

***Blonde and Blue-Eyed? The Globalization of the Beauty Industry 1945-1980***

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***Abstract***

This paper examines the globalization of the beauty industry between 1945 and 1980. It is preliminary as research is on-going, as is the framing of the major issues. It forms part of a book project on the globalization of the beauty industry from the nineteenth century to the present. The paper begins by providing some context on the industry before 1945. It then explores issues surrounding globalization after 1945. It shows how firms employed manufacturing and marketing strategies to diffuse products and brands internationally despite business, economic and cultural obstacles to globalization. The process proved unexpectedly difficult and complex. The globalization of toiletries proceeded faster than cosmetics, skin and hair care. By 1980 there remained strong differences between consumer markets. Although American influence was strong, globalization did not result in the creation of a stereotyped American blond and blue-eyed beauty female ideal as the world standard, although in a long-term historical perspective there has been a significant narrowing of the range of variation in beauty ideals.

## *Blonde and Blue-Eyed? The Globalization of the Beauty Industry 1945-1980*<sup>1</sup>

There is an enormous literature on globalization, and quite a strong literature on its historical development. Yet, as Mauro Guillen noted some years back, the literature remains highly contested (or else simply inconclusive) for all the “big” issues: what globalization really is; what is new and what is not; what drives it and what stops it; whether it undermines nation states; and whether it homogenizes cultures.<sup>2</sup> The history of the globalization of the beauty industry provides insights on several of those issues, which will be explored here.

It has to be observed that the historical development of today’s \$230 billion global beauty industry is poorly understood. The United States is the only country where the industry has generated substantial historical research.<sup>3</sup> The literature on other countries, even France, is fragmentary. The scarcity of the business, economic and social history literature is surprising. On the one hand, the story might be considered just a subset of consumer products in general. It certainly followed the familiar trajectory from commercialization in the nineteenth century, followed by transition from being composed of numerous small enterprises which sold products for their immediate localities to one in which “global brands” sold by a small number of large corporations could be found worldwide. On the other hand, the beauty industry has a number of distinctive characteristics which make it of unusual interest, including that it appeared relatively late, that many of its products were marketed to women, that it became characterized by large advertising budgets, that it spanned the health/science and aesthetics/beauty arenas, that demand was shaped by deep-seated cultural and societal norms, and that its products affected – in an intimate fashion – how individuals perceive themselves and others. It holds a particular significance in that context given the compelling research in a number of social

sciences concerning the “beauty premium,” which has explored how physical attractiveness, which the products of the beauty industry claim to enhance, exercise a major impact on individual lifestyles, ranging from the ability to attract sexual partners to lifetime career opportunities and earnings.<sup>4</sup>

Historical studies of the beauty industry are handicapped by definitional issues. Broadly the industry includes products applied to the human body to keep it clean and make it look attractive. Today it encompasses bath and shower products, such as toilet soap; deodorants; dental, hair and skin care products; color cosmetics (including facial and eye make-up, lip and nail products); fragrances; men’s grooming products, including shaving creams; and baby care products. “Beauty” is now treated as a single industry; there are listings of the largest firms and their market shares.<sup>5</sup> Historically, there were major differences between product categories, which appeared at different chronological periods, and differ widely in terms of production economics and distribution channels. A distinction was often made between “toiletries,” such as toothpaste and shampoo, and cosmetics and fragrances. At various times the industry was known as “toilet preparations” or “personal care.” In many countries toilet soap was placed in a different industrial classification.<sup>6</sup> There are additional definitional issues posed by the industry’s porous borders with such services as beauty salons and cosmetic surgery. The upshot is that compilation of even descriptive statistics about the historical development of the global beauty industry presents enormous challenges.

My current study is organized around three broad questions.

- why and how did this industry move from local to global
- why and how did today’s global giants emerge
- what have been the implications for people worldwide

However these broad questions open up further issues. First, assuming “attractive” features are found worldwide, why did the beauty industry become associated with certain features rather than others, and just a few geographical locations (essentially Paris and New York) become global beauty capitals? Second, to what extent has globalization led to homogeneity? Third, is this an industry which must be seen as almost the epitome of manipulative capitalism, more especially towards female consumers subjected to an obsession with physical perfection which, as argued by Naomi Wolf and a long American feminist tradition preceding her, trapped women in an endless spiral of hope, self-consciousness and self-hatred.<sup>7</sup>

### ***The Beauty Industry before 1945***

There was a fundamental contrast between the traditional uses of beauty products, which have been used by at least the elites of almost every recorded human society, with the emergence of the modern commercial beauty industry in the nineteenth century. Although the origins of the industry lay in age-old products and practices, advances in chemistry made possible the emergence of the modern perfume and soap industries, as well as the factory production of creams, hair dyes and shampoos. Further technological advances made possible toothpaste tubes, and advertising in magazines. The transformation of transport and communications technologies over the course of the century enabled the building of national markets.

The beauty industry was shaped by entrepreneurs who figured out ways to relate such technological advances to the human desire to be attractive. By 1914 many of the drivers of competitive success in the industry had been invented. Although fragrances, soaps and other products carried, to a greater or less extent functional benefits, the entrepreneurial pioneers of the industry had identified that the key to building successful businesses lay in developing emotional benefits through branding. They created brands

which delighted consumers through their associations with fashionable cities, with romantic images, and through stressing their natural ingredients which would make their consumers healthy. They were also well advanced on segmenting markets, by price, function, and brand positioning. The emergent industry made full use of contemporary assumptions and ideals. Beauty brands offered the social status to which many aspired. They became symbols of the superiority of the Western world; their use in the United States became a rite of passage for the unwashed hordes from southern and eastern Europe seeking to become Americans.

By 1914 entrepreneurs were also well advanced in both in creating and understanding the importance of distribution channels. For premium fragrances, cosmetics and toiletries, it was already understood that it was essential to have shops and salons in the right location in the world's global cities. The industry was either a pioneer or an early adapter of mail order and direct sales, celebrity endorsement and testimonials.

The modern beauty industry developed in three overlapping stages. Stage 1 made products which dealt with smell. Fragrances and soap were the two product categories which developed first. France was enormously important in fragrances, while the United States and Britain became early enthusiasts for using soap to become "clean".<sup>8</sup> Urbanization resulted in growing stench and infectious diseases, which probably lay behind the new desires to identify and classify smells, combined with a sudden urgency to suppress unwanted odors, which emerged from the mid-eighteenth century.<sup>9</sup>

Stage 2, which was well-advanced by the new century, was focused on appearance. As flickering candlelight gave way to gas and electricity, and mirrors were improved, people had unprecedented opportunities to look at themselves. The commercial development of photography from the 1880s intensified visual awareness and may have stimulated interest in using cosmetics.<sup>10</sup> Advances in printing enabled the

publication of illustrated magazines on a large scale, and mass circulation female fashion magazines emerged in the last decades of the century.<sup>11</sup> This stimulated the market for skin creams, and to a much lesser extent, cosmetics, which claimed to affect appearance, typically by restoring natural features.

Stage 3 involved products which transformed appearance, by lipstick, mascara, hair dyes, etc. Many such products were available by 1900, often in forms which were not very user-friendly and sometimes not safe, but their use was constrained by moral objections to “face painting” and so because of associations with prostitution or actors. Beyond such urban dens of immorality as Paris, London and New York, demand was limited. These products faced, in language dear to the hearts of sociologists, a major challenge gaining legitimacy. This was overcome, at different rates in different societies, after 1914. The growing use of transformational beauty products co-occurred with a wider trend which, as the French historian Delbourg-Delphis has argued, was manifested in a growing confidence that human beings could take control, and shape and improve their bodies, by exercise, diet and even surgery.<sup>12</sup> In many societies during the interwar years, and sometimes earlier, there was a growth in people taking exercise, and a concern for changing body shapes, although the manifestations were often strikingly different.

The size of the global industry may have reached \$100 million in 1914. There was also a supporting nexus of fashion magazines and, in several large cosmopolitan Western cities, beauty salons, in place. There were significant levels of entrepreneurial activity and innovation spread over several countries. France and its firms were firmly established as the benchmark of fashion and sophistication. The United States was already the largest single market, and its firms were well-advanced in mass marketing. Germany and Britain had many creative and innovative firms, but neither country had established itself as representing a global beauty ideal. Even Japan and Russia had significant businesses

supplying their domestic markets. The industry was in some aspects born global. Entrepreneurs were often immigrants. Fashions spread between Western countries. There was significant international trade in perfumes and toiletries.

Although the initial categories to achieve scale –toiletries – were either sold to both genders or to sometimes just men, several leading soap brands had already transitioned to an emphasis on feminine beauty by 1914. The importance of female consumers was much greater in fragrances, and even more so in cosmetics. Women were also successful entrepreneurs in cosmetics and hair care products, and many thousands worked in beauty salons or as direct sales agents.

In 1914 beauty remained an industry which served affluent people in rich countries. For most of the world's population, even soap was a luxury. One estimate suggests that only 20 per cent of Americans used any toilet preparation or cosmetic in 1916.<sup>13</sup> The global beauty industry was “democratized” during the three decades after 1914. Luxuries became necessities. The use of soap and other toiletries for cleaning and hygiene became almost universal in developed countries. Smelling badly meant social disgrace, but using soap was firmly established as being about a lot more than not smelling: Hollywood film stars had their favorite brands, which could – their advertising campaigns asserted - make every woman beautiful. In many Western countries the regular use by women of color cosmetics, hair dyes and other transformational products beauty products no longer carried connotations of immorality, and consumption spread far beyond a few fashionable European and American cities. At the outbreak of the Pacific War in 1941, the US government declared the production of lipstick a wartime necessity.<sup>14</sup> By 1948 perhaps 90% of American women used lipstick.<sup>15</sup> However the democratization of beauty was not confined to rising consumption. A fast growth of beauty salons and the spread of beauty pageants contributed to making beauty part of everyday life for many people.

