



Cosmetics

50

2019

The annual report on the most valuable and strongest cosmetics brands
May 2019

About Brand Finance.

Brand Finance is the world’s leading independent brand valuation and strategy consultancy.

Brand Finance was set up in 1996 with the aim of ‘bridging the gap between marketing and finance’. For more than 20 years, we have helped companies and organisations of all types to connect their brands to the bottom line.

We pride ourselves on four key strengths:

- + Independence

+ Technical Credibility
- + Transparency

+ Expertise

We put thousands of the world’s biggest brands to the test every year, evaluating which are the strongest and most valuable.

Brand Finance helped craft the internationally recognised standard on Brand Valuation – ISO 10668, and the recently approved standard on Brand Evaluation – ISO 20671.



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Request Your Brand Value Report.

A Brand Value Report provides a complete breakdown of the assumptions, data sources, and calculations used to arrive at your brand’s value.

Each report includes expert recommendations for growing brand value to drive business performance and offers a cost-effective way to gaining a better understanding of your position against competitors.

What is a Brand Value Report?

Brand Valuation Summary

- + Internal understanding of brand
- + Brand value tracking
- + Competitor benchmarking
- + Historical brand value

Brand Strength Index

- + Brand strength tracking
- + Brand strength analysis
- + Management KPIs
- + Competitor benchmarking

Royalty Rates

- + Transfer pricing
- + Licensing/franchising negotiation
- + International licensing
- + Competitor benchmarking

Cost of Capital

- + Independent view of cost of capital for internal valuations and project appraisal exercises

Customer Research

- | | |
|-------------|-------------|
| + Utilities | + Tech |
| + Insurance | + Auto |
| + Banks | + Hotels |
| + Telecoms | + Beers |
| + Airlines | + Oil & Gas |

For more information regarding our Brand Value Reports, please contact:

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What are the benefits of a Brand Value Report?



Insight



Strategy



Benchmarking



Education



Communication



Understanding

Brand Valuation Methodology.

Brand Finance calculates the values of the brands in its league tables using the Royalty Relief approach – a brand valuation method compliant with the industry standards set in ISO 10668.

This involves estimating the likely future revenues that are attributable to a brand by calculating a royalty rate that would be charged for its use, to arrive at a ‘brand value’ understood as a net economic benefit that a licensor would achieve by licensing the brand in the open market.

The steps in this process are as follows:

- 1 Calculate brand strength using a balanced scorecard of metrics assessing Marketing Investment, Stakeholder Equity, and Business Performance. Brand strength is expressed as a Brand Strength Index (BSI) score on a scale of 0 to 100.
- 2 Determine royalty range for each industry, reflecting the importance of brand to purchasing decisions. In luxury, the maximum percentage is high, in extractive industry, where goods are often commoditised, it is lower. This is done by reviewing comparable licensing agreements sourced from Brand Finance’s extensive database.
- 3 Calculate royalty rate. The BSI score is applied to the royalty range to arrive at a royalty rate. For example, if the royalty range in a sector is 0-5% and a brand has a BSI score of 80 out of 100, then an appropriate royalty rate for the use of this brand in the given sector will be 4%.
- 4 Determine brand-specific revenues by estimating a proportion of parent company revenues attributable to a brand.
- 5 Determine forecast revenues using a function of historic revenues, equity analyst forecasts, and economic growth rates.
- 6 Apply the royalty rate to the forecast revenues to derive brand revenues.
- 7 Brand revenues are discounted post-tax to a net present value which equals the brand value.

Disclaimer

Brand Finance has produced this study with an independent and unbiased analysis. The values derived and opinions produced in this study are based only on publicly available information and certain assumptions that Brand Finance used where such data was deficient or unclear. Brand Finance accepts no responsibility and will not be liable in the event that the publicly available information relied upon is subsequently found to be inaccurate. The opinions and financial analysis expressed in the report are not to be construed as providing investment or business advice. Brand Finance does not intend the report to be relied upon for any reason and excludes all liability to any body, government or organisation.



