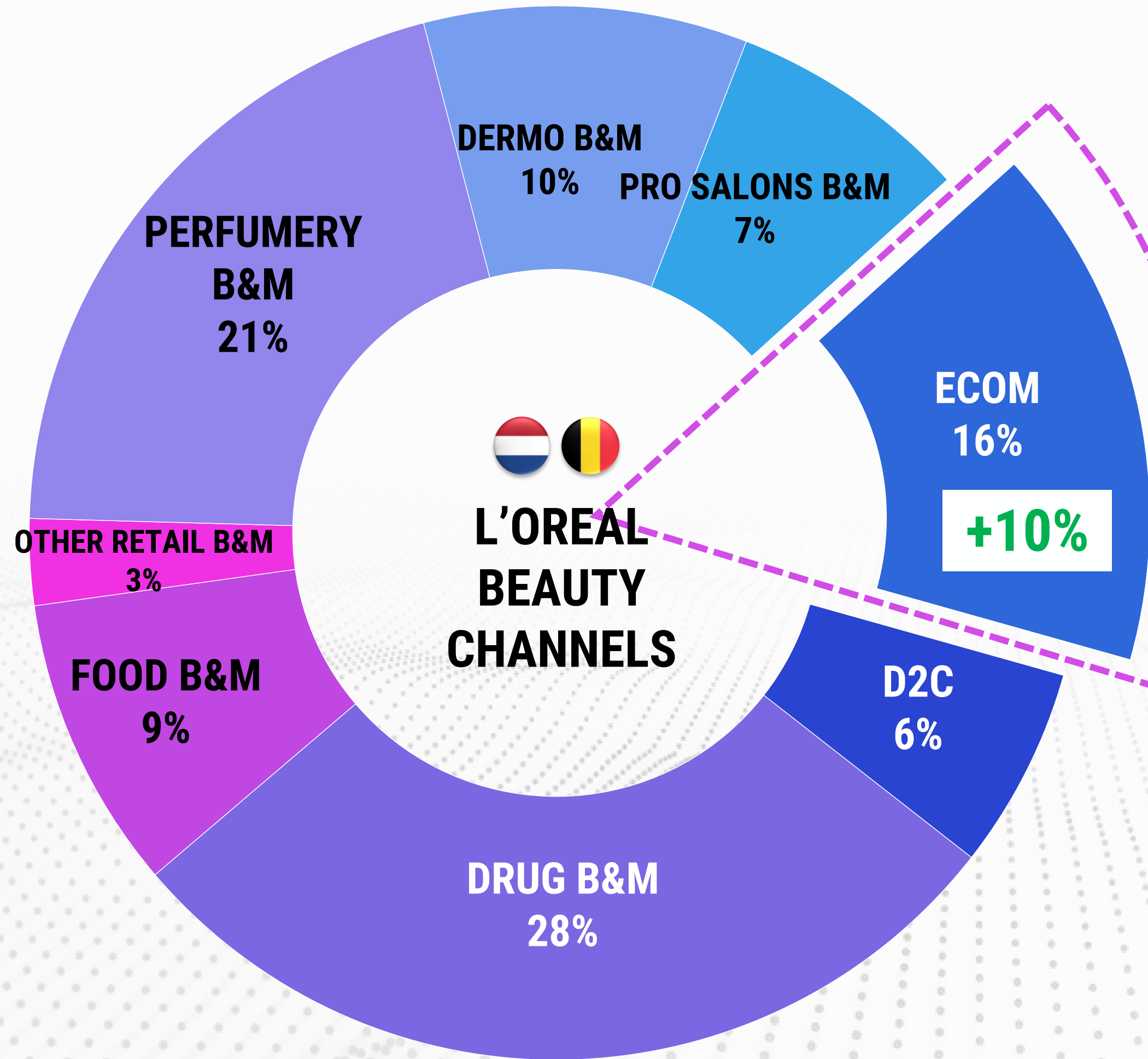