There were multiple drivers behind the growth of the beauty industry during these decades. The world wars introduced millions of soldiers to the importance of hygiene, eroded societal inhibitions about the use of cosmetics, and diffused practices and products. Although the industry's longer-term growth was a product of rising discretionary incomes and urbanization, the Great Depression encouraged the creation of cheaper and more accessible products. Firms engaged in huge educational efforts, whether to salon employers in American towns or schoolchildren in rural Japan, to show people how to use their products as the first step to persuading them to use them.

By the interwar years the United States was as firmly established as the home of democratic beauty as France was the home of haute couture. In the United States, the social pressure to be hygienic was enormous. It was the only country to have Cleanliness Institute. American firms were foremost in asserting the transformational claims of the industry. They and their advertising agencies led the world in market research and mass marketing.

Yet the democratization of the beauty industry had striking limitations. Beauty had borders which reflected prevailing societal and ideological assumptions. In the United States, the mainstream beauty companies had little interest in non-White consumers, beauty pageants excluded them, and ethnic groups with the “wrong” shaped noses created a demand for cosmetic surgery.<sup>16</sup> In many different contexts, and not merely the extreme cases of Nazi Germany and Imperial Japan, beauty was defined in a particular ethnic and ideological fashion. The beauty companies were not the originators of such ideologies, but they found them convenient marketing tools, and very rarely contested them.

In terms of industry structure, there were three distinctive types of firm in the industry before 1945. First, there were the “soapers” whose volume business was laundry soap, but also sold some toilet soap, dental products, men's shaving, and baby products,

categories which could be exploited by mass marketing and mass production. In 1945 Procter & Gamble's small beauty business remained largely toilet soap. The firm launched the *Camay* beauty bar in 1926. Colgate-Palmolive, created by merger in 1927, also built a large toothpaste business. Unilever, created in 1930 as Europe's largest firm by the merger of Lever Brothers and Margarine Union of the Netherlands, sold toilet soap, toothpaste, and perfumery as a small part of its overall business, which was primarily laundry soap and edible fats.

Secondly, pharmaceutical companies, especially for Over The Counter (OTC) markets, manufactured dental products, toothpaste and some cosmetics. In the United States, Lehn & Fink sold toothpaste and owned the *Dorothy Gray* brand of cosmetics. Vick Chemical, whose largest business was its famous vapor rub, acquired a man's toiletries and the Prince Matchabelli cosmetics businesses in 1941. Bristol-Myers sold its original pharmaceutical business during the interwar years, and devoted itself entirely to its specialties, including toothpaste – it launched the *Ipana* brand in 1916 – and toiletries, before becoming a large penicillin manufacturer during the 1940s. British-based Beecham, a long-established firm in patent medicine, diversified into OTC powders, pills and cough mixtures and health drinks, and acquired a British toothpaste company, Macleans, in 1938, followed by the manufacturer of a man's hair preparation *Brylcream*, designed to keep combed hair in place, which was among the first mass-marketed men's hair care products.<sup>17</sup> In 1945 the Swiss pharmaceutical company Hoffman La Roche, which had a large vitamin business, entered the personal care industry when the synthesis of the vitamin pathenol led to the development of the hair lotion *Pantene*.<sup>18</sup>

Finally, there were numerous specialty perfume, color cosmetics, skin and hair care firms, some of which sold toilet soap and dental products. This category was populated by numerous smaller, entrepreneurial firms, which typically began as specialists in single

products, including make-up (Max Factor), mascara (Maybelline), shampoos (Helene Curtis), nail varnish (Revlon) and male toiletries (Shulton). There was a major distinction between prestige cosmetic companies, such as Elizabeth Arden and Helena Rubinstein, and mass marketers, such as the skin cream company Pond's. The American beauty market was segregated on ethnic grounds, so there were also a cohort of African-American owned firms selling to the African-American market. By the 1940s the firms created by pioneering Black entrepreneurs such as Annie Turnbo-Malone and Madam C. J. Walker were shadows of their former self, but Fuller Products was a multi-million dollar business. There were an estimated 750 firms in the American cosmetics industry alone in 1954.<sup>19</sup> There were many firms in Europe, Japan, and elsewhere. France was also the home of multiple perfume companies. These included firms were dated from the nineteenth century, such as Guerlain, more recent entrants such as Coty, and designer houses which followed the lead of Paul Poiret and diversified into fragrances after 1911.

## II

Fragrances and toilet soap led the globalization process. The global status of Parisian perfumes was reflected in substantial exports during the nineteenth century both elsewhere to Europe and the United States. A number of the most prominent Parisian firms aggressively sought international markets. After 1900 Coty, Rigaud and Bourgois were among firms which hired New York agents, and later formed American affiliates.<sup>20</sup> Coty also opened selling branches in London and Buenos Aires by 1914. The French fragrance industry also spawned growth elsewhere through emigration and the export of essential oils and finished perfume compounds.

During the second half of the nineteenth century manufacturers of branded toiletries also developed export markets. Although the larger US firms were primarily

focused on their large domestic market, they also exported to Canada, Latin America and wider afield, although rarely to Europe.<sup>21</sup> European firms often looked beyond their smaller national markets at an earlier stage in their corporate lives. By the end of the century British-based Pears had built substantial markets both in the United States and many other international markets.<sup>22</sup> Lever Brothers pursued international markets even more aggressively, responding to the spread of tariffs by building factories (or acquiring them) in Europe and the settler countries in the British Empire, Canada and Australia, as well as in the United States.<sup>23</sup>

In skin and hair care, color cosmetics a number of firms sold on a much smaller scale primarily to rich countries. As Max Factor flourished providing make-up for Hollywood stars, the firm began to export during the early 1920s, and established a factory in Britain in 1935. Elizabeth Arden and Helena Rubenstein developed substantial sales in interwar Western Europe. The former retained a large business in Nazi Germany despite nationalistic and sometimes anti-cosmetic rhetoric<sup>24</sup> Pond's developed a large international business. It opened its first foreign plant – in Canada – in 1927. Two decades later Pond's sold in 119 countries, and international revenues represented more than 40% of the total, and 65% of total profit. Chesebrough's *Vaseline's Hair Tonic* was also sold in numerous countries by the 1940s.<sup>25</sup> As usual, European cosmetics companies often marketed abroad early in their corporate lives. By 1914 L'Oréal, founded in 1907 in Paris by the inventor a hair dye, was already selling in the Netherlands, Austria and Italy. In Germany, Beiersdorf – which began as a pharmacy which pioneered plasters, before launching toothpaste in 1900 and the world's first long-lasting moisturizer *Nivea* cream in 1911, was already making two-fifths of its sales outside Germany in 1914.<sup>26</sup>

The emergence of a modern beauty industry coincided with the first wave of globalization during the second half of the nineteenth century.<sup>27</sup> Given the importance of values in the growth of this industry, it is not surprising that it assumed a quasi-ideological role. There was a rapid globalization of the hygienic practices which had spread in mid-nineteenth century Western Europe and the United States. The export of soap came to be regarded as an important contributor to the mission of “civilizing” colonized peoples.<sup>28</sup> In colonial southern Africa, the alleged lack of hygienic habits by indigenous Africans formed an important component of colonial racist rhetoric.<sup>29</sup>

The profound impact of the diffusion of Western beauty ideals can be seen in the case of Japan, where although soap had been introduced by European merchants in the sixteenth century, it was used mainly for medicinal purposes. The majority of people used a mixture of rice bran, pumice and loofah for cleaning purposes, while hand and hair washing was not common. Daily hygiene and cosmetic practices were transformed after the forced opening of the Japanese economy after 1853, and the subsequent Meiji Restoration in 1868. By the end of the century sales of P & G’s *Ivory Soap* were widespread to upper class customers.<sup>30</sup>

The Japanese government was unusually sensitive to the significance of hygienic and cosmetic practices. After 1868 it sought to modernize - or Westernize - the appearance of their population. It banned the whitening of male faces – a practice previously followed by the nobility - the shaving of eyebrows and blackening of teeth. As Ashikari has shown, the Emperor’s “face” was Westernized to encourage this trend. As in the West, men were strongly discouraged from using cosmetics which was considered feminine. The concept of a beautiful Japanese face seems to have shifted in the Meiji era: narrow eyes, thin eyebrows and long faces were replaced by rounder eyes and faces and thick eyebrows.<sup>31</sup> By the First World War the government had managed to virtually

eliminate the two-thousand year practice of eyebrow shaving and tooth blackening at least in urban areas, though tooth blackening in rural areas seems to have persisted much longer, while the use of a white painted face by middle class women was encouraged as a way to retain traditional values and gender divisions. Later, during the interwar years, the traditional white face created by lead white powder became reserved for formal occasions, such as the marriage ceremony, while for everyday use women non-lead powders which produced a more transparent white complexion.<sup>32</sup>

### III

The United States emerged from World War II as by far the largest single beauty market. Table 1 provides an estimate of the size of the global market in that year and subsequent benchmark years. North America accounted for two-thirds of color cosmetics consumption in 1950, even higher than its share of the total beauty market.<sup>33</sup> The overall importance of the American market was reflected in the dominant position of US firms in the world industry (see Appendix)

**Table 1 World Beauty Market in 1950, 1959, 1966 and 1976 (\$ million and \$ 1976 million)<sup>1</sup>**

	1950	1959	1966	1976
<b>North America</b>	589	1,270	2,455	6,000
USA	560	1,184	2,430	5,670
<b>Europe</b>	287	543	1,600	4,740
France	62	105	430	972
Germany	62	132	350	1,586
Great Britain	58	124	290	581
Italy	57	84	240	553
Scandinavia	14	21	58	
<b>Australia and New Zealand</b>	15	32	66	214
<b>Asia (excluding Japan)</b>	30	82		
India	16	37		74
Indonesia	6	10		90
<b>Japan</b>	24	112	285	1,957
<b>South America</b>	61	80		
Brazil	28	38		372
Argentina	18	24		
<b>Africa</b>	12	18		
South Africa	7	11		141
Nigeria		8		49
<b>“World”(\$nominal)</b>	<b>1,026</b>	<b>2,173</b>	<b>5,200</b>	<b>15,000</b>
<b>“ World”(constant \$1976)</b>	<b>2,422</b>	<b>4,248</b>	<b>9,131</b>	<b>15,000</b>

<sup>1</sup>Data is for manufacturers' shipments. Communist countries are not included. Currencies converted to US dollars at current exchange rate.

