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# Globalization and Beauty: A Historical and Firm Perspective*

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## Abstract

This paper uses the beauty industry to explore the impact of globalization over the very long run. When the first wave of modern globalization struck in the nineteenth century, a homogenization of global beauty ideals began—one which has, to some extent, continued until the present day. This has had enormous societal and cultural consequences, and business enterprises are at the heart of this process. The paper explores how entrepreneurs and firms translated societal values into brands, globalized them, and changed societal perceptions of beauty as a result. It also shows the limitations of the homogenization achieved by firms even at the high point of globalization, before making the case that contemporary globalization is working to facilitate greater diversity in beauty ideals again.

**Key Words:** Beauty, globalization, culture

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* This article builds on, and develops, arguments presented originally in Jones (2010a). Documents were consulted in the following archives: records of Avon held at the Hagley Museum and Library, Wilmington, Delaware; the records of J. Walter Thompson held by the History of Advertising Trust, Norwich, Britain; the records of Procter & Gamble held in Procter & Gamble corporate archives, Cincinnati; records of Unilever NV held in Unilever Archives, Rotterdam.

## I. Overview

This paper uses the beauty industry to explore the impact of globalization over the very long run. Beauty may seem an odd choice as the industry rarely features in the management literature. Yet the industry is large, with global sales now in excess of $330 billion.[1] This makes it one of the largest of the so-called creative industries; by comparison, the size of the global fashion market has revenues of around $100 billion, and the global advertising industry has revenues of around $430 billion (Caves, 2000; Friedman & Jones, 2011: 237). Moreover, the beauty industry sells products which (for better or worse) impact an issue which has effects for all individuals—the perception of attractiveness. As recent research has demonstrated, there is a "beauty premium" which enables those considered more attractive to earn higher incomes, get acquitted more often in jury trials, earn higher student evaluations, and benefit in other ways (Cipriani & Zago, 2011; Hamermesh & Biddle, 1994; Mobius & Rosenblat, 2006; Mocan & Tekin, 2010). Insofar as the globalization of the beauty industry involved the globalization of what was considered to be attractive, the societal, cultural and individual impact was profound.

The modern beauty industry, involving factory production and the marketing of brands, originated in nineteenth century Europe and North America as a very local activity drawing on long-established craft traditions and beauty rituals. The use of beauty products themselves certainly did not originate in the nineteenth century. Indeed, for thousands of years, every known human civilization has used beauty aids of one kind or another, lending support to the view that the use of cosmetic artifices rested ultimately on biological imperatives to attract and to reproduce (Gunn, 1973; Jones, 2010a;

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[1] The definition of the beauty industry used in this article includes fragrances, hair and skin care products, color cosmetics, bath and shower products, oral care, and baby care. It does not include services such as salons and hairdressers, medical products and surgery such as Botox and plastic surgery, or fashion.

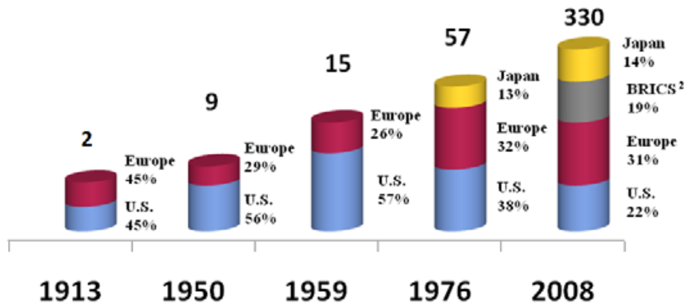
Le Guérer, 2005; Morris, 1984; Subbarayappa, 1999; Wang, 2000). In most past societies, however, access to beauty products was largely restricted to elites who had sufficient leisure and income. During the nineteenth century, industrialization made it possible to manufacture products in larger volumes, often more cheaply; transport improvements enabled entrepreneurs to seek markets beyond their immediate locality, and so prompted the emergence of brands; and rising incomes, initially in towns, enabled larger numbers of people to engage in discretionary spending, including on beauty products.

The growth of the new beauty industry was initially modest rather than dramatic. Moral objections to the use of color cosmetics lingered in many Western societies, especially outside major cities, until well into the twentieth century. Limited access to piped water and indoor plumbing restricted the demand for toiletries such as soap and toothpaste, again into the twentieth century, even in affluent Western countries. It has been estimated that only one-fifth of Americans used toiletries or cosmetics in 1916 (Peiss, 1998: 50).