Brand Strength Index (BSI)

Brand strength expressed as a BSI score out of 100.



Brand Royalty Rate

BSI score applied to an appropriate sector royalty range.



Brand Revenues

Royalty rate applied to forecast revenues to derive brand value.



Brand Value

Post-tax brand revenues discounted to a net present value (NPV) which equals the brand value.

Foreword.



David Haigh
CEO, Brand Finance

What is the purpose of a strong brand: to attract customers, to build loyalty, to motivate staff? All true, but for a commercial brand at least, the first answer must always be ‘to make money’.

Huge investments are made in the design, launch, and ongoing promotion of brands. Given their potential financial value, this makes sense. Unfortunately, most organisations fail to go beyond that, missing huge opportunities to effectively make use of what are often their most important assets. Monitoring of brand performance should be the next step, but is often sporadic. Where it does take place, it frequently lacks financial rigour and is heavily reliant on qualitative measures, poorly understood by non-marketers.

As a result, marketing teams struggle to communicate the value of their work and boards then underestimate the significance of their brands to the business. Sceptical finance teams, unconvinced by what they perceive as marketing mumbo jumbo, may fail to agree necessary investments. What marketing spend there is, can end up poorly directed as marketers are left to operate with insufficient financial guidance or accountability. The end result can be a slow but steady downward spiral of poor communication, wasted resources, and a negative impact on the bottom line.

Brand Finance bridges the gap between marketing and finance. Our teams have experience across a wide range of disciplines from market research and visual identity to tax and accounting. We understand the importance of design, advertising, and marketing, but we also believe that the ultimate and overriding purpose of brands is to make money. That is why we connect brands to the bottom line.

By valuing brands, we provide a mutually intelligible language for marketing and finance teams. Marketers then have the ability to communicate the significance of what they do, and boards can use the information to chart a course that maximises profits. Without knowing the precise, financial value of an asset, how can you know if you are maximising your returns? If you are intending to license a brand, how can you know you are getting a fair price? If you are intending to sell, how do you know what the right time is? How do you decide which brands to discontinue, whether to rebrand and how to arrange your brand architecture? Brand Finance has conducted thousands of brand and branded business valuations to help answer these questions.

Brand Finance’s research revealed the compelling link between strong brands and stock market performance. It was found that investing in highly-branded companies would lead to a return almost double that of the average for the S&P 500 as a whole.

Acknowledging and managing a company’s intangible assets taps into the hidden value that lies within it. The following report is a first step to understanding more about brands, how to value them and how to use that information to benefit the business.

The team and I look forward to continuing the conversation with you.

Johnson’s defends title of world’s most valuable cosmetics brand, as challenger brands steal spotlight.

- + Johnson’s retains pole position; brand value drops 20% to US\$14.1 billion
- + Chanel races up rankings, brand value up 95% since last year to US\$11.4 billion
- + Star performances from SKII, Chanel and Christian Dior
- + Johnson & Johnson-owned Neutrogena awarded exclusive AAA+ brand strength rating

Brand Value Analysis.



Johnson’s defends top spot

Johnson’s is still the world’s most valuable cosmetics brand, even though its brand value dropped 20% over the past year to US\$14.1 billion. The top 50 brands total value has increased by 10% this year, driven by the luxury brands in the table. While the total value of luxury brands in the top 50 has grown by 40%, the rest of the table’s total value has slumped down by 1%. These opposite trends are largely driven by Johnson’s and **Chanel**, number 1 and 2 in the Brand Finance Cosmetics 50 2019. Johnsons has fallen this year by 20%, and Chanel has grown by 95%, moving from 6th to 2nd in the ranking.