Sources: The main sources for 1950 and 1959 are Preparations and Perfumery Survey, 1950-51, June 1951, Report 3508; and World Toilet Preparations Survey 1959-1960, Report 3110, UAR. Unilever estimates exclude Japan, and Communist countries. The Japanese data is derived from Japanese Cosmetics Industry Association, *Japanese Cosmetics Industry – 120 Years of History* (Tokyo, 1995). For 1966, *Euromonitor* (1967), Table 101, p. 105; the US figure is from *Industrial Outlook*. For 1976, the US data is derived from *Industrial Outlook*, the Japanese data from *Japanese Cosmetics Industries*, and the remainder from Toilet Preparations Coordination Forward Plan 1977-1981, UAL, and OSC Product Strategy, 1974-1979 Discussion Paper (May 1976), ES76064, UAR

The pre-eminence of the United States in 1950 was exaggerated by the depressed disposable incomes in postwar Europe, Japan and elsewhere, yet there was little doubt that

the American market was uniquely important because of its size, level of discretionary incomes, and value systems, which had turned beauty products into a “necessity” rather than a “luxury.”

The American market was also largely homogeneous. The “ethnic” cosmetics market, which overwhelmingly sold products specially formulated and marketed to African-Americans, was 2.3 per cent of the total market in 1977.<sup>34</sup> The dominant discourse of ideal female beauty in postwar America remained resolutely Caucasian. Non-whites continued to be prohibited from participation in Miss America beauty contests as they had been since their inception in 1921, although there was one Jewish winner in 1945. It was only in the late 1960s that African Americans could enter the national contest, and the first to win was in 1984. Since 1921, over one-third of contestants have been blond.<sup>35</sup> *Barbie* toy dolls, created in the late 1950s, were blue-eyed and (predominately) blond until 1980, although the early prototypes, designed in Japan, had distinctly East Asian eyes.<sup>36</sup> These beauty ideals were well-represented in Hollywood movies, such as the Marilyn Monroe classic *Gentlemen Prefer Blondes* (1953), which were powerful drivers of fashion standards. The links with the beauty industry were close given the use of Hollywood starlets to advertise products.

The large American market stimulated continual marketing and product innovation. Beauty companies expanded demand by television advertising and sponsored game shows.<sup>37</sup> Although branding and marketing lay at the heart of competitive success in the industry, product and process innovation was important in expanding demand. This ranged from the basic research which enabled advances in therapeutic toothpaste, anti-dandruff shampoos and hair coloring, to constant experimentation in product formulations in creams and cosmetics and testing of their effects on animals. Significant postwar product innovations included aerosols for hair and fragrance products.<sup>38</sup> Both technology and

marketing skills could do much about men. The beauty market remained heavily skewed towards women, despite the best efforts of firms and advertising agencies to expand the male market. One survey on male products in 1962 concluded with “the blunt fact that the market has been nearly static for 50 years.”<sup>39</sup>

The size of the American market made evident its potential elsewhere. In 1950 Unilever asked a group of senior executives to investigate the global prospects of the industry. The subsequent investigation, which included a pioneering effort to quantify its size, identified “a direct relationship between the standard of living and the usage of toilet preparations.” The potential for global growth appeared even greater because the technology appeared basic, fixed capital requirements were limited, and the industry was highly fragmented. The industry was, the executives concluded, a “Unilever business.”<sup>40</sup>

The following decades confirmed the correlation between market growth and increases in discretionary incomes. As incomes rose, consumers moved along a spectrum of product categories spanning toilet soap, toothpaste, shampoo, mass cosmetics and ultimately prestige cosmetics. In developing countries, Western products either created a new market, as when shampoos replaced soap for hair washing, or substituted for traditional, often handicraft, cosmetics. Like many branded consumer products from automobiles to clothes, there was a strong aspirational driver behind this market growth. An industry estimate in the mid-1960s was that – worldwide – consumer purchases of personal care items tended to increase about 112% for every 100% increase in income.<sup>41</sup> Table 2, which compares the growth rates of the US and Japanese personal care markets and per capita income between 1950 and 1976, shows that to have been a conservative estimate.

**Table 2 Compound Annual Growth Rates of the US and Japanese Personal Care Markets and GDP Per Capita 1950-1976**

	U.S		Japan	
	<i>Personal Care</i>	<i>GDP Per Capita</i>	<i>Personal Care</i>	<i>GDP Per Capita</i>
<i>Current</i>	9.3	5.8	17.5	13.4
<i>Constant</i>	5.8	2.4	10.7	6.9

Sources: Japanese Cosmetics Industry Association, *Japanese Cosmetics Industry – 120 Years of History* (Tokyo, 1995); *Industrial Outlook*. Constant growth rate based 1976\$ and 1976 Yen.

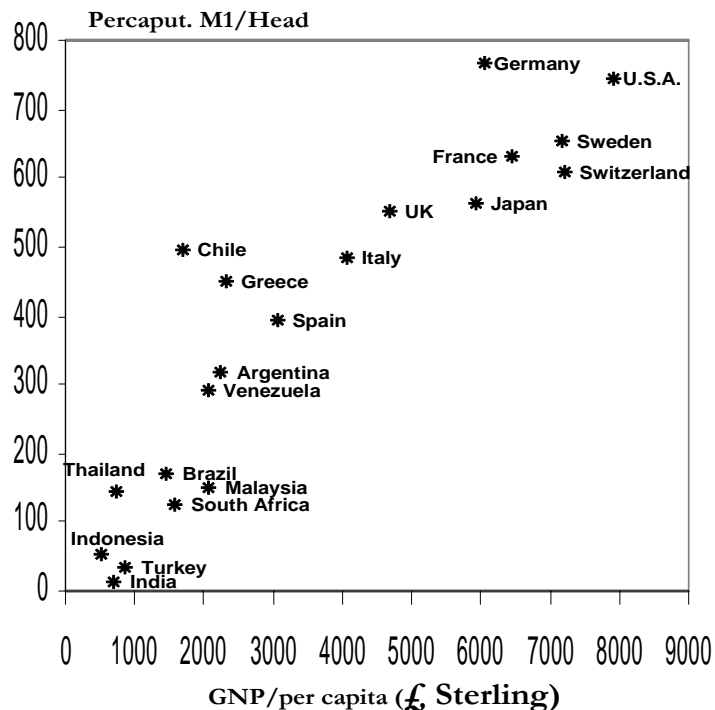
During the interwar years the rise of Hollywood to dominate the emergent world cinema industry intensified the diffusion of American hygiene and beauty ideals both to other Western countries, and to developing countries with much lower income levels and different cultural traditions. For example, there was a strong impact of Hollywood movies, and their media coverage, even on Iranian fashion and cosmetics culture during the 1930s and 1940s.<sup>42</sup> The war years intensified this impact through explicit linking of cosmetics sales with American lifestyle and democratic ideals, and interaction between American servicemen abroad and local women.<sup>43</sup> The postwar growth in international travel further diffused brands and products.<sup>44</sup>

There were further drivers of global growth. There were economies of scale with mass market products such as toilet soap and toothpaste. In prestige products, there was the lure of high margins. The margins obtainable from selling cosmetics were reported to be around 20% in the American industry during the 1960s and 1970s.<sup>45</sup> Beauty brands, with their emotional and aspirational characteristics, seemed less vulnerable to commodification. As new markets opened up, firms had strong incentives to capture first mover advantages for their brands.

Yet there were at least three major obstacles faced by firms as they sought to build global beauty businesses. The first related to markets. The problem was not merely that

most of the world after the Second World War lacked the level of disposable income to purchase most of these products, but also that consumer preferences varied widely across the full spectrum of beauty products even at similar income levels. For example, while the per capita consumption of toothpaste was broadly similar in the United States, Switzerland and Venezuela during the 1970s, it was nearly double that seen in France, Italy and Brazil.<sup>46</sup> Fig 1 illustrates the same phenomenon in global shampoo usage. While the ability to construct such comparative data demonstrated the informational advantage held by firms with multi-country operations, it also demonstrates the complexity in predicting changes in consumer expenditure.

**Fig. 1 Consumption of Shampoo Relative to GDP per capita, c1982**



Source: UAR, ES 83111 Economics Department, Shampoo Overseas (March 1983).

In skin care and cosmetics there were also wide differences in consumer preferences. Japanese women hardly used fragrances, but had a strong preference for clear skin. During the 1960s 60% of total personal care consumption in Japan was spent on skin preparations. In 1980 the Japanese market for face creams was double the size of that of the United States. The use of foundation, which changed from pure white to skin color after 1945 but still made women look whiter than they really were, was (and is) extremely common.<sup>47</sup> American women, in contrast, were highly “made-up.” By the early 1960s an estimated 86% of American girls aged 14 to 17 already used lipstick, 36% used mascara, and 28% used face powder.<sup>48</sup>

The beauty markets of even neighboring European countries differed widely. Table 3 shows the major variations in propensity to use skin creams, lipsticks and deodorants in the early 1960s.

