



# FRÉDÉRIC ROZÉ

DIRECTEUR GÉNÉRAL ZONE AMÉRIQUES

20 AVRIL 2017



L'ORÉAL

USA DYNAMISME  
& PERSPECTIVES  
PROMETTEUSES



1<sup>ère</sup> FILIALE  
★ MONDE





1<sup>er</sup> MARCHÉ  
★ BEAUTÉ MONDIAL



# 1<sup>er</sup> ACTEUR SUR LE MARCHÉ AMÉRICAIN





1<sup>ère</sup> FILIALE  
MONDE 



6,2  
Mds €

CHIFFRE  
D'AFFAIRES  
2016

RÉPARTITION  
DU CHIFFRE  
D'AFFAIRES 2016



27,3% US \$



24,7% €

48% AUTRES

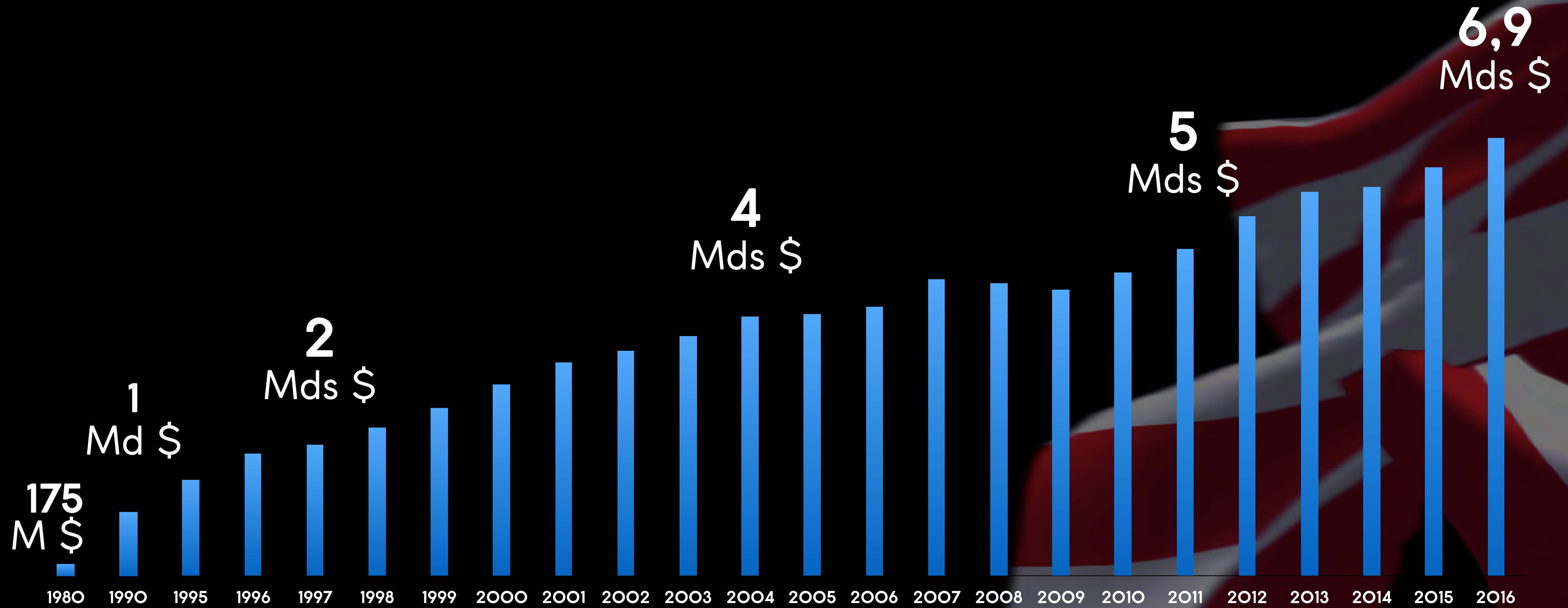


★ 1953





# ★ CHIFFRE D'AFFAIRES



\*L'Oréal USA Chiffre d'affaires en \$

★ 5 USINES  
AUX USA

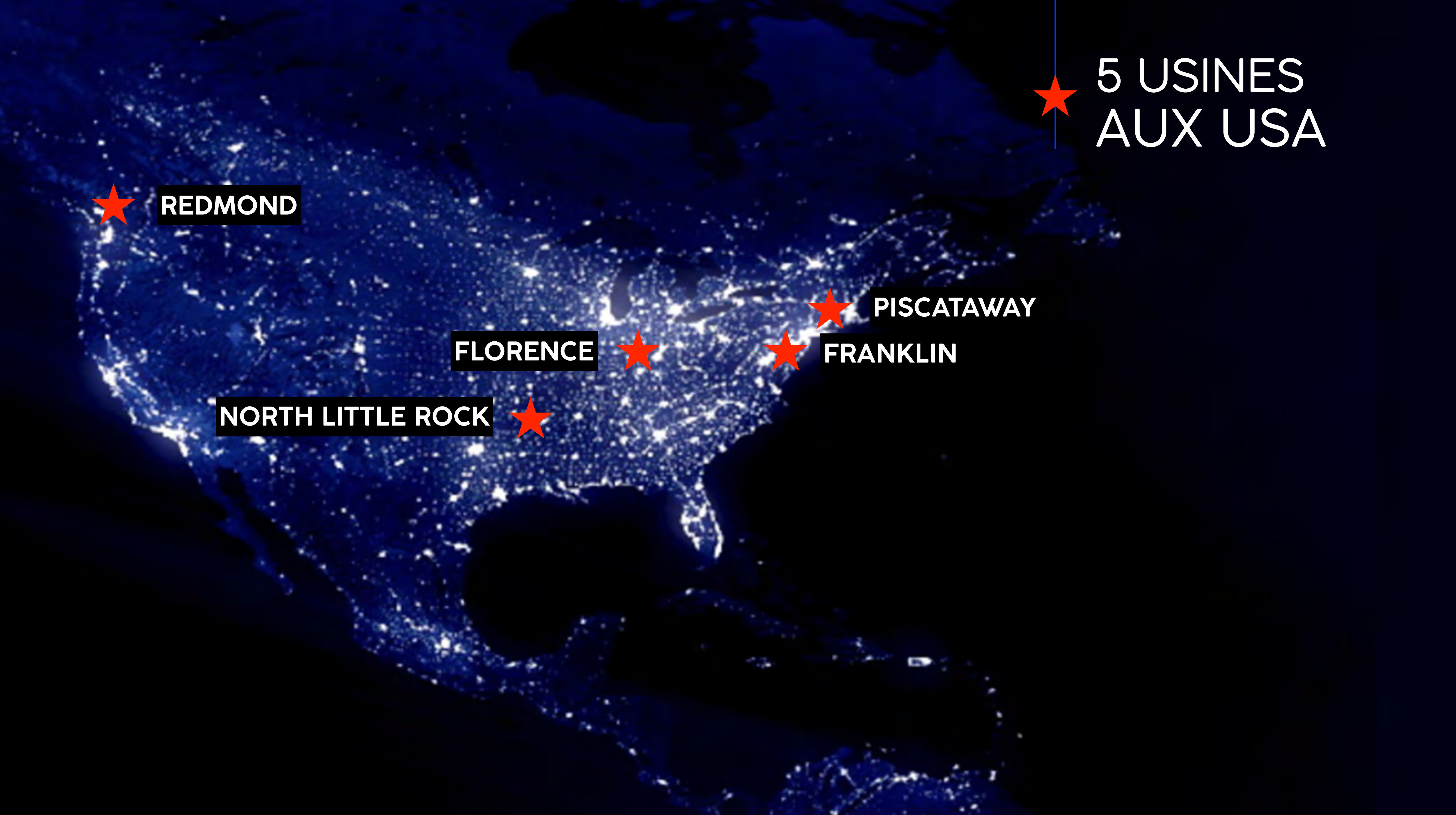
★ REDMOND

FLORENCE ★

NORTH LITTLE ROCK ★

★ PISCATAWAY

★ FRANKLIN







L'Oréal Paris  
LUMINOUS

L'Oréal Paris  
LUMINOUS

L'Oréal Paris  
LUMINOUS

L'Oréal Paris  
LUMINOUS

Black/Noir 373  
L'Oréal Paris, NY 10017  
MADE IN U.S.A.  
NET WT. 0.27 FL. OZ. / 8.1 ml

Black/Noir 373  
L'Oréal Paris, NY 10017  
MADE IN U.S.A.  
NET WT. 0.27 FL. OZ. / 8.1 ml

Black/Noir 373  
L'Oréal Paris, NY 10017  
MADE IN U.S.A.  
NET WT. 0.27 FL. OZ. / 8.1 ml