Johnson’s under the microscope

As cosmetics giant Johnson’s defends its first-place spot and title as the world’s most valuable cosmetics brand, its ongoing talcum powder and asbestos litigation cannot be ignored. While the baby powder is only a small share of the company revenues, the link to the brand image is 100%. The share of group revenues fell and Johnsons recognised in early 2018 that they needed to relaunch the brand to appeal to millennial mothers. Overall the group’s revenue outlook is shaky because of the ongoing litigation but the burgeoning group of brands under the Johnson’s umbrella will perhaps reignite the brand value in the following year.

Growth in the cosmetics market is dependent on a brand fully grasping and meeting the demands of its discerning customer, something which, with the rise of social media and the explosion of vloggers and influencers, is constantly evolving. Whilst pricing, variety, packaging and brand loyalty remain central to repeat business, cosmetics brands which capitalise on their marketing and digital presence, are the ones most likely to prosper.

















David Haigh
CEO, Brand Finance

Challenger vs luxury brands

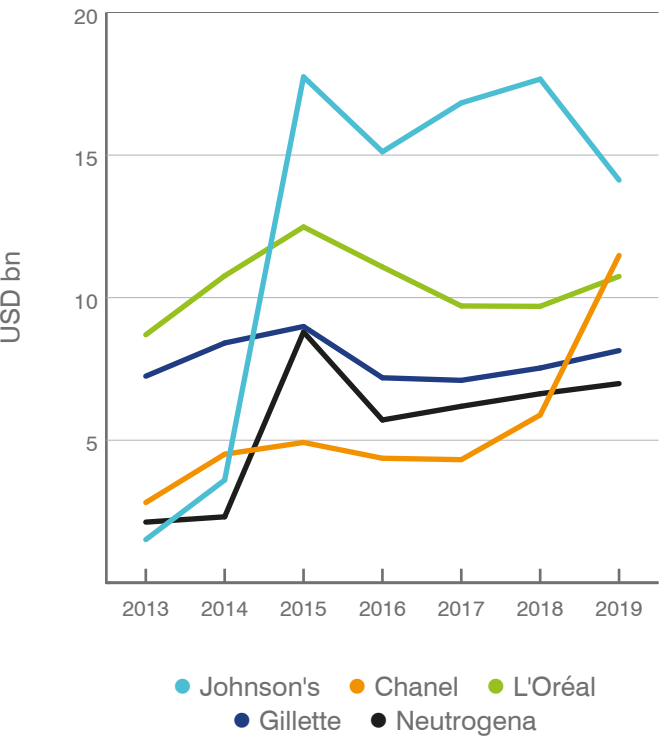
Across the cosmetics industry, it is now the challenger brands which seem to be grabbing the most attention through their consumer-focus, inclusive mindset and digital marketing campaigns. However, a lot of these smaller brands fit into the e-commerce only arena as the established cosmetics brands use their weight to keep them smaller challengers out of department stores.

However, it seems logical to think that in-store experiences, such as sampling tones and makeovers, will continue to be important in the customer journey for a while. For mid to high end brands to remain relevant and agile, it is important to build an omnichannel presence. The success seen of luxury brands (grown on average 25% year on year) is a testament to strength and continued appeal of their brands, coupled with adaptability to digital marketing and omnichannel presence.

Top 10 Most Valuable Brands

	1 ← 1 	2019: \$14,122m 2018: \$17,663m -20.0%
CHANEL	2 ↑ 6 	2019: \$11,480m 2018: \$5,884m +95.1%
	3 ↓ 2 	2019: \$10,745m 2018: \$9,695m +10.8%
	4 ↓ 3 	2019: \$8,143m 2018: \$7,531m +8.1%
Neutrogena	5 ↓ 4 	2019: \$6,986m 2018: \$6,630m +5.4%
	6 ↓ 5 	2019: \$6,853m 2018: \$6,455m +6.2%
DIOR	7 ↑ 15 	2019: \$6,323m 2018: \$4,035m +56.7%
	8 ← 8 	2019: \$5,388m 2018: \$5,044m +6.8%
	9 ↑ 14 	2019: \$5,244m 2018: \$4,215m +24.4%
GUERLAIN	10 ↓ 7 	2019: \$5,069m 2018: \$5,306m -4.5%