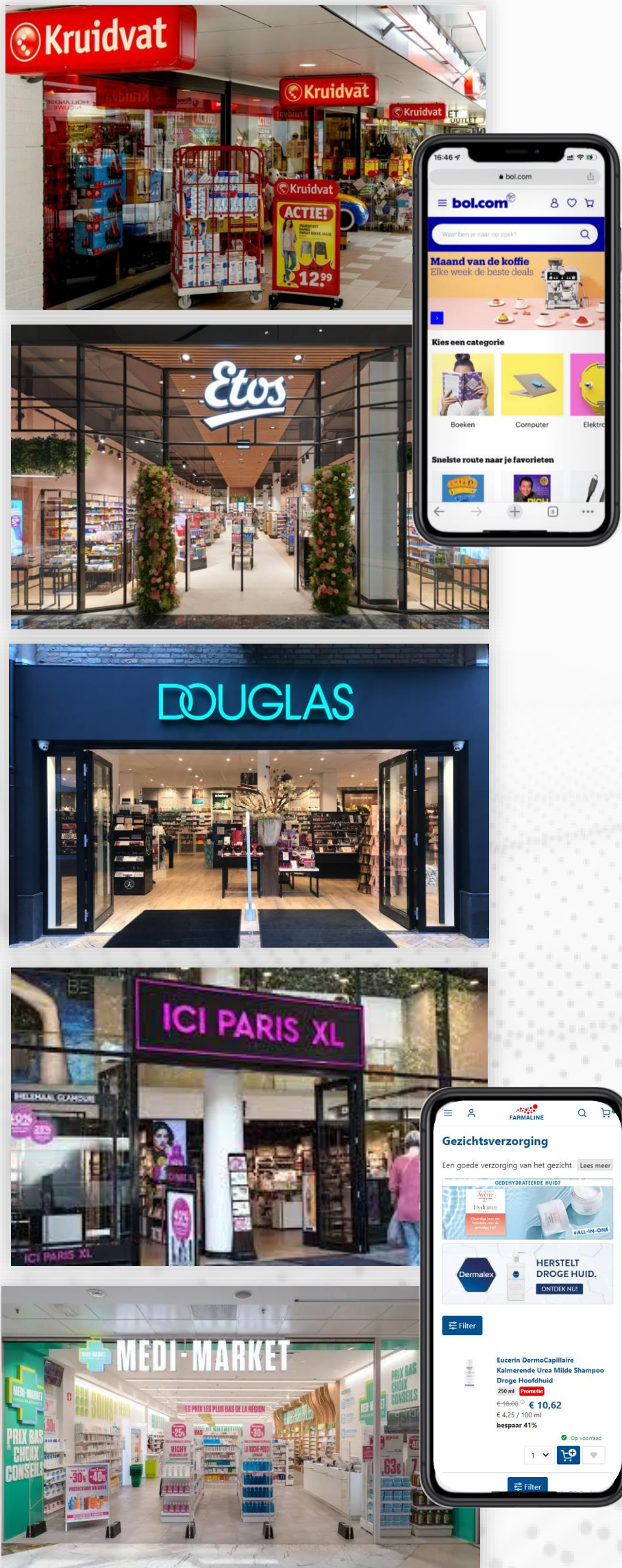