1er  
MARCHÉ  
★ BEAUTÉ  
MONDIAL





1/4

MARCHÉ  
MONDIAL



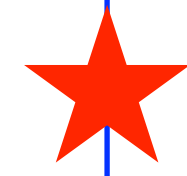


★ LUXE





MAQUILLAGE



RICHESSSE  
DU PORTEFEUILLE  
DE MARQUES  
MAQUILLAGE

L'ORÉAL  
PARIS

GIORGIO ARMANI

LANCÔME  
PARIS

YVES SAINT LAURENT

MAYBELLINE  
NEW YORK

UD  
URBAN DECAY

essie

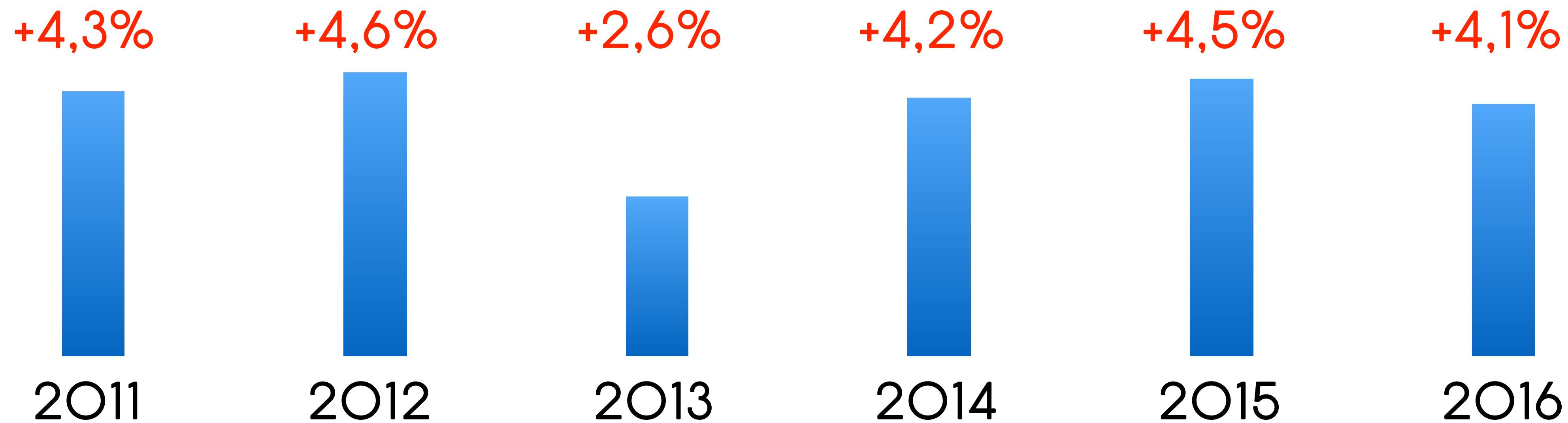
it COSMETICS®

NYX  
PROFESSIONAL MAKEUP

shu uemura

# ★ UN MARCHÉ DYNAMIQUE

+4% ★  
CROISSANCE  
MOYENNE  
2011 / 2016



\*Hors savons, dentifrices et rasoirs. Source : estimations L'Oréal. Croissance à changes constants

A hand is shown holding a fan of colorful pens, with the tips of the pens pointing towards the viewer. The pens are in various colors including red, pink, orange, and purple. The background is dark, making the colorful tips stand out.