Brand Value over Time



Star performers: SK-II, Chanel and Christian Dior

Japanese skin care brand **SK-II**, owned by parent company Procter & Gamble, has delivered consistent double-digit growth in fiscal year 2017 and is a notable strong performer in this year’s Brand Finance Cosmetics 50. Skin & personal Care organic sales grew double digits versus one year ago. It is interesting to note that developing markets were up double digits, mostly led by strong growth in China across Olay Skin and SK-II. Developed markets were up and this was led mostly by premium innovation in skin and personal care and SK-II growth in Japan.

In the wake of the passing of **Chanel** (up 95% to US\$11.4bn) designer Karl Lagerfeld earlier this year, many have credited him for his tactical strategies of introducing ranges of affordable cosmetics which allowed the aspirational aspects of the brand to be actualised by a wider pool of consumers; those who could only ever aspire to wear Chanel clothing but who could own a perfume or lipstick. Whether Karl’s successor Virginie Viard can continue the brand’s journey is yet to be seen. **Christian Dior** (up 57% to US\$6.3bn) has seen a stream of successful

new perfume launches with high profile brand ambassadors for accompanying campaigns for the likes of Sauvage with Johnny Depp and Joy with Jennifer Lawrence, which has boosted their brand value and presence this year.

The biggest challenge for new cosmetics brands is enticing consumers to trial. Beauty purchases are decisions based on experience, habit and trust. Some feel that this is why the uptake of ecommerce in beauty products has been much slower than in, for example, the apparel sector.

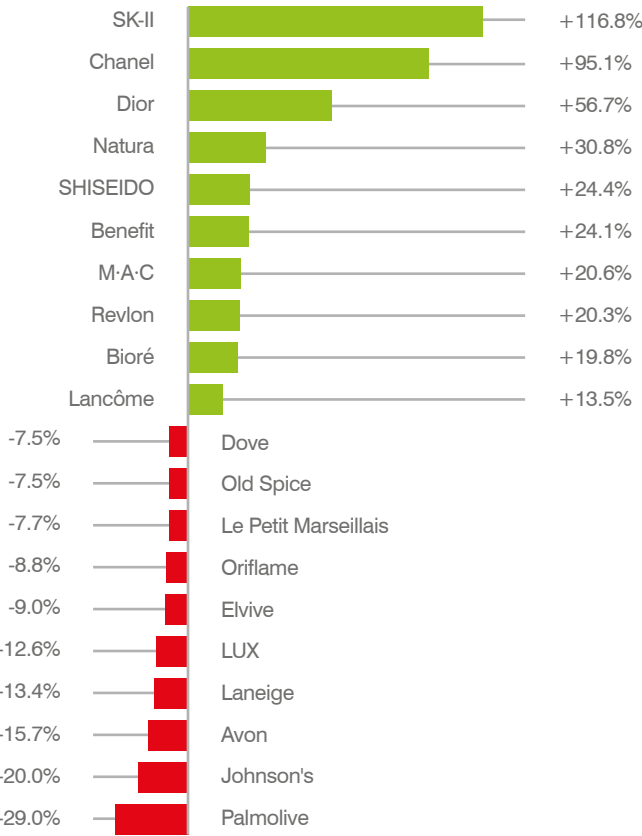
David Haigh
CEO, Brand Finance

Brand Value by Country



Country	Brand Value (USD bn)	% of total
United States	70.0	43.2%
France	51.9	32.0%
United Kingdom	11.2	6.9%
Germany	10.1	6.2%
Japan	8.5	5.3%
China	4.1	2.5%
Other	6.4	3.9%
Total	162.2	100.0%

Brand Value Change 2018-2019 (%)



Neutrogena sitting pretty as world’s strongest cosmetics brand

Aside from calculating overall brand value, Brand Finance also determines the relative strength of brands through a balanced scorecard of metrics evaluating marketing investment, stakeholder equity, and business performance. Along with the level of revenues, brand strength is a crucial driver of brand value.