 Kruidvat

de Bijenkorf 

...KEY / DYNAMIC ONLINE PLAYERS MISSING IN CURRENT SCOPE

VISIBILITY ON THE E-COMM CHANNEL WHICH IS BECOMING INCREASINGLY MORE IMPORTANT



BLIND SPOTS E-COMM



LOOKFANTASTIC

NOTINO

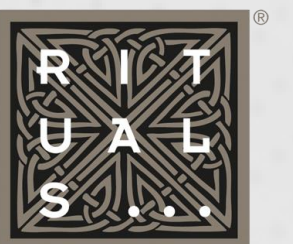
BEAUTY PLAZA .COM

Boozyshop

deloox.



JOHNBEERENS .COM





ELEVATING E-COMM STRATEGY

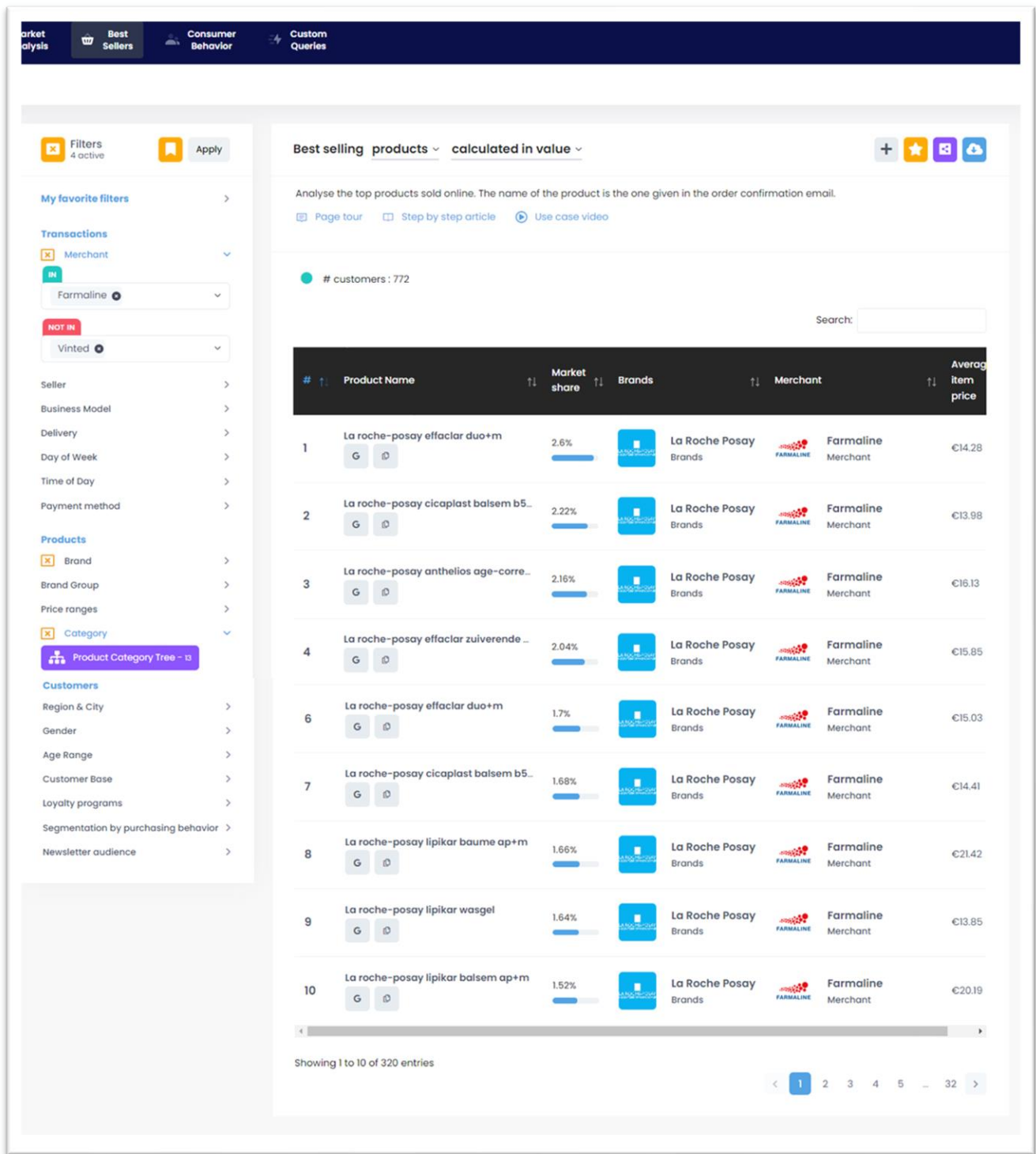
NIELSEN IQ E-COMMERCE SOLUTIONS

ELEVATING E-COMM STRATEGY BASED ON DATA DRIVEN INSIGHTS:

THE TOOL PROVIDES VISIBILITY ON:

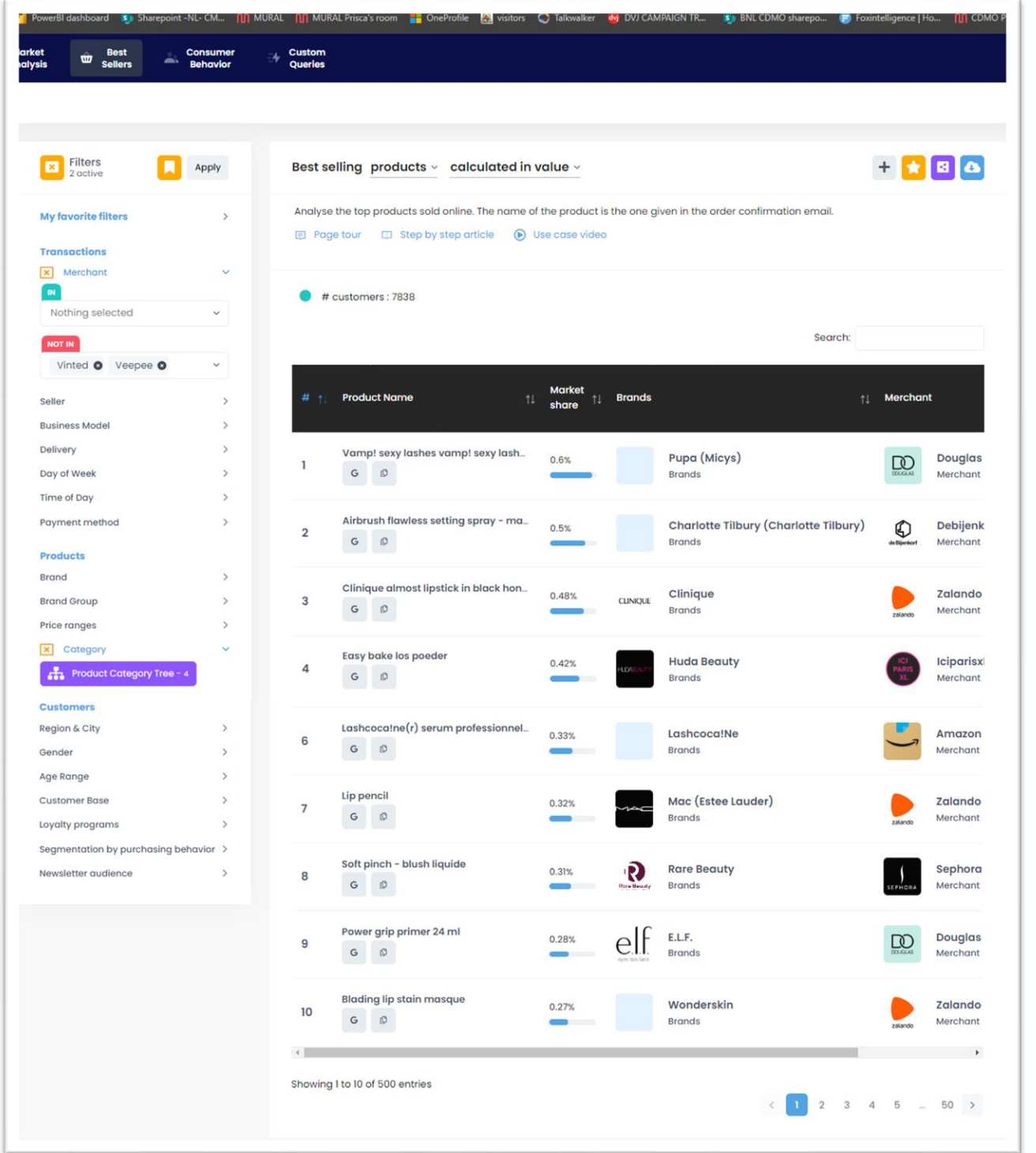
1

RETAILER PERFORMANCE INCL BLIND SPOTS



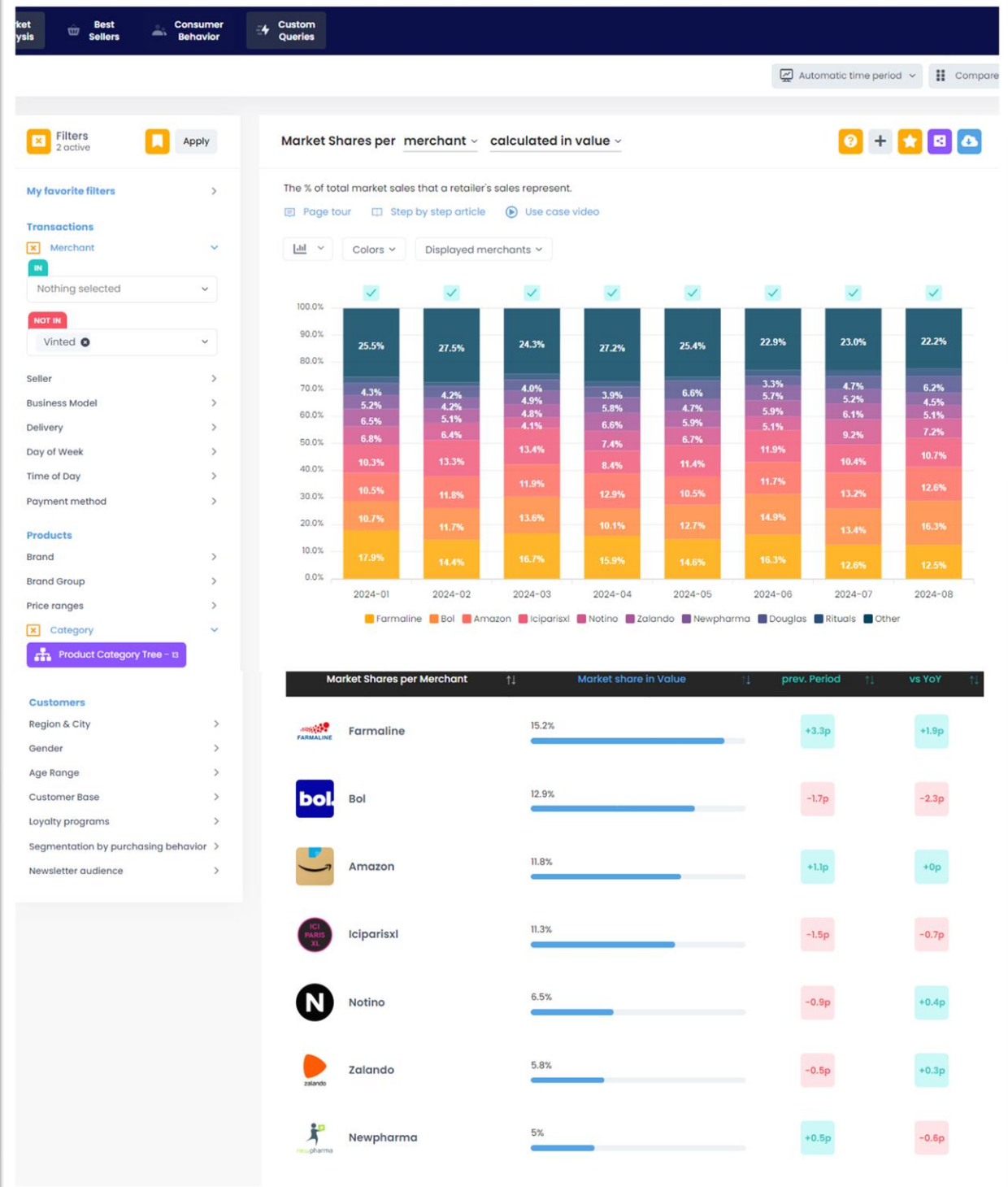
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BRAND REPERTOIRES



3

CONSUMER SEGMENTATION



RETAILER PERFORMANCE & BLIND SPOTS: HAVE VISIBILITY ON BEST PERFORMING BRANDS AND PRODUCTS L'OREAL







TOTAL BEAUTY TOP RETAILERS			
RETAILERS	MS	Δ YOY	
1 Farmaline	15,2%	+1,9%	}
2 bol.	12,9%	-2,3%	
3 amazon	11,8%	+0,0%	
4 ICI PARIS XL	11,3%	-0,7%	
5 NOTINO	6,5%	+0,4%	


TOTAL BEAUTY TOP BRANDS Farmaline			
BRAND	MS	Δ YOY	
1 LA ROCHE POSAY	13,8%	+0,1%	}
2 EUCERIN	10,8%	-1,6%	
3 AVENE	7,5%	+0,8%	
4 LOUIS WIDMER	5,8%	+1,5%	