★ MARCHÉ  
STRATÉGIQUE

320 M

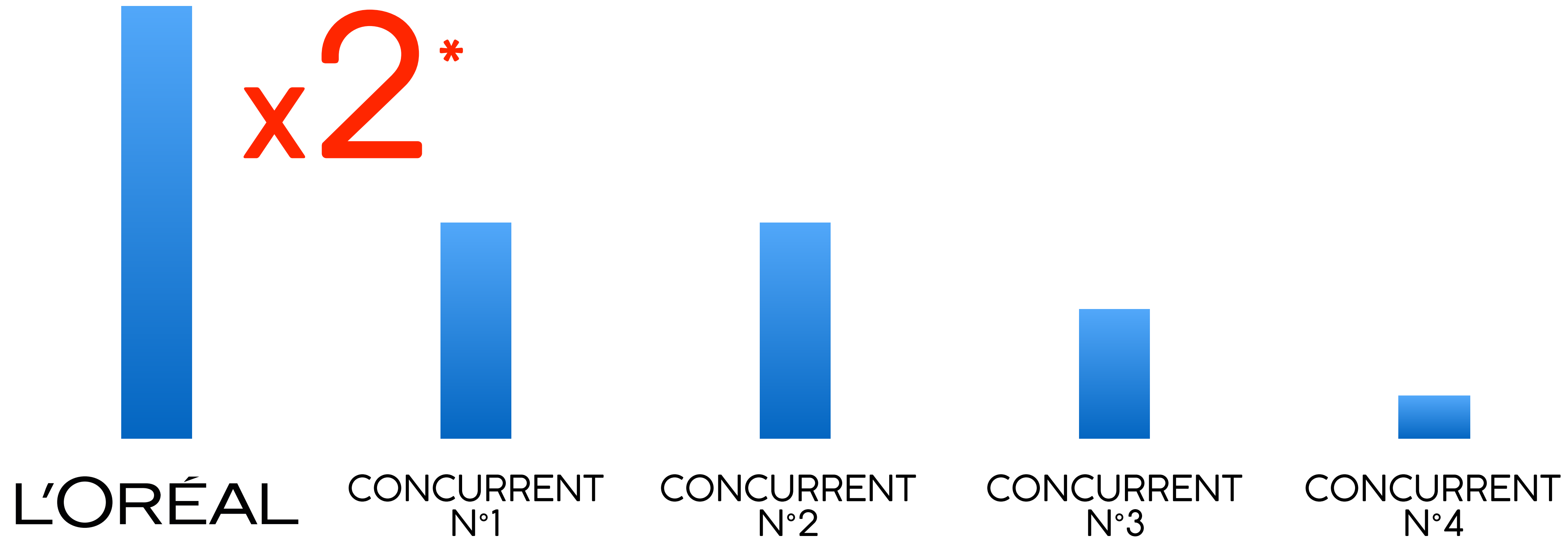
D'HABITANTS



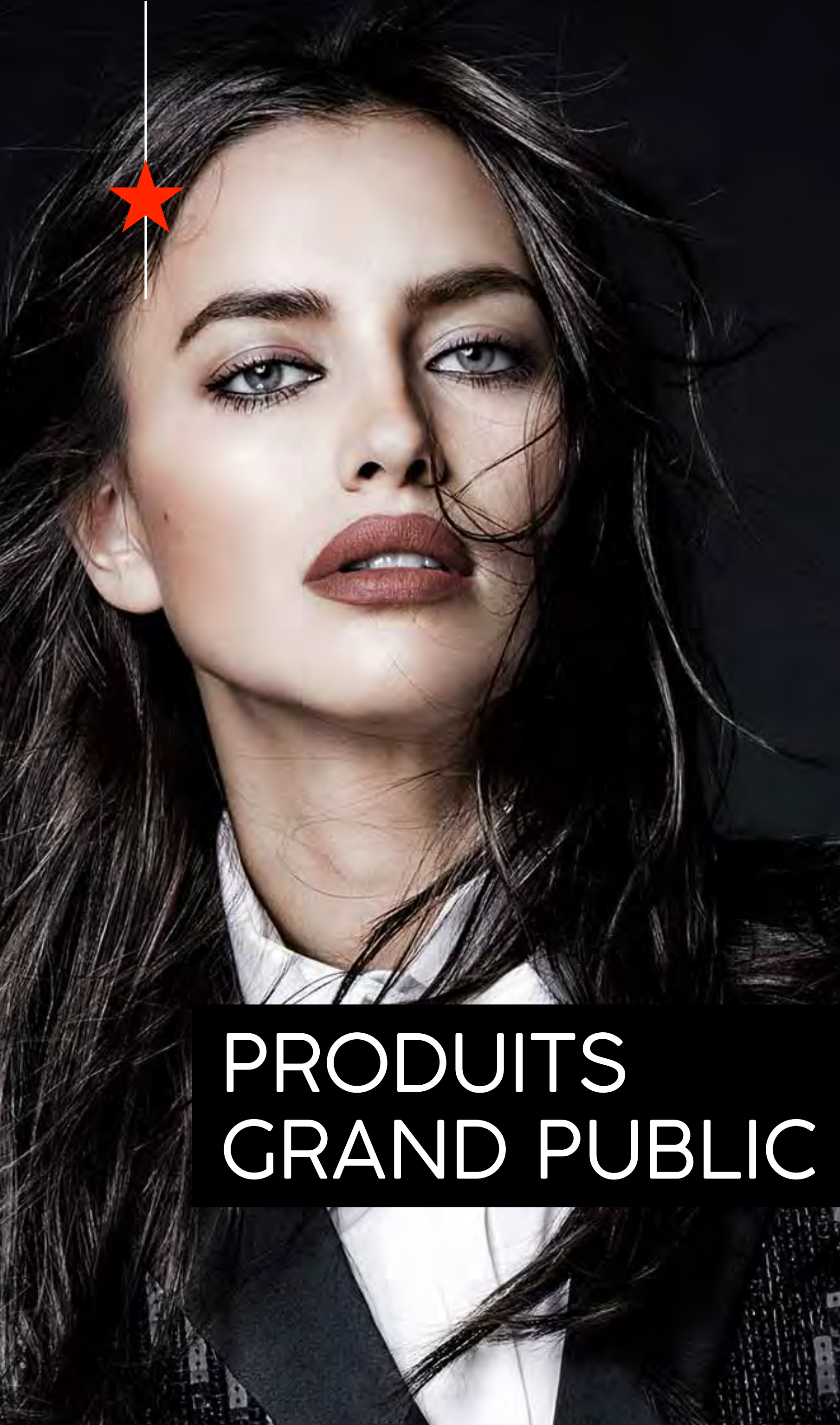
N°1  
AUX  
ÉTATS-UNIS



# LEADER DEPUIS 20 ANS



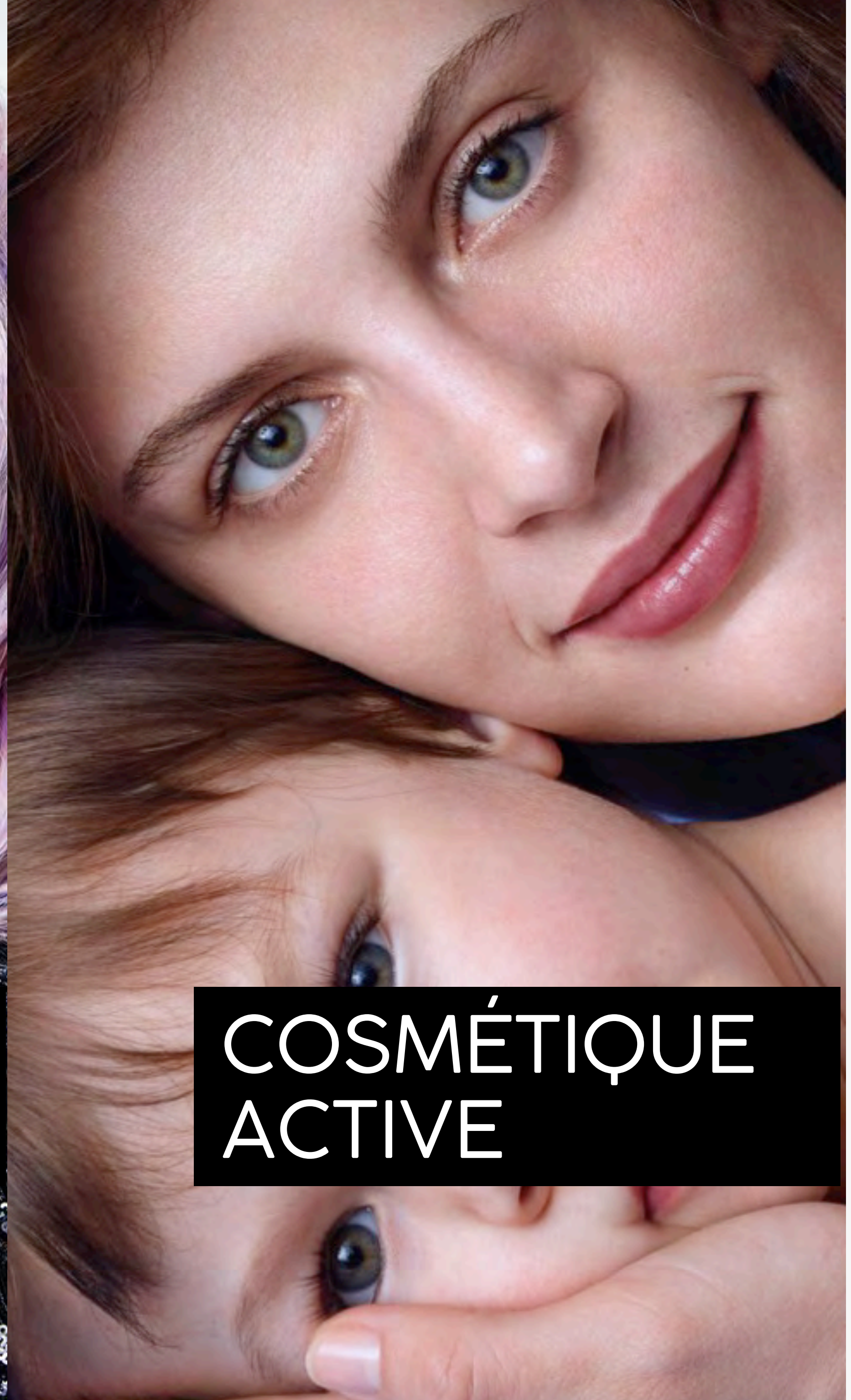
\*Estimations L'Oréal



**PRODUITS  
GRAND PUBLIC**



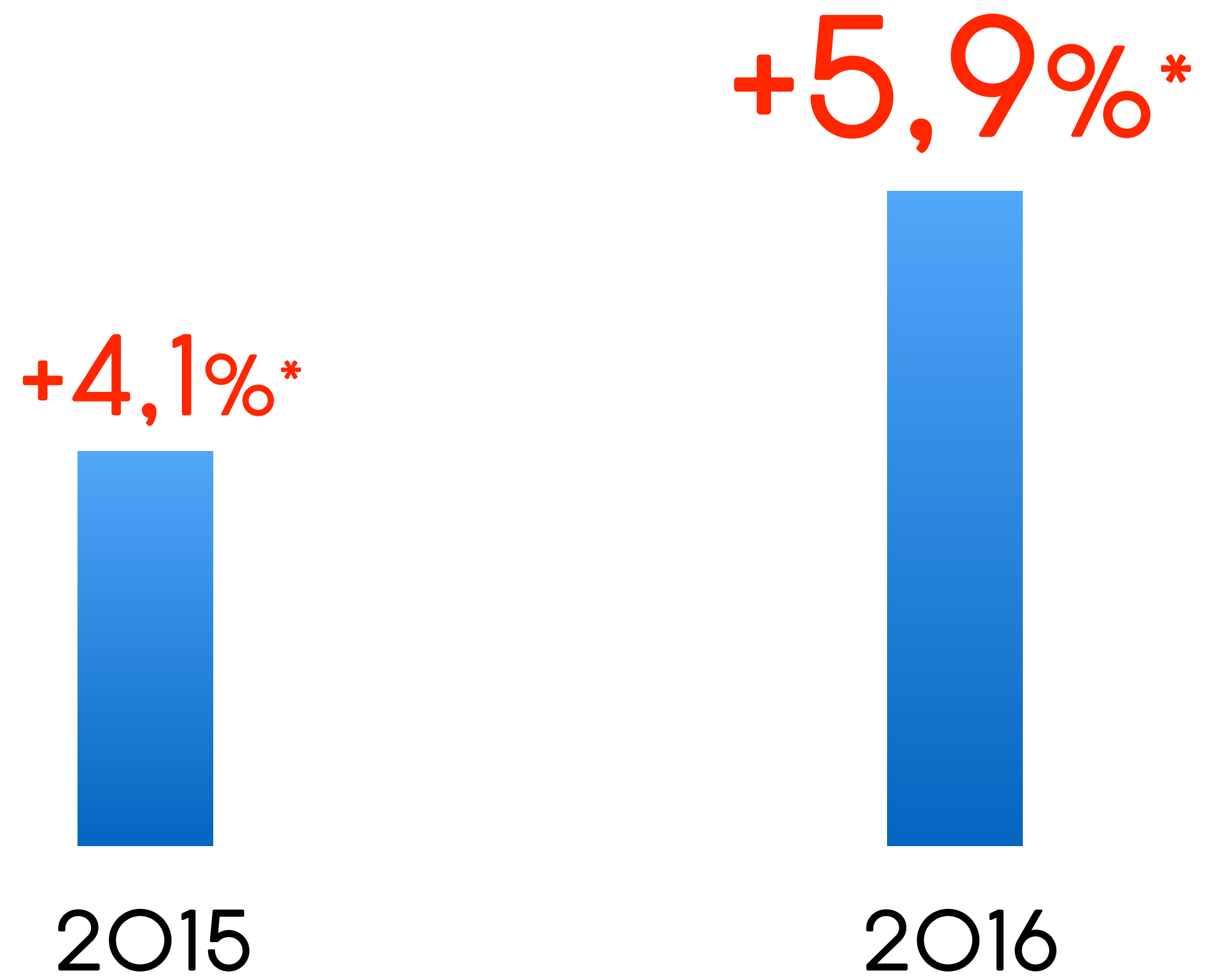
**PRODUITS  
PROFESSIONNELS**



**COSMÉTIQUE  
ACTIVE**

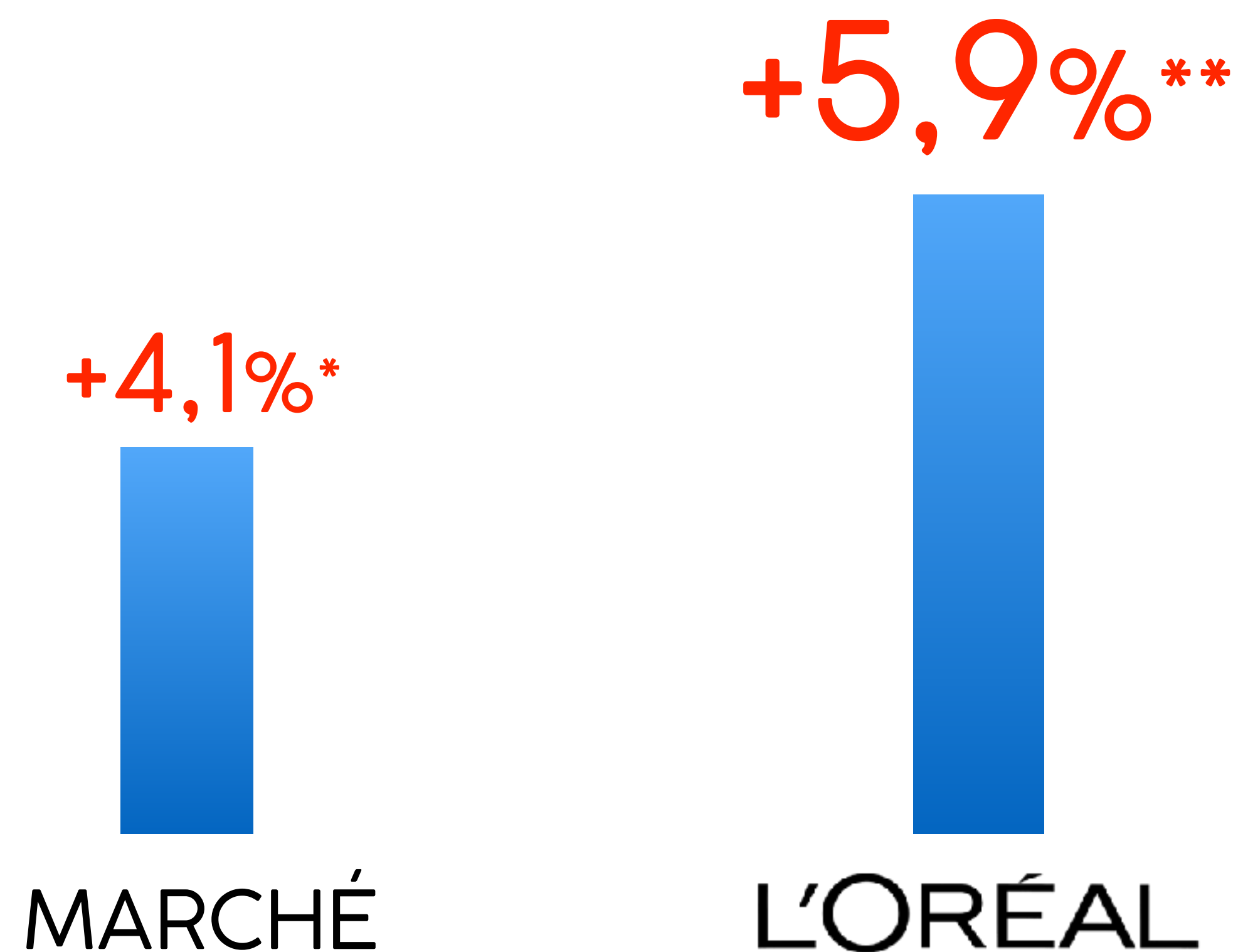


★ 2016  
ACCÉLÉRATION



\*Chiffre d'affaires, évolution à données comparables

# ★ 2016 ACCÉLÉRATION



★ CROISSANCE  
**1,5 x**  
SUPÉRIEURE  
AU MARCHÉ  
COSMÉTIQUE

\*Hors savons, dentifrices et rasoirs. Source : estimations L'Oréal 2016. Croissance à changes constants.

\*\*Chiffre d'affaires 2016, évolution à données comparables

RAISON

★ N°1

PERSÉVÉRANCE  
INNOVATION  
& QUALITÉ