**Table 3: Female Use of Skin Preparations in Europe, 1963 (%)**

	Hand and Face Cream	Lipsticks	Deodorants
France	54	58	25
Germany	75	38	29
Belgium	32	51	14
Italy	20	25	12
Britain	60	73	48

**Source:** UAR, TR 67002, E and S, Markets for Skin Preparations, An Interim Report. 12 December 1967.

Although consistent time series data is elusive, anecdotal evidence suggests that the differences seemed as strong two decades later. In the early 1980s Germans remained high spenders on skin creams. The French remained low users of deodorants and soap compared

to the British and Germans, but far greater consumers of fragrances. Over a quarter of the entire French beauty market was fragrances compared to 8 per cent in Germany, while French per capita consumption was twice that of Britain and Germany.<sup>49</sup> Consumer purchasing behavior in the same category also varied widely between countries. French female fragrance consumers had a strong preference for prestige products and were loyal to one or two scents. In the United States, there was a far higher consumption of mass market fragrance brands, and typically consumers used more fragrances.<sup>50</sup>

There were multiple factors driving cross-national differences in consumption patterns. These included persistent variations in grooming habits. In the 1970s two-thirds of French, German and Swedish women showered, but 90% of British women preferred to wash in the bath tub. Americans also overwhelmingly preferred showers.<sup>51</sup> There continued to be wide variations in social attitudes towards cosmetic use. “In Germany,” a report conducted by Unilever in 1963 observed, “the puritanic view of a strong connection between beauty care and condemnable sex enhancing methods is still widespread and hampers the growth of the color range products.”<sup>52</sup>

A second set of obstacles to globalization related to access to distribution channels and marketing. The advertising strategies used to grow the US beauty market were not readily transferable. There were many restrictions on media advertising outside America. The United States had six commercial television stations by 1945, and a decade later over 400, but commercial television was only launched in Japan in 1953 and Britain in 1955, and was even later elsewhere in Europe and other countries. There were often restrictions on product advertising, and few countries permitted sponsored game shows.<sup>53</sup>

Finally, there were obstacles to globalization arising from differences both in human physiology and governmental regulations. Products and brands needed some reformulation because of differences in skin tone, hair texture, diet and climate. Moreover

as the products of the industry could affect health, there was quite extensive regulation of permitted formulations and preservatives, claim substantiations and ingredient labeling. These varied widely between the United States, Europe and Japan.<sup>54</sup>

#### IV

The task of globalizing beauty products after 1945 appeared to provide fewer challenges for the large consumer products companies which had established international businesses in laundry soap and other consumer products. They had the resources and sometimes the local geographical knowledge to grow businesses in personal care. They had the large advertising budgets and marketing skills needed to create attractive international brands. There were also economies of scale in the manufacture of such products, enabling the creation of entry barriers. As most developing countries had high tariff barriers during the postwar decades, multinational firms which created factories behind them could capture strong market positions with limited competition.

The consumer products companies undertook a rapid globalization of toilet soap, toothpaste and shaving creams. They both exported and built foreign factories. By the 1970s Unilever, Gillette, and Colgate-Palmolive manufactured in numerous developed and developing markets. The latter firm had over 30 factories outside the United States spread over Europe, Latin America, Africa and Asia, by the early 1970s.<sup>55</sup> Global brands were developed in these product categories, although firms typically struggled to achieve uniformity in composition or packaging in different countries. *Palmolive* was sold in numerous countries. Unilever's *Lux* toilet soap, created in the 1920s, was sold on five continents by 1960.<sup>56</sup> As firms considered entering in developing countries, firms such as the US advertising agency J. Walter Thompson were employed to collect basic information

about market size and consumer preferences.<sup>57</sup> There was also product and marketing adaptation to the conditions in those countries. In Thailand, where Unilever held nearly 50 per cent of the total toilet soap market with *Lux* in the early 1980s, the local company formulated its toilet soap with no tallow, using locally produced palm oil. In India, Unilever both used local ingredients and introduced special low cost brands during the 1970s in response to government requests.<sup>58</sup>

The market for toothpaste grew rapidly after 1945, including in developing countries where its use had been minimal previously. As in toilet soap, a global oligopoly emerged. Toothpaste replaced toilet soap as the driver of Colgate-Palmolive's international growth. Unilever also pursued a global strategy with *Pepsodent*, an American brand which it had acquired in 1944. By 1959, as Table 4 shows, a small group of firms held significant shares of many national markets, even though powerful local incumbents were present in some of them, such as Germany, where Blendax held one-third of the dental market.

**Table 4: Market Shares in Selected Dental Markets, c1959 (%)**

Country	Total Market Size (\$ million)	Colgate-Palmolive	Unilever	P&G	Bristol-Myers	Beecham
United States	167	30	19	20	n.a.	n.a.
UK/Ireland	23	27	32	9	n.a.	19
Germany	19	16	14	n.a.	n.a.	n.a.
France	8	40	31	n.a.	n.a.	n.a.
Denmark	2	42	13	n.a.	n.a.	20
Brazil	9	21	9	n.a.	n.a.	n.a.
Thailand	2	82	n.a.	n.a.	9	n.a.
India	11	17	2	n.a.	n.a.	n.a.
Philippines	4	96	n.a.	4	n.a.	n.a.
Australia	6	56	12	n.a.	17	n.a.
South Africa	3	51	18	n.a.	11	n.a.

Source: UAR, Report 3110, World Toilet Preparations Survey 1959-1960.

By the 1970s Colgate-Palmolive sold around one-third of world toothpaste outside Japan and the Communist countries, while Unilever and P & G a further one-fifth each. This was a product category in which first-mover advantages, including in brand reputations, were strong, although not invincible. Colgate-Palmolive's dominance in the United States was overwhelmed by P & G's blockbuster *Crest*, launched in 1955, which eventually took and held two-fifths of the market. Beecham also briefly captured 8% of the American market during the 1960s, initially by encouraging sampling of *Macleans* toothpaste by giving a tube away free with the well-established *Brylcream* hair dressing product.<sup>59</sup>

Both men's shaving products and the new category of deodorants were rapidly globalized during the postwar decades. In 1950 Gillette held over a quarter of the total world market for the former product. This firm expanded rapidly in postwar Latin America and was strongly represented in Europe, where it competed with Unilever and Colgate-Palmolive. During the 1970s Gillette held around a one-fifth of the French, German and British shaving markets.<sup>60</sup> Bristol-Myers, Gillette and Unilever globalized deodorants as a replacement for soap and colognes. Bristol-Myer's *Mum*, an underarm deodorant based on the same principle as the newly invented "ball point" pen, was rapidly internationalized after its launch in 1952. Gillette's *Right Guard* aerosol deodorant, launched in 1960, and Unilever's underarm deodorant brand *Rexona* competed in dozens of markets. By 1979 *Rexona* held 7% of the "world" deodorant market outside Japan and the Communist countries.<sup>61</sup>

The surprising omission from the above list, which emphasized the limits to globalization, was Procter & Gamble. During the 1950s this firm, which was twice the size of Colgate-Palmolive, remained heavily focused both on the North American market, and laundry soap and synthetic detergents, where it had secured a world-wide technological

lead. There were limited international sales of shampoo in Canada and other developed countries, and of *Camay* in Latin America and the Philippines, but this never developed as global brand. From the 1950s P & G expanded its international business, previously focused on Canada and Britain, into Continental Europe, and to a limited extent elsewhere. However international expansion was driven by detergents and, from the 1960s, *Pampers* diapers, which were both highly capital-intensive businesses. While *Pampers* was sold in more than 70 countries by 1980, *Crest* toothpaste and *Head and Shoulders*, the anti-dandruff shampoo launched in 1961 which captured one-quarter of the American market, were sold in half a dozen countries outside the United States.<sup>62</sup>

The globalization of Stage 2 and 3 beauty products - hair and skin care, and color cosmetics – proved much more challenging. In these categories, competitive advantage rested less on scale economies and more in brand image. Hair care proved a volatile business. As the product was quite inexpensive to manufacture, there were low entry barriers permitting many new entrants. Consumers were prone to experiment with different brands. The market shifted frequently with changing fashions, and it was subject to technology shifts, such as the use of blow dryers during the 1970s.<sup>63</sup>

Outside the United States, shampoo consumption was not widespread after World War II, and initially almost entirely confined to women. Helene Curtis, a strong US innovator, took the lead in the postwar globalization of hair products. By the 1970s Helene Curtis brands could be bought in over 100 countries. However the firm's use of agency agreements to gain rapid access to markets seems to have limited its growth potential. By that decade three-quarters of its revenues were earned in the United States,<sup>64</sup> and the large consumer products companies and L'Oréal had replaced it as the largest international firms in the category (Table 5).

**Table 5: Share of World Shampoo Markets in 1973 by Leading Firms**

	<b>Colgate- Palmolive</b>	<b>Unilever</b>	<b>P &amp; G</b>	<b>Beecham</b>	<b>L'Oréal</b>
Europe	7	12	2	9	15
North America	4	-	21	-	-
Latin America	9	33	2	2	11
Africa	13	15	-	7	-
Asia (exc.Japan)	17	40	-	1	1
“World”	6	8	12	4	6

Source: UAR, ES 75 235, Unilever Economics Department: Colgate Palmolive. A Competitor Study (1975). The “World” excludes Communist countries and Japan.

The global shampoo market was much less oligopolistic than toothpaste, yet Colgate-Palmolive, Unilever and Beecham sold widely. L'Oréal also manufactured and sold hair care products throughout Europe and parts of Latin America – it held a 16 per cent share of the Argentinean market in 1973. In the 1970s L'Oréal held over a half of the French hair care market, but only 10 per cent of the German, where local firms Wella, Schwarzkopf, and Henkel held over one half of the retail hair market. Wella was one of the world's largest global hair care firms, with sales throughout the world. In major Continental markets, the shampoo market was distorted by regulation on distribution channels, designed to protect pharmacies. In France only pharmacies could sell treatment or medicated shampoos – around one quarter of the market.<sup>65</sup> Unilever's *Sunsilk*, launched in Britain in 1954 and manufactured in 27 countries by the early 1970s, was the closest to a global hair care brand. The market positioning varied with income levels. In urban Brazil, Argentina and South Africa, where liquid shampoo use spread after 1945, it was sold using

a “natural beauty” image, as in Europe. However, in lower income markets, where shampoos remained unusual even in the 1970s, it was targeted at the rich elites who had begun to use hairdressers, and socially aspirant women who had enough disposable income to use a specialist hair product occasionally.<sup>66</sup> Neither Unilever nor other firms reformulated for hair types in this period. One consequence was that Chesebrough’s *Vaseline* found an unexpected large market in postwar Africa for hair dressing and conditioning, as shampoos formulated for Caucasian hair worked poorly with African hair.<sup>67</sup>