5 VICHY	4,9%	-0,8%	
6 CERAVE	4,1%	-1,0%	
7 URIAGE	2,8%	+0,8%	
8 BIODERMA	2,8%	+0,5%	
9 NUXE	2,6%	-0,8%	
10 OENOBIOL	2,1%	+0,9%	

TOP 3 PRODUCTS LA ROCHE POSAY AT FARMALINE



RETAILER PERFORMANCE & BLIND SPOTS: ALLOWS US TO PUT THE RIGHT OFFER AT THE RIGHT RETAILER

 TOTAL BEAUTY TOP RETAILERS			
RETAILERS	MS	Δ YOY	
1 	15,2%	+1,9%	}
2 	12,9%	-2,3%	
3 	11,8%	+0,0%	
4 	11,3%	-0,7%	
5 	6,5%	+0,4%	


TOTAL BEAUTY TOP BRANDS 			
BRAND	MS	Δ YOY	
1 LA ROCHE POSAY	13,8%	+0,1%	}
2 EUCERIN	10,8%	-1,6%	
3 AVENE	7,5%	+0,8%	
4 LOUIS WIDMER	5,8%	+1,5%	
5 VICHY	4,9%	-0,8%	
6 CERAVE	4,1%	-1,0%	
7 URIAGE	2,8%	+0,8%	
8 BIODERMA	2,8%	+0,5%	
9 NUXE	2,6%	-0,8%	
10 OENOBIOL	2,1%	+0,9%	