According to these criteria, **Neutrogena** is the strongest brand in the Brand Finance Cosmetics 50 2019 ranking, with a Brand rating of AAA. With brand strength and trust becoming inescapably crucial to the success of a cosmetics brand, Neutrogena has over the years managed to retain a very loyal customer base and become known as a trusted skin care brand. Having launched a steady stream of high-quality cleansers, creams and masks, accompanied by targeted campaigns and strategic placement of celebrities or beauty vloggers and influencers in their global marketing activities.

Top 10 Strongest Brands

Neutrogena	1	← 1		2019: 90.0 2018: 90.9	AAA+ AAA+	-0.9
Johnson's	2	← 2		2019: 89.4 2018: 90.4	AAA AAA+	-1.0
natura	3	← 3		2019: 88.8 2018: 90.1	AAA AAA+	-1.3
L'ORÉAL PARIS	4	← 4		2019: 88.6 2018: 89.2	AAA AAA	-0.5
Gillette	5	↑ 10		2019: 88.6 2018: 87.1	AAA AAA	+1.5
MAYBELLINE NEW YORK	6	↑ 16		2019: 87.2 2018: 86.0	AAA AAA	+1.3
PANTENE	7	↓ 6		2019: 87.1 2018: 87.7	AAA AAA	-0.6
Le Petit Marseillais	8	↓ 7		2019: 86.7 2018: 87.6	AAA AAA	-0.9
Aveeno	9	↑ 11		2019: 86.7 2018: 86.6	AAA AAA	+0.1
Dove	10	↓ 8		2019: 86.7 2018: 87.6	AAA AAA	-0.9

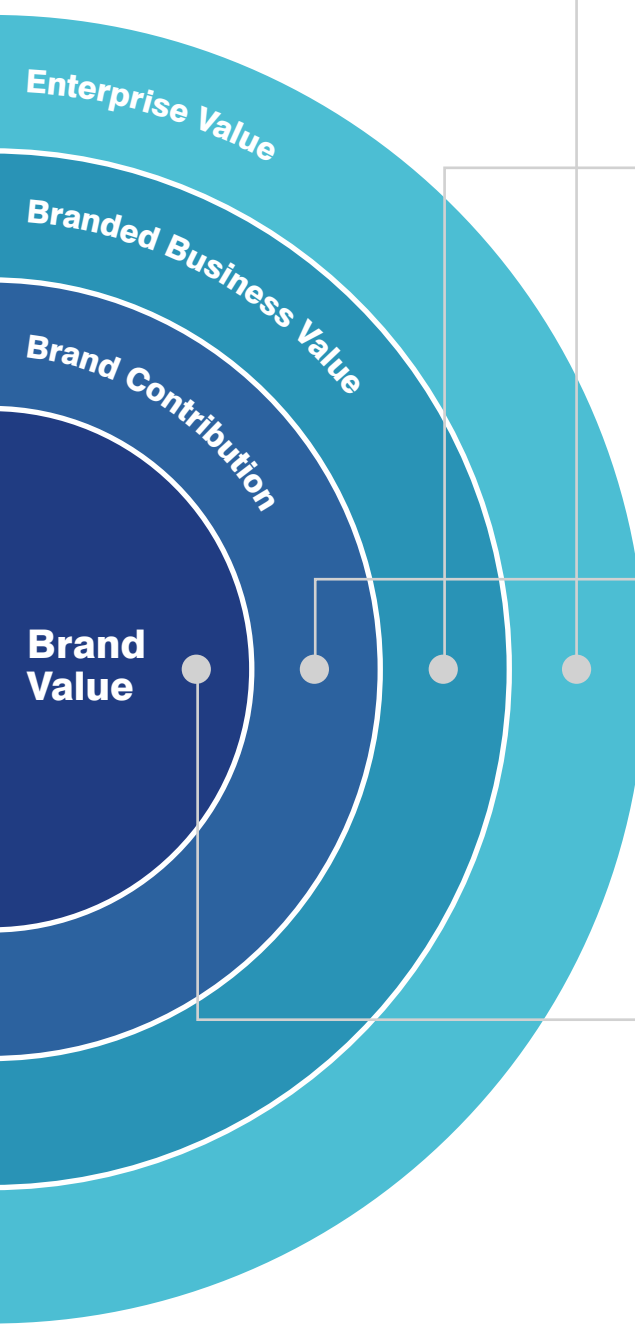
Brand Finance Cosmetics 50 (USD m).