The American hair care market, with strong local incumbents and a complicated distribution system, had almost no foreign brands. During the 1970s Unilever tried but failed to sell shampoo in the United States. Neither Wella nor L’Oréal was able to build significant businesses. In 1953 the latter formed licensee Cosmair Inc. to distribute hair products to beauty salons, which were very important for hair care sales in that country, but could made limited progress in a situation where local middlemen rather than national distributors delivered to beauty shops. The French company had few relationships with such middlemen, while hair salons and their clientele were unfamiliar with the L’Oréal brand.<sup>68</sup>

As skin care and cosmetics firms crossed borders, they also built factories and created distribution companies. In the early 1960s L’Oréal had sales in 60 countries, and manufactured in about 30, although two-thirds of its revenues remained generated in France.<sup>69</sup> Beiersdorf, like Wella, built an extensive global business. By 1975 the German firm had 18 foreign subsidiaries as well as 22 licensing agreements to produce its products in local markets, and by the end of that decade 74% of *Nivea* sales were made outside Germany.<sup>70</sup> A small number of American firms were very international. By the mid-1950s, Pond’s was manufacturing used two plants in the US and four abroad to sell in nearly 120

countries.<sup>71</sup> By 1958 Max Factor manufactured in 13 countries and sold in 106; by 1971 it sold in 143 countries, and international sales were 54 % of the firms' total.<sup>72</sup> In 1954 Avon, whose only international operation had been in Canada, opened in Puerto Rico and Venezuela, followed soon afterwards by Cuba, Mexico and Brazil. By the early 1970s it manufactured in 16 countries. By the 1960s Helena Rubenstein sold color cosmetics in over 70 countries - with seven plants in Latin America, five in Europe, plus Australia, Canada, Israel, Japan, New Zealand and South Africa. Revlon opened a Mexican factory in 1948, entered Germany with a licensing agreement with Henkel, the leading German laundry soap company, and by 1971 the firm manufactured in twelve countries and sold its products in 84.<sup>73</sup>

Yet many leading US cosmetics companies were far less active internationally. Before 1956 Noxzema's international sales of skin cream were confined to Canada and limited exports, directed by a single manager in Baltimore. Despite the great domestic success of the *Cover Girl* make-up launched in 1961, there was only cautious international growth. A sales branch was opened in Britain in 1964, which began to manufacture in 1978. Elsewhere markets were supplied by exports or licensing agreements.<sup>74</sup>

The cosmetics and skin care companies faced multiple challenges as they globalized. In developed markets there was usually a high degree of fragmentation and competition. It was expensive to build and sustain brands; on average, cosmetics companies spent 12 per cent of their sales on advertising. As demand was highly influenced by seasonal and fashion trends, with colours failing in and out of favour, which meant that products, advertising and promotional campaigns in each country needed to be constantly reviewed. Typically consumers of foundation were loyal to existing brands, as the product was expensive and needed to be a good match with skin tone. In contrast, eye and lip cosmetics, which were "fun" products, were fashion-driven and required constant

innovation in positioning, packaging and formulation. In these categories, brand loyalty was low.

Like skin care, these product categories experienced many new entrants. Both the US and French industries had many new entrants, some highly successful. Among the French industry's many new entrants between 1945 and 1980 were some firms which became large corporate players in global beauty. In 1954 Jacques Courtin-Clarins, for example, founded Clarins as a skincare company. As a young medical student, he had noted that when patients were treated for circulatory problems with massage, their skin looked better. He started a business with botanical body oils. Opening the first Clarins Institute de Beaute in Paris, he developed treatments and products using natural botanical ingredients first for the body and then for the face. In 1959 Yves Rocher was formed by Yves Rocher. He had been born in La Gacilly in Brittany. The village was losing its population as people moved to the towns. Driven by the idea of creating jobs to revitalize the region, Yves Rocher decided to start a company focusing on nature and feminine beauty, beginning with manufacturing plant-based cosmetics which it distributed through mail order, and thereafter focused on its reliance on natural ingredients. In Sweden, Oriflame (now one of the world's biggest direct sellers), was started in 1967 by two brothers with no prior experience of beauty – one of them was a salesman for vacuum cleaners. They had a concept of using Swedish natural herbs in a formulation, with a low perfume concept and no animal testing, and contracted out the manufacture to a firm in Britain.<sup>75</sup>

In skin care, the importance of long-established brands such as *Nivea* and *Pond's* did not prevent new entrants. In 1969 Henkel introduced a new skin cream which almost immediately captured 7% of the Germany market, causing a temporary crisis (followed by

a corporate and marketing strategy restructuring) for Beiersdorf's *Nivea* brand.<sup>76</sup> While the Henkel brand was eventually withdrawn, a more sustained new entry was *Oil of Olay*. In 1970 Richardson-Merrell (formerly Vick Chemical), purchased Adams Company, an entrepreneurial South African company which had developed the brand in the early 1950s, and launched it seven other countries by the end of the 1960s. The new owners rapidly grew the brand in the United States, positioning it in the medium-price mass market, and manufacturing in Puerto Rico to secure tax breaks. During the 1970s global *Olay* sales rose from \$7 million to \$117 million and US sales from \$3 million to \$60 million, representing one-third of the US skin care market. The brand was also launched and grew rapidly in Southeast Asia, Mexico and Brazil.<sup>77</sup>

Firms also faced major challenges accessing distribution channels when they sought to globalize. As Avon expanded abroad, it encountered the problem that the distinctive American practice of door-to-door selling was neither known nor welcomed in many countries. In Britain, Avon initially struggled because, as an executive noted in 1963, "there was a feeling that Direct Selling was akin to "hawking" or being a "fish monger" and done only by the very low classes."<sup>78</sup> Both prestige and mass cosmetic brands struggled to persuade distribution channels to provide space on their shelves or floors. In prestige, this meant persuading exclusive department stores to provide floor space in a good location, which usually meant displacing incumbents. Estée Lauder, who in the late 1940s had fought hard to get the products of her new business into prestigious American department stores, had to repeat the effort in foreign countries.<sup>79</sup> In the United States, it was only during the early 1980s and after years of effort that L'Oréal was able to convince Macy's to give the expensive *Lancôme* brand the same amount of space as *Estée Lauder*, a move which in a single year boosted the US sales of *Lancôme* by 25%.<sup>80</sup>

As a result of these difficulties, the level of globalization in cosmetics and fragrances remained muted before 1980. In a famous 1983 article, the Harvard Business School marketing guru Theodore Levitt identified Revlon as one of the symbols of the globalization of the beauty (and other) markets.<sup>81</sup> Yet during the 1970s Revlon diversified domestically into health care and other unrelated products and remained heavily dependent on domestic sales of cosmetics. This was true of most other US cosmetics companies, except Avon, as well as L'Oréal and Shiseido (see Appendix Table 2).

In terms of market share, foreign firms had limited presence in the United States, Japan or France. During the 1960s in the United States, Revlon and Avon held alone 50% of the lipstick market between them; Revlon, Avon, Chesebrough-Pond's, and Helena Rubinstein dominated the face cream market. Maybelline accounted for one-third of the eye cosmetics market.<sup>82</sup> As Revlon, Max Factor, Coty, and Estée Lauder, diversified into perfume, they eroded the French pre-eminence in that market, even taking large shares of the prestige sector during the 1960s.<sup>83</sup> In Japan Shiseido, Kanebo and Pola held more than 50% of the cosmetics market in 1978. Avon and Revlon, the largest foreign companies, held a mere 1 to 2%.<sup>84</sup> In France, L'Oréal brands were pre-eminent in all cosmetic categories. Avon, the largest foreign firm, held 5 per cent of the French cosmetics and toiletries sector.<sup>85</sup>

It was in countries lacking powerful incumbents that foreign firms established a stronger position. In Britain, US firms were pre-eminent in color cosmetics. Max Factor and Avon together held nearly two fifths of the make up market in the early 1980s. Revlon and Estée Lauder held smaller shares. In Italy, L'Oréal, Revlon, Elizabeth Arden and Avon dominated the make-up market. In Germany, while local skin care brands led by *Nivea* dominated the sector, Avon and Revlon held around two-fifths of the eye, lip and nail cosmetic markets.<sup>86</sup>

In most developing countries, average income levels restricted cosmetics sales to urban elites, who however were willing consumers of aspirational brands. By 1960 Avon held strong market positions in many Latin American countries, including Venezuela where it held 50 per cent of the cosmetics market.<sup>87</sup> By 1972 Revlon and Shiseido held 50 per cent of the Thai cosmetics market, while Elizabeth Arden was affiliated with a local manufacturer which operated retail stores. Avon began operations in Thailand six years later.<sup>88</sup> In Africa, affluent white South Africans were the most significant market for global cosmetics firms, but there was some international presence elsewhere. In West Africa, Unilever from the interwar years sold “traditional” cosmetic products including pomades and oil-based perfumes, and in 1961 a factory was opened in Nigeria to make such products. By then Unilever, along with Max Factor and Pond’s, was experimenting with color cosmetics, including specially formulated make-up for the West African market.<sup>89</sup>

In developing markets it was necessary to invest in explaining to consumers how to use them. As Avon expanded its direct sales business internationally, it devoted considerable resources to educating consumers in the use of their products, especially in developing countries. After entering Mexico in the 1958, it faced a major educative role. As an Avon executive recalled five years later, “many women do not know how to use or even buy various cosmetics. In some cases they have seen them advertised or heard of them, but would not buy or use them for fear of showing their lack of knowledge.”<sup>90</sup> Max Factor similarly invested in organizing demonstrations in stores and pharmacies as it spread abroad.<sup>91</sup>

In terms of the impact of globalization, during the post-1945 period the momentum for homogenization was still appeared strong. In the nineteenth century American firms had often adopted fake French brand names for brands, and even imaginary French offices. Postwar US firms were strongly inclined to regard American beauty ideals as universal.

The global popularity of Hollywood and the prestige of the United States certainly gave American brands powerful resonances of success and fashion. No other country could match that appeal. While France had a powerful image of style and elegance, L'Oréal found that the prestige of French perfume in the United States did not translate into its hair coloring products during the postwar decades.<sup>92</sup> Britain's Yardley was able to build a modest international business with an English image for its flower-scented soaps and traditional perfumes, but it opened a Paris office in the 1920s, and sometimes put "London and Paris" on labels.<sup>93</sup> Japan's Shiseido benefited from a growing Japanese image for quality in Asian markets, but in the West only earned a transient advantage from being "exotic".<sup>94</sup> One option for foreign firms was to borrow American imagery. Unilever's *Lux* toilet soap was traditionally promoted by famous Hollywood film stars.