★ N°1  
AMÉRICAIN



WHAT WE LEARN ON THE TRACK  
DOESN'T STAY ON THE TRACK  
@LIDL



Looking good in selfies?  
I've mastered it.

MAYBELLINE  
NEW YORK  
MAKE IT HAPPEN™

INVICTA

NEW  
MASTERCAMO™  
COLOR CORRECTING KIT BY BYEFACESSTUDIO™

3 kits for  
light, medium  
& deep skin tones.  
#MASTERCAMO

THE  
LION  
KING

SOYOL

VIACOM

1515

1459

socialite

VORRADO

RIGHT  
LEFT  
W 4  
ST



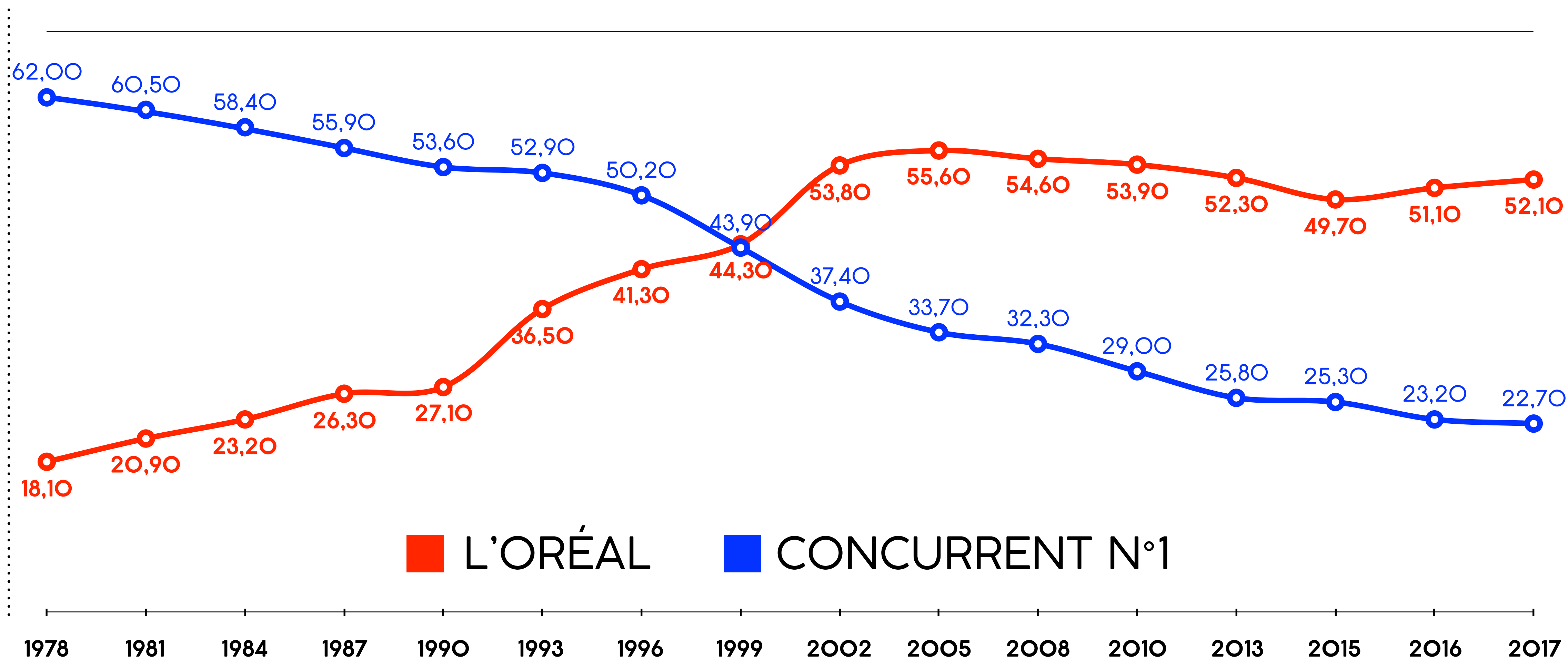
L'ORÉAL  
PARIS





# COLORATION GRAND PUBLIC

PARTS DE MARCHÉ (EN%)



\*Source: Nielsen, Scanning Data through P5 12/31/2016- Total xAOC



L'ORÉAL  
PARIS

★ 1<sup>ère</sup>  
MARQUE  
BEAUTÉ\*

\*Euromonitor 2016

Because I am worth it Because I am worth it

Because I am worth it Because I am worth it Because I am worth it Because I am worth it Because i am worth it B