There remain major uncertainties concerning the history of the subsequent growth of the global beauty industry. The reason being that few countries, except the United States and Japan, collected statistical data on the industry—such products were often included in other categories, especially that of soap and detergents. Figure 1, which provides an estimate of the growth of the industry in today's U.S. dollars between 1913 and 2008, is thus best seen as a rough approximation.

Despite uncertainties concerning the numbers, however, Figure 1 offers what seems to be a broadly accurate view of the expanding world market for beauty products in real terms. The market was initially dominated by the rich Western countries in Europe and the United States, although in other markets there is every reason to assume beauty products were being made at home and in the informal sector. During the 1920s, production and consumption soared in the affluent United States, and there is good evidence that elites in large Latin American and Asian cities, such as Buenos Aires, Tokyo and Shanghai, also became significant consumers. In 1950, as Europe and

Figure 1 Estimated Growth of the Global Beauty Market 1913-2008[1]
(in 2008 U.S. dollars)




Source: Jones (2010a: 366-367).
Notes: 1. The 1913-1976 figures are for production. The 2008 figure is for retail sales.
2. BRICS=Brazil, Russia, India and China.

most of Asia slowly recovered from the destruction of World War II, the United States may have accounted for over half of the world market, but the Japanese market grew rapidly thereafter, become the world's second largest after the United States by 1976.

During recent decades, the growth in sales of beauty products in emerging and transition markets has been phenomenal. In the 1980s, the beauty market in China was nearly non-existent, as the regime suppressed cosmetics production, while consumers in the Soviet Union could only access the products made by the central planning regime. Today, the situation is different, with Brazil, China, Russia and India—the so-called BRIC economies—now constituting the world's third, fourth, eighth and fourteenth largest markets for beauty products. Collectively, they account for almost one-fifth of the entire world market.

With this broad picture of the evolution of the world industry in mind, the paper proceeds chronologically, examining the international growth of the industry from the nineteenth century, with a focus on the products and beauty ideals promoted.

## II. Beauty and the First Wave of Globalization

The growth of the world beauty market was closely linked to the waves of globalization which began in the nineteenth century. Business enterprises were at the heart of the building of what is now called the first global economy. From the mid-nineteenth century, thousands of firms, primarily based in the Western countries which had experienced their own industrial revolutions crossed borders and established operations in foreign countries. These firms drove the rapid increase in trade flows and built most of the infrastructure of the global economy, including telegraph and railroad lines, and ports. Given the absence of appropriate infrastructure in many countries, foreign enterprises frequently not only introduced technologies specific to their activities, but also social technologies such as police, postal and education systems. Between the late nineteenth century and 1914, Western firms provided the residents of most of the world's cities with access to electricity, in their homes or at work, as well as in the form of street lighting. By 1914, world FDI was equivalent to nine percent of world output, a ratio which was not to be reached again until the 1990s (Jones, 2005a).

The first modern manufacturing multinationals—firms like Siemens and Singer—also began building factories in foreign countries during the middle decades of the nineteenth century. For example, by 1914, Singer had taken the sewing machine around the world and accounted for upwards of 90 percent of such machines in use worldwide. In comparison with such industrial giants, beauty firms were minuscule entrepreneurial enterprises, but it is striking how many of those first generation beauty entrepreneurs committed to selling their brands in foreign countries. This commitment rested, ultimately, on a perception of the universality of beauty in human societies, as well as the international ambitions of the entrepreneurs themselves. Born in an age in which international travel and communications were much easier than ever before, many pioneering entrepreneurs in nineteenth century also started businesses in countries other than their birthplaces. These included such iconic figures in the American cosmetics industry as Elizabeth Arden, Max Factor and Helena Rubinstein.

Both French and British perfume houses, for example, built large export businesses by the middle of the nineteenth century. Parisian and London perfume houses, such as Piver, Guerlain and Rimmel, opened retail shops in foreign countries to sell their brands. French perfume houses, led by the pioneering Grasse firm of Chiris, began a worldwide search for new flowers and plants, which started to transform the range of scents available to perfumer (Jones, 2010a: 22-24, 34). As a market emerged for mass produced and mass marketed brand name soaps during the second half of the century, leading British and American firms such as Lever Brothers and Procter & Gamble (P&G) energetically joined the pursuit for international markets.