Top 50 most valuable cosmetics brands 1-50





2019 Rank	2018 Rank	Brand	Country	2019 Brand Value	Brand Value Change	2018 Brand Value	2019 Brand Rating	2018 Brand Rating
1	1	← Johnson's	United States	\$14,122	-20.0%	\$17,663	AAA	AAA+
2	6	↑ Chanel	France	\$11,480	+95.1%	\$5,884	AA+	AA+
3	2	↓ L'Oréal	France	\$10,745	+10.8%	\$9,695	AAA	AAA
4	3	↓ Gillette	United States	\$8,143	+8.1%	\$7,531	AAA	AAA
5	4	↓ Neutrogena	United States	\$6,986	+5.4%	\$6,630	AAA+	AAA+
6	5	↓ Nivea	Germany	\$6,853	+6.2%	\$6,455	AAA-	AAA
7	15	↑ Dior	France	\$6,323	+56.7%	\$4,035	AAA-	AAA-
8	8	← Clinique	United States	\$5,388	+6.8%	\$5,044	AAA	AAA
9	14	↑ Shiseido	Japan	\$5,244	+24.4%	\$4,215	AAA-	AA+
10	7	↓ Guerlain	France	\$5,069	-4.5%	\$5,306	AAA	AAA
11	9	↓ Pantene	United States	\$5,058	+0.5%	\$5,034	AAA	AAA
12	12	← Estée Lauder	United States	\$4,952	+11.3%	\$4,448	AAA	AAA
13	10	↓ Dove	United Kingdom	\$4,486	-7.5%	\$4,847	AAA	AAA
14	11	↓ Garnier	France	🔒	🔒	🔒	🔒	🔒
15	13	↓ Clarins	France	🔒	🔒	🔒	🔒	🔒
16	16	← Maybelline	United States	🔒	🔒	🔒	🔒	🔒
17	17	← Head & Shoulders	United States	🔒	🔒	🔒	🔒	🔒
18	18	← Lancôme	France	🔒	🔒	🔒	🔒	🔒
19	19	← M-A-C	United States	🔒	🔒	🔒	🔒	🔒
20	22	↑ Benefit	France	🔒	🔒	🔒	🔒	🔒
21	23	↑ Schwarzkopf	Germany	🔒	🔒	🔒	🔒	🔒
22	20	↓ Olay	United States	🔒	🔒	🔒	🔒	🔒
23	-	New Pechoin	China	🔒	🔒	🔒	🔒	🔒
24	21	↓ Axe/Lynx/Ego	United Kingdom	🔒	🔒	🔒	🔒	🔒
25	24	↓ Rexona	United Kingdom	🔒	🔒	🔒	🔒	🔒
26	25	↓ Aveeno	United States	🔒	🔒	🔒	🔒	🔒
27	45	↑ SK-II	United States	🔒	🔒	🔒	🔒	🔒
28	26	↓ Elvive	France	🔒	🔒	🔒	🔒	🔒
29	29	← Sulwhasoo	South Korea	🔒	🔒	🔒	🔒	🔒
30	28	↓ L'Occitane	France	🔒	🔒	🔒	🔒	🔒
31	37	↑ Natura	Brazil	🔒	🔒	🔒	🔒	🔒
32	31	↓ Innisfree	South Korea	🔒	🔒	🔒	🔒	🔒
33	30	↓ Old Spice	United States	🔒	🔒	🔒	🔒	🔒
34	32	↓ Sunsilk	United Kingdom	🔒	🔒	🔒	🔒	🔒
35	38	↑ Bioré	Japan	🔒	🔒	🔒	🔒	🔒
36	27	↓ Palmolive	United States	🔒	🔒	🔒	🔒	🔒
37	36	↓ Kosé	Japan	🔒	🔒	🔒	🔒	🔒
38	34	↓ Le Petit Marseillais	United States	🔒	🔒	🔒	🔒	🔒
39	33	↓ LUX	United Kingdom	🔒	🔒	🔒	🔒	🔒
40	-	New CHANDO	China	🔒	🔒	🔒	🔒	🔒
41	40	↓ Clean & Clear	United States	🔒	🔒	🔒	🔒	🔒
42	35	↓ Avon	United States	🔒	🔒	🔒	🔒	🔒
43	43	← CoverGirl	United States	🔒	🔒	🔒	🔒	🔒
44	39	↓ Laneige	South Korea	🔒	🔒	🔒	🔒	🔒
45	41	↓ Rejoice	China	🔒	🔒	🔒	🔒	🔒
46	46	← Coty	United States	🔒	🔒	🔒	🔒	🔒
47	42	↓ Oriflame	Switzerland	🔒	🔒	🔒	🔒	🔒
48	50	↑ Revlon	United States	🔒	🔒	🔒	🔒	🔒
49	-	New Pola	Japan	🔒	🔒	🔒	🔒	🔒
50	49	↓ Syoss	Germany	🔒	🔒	🔒	🔒	🔒