Because I am worth it

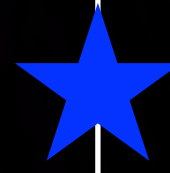
Because I am

Because I am worth it





# ACQUISITION MARQUES



MAYBELLINE  
NEW YORK

1996

SOFTSHEEN | CARSON  
LABORATORIES ADVANCED RESEARCH  
AFRICAN HAIR AND SKIN

2000

essie

2010

NYX  
PROFESSIONAL MAKEUP

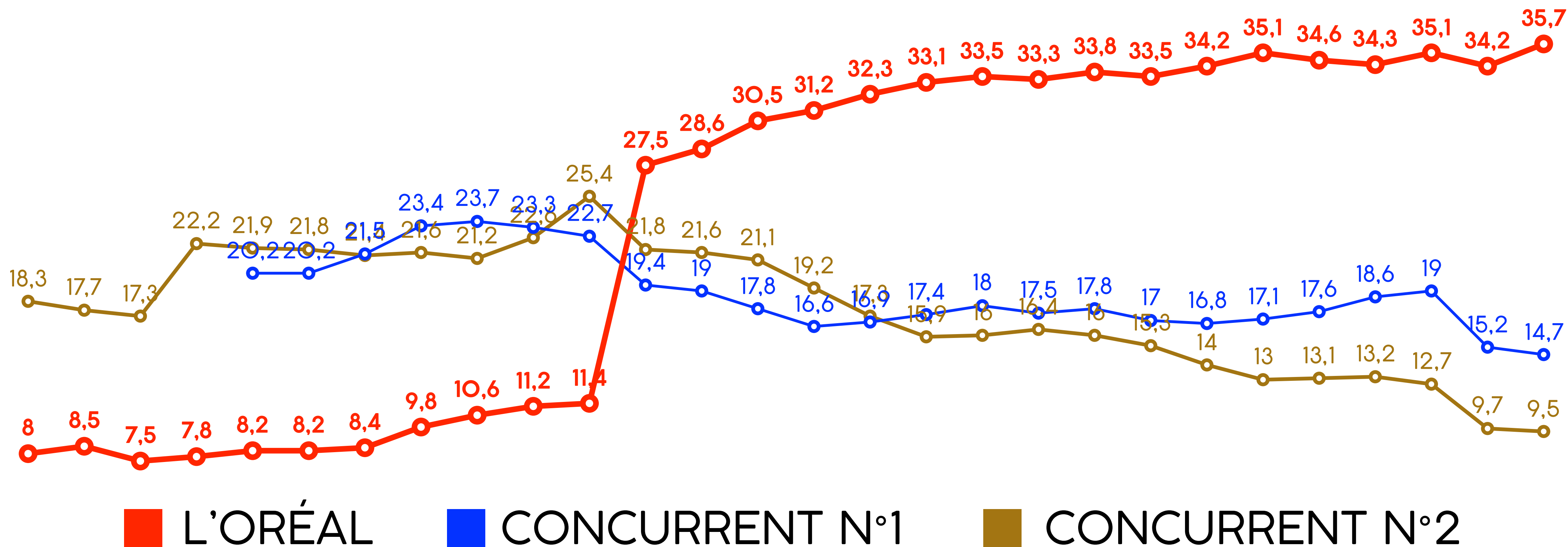
*Carol's Daughter*

2014



# MAQUILLAGE

PARTS DE MARCHÉ (EN%)



1985 1986 1987 1988 1989 1990 1991 1992 1993 1994 1995 1996 1997 1998 1999 2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2015 2016

\*Source: Nielsen, Scanning Data through P5 12/31/2016- Total xAOC, excludes nail care

