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Beauty Inc. Top 100 2014

One look at the WWD Beauty Inc Top 100, our annual ranking of the world's biggest beauty companies, shows that some key players faced significant challenges in 2014.

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Call it a year of mostly ups and some downs: In 2014, 77 percent of the world's leading beauty companies—including number one, L'Oréal—posted sales gains. But one look at the WWD Beauty Inc Top 100, our annual ranking of the world's biggest beauty companies, shows that some key players faced significant challenges. Not least of these was caused by currency fluctuations, which had a significant impact on many firms. For example, with the exception of the big three (Shiseido, Kao and Kosé), Japanese companies all dropped a few places in the ranking, while certain European companies, particularly those with large businesses in countries plagued by political and economic instability, like Russia and Italy, lagged, too. Conversely, no surprise that South Korean firms all climbed up the rankings, in large part thanks to brisk international business, particularly in China.

In terms of categories, companies with exposure to the professional hair-care channel generally continued to see their sales affected by the weakness in that segment.

One notable trend in 2014 was the acceleration in acquisition activity by the leading players—L'Oréal and the Estée Lauder Cos., but also Coty, with its surprise agreement to buy Bourjois from Chanel. With the exception of L'Oréal's purchase of Niely do Brasil, the acquisitions were not large enough to affect the companies in the ranking, and since that acquisition was finalized in 2015, Niely maintains its own place for 2014, at number 100.

Private equity firms were less acquisitive than in previous years, meanwhile, meaning that they did not continue to progress up the Top 100 as was the case in prior years. Following the sale of the majority of its beauty holdings, TSG Consumer Partners was one company to disappear from the ranking.

Total sales for all 100 companies reached \$207.41 billion, a 1.4 percent increase year-on-year. L'Oréal accounted for 14.4 percent of total sales, while the top 10 companies overall generated sales of \$120.42 billion, or 58 percent of total Top 100 sales.

The numbers aren't the only thing that continues to grow. WWD Beauty Inc's Top 100 is bigger and better as well, with expanded quantitative and qualitative analysis to deliver an in-depth picture of the year in beauty.

79. RODAN + FIELDS

San Francisco

2014 Beauty Sales:

\$260.2 Million

+68% V. '13

Subsidiaries + Main Brands: Redefine, Acute Care, Reverse, Unblemish, Soothe, Essentials, Enhancements (skin care).

Year in Review: Direct seller Rodan + Fields saw 2014 revenues surge behind its growing sales force and new product launches. The number of sales consultants rose 61% to 77,600. Launches, including Acute Care Skincare for Expression Lines and the Reverse Regimen for the appearance of brown spots, dullness and discoloration, helped drive sales. Rodan + Fields' loyalty program, PC Perks, helped grow the top line by selling enrolled customers products on a recurring basis for a discount, free shipping and exclusive promotions. To mobilize its sellers, the company introduced the Lead the Way Consultant program. The U.S. accounted for all company sales, however Rodan + Fields launched in Canada in February 2015.