While perfume and soap were at the forefront of globalizing beauty, firms making smaller emergent product categories also sought international markets. In skin care, the American firms Pond's and Chesebrough both developed strong international markets for their mass skin creams. At a higher price point, Polish-born Helena Rubinstein built a network of beauty salons selling her creams in Melbourne, London and Paris prior to 1914. She moved to New York following the outbreak of World War I, where she began to develop another business (Jones, 2010a). In another, as yet small, product category, hair dyes, Eugène Schueller invented the first safe synthetic hair color formula in Paris in 1907, which provided the basis for a new company: L'Oréal. Within a decade, the still-small company was selling its hair dyes in neighboring countries (Jones, 2010a: 49-50).

As firms advertized their brands, there were frequent assertions of the universality of beauty. The German fragrance house Muehlens, which was very active internationally, proclaimed in an advertisement for its perfumed soap in the United States in 1897 that its virtues were "upheld by beautiful women everywhere." An advert by the leading Swedish toothpaste manufacturer Barnängens maintained that "Men around the world use Vademecum" (Jones, 2010a: 35). Yet brands, and their emotional associations, were not value free. They carried with them strong assumptions from the societies and countries in which they emerged concerning what it meant to be "beautiful."

Before these and other Western firms began exporting, beauty had always been a craft which was very local in its products and traditions. There was no global standard of what it meant to be beautiful. Societies had always varied considerably, both over time and between geographies, in how they sought to enhance their attractiveness through the use of cosmetic aids, hairstyles, and clothing, and in their broader views of aesthetics. Both males and females, for example, have made extensive use of cosmetics in certain contexts. Indeed, in some societies it was the male body, rather than the female, which was held to represent the ideal beauty. As Western culture and influence expanded during the nineteenth century, Europeans and Americans became increasingly curious about, if not respectful of, the rest of the world, writing in scientific journals about the apparent differences in beauty ideals (Anonymous, 1851). In 1871, Charles Darwin confidently asserted in his book *The Descent of Man* that, "[i]t is certainly not true that there is in the mind of man any universal standard of beauty with respect to the human body" (Darwin, 1871: 353).

The international growth of the beauty industry soon challenged Darwin's view, and drove a worldwide homogenization of beauty ideals. Beauty ideals, assumptions and routines prevalent in the West spread as global benchmarks. These ideals included the aspirational status of Paris as the capital of fashion and beauty, reflecting France's established reputation for refined luxury, which was greatly strengthened by the development of *haute couture* during the middle decades of the century. As the French perfume industry grew rapidly through technological and marketing innovations, its firms linked their products firmly to this prestigious world of fashion (Briot, 2011; Jones, 2010a: 26-27). One of the peculiarities of the emergent global economy was that country, or city, of origin assumed an ever-greater importance as an indication of quality and prestige. In the case of beauty, France, and in particular Paris, became the symbolic capital, joined much later by New York.

Beauty also came to mean white. Although before the nineteenth century, Western people, with their long-established hostility to bathing, had stunk, and were probably the dirtiest societies on earth, by the end of that century Western soap brands confidently associated cleanliness with "whiteness." Crude racial stereotypes were used to advertise soap and other toiletries, which were presented as components of the Western contribution to "civilizing" colonized peoples (Burke, 1996: 17-34). The British and U.S. mass marketers of soap regularly claimed that using their soap would whiten the skin of people of color, thereby "civilizing" them (McClintock, 1995: 207-231; Sivulka, 2001: 98-106). Strikingly, however, even the advertisements of traditional Greek soap firms proclaimed that they were capable of "turning even a negro white" (Sifneos, 2002: 71).

The underlying assumptions of the beauty industry concerning ethnicity were most strikingly seen in the United States, where African-Americans represented over one-tenth of the population before World War I, but where the commercial beauty industry made no provision for their distinctive hair texture or skin tones. The mainstream beauty industry did not cater to this market because it was impossible to imagine non-whites as beautiful. This provided an entrepreneurial opportunity for African-American entrepreneurs, such as Annie Turnbo Malone and Madam C. J. Walker, who built large businesses concerned with the treatment of African-American hair, which is often tightly coiled. Whether because of a desire to look more like white people or because of a desire to make their hair more "manageable," products to "straighten" African hair became a fertile area for African-American entrepreneurs (Peiss, 1998: 67-70).

Beauty companies need to be seen as interpreters, rather than creators, of the ethnic and cultural assumptions in their societies. It was hardly surprising that at the high point of Western imperialism, white skin was considered superior, along with everything else in Western civilization. However, adroit marketing and branding strategies reinforced and diffused such values. Business enterprises diffused the underlying assumptions behind their brands—they did not originate them—but their role was nonetheless an important driver of the globalization of beauty ideals.