MAYBELLINE  
NEW YORK

★ 1<sup>ère</sup> MARQUE  
DE MAQUILLAGE\*

\*Euromonitor 2016

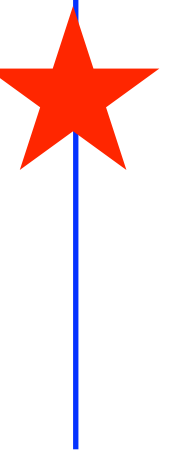


essie

MAQUILLAGE  
★ ONGLES



**NYX**  
 ♥  
 PROFESSIONAL MAKEUP



L'ORÉAL  
PARIS

MAYBELLINE  
NEW YORK

essie

NYX

PROFESSIONAL MAKEUP



DÉVELOPPEMENT  
EXCEPTIONNEL  
EN MAQUILLAGE



# MULTIETHNIQUE





*Carol's Daughter*<sup>®</sup>

BEAUTÉ  
MULTICULTURELLE





SOFTSHEEN | CARSON  
LABORATORIES ADVANCED RESEARCH  
AFRICAN HAIR AND SKIN

LEADER DU SOIN CHEVEU  
MULTIETHNIQUE\*

\*Nielsen 2016



# LEADER DANS LES SALONS DE COIFFURE\*



\*Kline 2016

E L I V E



REDKEN

5TH AVENUE NYC

N°1\*

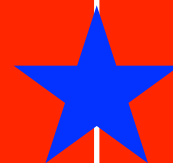
\*Kline 2016

REDKEN

M A T R I X

IMAGINEZ TOUT CE QUE VOUS POUVEZ ÊTRE

N°2\*



\*Kline 2016



# ★ RÉSEAU DISTRIBUTEURS



RÉSEAU

★ DISTRIBUTEURS

saloncentric

VICHY  
LABORATOIRES



# Derm skin care

## effective

Scientifically  
advanced formulas

## gentle

Paraben-free

## trusted

Recommended  
by dermatologists

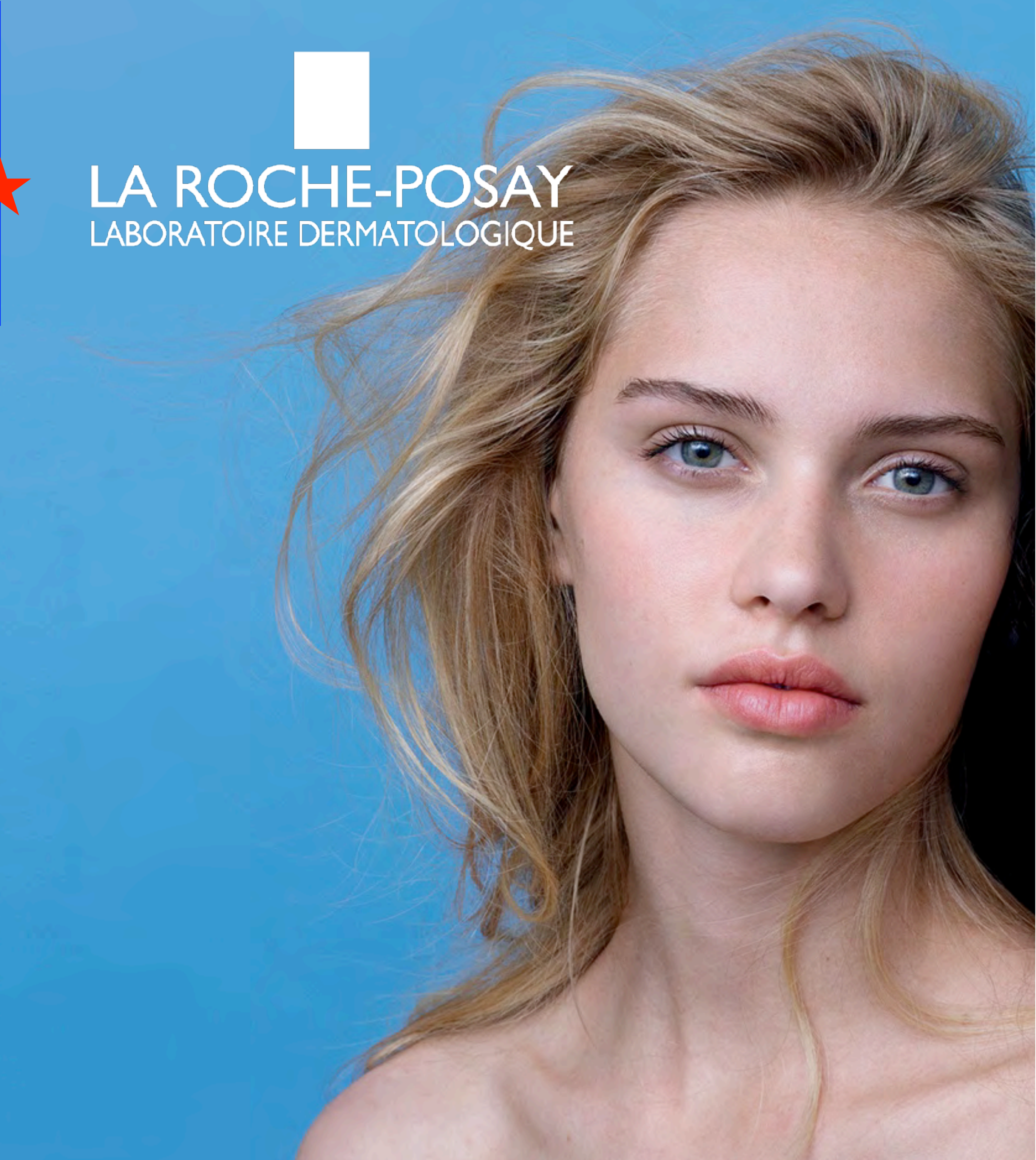


# COSMÉTIQUE ACTIVE

VICHY  
LABORATOIRES



LA ROCHE-POSAY  
LABORATOIRE DERMATOLOGIQUE







**SKINCEUTICALS**

ADVANCED PROFESSIONAL SKINCARE





# SKINCEUTICALS

ADVANCED PROFESSIONAL SKINCARE

# 100 M \$





DERMOCOSMÉTIQUE  
ACCESSIBLE



CHIFFRE  
D'AFFAIRES  
DIVISION

x2



L'ORÉAL  
LUXE

★ N°2  
DU MARCHÉ  
SÉLECTIF\*

\*Panel NPD 2016



L'ORÉAL  
LUXE



GAINS  
DE PARTS  
DE MARCHÉ



LANCÔME  
PARIS

★  
N°2  
DU MARCHÉ SÉLECTIF  
AMÉRICAIN\*

\*Panel NPD 2016



★ N°1  
PARFUMS  
FÉMININS\*

\*Panel NPD 2016



★ MON  
PARIS

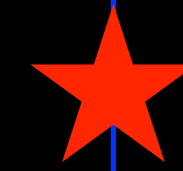


★ FLOWER  
BOMB





LA VIE  
EST BELLE



N°2\*

\*Panel NPD 2016. Parfums féminins



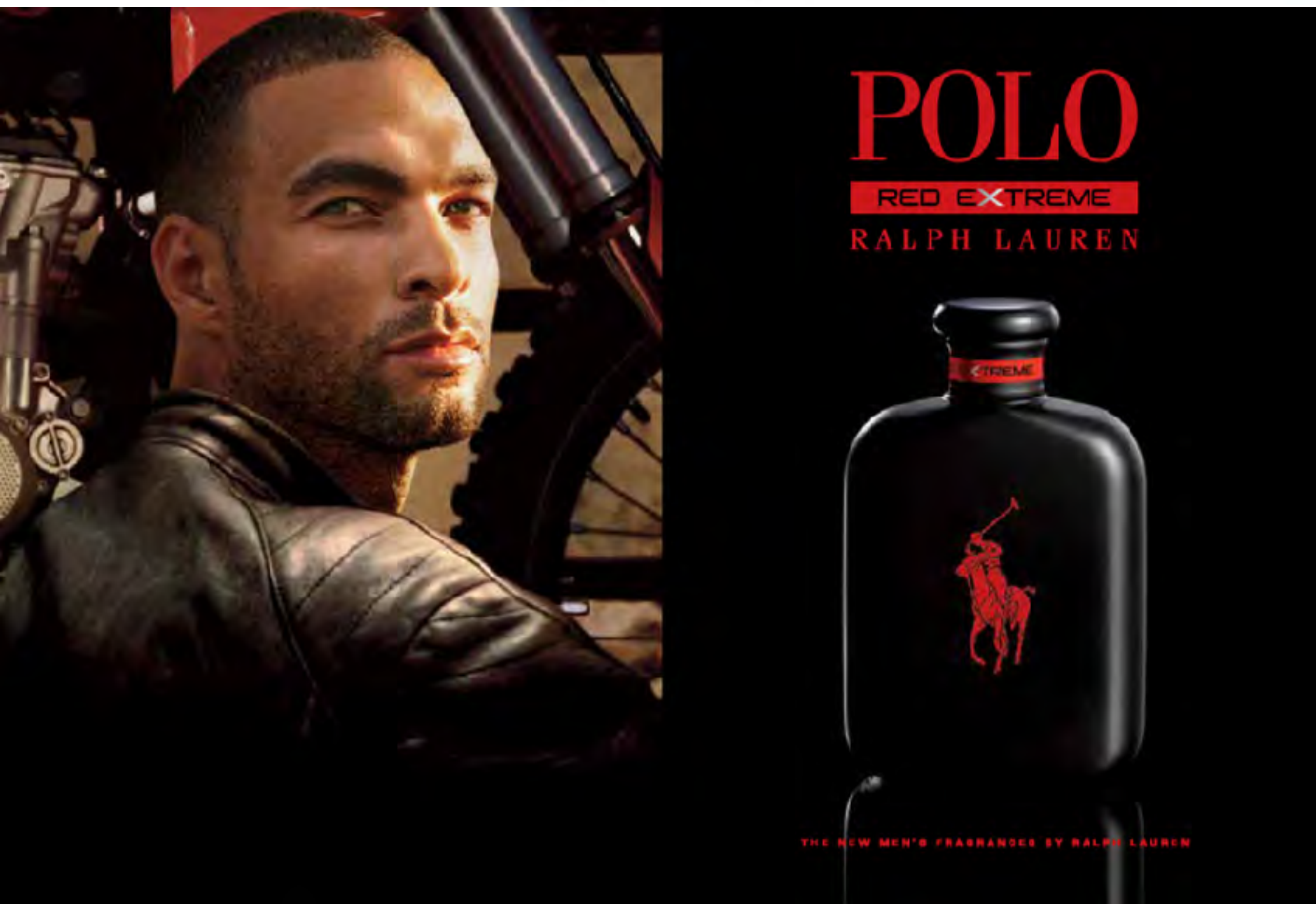
GIORGIO ARMANI

ARMANI  
code  
COLONIA, the new freshness



#FollowYourGuide

★ N°1  
PARFUMS  
MASCULINS\*



POLO  
RED EXTREME  
RALPH LAUREN



THE NEW MEN'S FRAGRANCES BY RALPH LAUREN

\*Panel NPD 2016

**ud**  
URBAN DECAY

★ **N°2\***  
DU MAQUILLAGE  