TOP 3 PRODUCTS EUCERIN AT FARMALINE



BRAND REPERTOIRE: TELLS US WHO OUR COMPETITORS REALLY ARE

VISIBILITY ON REAL BRAND REPERTOIRES, NOT THE CLAIMED ONES

 MAKEUP TOP BRANDS			
BRANDS		MS	Δ YOY
1	MAYBELLINE	5,3%	-0,7%
2	L'OREAL PARIS	3,4%	+0,3%
3	SHEIN	3,4%	+1,0%
4	SHEGLAM	3,2%	+0,5%
5	CHARLOTTE TILBURY	3,0%	-0,1%
6	M.A.C.	2,9%	-0,1%
7	NYX	2,7%	-0,7%
8	HUDA BEAUTY	2,6%	+0,3%
9	CLINIQUE	2,2%	+0,1%
10	DIOR	2,2%	+0,6%

MAKEUP TOP PRODUCTS

DOUGLAS deBijenkorf  zalando ICI PARIS XL zalando



PUPA
M I L A N O




Charlotte Tilbury



CLINIQUE




HUDA BEAUTY



L'ORÉAL
PARIS

BRAND REPERTOIRE: AND SPOTTING TRENDS AT TOP PERFORMING RETAILERS

 MAKEUP TOP BRANDS			
BRANDS		MS	Δ YOY
1	MAYBELLINE	5,3%	-0,7%
2	L'OREAL PARIS	3,4%	+0,3%
3	SHEIN	3,4%	+1,0%
4	SHEGLAM	3,2%	+0,5%
5	CHARLOTTE TILBURY	3,0%	-0,1%
6	M.A.C.	2,9%	-0,1%
7	NYX	2,7%	-0,7%
8	HUDA BEAUTY	2,6%	+0,3%
9	CLINIQUE	2,2%	+0,1%
10	DIOR	2,2%	+0,6%

MAKEUP TOP PRODUCTS SHEGLAM/SHEIN



CONSUMER SEGMENTATION: FIND OPPORTUNITIES TO CREATE MORE VALUE

SEGMENT CONSUMERS ON SPECIFIC CRITERIA AND DEEPLY INTO SEGMENT BEHAVIOR



TOTAL BEAUTY TOP RETAILERS GEN Z

RETAILERS	MS	Δ YOY
1 ICI PARIS XL	14,0%	+3,6%
2 bol.	13,0%	-6,6%
3 DOUGLAS	11,8%	+0,3%
4 zalando	10,8%	+0,8%
5 amazon	8,4%	+0,2%

TOTAL BEAUTY TOP BRANDS GEN Z

BRAND	MS	Δ YOY
1 LA ROCHE POSAY	2,8%	+0,1%
2 THE ORDINARY	2,6%	-0,8%
3 JP GAULTIER	2,3%	+1,0%
4 DIOR	2,0%	-0,2%
5 CERAVE	1,9%	-0,3%
6 RITUALS	1,9%	-0,5%
7 SOL DE JANEIRO	1,9%	+0,4%
8 CHARLOTTE TILBURY	1,7%	+0,3%
9 PACO RABANNE	1,7%	+0,1%
10 SHEIN	1,4%	+0,5%

TOP 3 FRAGRANCE PRODUCTS GEN Z



CONSUMER CENTRICITY FOR GROWTH

“

CONSUMER CENTRICITY **PUTS THE CONSUMER AT HEART OF EVERY DECISION,** EVERY INNOVATION, AND EVERY INTERACTION. THIS TAKES A COMPANY CULTURE THAT IS **OBSESSED WITH UNDERSTANDING & ANTICIPATING** THE EVOLUTION OF CONSUMER NEEDS, DESIRES AND ASPIRATIONS, AT EVERY LEVEL OF THE BUSINESS **TO CURATE EXCEPTIONAL EXPERIENCES** AT EVERY STEP OF THE CONSUMER JOURNEY.

”

WE ARE ON THE LOOKOUT FOR
MORE
INSIGHTS

INTO
**CONSUMER
PREFERENCES**

**WHICH IS SUCCESSFULLY BEING
SUPPORTED BY UTILIZING
NIELSENIQ ECOMMERCE
SOLUTIONS AS BEING A
CONSUMER CENTRIC TOOL**

**THANK YOU
FOR YOUR ATTENTION
QUESTIONS?**

L'ORÉAL
CDMO TEAM

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