As Western beauty standards were globalized, non-Western countries, local ideals and practices retreated, albeit at different rates and to different extents. This shift was achieved not by force of arms, but by shaping aspirations. Nineteenth century Japan provides one example. After Japan was forced to open its doors to trade with the West, the modernizing Meiji government actively sought to change the cultural face of the Japanese people by banning traditional practices such as tooth blackening, eyebrow shaving, and male use of cosmetics (Ashikari, 2003). Although the Japanese government sought to avoid Western colonization, and facilitated the creation of indigenous firms to compete with Western firms in industries such as shipping and banking, it took the lead in imposing more Western beauty ideals on its own people. When Japanese-owned beauty companies such as Shiseido and Lion emerged towards the end of the century, they looked to France and the United States for products and brand names (Jones, 2010a: 61-62).

The momentum towards homogenization continued after 1914. The international spread and appeal of Hollywood created a powerful new driver. During World War I, the American movie industry pulled ahead of the French, which had initially dominated the cinema industry. By the 1920s, the industry was concentrated in southern California and able to benefit from the size of its home market and control of distribution networks to dominate both the American market and international markets (Bakker, 2008). Movie theatres reached almost every American town, diffusing new lifestyles and creating a new celebrity culture around stars—that shaped perceptions of beauty, especially female beauty (Banner, 1983: 283).

Beauty companies formed part of the eco-system of Hollywood and celebrity. The firm of Max Factor, based in Los Angeles, innovated in cosmetics for the needs of actors and actresses, and then commercialized those innovations, first in the United States, and then elsewhere (Basten, 2008: 46). In 1925, Lever Brothers launched the perfumed Lux bar toilet soap, which grew after a 1928 advertizing campaign asserting that nearly 100 percent of Hollywood screen stars used the brand. The association with the celebrities of the expanding film industry was reinforced by testimonials from actresses and directors (Reichert, 2003: 118-119; Scott, 2005: 184-186). Hollywood was a thoroughly capitalist enterprise, and heavily dependent on export markets, so there was no narrow definition of beauty. By the 1930s, the Hollywood studios were active recruiting actors and actresses from all over Europe and Latin America, both to make their films seem exotic and to enhance their international appeal. Female actresses were permitted a wide range of skin tone and hair color, but diversity had strict boundaries—African-Americans and Asians did not appear on screen (Berry, 2000).

## III. The Beauty Industry and De-Globalization

World War I began the disintegration of the first global economy: The international monetary system collapsed; countries expropriated the assets and intellectual property of firms based in enemy countries; ethnic and racial tensions rose, resulting in the emergence of draconian and racist immigration laws in the United States and elsewhere. The Great Depression finished the process of disintegration, and by the 1930s, trade barriers and exchange controls had lowered levels of market integration to those previously seen in the early nineteenth century.

Yet despite the efforts of politicians, the international consumer culture survived the rampant political and economic nationalism of these years (De Grazia, 2005). Hollywood movies were still shown in Nazi Germany, in part because most studios declined to criticize such repressive regimes and risk losing access to important markets. Companies such as Max Factor and Unilever were closely associated with, and benefitted from, the globalization of Hollywood through their use of celebrities to endorse their brands. The momentum towards globalization was encouraged by the multinational strategies of such leading firms. In the more expensive product categories, the fragrance house Coty and cosmetics companies such as Elizabeth Arden and Helena Rubenstein, built businesses on both sides of the Atlantic in the interwar years, and sometimes in prosperous cities elsewhere, especially Latin America. The sellers of mass market creams and toiletries, such as Pond's and Unilever, expanded their exports and even manufacturing to parts of Asia and Latin America (Jones, 2010a: 97-150).

After World War II, the Western world and Japan resumed trade and investment, and growth soared. Yet much of the world had opted out of global capitalism. The Communist world, which now included the People's Republic of China as well as the Soviet Union and its satellites, was almost entirely closed to capitalism. Much of the rest of the non-Western world first freed itself from colonial rule, and then erected formidable barriers, import and otherwise, to foreign firms as they sought to modernize and grow their economies. By 1980, world FDI was the equivalent to a mere 4.8 percent of world output—a far lower share than in 1914.