Definitions.



Brand Value

 [Johnson & Johnson]	+ Enterprise Value The value of the entire enterprise, made up of multiple branded businesses. Where a company has a purely mono-branded architecture, the 'enterprise value' is the same as 'branded business value'.
 [Johnson's]	+ Branded Business Value The value of a single branded business operating under the subject brand. A brand should be viewed in the context of the business in which it operates. Brand Finance always conducts a branded business valuation as part of any brand valuation. We evaluate the full brand value chain in order to understand the links between marketing investment, brand-tracking data, and stakeholder behaviour.
 [Johnson's]	+ Brand Contribution The overall uplift in shareholder value that the business derives from owning the brand rather than operating a generic brand. The brand values contained in our league tables are those of the potentially transferable brand assets only, making 'brand contribution' a wider concept. An assessment of overall 'brand contribution' to a business provides additional insights to help optimise performance.
 [Johnson's]	+ Brand Value The value of the trade mark and associated marketing IP within the branded business. Brand Finance helped to craft the internationally recognised standard on Brand Valuation – ISO 10668. It defines brand as a marketing-related intangible asset including, but not limited to, names, terms, signs, symbols, logos, and designs, intended to identify goods, services or entities, creating distinctive images and associations in the minds of stakeholders, thereby generating economic benefits.

Brand Strength

Brand Strength is the efficacy of a brand's performance on intangible measures, relative to its competitors.

Each brand is assigned a Brand Strength Index (BSI) score out of 100, which feeds into the brand value calculation. Based on the score, each brand is assigned a corresponding rating up to AAA+ in a format similar to a credit rating.

In order to determine the strength of a brand, we look at Marketing Investment, Stakeholder Equity, and the impact of those on Business Performance.

Analysing the three brand strength measures helps inform managers of a brand's potential for future success.

Brand Strength Index	Marketing Investment	Widely recognised factors deployed by marketers to create brand loyalty and market share.
	Stakeholder Equity	Perceptions of the brand among different stakeholder groups, with customers being the most important.
	Business Performance	Quantitative market and financial measures representing the success of the brand in achieving price and volume premium.



Marketing Investment

- A brand that has high Marketing Investment but low Stakeholder Equity may be on a path to growth. This high investment is likely to lead to future performance in Stakeholder Equity which would in turn lead to better Business Performance in the future.
- However, high Marketing Investment over an extended period with little improvement in Stakeholder Equity would imply that the brand is unable to shape customers' preference.