In Mexico, Moreno has shown how US cosmetics companies used endorsements by white American celebrities to sell products, although from the early 1940s they sometimes featured local celebrities and occasionally appealed to Mexican beauty ideals.<sup>95</sup> Pond's was especially reluctant to admit local images into its international marketing and was strongly committed to advertising cosmetics as universal products that appealed to international rather than local aspirations. Pond's and its agency J. Walter Thompson strove to maintain the core marketing strategy – such as endorsements by high society women – despite local pressures for alternative approaches in postwar Europe and elsewhere.<sup>96</sup> Pond's launched *Angel Face*, a face powder in 1946, began selling it in Latin America three years later, and by 1961 it was sold in 30 countries, using almost identical advertising and brand image. "We like Chesebrough-Pond's to have a uniform image," an executive observed in 1961, "to look the same everywhere."<sup>97</sup>

However there was never a complete consensus as to the degree of local adaptation needed in marketing and other matters. By 1949 Max Factor was using the young Mexican-

born Hollywood actor Ricardo Montalban to promote sales of men's products in Spanish-speaking countries.<sup>98</sup> In postwar Mexico, *Palmolive* was marketed with a distinct Mexican identity.<sup>99</sup> Both local regulatory requirements and market differences encouraged some firms to engage in substantive local adaptive research. By the early 1980s L'Oréal and Chanel had major laboratories in two countries, Max Factor in four, and Chesebrough-Pond's in eight, but Avon, Revlon, Estée Lauder and Shiseido relied on central laboratories in their home countries.<sup>100</sup>

Insofar as the marketing of beauty brands using aspirational images, including Hollywood stars and "blond and blue-eyed" models can be seen as contributing to the diffusion of Western, or American, beauty ideals at the expense of local discourses, the meaning of this diffusion is complex. In the cities of Asia, Latin America and elsewhere, the spread of Western beauty brands can be interpreted as cultural imperialism, and certainly traditional ideals, practices and aspirations were swept away by alien ones. Yet Western beauty products, and even beauty pageants, were often interpreted by consumers, especially female consumers, as aspirational, and agents of modernity rather than of subjugation. After 1945 American beauty culture was aspirational for many women in developing countries. Both the ideal, and business methods such as direct selling, carried powerful images of modernity and opportunity for women in regions and countries as diverse as Brazil and Thailand.<sup>101</sup> Moreover, a region such as Latin America had its own discourses about skin color which were unrelated to the globalization of beauty products using Caucasian models.<sup>102</sup>

If international beauty pageants are used as a proxy, then - not surprisingly - a stereotyped blonde and blue-eyed American beauty ideal did not sweep the postwar world. Americans won one of the (UK-based) Miss World contests between 1951 and 1979 and four of the (US-based) Miss Universe contests between 1952 and 1979. However, a strong

Caucasian bias was evident. Blonde Scandinavians were the first winners of both contests. There were 20 Caucasians and 6 pale-skinned Latin American among the Miss World's. Apart from a pale-skinned Miss Egypt in 1954, Miss India in 1966 was the first "darker skinned" winner and Miss Grenada (1970) the first of visible African descent. The Miss Universe's included 14 Caucasians and 7 pale skinned Latin Americans. There was a Japanese winner in 1959, a Thai in 1965, and a Trinidadian of African descent in 1977. A "Miss Universe standard of beauty" involving face, figure, proportions and posture was diffused into national beauty contests, as has been shown in the case of Thailand.<sup>103</sup> The sponsorship of US cosmetics companies co-opted women of every nationality into their international marketing. Max Factor sponsored Miss Peru, the winner of the 1957 Miss Universe contest, on a tour of Latin America, in what the company called a "sensationally successful publicity promotion." The same pattern was followed subsequently, with the company sponsoring Miss Japan to tour Japan on its behalf two years later.<sup>104</sup>

By the 1970s the postwar wave of crude homogenization or Americanization was faltering. In the United States itself the postwar beauty ideal began to fragment in response to the success of the civil rights movement, and surging Latino and Asian immigration. During the 1970s more and more beauty companies used local models and make other local adaptations than three decades previously, though practice continued to differ between firms, markets, as well as price ranges. Typically firms sought consistent brand images and formulations for prestige brands, whose consumers were often internationally mobile. As the second global economy gained momentum after 1980 as China opened its doors to foreign investment, the Berlin Wall came down, and developing countries liberalized, the pressures for crude homogenization weakened further and faster. However the choice of models was to remain a challenging decision for marketing executives.

V

The challenges of globalizing beauty provided an incentive to consolidate the highly fragmented cosmetics industry. As the original founders of entrepreneurial firms retired or died, a trend which intensified during the 1960s, firms became available for acquisition. The result was a strong concentration process (see Table 7). This might have been expected to have facilitated globalization, but much of the process turned out to be unsustainable

**Table 7 Mergers and Acquisitions of Cosmetics and Fragrances Firms by Consumer Goods, Pharmaceutical and Conglomerate Firms 1947-1980**

Date	Acquirer	Acquired <sup>1</sup>	Divested
<i>Consumer Products</i>			
1947	Unilever	Harriet Hubbard Ayer	1954
1949	Gillette	Toni Company	2005 acq. <sup>4</sup>
1954	P & G	Monsavon (France)	
1955	Unilever	Thibaud Gibbs (France)	
1973	Gillette	Jafrá Cosmetics	1998
1974	Colgate-Palmolive	Helena Rubenstein	1980
1976	Unilever	Pierre Robert (Sweden)	
<i>Pharmaceutical</i>			
1959	Bristol-Myers	Clairol	2000
1963	Pfizer	Coty	1992
1963	American Cyanamid	Breck	1990
1966	Sterling Drug	Lehn & Fink	1988 acq. <sup>5</sup>
1967	Plough	Maybelline	1989
1967	Beecham	Lancaster (Monaco)	1990
1969	Hoechst	Schwarzkopf (25%)	1995
1970	American Cyanamid	Shulton	1990

1970	Eli Lilly	Elizabeth Arden	1987
1970	Richardson-Merrill	Adams (South Africa)	1985 acq. <sup>6</sup>
1971	Squibb	Charles of the Ritz	1986
1971	Smith & Nephew	Gala (UK)	1980
1973	Sanofi	Yves Rocher	2002
1975	Hoechst	Jade (Germany)	1995
1975	Hoechst	Marbert (Germany)	1995
1978	Schering-Plough	Rimmel (UK)	1989
1979	Beecham	Jovan	1990
<b><i>Conglomerate</i></b>			
1961	Kanebo	Kanegafuchi (Japan)	2005 acq. <sup>7</sup>
1967	BAT	Yardley (UK)	1984
1969	BAT	Germaine Monteil (France)	1984
1969	Reckitt & Colman	Goya (UK)	1977
1970	American Brands	Andrew Jergens	1988
1971	ITT	Rimmel (UK)	1978
1972	Consolidated Foods	Erdal (Netherlands)	
1973	Norton Simon	Max Factor	1983 acq. <sup>8</sup>

<sup>1</sup> All acquisitions of US firms except when specified.

<sup>2</sup> Chesebrough-Pond's was acquired by Unilever in 1986.

<sup>3</sup> Helene Curtis was acquired by Unilever in 1996.

<sup>4</sup> Sterling Drug was acquired by Eastman Kodak in 1988.

<sup>5</sup> Gillette was acquired by P&G in 2005.

<sup>6</sup> Richardson-Vicks was acquired by P&G in 1985.

<sup>7</sup> Kanebo was acquired by Kao in 2005.

<sup>8</sup> Norton Simon was acquired by Esmark in 1983

In France and the United States some cosmetics companies merged with others or acquired them. L'Oréal purchased small, and often poorly managed, family-owned cosmetics firms in the fragmented French industry, including Lancôme, which sold prestige cosmetics and perfumes, and Garnier, a hair care company, in 1964.<sup>105</sup> In the United States Chesebrough-Pond's, created by merger in 1955, acquired a series of smaller firms. However, many larger firms, including Avon, Revlon and Shiseido, as well as the fast-growing and still family-owned Estée Lauder, opted for organic growth. Revlon and later Avon made unrelated acquisitions. In 1979 Avon acquired Tiffany's, the prestige New

York jewelry store, and began a decade of ill-fated unrelated diversification which was ultimately divested.<sup>106</sup>

However it was the consumer products, pharmaceutical and conglomerate companies which made the most extensive acquisitions in cosmetics. The process appeared logical. They had financial resources to invest in the advertising-intensive category and research facilities to engage in innovation. In many cases they had international distribution and production facilities. The profitability of the cosmetics, and the potential for globalization, provided major attractions. Yet the outcomes turned out to be unsuccessful and transient.

Unilever was a first mover in seeking to diversify into cosmetics. It acquired Harriet Hubbard Ayer – America’s oldest cosmetics firm - in 1947. However it was sold in 1954 after heavy losses.<sup>107</sup> Thereafter Unilever made little progress in cosmetics. While attempts to create a sizeable business organically failed, it missed acquisition opportunities. In 1947 a proposal by Unilever’s American management to buy the Toni Company, a US company which made kits to enable women to wave their own hair at home, was rejected by the head office as too costly and risky.<sup>108</sup> During the 1960s an agreement with the majority owner of L’Oréal, the daughter of the founder, by Unilever’s French management for the acquisition of a minority shareholding was again blocked by senior management. Nestlé acquired a shareholding in 1974. The only significant acquisition before 1980 was a medium-sized Swedish cosmetics firm in 1975.<sup>109</sup> A senior female manager in Unilever later provided a gendered explanation for the lack of progress. “The whole idea of being linked with up-market beauty products and fragrances,” she later observed, “rather embarrassed the tough business executives who operated in Unilever House.”<sup>110</sup> Firms with large businesses in detergents or diapers faced an uphill struggle to persuade managers to work in personal

care, or to persuade local affiliates that they should divert resources away from high volume and profitable businesses to market such products.