The beauty industry continued to internationalize where it was permitted to invest. After 1945, industry growth was aided by new and powerful diffusers of a Western-orchestrated international beauty culture and television reinforced the impact of Hollywood's role in diffusing Western, especially American, ideals in terms of lifestyle, fashion, and beauty. The United States became a major source of television programming for other countries, with programs dubbed or subtitled into local languages. Television was also important in turning beauty pageants, which existed well before World War II, into international media events: A British-based Miss World pageant was launched in 1951; a U.S.-based Miss Universe followed in 1952. Both pageants were televised in many countries and feminine grooming became a media spectacle that set expectations and defined aspirations (Gundle, 2008: 257-258). At a global level, the paler skins and wider eyes favored in both these contests for the first few decades represented what has been termed a "Miss Universe standard of beauty" (Van Esterik, 1996: 215).

There were new international distribution channels, too, after World War II. The first duty-free shop opened at Shannon Airport in Ireland, in 1946, to cater for trans-Atlantic passengers who had to disembark at the airport while their planes refueled. The first duty-free counter at London's Heathrow Airport appeared in 1959. As air travel expanded, duty-free retail grew, especially in Europe and Asia. Travel retail provided an important means of growing the market for more expensive fragrances, cosmetics and skin care because it exposed many new potential customers, including male international business travelers, to brands for the first time, and at tax-free prices. Overcoming consumers' reluctance to buy internationally, rather than locally, marketing beauty products became easier as consumers themselves became more international (Jones, 2010a: 209-210).

In the postwar period, consumers could buy the same brands in many markets. By 1971, Max Factor was manufacturing in eight foreign countries and being sold in 143 (Anonymous, n.d.a). Prestige perfume brands, such as Chanel or Guerlain, were widely sold in developed countries and available to the elites of non-Western developing countries. Companies such as Unilever and Colgate-Palmolive sold their soap, toothpaste and shampoo brands on five continents. Above all, aspirations had been globalized. Beauty and even hygiene was associated with Western white ethnicity, and with certain locales, notably Paris and New York.

## IV. Homogenization Constrained

Although this paper has so far emphasized the role of the beauty industry in homogenizing beauty ideals, it is important to introduce a note of caution. At no point were globalization and homogenization entirely identical processes. As firms invested internationally, they shaped markets by transferring brands and products, but they also had to respond to those new markets. The ability of firms to dictate was constrained by their need to be profitable, and in a consumer products industry, profits came by offering things consumers wanted to buy. Corporate advertising and marketing could certainly shape consumer preferences, but they were also shaped by inherited cultural and social norms which proved very resilient, even as globalization gathered pace.

As firms expanded internationally, they quickly learned that markets differed in their tastes and preferences. As the French fragrance company Coty sought to grow a U.S. business in the decade before World War I, for example, the firm identified that cosmetics and face powders represented a greater opportunity than perfumes, and built a business based on them (Jones, 2010a: 37). It was to become a familiar story in the industry—firms needed to make their products relevant to local consumers. Despite the spread of an international consumer culture, the markets for consumer products, whether those were movies or laundry soap, continued to exhibit local preferences reflective of inherited social and cultural values, linguistic differences, different climatic conditions and culinary traditions, differences in distribution systems, variations in political systems, and many other factors. The beauty industry, which sold deeply personal products that were applied to the body and affected personal confidence, was an unlikely candidate for homogenization . . . and so it proved.

The challenge of making international brands locally relevant was complex, and firms adopted different strategies. As a general rule, companies which sold premium and luxury brands sought to minimize local adaptation: They were essentially in the business of selling global aspirations associated with Paris, or later New York, to people who travelled. This meant that any adaption needed for local relevance had to be subtle, as consumers were to associate the product with Paris, not Detroit or Rotterdam. Premium brands which went very local, such as Coty in the U.S. in the 1920s, risked diluting the appeal of their brands, and were often penalized. Coty's American business, for example, collapsed dramatically after the onset of the Great Depression (Jones, 2010a: 110).

Armand Petitjean, the Belgian who founded Lancôme in Paris in 1935, experimented with a more subtle solution to seeking global relevance. He launched five fragrances sold in elegant bottles created by a renowned artist. The defining idea was to create a separate scent for women from each of the five continents by building an association between each scent and the flowers, spices, and cultural identity of each part of the world. A true beauty brand, Petitjean argued, had to be relevant to women everywhere (Jones, 2010a: 128). It was an intriguing idea, which successfully launched his new brand, but did not provide a general solution to the dilemma facing prestige brands as they went global. Too much local adaption continued to decimate even the most iconic brands. Strong brand equities, such as Chanel N° 5, could be, and were, eroded by poor marketing. Despite an iconic Catherine Deneuve advertising campaign for Chanel N° 5, aimed exclusively at the American market between 1968 and 1978, the brand was badly tarnished in the United States when it became available for sale through drug stores (Anonymous, 2003).