SÉLECTIF

\*Panel NPD 2016

YVES SAINT LAURENT

★ +26%\*  
EN 2016

YVES SAINT LAURENT

be who  
you are

\*Chiffre d'affaires, évolution à données comparables



# FORTE CROISSANCE



**it** COSMETICS®





★ L'ORÉAL  
LUXE

BIENTÔT  
N°1



# RAISON N°2

ACQUISITION  
DE MARQUES  
AMÉRICAINES



RALPH LAUREN  
FRAGRANCES

REDKEN  
5TH AVENUE NYC



essie

clarisonic

MATRIX  
IMAGINEZ TOUT CE QUE VOUS POUVEZ ÊTRE

MAYBELLINE  
NEW YORK

Kiehl's  
SINCE 1851

it COSMETICS

CeraVe<sup>®</sup>  
DEVELOPED WITH DERMATOLOGISTS

UD  
URBAN DECAY

SKINCEUTICALS

SOFTSHEEN | CARSON  
LABORATORIES  
ADVANCED RESEARCH  
AFRICAN HAIR AND SKIN



★ MARQUES  
AMÉRICAINES  
CROISSANCE  
MONDIALE  
DU GROUPE



MAYBELLINE  
NEW YORK



90%  
DU CHIFFRE  
D'AFFAIRES  
AUX ÉTATS-UNIS  
EN 1996





MAYBELLINE  
NEW YORK

★ LEADER  
DU MARCHÉ  
CHINOIS



MAYBELLINE  
NEW YORK

CHIFFRE  
D'AFFAIRES

X8

DEPUIS  
1996



*Kiehl's*

SINCE 1851

★ 40 M \$  
DE CHIFFRE  
D'AFFAIRES  
EN 2001





*Kiehl's*  
SINCE 1851

★ 1 Md \$

+21%  
CROISSANCE  
ANNUELLE



# RAISON N°3

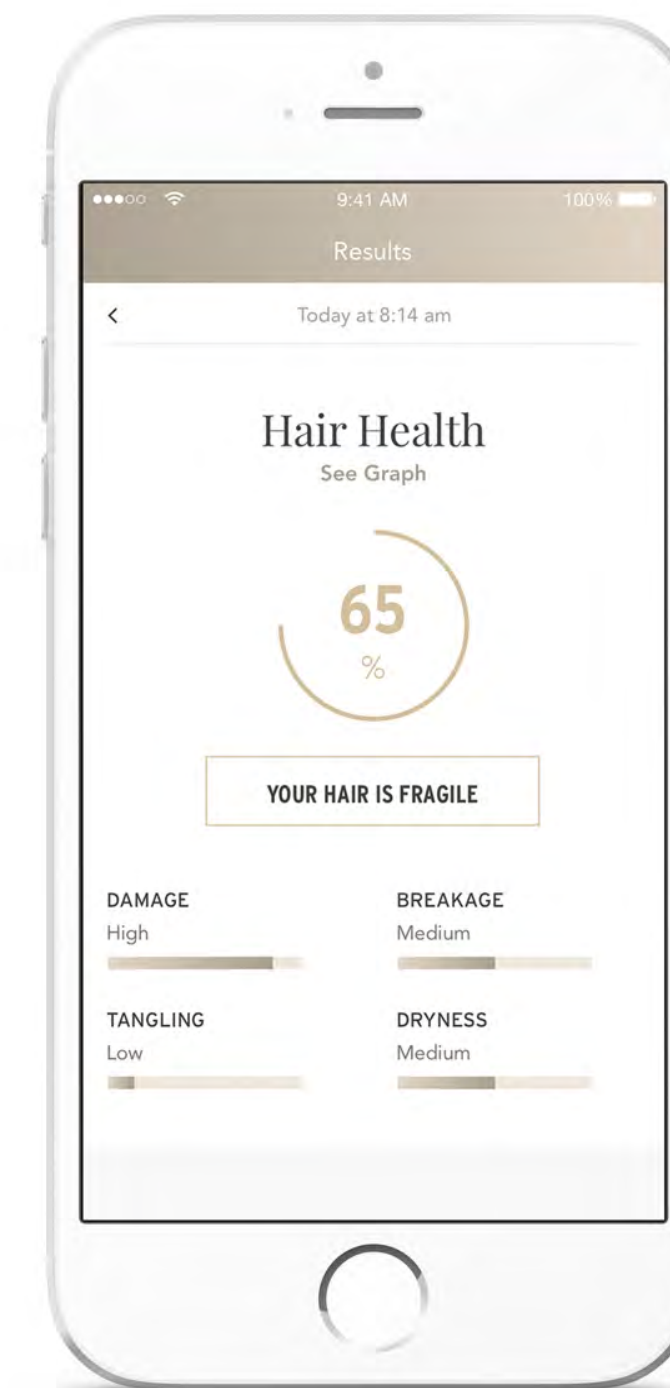
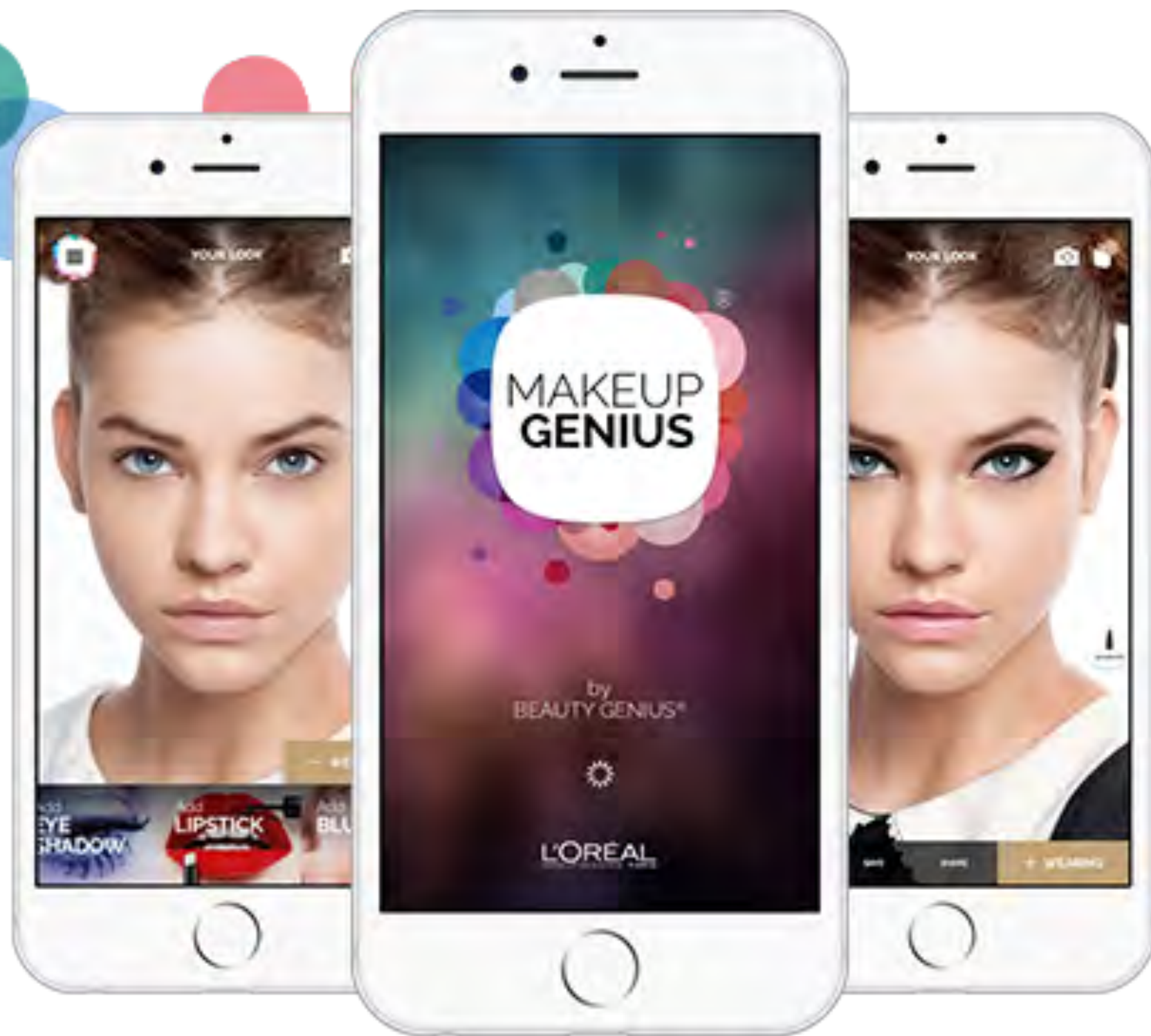
NOTRE  
RECHERCHE



A close-up, profile view of a female scientist with dark hair, wearing a white lab coat over a white ribbed turtleneck sweater and clear safety goggles. She is looking intently at a piece of laboratory equipment. The background shows a laboratory setting with a fume hood and various pieces of equipment. A red star icon is positioned to the left of the text.

**400**  
**CHERCHEURS**

# ★ INCUBATEUR SILICON VALLEY





★ BROSSE  
CONNECTÉE  
KÉRASTASE





RAISON

N°4

FORCE  
DU DIGITAL

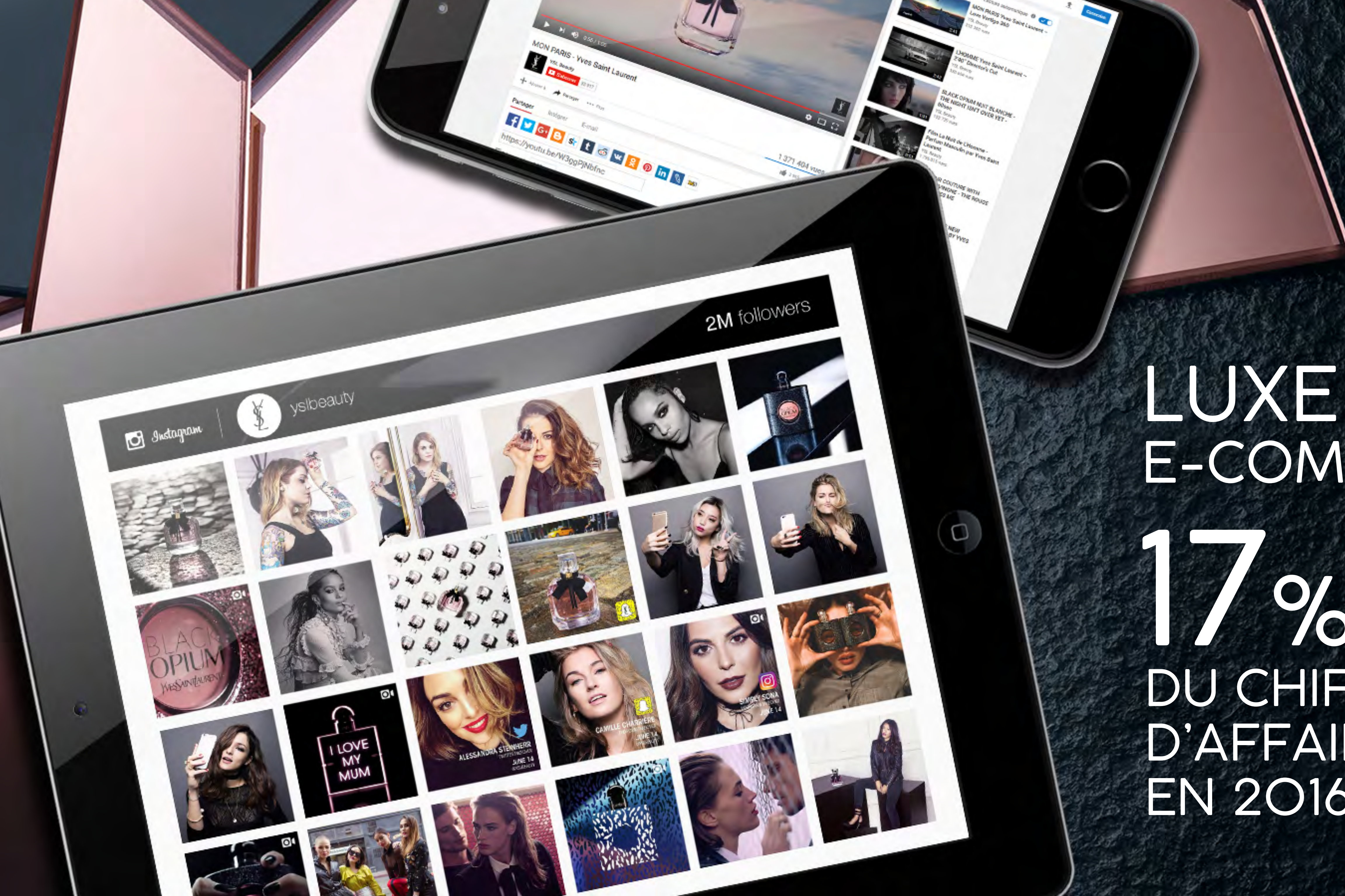


A woman with long red hair and glasses is shown in profile, looking down at a smartphone she is holding in her left hand. She is wearing a light-colored button-down shirt. The background is a blurred city street at night, with various lights and buildings creating a bokeh effect. The overall mood is professional and tech-oriented.