There was evidence from other companies that cosmetics posed cultural and organizational challenges for consumer products firms, whose mass marketing and manufacturing capabilities proved hard to transfer to a product category where creativity and fashion were at a premium. In 1973 Gillette, which had eventually acquired Toni, acquired Jafra Cosmetics, a Californian direct-sales cosmetics company, which employed thousands of saleswomen to sell skin care products and had locations in dozens of countries, with a strong presence in Mexico. However a move of head office to Gillette's home of Boston resulted in a major loss of momentum.<sup>111</sup> In 1974 Colgate-Palmolive acquired Helena Rubenstein for \$142 million. However an unsuccessful attempt to take the brand mass market, accompanied by a traumatic move of the head office from the creative center of New York, caused a meltdown of the North American business. In 1980, after trying but failing to dispose of the business to both L'Oréal and Kao, it was sold to a private buyer for \$20 million.<sup>112</sup> Meanwhile P & G, alarmed by an encounter with anti-trust following an acquisition in the late 1950s, did not make acquisitions in any sector, including cosmetics.<sup>113</sup>

Pharmaceutical companies made major acquisitions in cosmetics and hair care. The trend began with Bristol-Myers purchase of Clairol, whose improved hair color products had transformed American women's hair dying during the 1950s and permitted millions to "be blonde beautifully."<sup>114</sup> Thereafter a succession of prominent cosmetics firms were acquired, spurred by a belief that the research capabilities of pharmaceutical companies would lead to new product innovations in cosmetics. There were also predictions that government regulation over cosmetics would grow and that as a result their expertise would be valuable.<sup>115</sup> However, many once prominent brands withered under their new

ownership. American Cyanamid reformulated and repositioned the once famous *Breck* shampoo as a budget brand and then spent little to market it. By the 1970s it was left behind by herbal-based competitors and provoked feminist disdain for the traditional Breck “girls” used in its advertisements. Within two decades it was only being sold in Mexico and as a 99-cent shampoo cast away on US supermarket shelves.<sup>116</sup>

A key problem for the pharmaceutical companies was that product innovation needed to be embedded in creative marketing and branding strategies. This was hard to achieve given the gap in the culture, marketing and branding capabilities required to succeed in pharmaceuticals and cosmetics.<sup>117</sup> From the mid-1970s US pharmaceutical companies made only relatively small acquisitions, although as late as 1979 British-based Beecham acquired a successful Chicago fragrance start-up.<sup>118</sup> Subsequently there was a complete divestiture of pharmaceuticals from the beauty sector. An early mover in this trend was Smith & Nephew, the British pharmaceutical and medical products company, which had acquired the rights to *Nivea* in the British market as a result of the Second World War. In 1971 they had acquired Gala, a medium-sized British cosmetics company, but divested nine years later after making heavy losses, especially in the United States.<sup>119</sup>

There were also major investments by conglomerates in cosmetics. Japan’s Kanebo, which had originated as a textile manufacturer, led this trend when it purchased the cosmetics division of an affiliated Japanese chemicals company in 1961. By 1977 Kanebo had captured 17 % of its domestic market and built an international business, primarily in Asia.<sup>120</sup> In contrast, the cosmetics acquisitions of British and American conglomerates proved transient. ITT, the classic conglomerate of the era, acquired one of the larger British-owned cosmetics companies in 1971, only to sell it nine years later as it began to divest its highly diversified portfolio. Max Factor experienced major management problems under its new owner, as did Andrew Jergens before its sale to Kao in 1988.<sup>121</sup>

The most interesting experiment was by BAT, which like American Brands was a large tobacco company seeking high margin diversification opportunities. During the 1960s the British company spent \$120 million acquiring small and medium-sized European cosmetics and fragrances businesses. These were merged into a wholly-owned subsidiary, British American Cosmetics (BAC), in 1970, which manufactured in 37 countries and sold in 143 by the early 1980s.<sup>122</sup>

BAC's largest component was the long-established toiletries company Yardley. This company had diversified into color cosmetics in the American market under its previous family owners, resulting in large losses which were only stemmed when the US business was sold, and Yardley could concentrate in its profitable businesses elsewhere, including in Britain, South Africa and Columbia. By the early 1980s BAC, which was managed fairly autonomously from its parent, had become a cohesive and quite profitable cosmetics company.<sup>123</sup> However cosmetics never exceeded 2 per cent of overall BAT revenues, and one per cent of the profits, and there was little interest in growing further though major acquisitions. In 1984 BAC was sold to Beecham, creating a quite substantial British-based cosmetics company whose sales reached £360 million by the end of the decade. The combination of the toiletry and cosmetics interests of the two firms had the apparent potential to create a significant British-based beauty company, but Beecham divested from cosmetics following its merger with a US pharmaceuticals company in 1989, and little remained of the group within a decade.

By 1980 the global beauty industry had changed considerably compared to 1950. However the presence of so many pharmaceutical and conglomerate companies was to prove a temporary affair, demonstrating a distinct lack of path dependency in this industry's evolution. Within a decade almost all of these investments had been divested. By the early twenty first century industry leadership was shared between firms which had

originated in cosmetics and hair care – L’Oréal, Avon and Estée Lauder – and consumer products companies, especially P and G and Unilever, which belatedly developed the capacity to acquire and integrate businesses in skin and hair care and cosmetics.

## VI

This paper has offered a highly provisional, first take on the history of the globalization of the beauty industry. It has stressed the role of firms in driving this globalization. It has shown how companies used manufacturing and marketing strategies to diffuse beauty products globally, despite long-standing cross-national differences cultural and social values towards such products, as well as the heterogeneity of the physiology of human beings. The internationalization of the industry was paralleled in other consumer products, including those such as food and beverages in which cultural preferences shaped demand. Yet this paper has emphasized the challenges of globalization within the beauty industry. It was neither easy nor linear. There proved to be surprisingly strong barriers even between the US and European markets. Local incumbents remained dominant in the giant Japanese market as well as in the United States with the exceptions of toilet soap, toothpaste and fragrances. Large corporations struggled to succeed in the fashion conscious hair care and cosmetics markets.

This paper points to the significant, but nuanced, impact of globalization waves on consumer cultures and beauty ideals. During the first global economy there was a strong homogenization affect. In the context of the widening gap between the successful West and the rest, and imperialism, soap and more generally Western beauty ideals swept the world, or at least its elites who could afford them. French and later American firms set the aspirations which others desired. As the case of Japan shows, people’s faces were literally

changed, in addition to their hygienic habits. This momentum continued after 1914, by which time US-based companies, the attractions of American wealth and hegemony, and beauty ideals represented in Hollywood movies, combined to create a powerful momentum. This crude homogenization impact was never complete, however, as shown in the persistent of strong consumer preferences even in countries which were hosts to many global firms. During the 1970s it weakened further as more and more firms employed local models in their advertising.

Paradoxically, at least for those that consider the contemporary or second global economy which emerged after 1980 represented a new and powerful homogenization or Americanization, there was to be a re-assertion of local and ethnic identities in beauty ideals, as firms both globalized beauty brands and segmented markets on ethnic, psychographic, gender, age, and other dimensions. However the momentum of the homogenization wave of the first global economy left a strong legacy which meant that this fragmentation and re-assertion of local identities took in the context of certain ideals, especially for women, had become widely diffused worldwide, including a lack of body odor, white natural teeth, slim figures, paler skins and rounder eyes. In that sense, globalization resulted in a reduction in the range of global variation in beauty ideals.

## Appendix

### The World's Largest Beauty Companies, 1950 (\$ million)

	<i>Ownership</i>	<i>Beauty Revenues</i>	<i>Total Corporate Revenues</i>	<i>% International Revenues</i>	<i>Main Product Categories</i>
Colgate-Palmolive	U.S.	58	312	32	Dental, shaving, soap
Unilever	U.K./NL	48	2,240	80	Hair, soap, dental
Avon	U.S.	31	31	6	Cosmetics, toiletries
Gillette	U.S.	25	99	33	Shaving cream, men's toiletries
Shulton	U.S.	23	25		Men's toiletries
Pond's <sup>1</sup>	U.S.	22	22	40	Skin care
Revlon	U.S.	19	19	10	Cosmetics
Coty	U.S.	18	18		Fragrances
Andrew Jergens <sup>2</sup>	U.S.	17	17		Cosmetics, toiletries
Johnson & Johnson	U.S.	16 <sup>3</sup>	162		Baby care products
Max Factor <sup>4</sup>	U.S.	15	15	25	Cosmetics
Bristol-Myers	U.S.	13	52	10	Dental, hair care
Helena Rubenstein	U.S.	13	13		Cosmetics, skin care
P&G	U.S. <sup>5</sup>	13	633	15	Soap, hair, dental
Lehn & Fink	U.S.	12	16	8	Cosmetics, dental
Elizabeth Arden	U.S.	12	12		Cosmetics
L'Oréal	France	11	11	10	Cosmetics, toiletries
Chesebrough	U.S.	11	11		Cosmetics
Beecham	U.K.	11 <sup>6</sup>	47	42	Dental, hair
Helene Curtis	U.S.	9	10		Hair
Warner-Hudnut	U.S.	9 <sup>7</sup>	47	43	Cosmetics
Charles of the Ritz	U.S.	6	6		Fragrances
Noxzema Chemical	U.S.	6	6		Skin care
Lambert	U.S.	6 <sup>8</sup>	25	9	Dental, toiletries
Yardley	U.K. <sup>9</sup>	5	5		Fragrances, toiletries
Nestle-LeMur	U.S. <sup>10</sup>	4	4		Hair, cosmetics
Shiseido	Japan	3	3	0	Cosmetics, toiletries
Vick Chemical	U.S.	3	43	10	Cosmetics, toiletries
Wella	Germany	3	3	2	Hair, cosmetics
Beiersdorf	Germany	3	7		Skin care, dental, toiletries
Kao Soap	Japan	3	3		Toiletries
Clairol	U.S.	1	1		Hair
Estée Lauder	U.S.	1	1	0	Cosmetics

Source: Annual Reports and other published information, except when specified.