In contrast, as mass brands were internationalized in the interwar decades, they generally engaged in greater customization, both in their formulation and marketing. Strikingly, toiletry companies such as Colgate-Palmolive and Unilever used local celebrities rather than Hollywood stars in their advertisements for mass-marketed products. In interwar China and India, in particular, Western firms seem especially willing to use local celebrities and advertizing images when selling mass brands such as Pond's, Nivea and Lux, even though Hollywood celebrities were well-known in those markets (Jones, 2010a: 147).

Such localization reflected the substantial regional and national differences which persisted even in neighboring developed countries for the consumption of beauty products. There were, and remain, especially large variations between countries in the use of fragrances and scent preferences. French use of fragrances, for example, remained unusually high for a developed Western country. There was also a strong preference for prestige fragrances, and as a result the mass market segment was smaller than elsewhere in postwar Europe, and especially the United States. During the 1970s, over a quarter of the entire French beauty market was fragrances compared to eight percent in Germany, and French per capita consumption was twice that of Britain and Germany. In contrast, in the United States, in the mid-1950s, fragrances still accounted for less than 1 percent of the total beauty market. In Japan, and East Asia generally, there was little demand for fragrances, which remains the case today (Anonymous, n.d.b; Frost & Sullivan, 1972).

Significant differences remained between countries in the use of color cosmetics and skin care products. American women became famous for being highly "made-up," and by the early 1960s an estimated 86 percent of American girls aged 14 to 17 were using lipstick. In Europe, overall acceptance of cosmetics remained lower for much longer. In much of Europe and Japan, skin products were more important than in the United States. During the 1960s, three-fifths of the total Japanese beauty market was held by skin preparations. In Europe, skin products were used much more widely than color lines, although there were major differences between countries. In 1963, while 75 percent of German women used skin or face cream, only 54 percent of French women and 20 percent of Italians did so. While 73 percent of women in Britain used lipstick and 58 percent of French did so, a mere 25 percent of Italian women applied the product. On the other hand, Italians made much more use of eye make-up. "It is a general rule in Western Europe," one contemporary study observed, "that either the eyes or the mouth are emphasized but not both altogether" (Anonymous, n.d.b; Jones, 2010a: 190; Mann, 1968: 2, 54).

There were wide differences between countries even in toiletries. While shampoo consumption broadly increased with per capita income, actual consumption varied widely at broadly similar levels. In the early 1980s, per capita shampoo consumption in Venezuela and Argentina was three times that of Malaysia and South Africa, despite broadly similar incomes (Jones, 2008: 154). While the need to be "clean," and not to smell, became a social norm across social classes in all developed countries and among social elites elsewhere, societies continued to differ widely in which products they used, and how frequently they used them. The United States emerged as obsessively "clean" (Ashenburg, 2007: 275). In Europe, there were regional differences. Per capita consumption of toilet soap was highest in northern European countries such as Britain, German and the Netherlands. In France, Spain and Italy it remained low until the 1960s, when a slow convergence in consumption patterns began (Anonymous, n.d.c).

These variations in toiletry demand were striking in that these markets were largely dominated by the same large firms—Colgate-Palmolive, Henkel, Procter & Gamble, and Unilever. Yet these firms had to adapt to different cultural values, and variations in urbanization levels, access to piped water, and the availability and nature of washing facilities. Bathing consumed more soap than showering. Britain had a growing number of installed baths in houses—90 percent in the early 1970s—but a low proportion of showers—less than one-fifth of households—whereas the majority of households in Germany had both baths and showers installed (Anonymous, n.d.c). Germans had a special preference for bath preparations, with a particular liking for liquids with foaming properties, and scented with herbal extracts such as pine. During the 1960s, seven percent of total German beauty production was represented by this category; no other country had such a demand for perfumed soap baths and bath salts (Mann, 1968).