Stakeholder Equity


- The same is true for Stakeholder Equity. If a company has high Stakeholder Equity, it is likely that Business Performance will improve in the future.
- However, if the brand's poor Business Performance persists, it would suggest that the brand is inefficient compared to its competitors in transferring stakeholder sentiment to a volume or price premium.

Business Performance

- Finally, if a brand has a strong Business Performance but scores poorly on Stakeholder Equity, it would imply that, in the future, the brand's ability to drive value will diminish.
- However, if it is able to sustain these higher outputs, it shows that the brand is particularly efficient at creating value from sentiment compared to its competitors.


Consulting Services.






MARKETING

We help marketers to connect their brands to business performance by evaluating the return on investment (ROI) of brand-based decisions and strategies.




FINANCE

We provide financiers and auditors with an independent assessment on all forms of brand and intangible asset valuations.



TAX

We help brand owners and fiscal authorities to understand the implications of different tax, transfer pricing, and brand ownership arrangements.



LEGAL

We help clients to enforce and exploit their intellectual property rights by providing independent expert advice in- and outside of the courtroom.

Brand Evaluation Services.



How are brands perceived in my category?

Brand Finance tracks brand fame and perceptions across over 30 markets in 10 consumer categories. Clear, insightful signals of brand performance, with data mining options for those who want to dig deeper – all at an accessible price.

What if I need more depth or coverage of a more specialised sector?

Our bespoke brand scorecards help with market planning and can be designed to track multiple brands over time, against competitors, between market segments and against budgets. Our 30-country database of brand KPIs enables us to benchmark performance appropriately.

Do I have the right brand architecture or strategy in place?

Research is conducted in addition to strategic analysis to provide a robust understanding of the current positioning. The effectiveness of alternative architectures is tested through drivers analysis, to determine which option(s) will stimulate the most favourable customer behaviour and financial results.

How can I improve return on marketing investment?

Using sophisticated analytics, we have a proven track record of developing comprehensive brand scorecard and brand investment frameworks to improve return on marketing investment.

What about the social dimension? Does my brand get talked about?

Social interactions have a proven commercial impact on brands. We measure actual brand conversation and advocacy, both real-world word of mouth and online buzz and sentiment, by combining traditional survey measures with best-in-class social listening.

Communications Services.

How we can help communicate your brand's performance in brand value rankings



Brand Accolade – create a digital endorsement stamp for use in marketing materials, communications, annual reports, social media and website. Advertising use subject to terms and conditions.



**TOP 50
COSMETICS
BRAND**



**MOST VALUABLE
COSMETICS
BRAND**



**STRONGEST
COSMETICS
BRAND**



Video Endorsement – record video with Brand Finance CEO or Director speaking about the performance of your brand, for use in both internal and external communications.



Bespoke Events – organise an award ceremony or celebratory event, coordinate event opportunities and spearhead communications to make the most of them.



Digital Infographics – design infographics visualising your brand's performance for use across social media platforms.



Trophies & Certificates – provide a trophy and/or hand-written certificate personally signed by Brand Finance CEO to recognise your brand's performance.



Sponsored Content – publish contributed articles, advertorials, and interviews with your brand leader in the relevant Brand Finance report offered to the press.



Media Support – provide editorial support in reviewing or copywriting your press release, pitching your content to top journalists, and monitoring media coverage.

Brand Dialogue[®]



Value-Based Communications

With strategic planning and creative thinking, we develop communications plans to create dialogue with stakeholders that drives brand value. Our approach is integrated, employing tailored solutions for our clients across PR, marketing and social media.

SERVICES

- Research and Insights
- Integrated Communications Planning
- Project Management and Campaign Execution
- Content and Channel Strategy
- Communications Workshops

For more information, contact enquiries@brand-dialogue.co.uk or visit www.brand-dialogue.co.uk

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for
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