L'ORÉAL

★ USA

AVANT-GARDISTE



LUXE   
E-COMMERCE

17%  
DU CHIFFRE  
D'AFFAIRES  
EN 2016

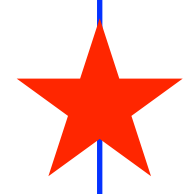




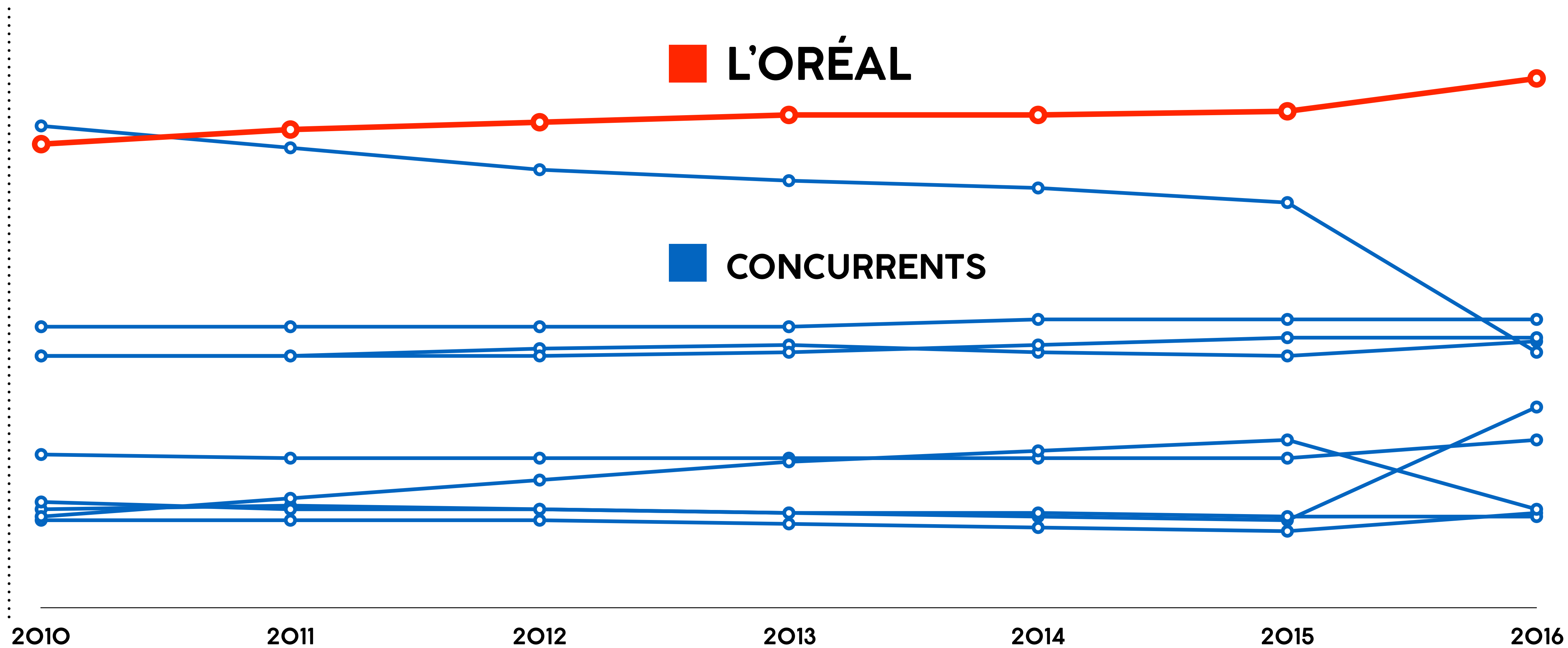
RENFORCER  
SON



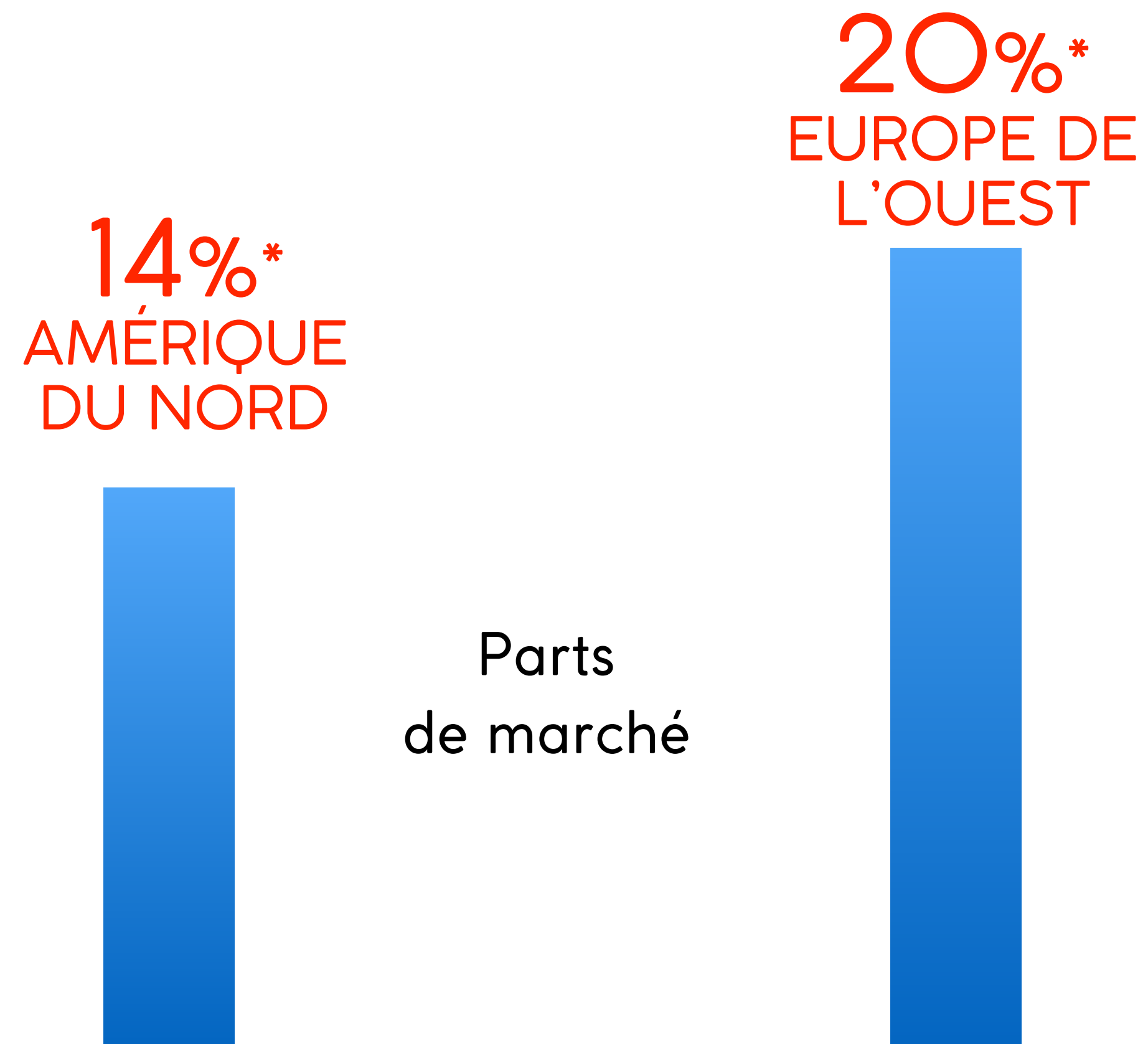
LEADERSHIP



# GAGNANT SUR LE MARCHÉ AMÉRICAIN

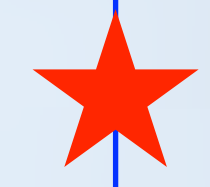


# ★ UN POTENTIEL IMMENSE



\*Hors rasoirs, savons et dentifrices. Source : estimations L'Oréal 2016





# ENGAGEMENT ET TALENT





L'ORÉAL



NEW-YORK

A man in a pink shirt is talking on a mobile phone in a modern office. The office has large windows overlooking a city skyline and a body of water. In the foreground, there is a wooden conference table with purple chairs, a yellow armchair, and a grey sofa with a yellow pillow. A large black lamp is also visible.

FACILITER LES  
ÉCHANGES  
ET LES  
SYNERGIES





L'ORÉAL  
USA



CHAMPION  
DE LA BEAUTÉ



★ MERCİ