Multinational corporations proved to be unreliable enforcers or guarantors of homogenization. During the postwar decades, most firms remained, by later standards, quite fragmented. The name L'Oréal was not even used by most of its foreign subsidiaries, for example. The company was named SAIPO in Italy, Golden in Britain, and Haarkosmetik u. Parfümerie in Germany (Jones, 2005b: 38-42). It was common for the same product to be given different brand names in different countries. Companies marketed multiple brands under different brand names in different countries. Even the most "global" beauty brand was in practice typically very "local." It was the norm rather than the exception for brand positioning to vary between countries. In part, this reflected tensions and rivalries within large business organizations. Local managers frequently exaggerated the need for local adaptations, sometimes simply to defend their own turf, but often also because their understanding of the market gave them a greater understanding of what would be successful in their own area.

However, there were wide variations in this regard between firms, and even inside firms. Many of Unilever's large number of international brands in the postwar decades lacked consistent positioning or formulation, although it had more success maintaining consistency across countries in several large toiletry brands than in its much larger detergents and foods businesses. Lux toilet soap, which was sold on five continents by 1960 and was the largest-selling toilet bar soap, was marketed worldwide with a consistent brand positioning as the "soap of the stars" (Jones, 2005b: 142-146, 165-166). In an unusual reversal, it was the highly centralized P & G that experienced the most problems with the less-widely sold Camay bar soap. The former head of their export division later observed how P & G during the postwar decades "kept going from right to left on Camay . . . I did not recognize the Camay in Australia or in Germany because they were different" (Anonymous, 1988: 3-6; Anonymous, n.d.d).

However, even in cases when brand positioning was consistent, such as Unilever's Lux toilet soap, product formulation was usually adapted to local conditions. This was often required by government regulations as well as the cost and availability of raw materials, let alone local consumer preferences for scents, colors, and other features. The upshot was that the same brand and product often looked and smelt very differently in different countries.

Wide differences between countries in their retail distribution systems provided both a major barrier to globalization and a constraint on homogenization, as retailers and sales channels had important voices on what was sold. In Europe, Italy and Britain were at opposite extremes. In postwar Italy, the market was fragmented with the majority of outlets, most of which were individually owned:

small perfumeries, hairdressing salons, pharmacies and grocery shops. While perfumeries accounted for over one-third of the outlets for cosmetics and toiletries around 1980, there were few department stores or supermarkets. In Britain at the same time, there were few perfumery shops, but supermarkets accounted for one-quarter of cosmetics and toiletries outlets, and pharmacies almost a half, of which the Boots chain of over 1,100 retail pharmacies accounted for 30 percent. In Germany, specialist drug stores rather than pharmacies accounted for 35 percent of the market, and supermarkets only 11 percent. For much of the postwar period prestige cosmetics was sold exclusively through drug stores and perfumeries. It was only in 1981 that a major department store began to sell a prestige cosmetics range, that of Estée Lauder (Frost & Sullivan, 1983: 308-333).

In developing countries, Western firms were often obliged to make great adaptations to their formulations. In India and many other developing countries, import and exchange controls obliged firms to use alternative, local ingredients. In Thailand, Unilever's Lux held one-half of the total bar soap market by the early 1980s, but unlike in Europe or the United States, the product contained no tallow, and instead used local palm oil (Jones, 2005b: 164). The need to adapt also applied to the marketing side of the business. In the early 1970s, for example, Unilever employed the advertizing agency J. Walter Thompson to help it expand the market share for Pepsodent in Kenya, then a mere 4 percent. Another Unilever brand, Signal, held 10 percent, but both were dwarfed by Colgate's four-fifths market share. Unilever wanted to reach new toothpaste users, rather than cannibalize its existing consumers, but careful thought had to be given to the marketing campaign. While the agency had run a campaign for the brand in Italy claiming "Whiteness without scratching the teeth," this could not be used as attitude surveys indicated that Kenyans blamed (correctly) yellowed teeth on the high levels of natural fluoride in their water. The next campaign idea to claim that Pepsodent would deliver the "big white smile of success" was abandoned when it was realized that the concept of "success" was hard to explain in Swahili, the local language. After several more experiments, the agency settled on a "Dangermouth" campaign, which claimed that Pepsodent gave relief from the prospect of toothache. However, figuring out the right campaign message remained as much as an art as a science (Anonymous, n.d.e).

## V. Spiky and Flat Worlds in the Second Global Economy

The latest stage of globalization, which began during the 1980s, has sometimes been called the second global economy (Jones, 2010b: 150-154). The most striking characteristic has been the re-integration into the international economy of large parts of the world that had opted out for many decades. The countries opting in included Russia and China, formerly closed Communist economies, and many developing countries, such as India and much of Latin America, that had been so closed and protectionist that previously they had hardly counted contributed to the international economy. The new wave of economic integration, by most measures, reached and began to surpass the pre-1914 high point of globalization, with the significant exception of labor markets, which remained highly regulated by national immigration controls.