<sup>1</sup> 1948.

<sup>2</sup> Estimated. Revenues were \$29.5 million in 1956, and a 10% per annum growth rate is assumed.

<sup>3</sup> Personal care sales are estimated share of baby care products in Johnson & Johnson's revenues.

<sup>4</sup> 1949

<sup>5</sup> Personal care sales estimated. The international share of earnings is used as a proxy for international sales.

<sup>6</sup> Personal care sales are understated because this is for Britain only.

<sup>7</sup> Personal care revenues estimated. The share of international revenues in 1951.

<sup>8</sup> Estimated.

<sup>9</sup> Estimated. In 1950 Yardley net profits were £231,713

<sup>10</sup> 1953 figure.

**The World's Largest Beauty Companies, 1977 (\$ million)**

	<i>Ownership</i>	<i>Beauty Revenues</i>	<i>Total Corporate Revenues</i>	<i>Total % Revenues Outside Home<sup>1</sup></i>	<i>Product Categories</i>
Colgate-Palmolive (Helena Rubenstein)	U.S.	2,526	3,568	55	Dental, toiletries, cosmetics
Avon	U.S.	1,356	1,648	41	Cosmetics, toiletries
Shiseido	Japan	916	916	5	Cosmetics, toiletries
Revlon	U.S.	810	1,143	28(11)	Fragrance, cosmetics, skin care Hair care, cosmetics, toiletries
L'Oréal	France	803	923	53	toiletries
Bristol-Myers	U.S.	749	2,233	31	Dental, hair care
Unilever	U.K./NL	665	16,007	71(83)	Hair care, dental, toiletries
P&G	U.S.	630	7,284	27(8?)	Hair care, dental, toiletries
Chesebrough-Pond's	U.S.	492	808	28	Skin care, fragrances
Wella	Germany	432	543	78	Hair care
Johnson & Johnson	U.S.	416 <sup>2</sup>	2,914	41	Toiletries, baby care
Gillette	U.S.	413	1,587	55	Shaving cream, toiletries
Schwarzkopf	Germany	379	379	36	Hair care
Norton Simon (Max Factor)	U.S.	352	1,808	17	Fragrance, cosmetics
American Cynamid (Breck, Shulton)	U.S.	321	2,413	33	Fragrance, hair care
Beiersdorf	Germany	230	571	50	Skin care
Kanebo	Japan	255 <sup>3</sup>	1,613	75	Cosmetics, toiletries
Beecham	U.K.	231 <sup>4</sup>	1,261	68	Toiletries, cosmetics
Fabergé	U.S.	228	233	24	Fragrances, cosmetics, hair
Pfizer (Coty)	U.S.	227 <sup>5</sup>	2,032	63	Cosmetics
Estée Lauder	U.S.	200	200		Cosmetics
BAT (Yardley)	U.K.	184	10,871	86	Cosmetics, toiletries
Henkel	Germany	163	1,301	5	Toiletries and cosmetics
Eli Lilly (Elizabeth Arden)	U.S.	152	1,550	28	Cosmetics, fragrances
Yves Rocher	France	150	150		Skin care, cosmetics
Squibb (Charles of the Ritz)	U.S.	147	1,342	33	Cosmetics
Schering-Plough (Maybelline)	U.S.	130 <sup>6</sup>	941	56	Cosmetics
Noxell	U.S.	124	138	18	Cosmetics
Alberto Culver	U.S.	110	172	21	Hair care
Parfumes Christian Dior	France	107	107		Fragrances
Helene Curtis	U.S.	106	124	20	Cosmetics
Richardson-Merrill	U.S.	89	836	46	Skin Care
American Brands (Jergens)	U.S.	79	4,616	(11)	Cosmetics
Guerlain	France	60	60		Fragrances
Mary Kay	U.S.	49	49	5?	Cosmetics

<sup>1</sup>Figures in brackets are the share of personal care revenues earned outside home country.

<sup>2</sup>Estimated. Johnson & Johnson consumer segment had sales of \$1,268 million, including baby care products, feminine hygiene, toiletries, first aid products, and drugs.

<sup>3</sup>Estimated

<sup>4</sup> Estimated. Consumer Products sales were \$772 million. UAR, ES 82267, Toiletry/Cosmetics Competitor Profitability 1976-1981, December 1982, estimated 30% of these sales were personal care.

<sup>5</sup> Estimated. Personal Care Division sales of \$227 million included dietary foods and plant care.

<sup>5</sup> Estimated. The consumer products division, which included Maybelline, sun care, and OTC drugs, was \$254 million.

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## **Endnotes**

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<sup>2</sup> Guillen, “Is Globalization Civilizing, Destructive or Feeble?”

<sup>3</sup> Peiss, *Hope*, provides an overview of a large literature.

<sup>4</sup> Etcoff, *Survival*, chapters 3 and 4; Hamermesh and Biddle, “Beauty”; Mobius and Rosenblat, “Why Beauty Matters.”

<sup>5</sup> For example, *Euromonitor* and *Women’s Wear Daily* provide listings of the largest firms.

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<sup>6</sup> In the United States (and many other countries) toilet soaps for personal washing were included in SIC code 2841 - Soaps and Detergents - and were consequently excluded from statistics on Cosmetics and Toilet Preparations, which was SIC code 2844.

<sup>7</sup> Naomi Wolf, *The Beauty Myth. How Images of Beauty are Used Against Women* (Harper Perennial: New York, 1991).

<sup>8</sup> Bushman, "Early History," p. 1225.

<sup>9</sup> Corbin, *Le miasme et la jonquille*; Jütte, *A History of the Senses*, pp.207-211.

<sup>10</sup> Riordan, *Inventing Beauty*, pp. 4-5.

<sup>11</sup> Christopher Brevard, "Femininity and Consumption: The Problem of the Late Nineteenth-Century Fashion Journal", *Journal of Design History*. 7/2 (1994).

<sup>12</sup> Delbourg-Delphis, *Le Chic et le Look*

<sup>13</sup> Peiss, *Hope*, p.50.

<sup>14</sup> Scott, *Fresh Lipstick*, p. 222.

<sup>15</sup> Peiss, *Hope*, p. 101.

<sup>16</sup> Haiken, *Venus Envy*.

<sup>17</sup> Corley, "Beecham."

<sup>18</sup> Peyer, *Roche*, p.194.

<sup>19</sup> "Beauty Parade," *Barron's* (8 March 1954).

<sup>20</sup> Peiss, *Hope*, pp.98.

<sup>21</sup> Wilson, *Unilever*, vol 1, pp.248.

<sup>22</sup> Wilson, *Unilever*, vol. 1, pp. 17-18. John A. Hunt, "A short history of soap", *The Pharmaceutical Journal* 263, 7076 (December 18/25), 1999, pp.985-989.

<sup>23</sup> Wilson, *Unilever*.

<sup>24</sup> Houy, "Of Course," Chapter 4.

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<sup>25</sup> The Pond's Extract Company: A Case History, 2/13/59, in Howard Henderson papers – Special Projects. Case History Project. Clients: Chesebrough-Pond's 1959, JWT. Unilever Archives Rotterdam (hereafter UAR), Report 3508, Preparations and Perfumery Survey 1950-1951, June 1951.

<sup>26</sup> *100 Jahre*, p. 26.

<sup>27</sup> Jones, *Multinationals*.

<sup>28</sup> McClintock, *Imperial Leather*, pp. 207-31.

<sup>29</sup> Burke, *Lifebuoy Men, Lux Women*, pp. 17-34.

<sup>30</sup> Gennifer Weisenfeld, “‘From Baby’s First Bath’: Kao Soap and Modern Japanese Commercial Design,” *The Art Bulletin* 86 (September 2004).

<sup>31</sup> Interview with Noriyo Tsuda, Pola Culture Research Center, Tokyo, 23 March 2007.

<sup>32</sup> Mikiko Ashikari, “The Memory of the Women’s White Faces: Japaneseness and the ideal image of women,” *Japan Forum* 15 (2003): 55-79.

<sup>33</sup> UAR, Report 3508, Preparations and Perfumery Survey, 1950-51, June 1951.

<sup>34</sup> Frost and Sullivan, *Ethnic Cosmetics*, p.3; Robert, “White Success.” Before 1970s African American-owned firms primarily supplied the ethnic market. Johnson Products, the largest, began manufacturing in Africa and Trinidad in the 1980s.

<sup>35</sup> Banet-Wesier, *Most Beautiful Girl*; Kinloch, “Rhetoric”; Perlmutter, “‘Miss America.’”

<sup>36</sup> Varaste, *Face*, p.17; Lord, *Forever Barbie*, p. 162.

<sup>37</sup> Peiss, *Hope*, pp. 249-52; Tedlow, *Giants*, pp. 279-98.

<sup>38</sup> Overview of the Over-the Counter Cosmetic Industry, March 13 1974, RG 11 Historical Files, Series 9, Library Resources-Alphabetical Files, BOX 127, Avon Archives, Hagley Museum, Delaware (hereafter AVON).

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<sup>39</sup> Peter Vautin, "Men's Toiletries are Undersold," *Drug and Cosmetic Industry* (April 1962), pp. 409, 518.

<sup>40</sup> Wilson, *Unilever*, vol 3, pp. 160-1, 198-201.

<sup>41</sup> UAR, TR 67002, E and S, Markets for Skin Preparations. An Interim Report, 12 December 1967.

<sup>42</sup> Amin, "Importing 'Beauty Culture' into Iran."

<sup>43</sup> Lake, "Female Desires"; Peiss, "Educating."

<sup>44</sup> Moskowitz, "Cosmetics Move Abroad."

<sup>45</sup> *Standard and Poor Industry Surveys*, 1960s-1970s.

<sup>46</sup> Frost and Sullivan, "Cosmetics."

<sup>47</sup> Ashikari, "Urban Middle- Class Japanese Women".

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- <sup>56</sup> Jones, *Renewing*, p. 25; UAL, Report Box 2, 39/2, Marketing Division, "Colgate Toilet Soaps: A Ten Year Review 1965-1974," October 1974.
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