The impact of the latest wave of globalization on the beauty industry has had paradoxical effects. On the one hand, the beauty industry underwent unprecedented globalization, including the large-scale penetration of the U.S. market by foreign firms, the spread of mega-brands, and the re-opening of China and Eastern Europe to the global industry. Also, the impact of the globalization of celebrity culture, and the diffusion of the aspirational appeal of New York and Paris to a new generation of consumers in China, India, Russia and elsewhere, has been striking. Certain beauty ideals, especially for women, have become widely diffused worldwide, including wide-eyes, paler skin, and thin bodies.

This has been an era of consolidation in the industry, in which global giants have grown rapidly through acquisitions, and rolled out brands rapidly. Much the same consolidation was evident in other consumer products industries, such as alcoholic beverages (Lopes, 2007). In beauty, L'Oréal and Procter & Gamble were emblematic of the scale of changes; during the 1980s both were primarily confined to their home regions. Today, the two firms are the largest in the industry, collectively selling a quarter of the world's beauty products.

In the 1980s, L'Oréal was still primarily a European company, with a small business in the United States, and none at all in Asia. Over the following decade, the firm bought leading U.S. brands such as Redken, Maybelline and Soft-Sheen Carson, and subsequently acquired Japanese brands such as Shu Uemura and British brands such as The Body Shop. It opened businesses in Russia and then China, introducing its French and recently acquired U.S. brands into them. In the mid-1990s, 63 percent of the company's business was still in Western Europe, and 20 percent in North America. A decade later, thanks to rapid growth in new markets, the percentage of sales concentrated in Western Europe had fallen to 46 percent, and North America had risen to 27 percent.

In the case of Procter & Gamble, it had only a modest shampoo and bar soap business, concentrated mainly in rich countries, in the 1980s. Thereafter, acquisitions of brands such as Max Factor, Clairol, Wella and Gillette gave the firm a huge global presence. During the decade stretching from the mid-1990s to the mid-2000s, the U.S. firm became the world's largest hair care and men's grooming products company, the second largest in oral hygiene, and the third largest in color cosmetics and bath and hygiene (Jones, 2010a: 302-308).

These two firms, and others, responded to the opening of Russia, China and other countries with a surge of globalization was exemplified by the rapid geographical diffusion of "mega brands" such as L'Oréal Paris, Pantene, Nivea and Dove. The beauty companies, along with many other consumer products companies in this era, sought to pare down their brand portfolios to what they considered "core" brands, which enjoyed large sales and could be expanded across markets and to different cosmetic and personal care product categories. The pace of the worldwide roll-out of brands was unprecedented. When L'Oréal acquired Maybelline in 1996, the brand only had seven percent of its sales outside America, and the company was based in Tennessee. L'Oréal rapidly moved the company to New York, transformed its products through the application of its own technologies and people, and rebranded it as Maybelline New York. The Maybelline New York brand was the launched in 80 additional countries within five years. A disciplined global brand image of American modernity—urban, relaxed and hip—was enforced, even though the make-up was formulaically adapted to skin types and weather across the globe. The fast roll-out of the brand was achieved partly by buying prominent local brands, such as Miss Ylang in Argentina in 2000 and Colorama in Brazil in 2001, which were integrated into Maybelline (Jones, 2010a: 308; Jones, Kiron, Dessain, & Sjöman, 2006).

The merger of such prominent local brands into global behemoths would appear to provide compelling evidence of the further erosion of the particular local by the homogenized global. However there were other political, social and cultural trends during these decades which worked in different directions. During the 1960s and 1970s, the Civil Rights movement in the United States and decolonization in Asia and Africa defenestrated a world in which white and Western were automatically assumed to be superior. As Western societies grew more ethnically diverse, and as the rights of minorities were recognized and in rare cases celebrated, any imagined world of blond and blue-eyed white beauty has given way to multi-ethnic beauty ideals. In the United States, the narrative of the melting pot gave way to the image of the mosaic.

The rapid economic growth of China and India, especially, but also some other emerging markets, also raised awareness of both and the status of non-Western cultures and physical types. The impact is evident in the increasing worldwide popularity of Bollywood and other non-Western cinemas and the spread of "ethnic" cuisines (Kavoori & Punathambekar, 2008). It can also be seen in the increasing popularity of fashions originating beyond the West, as seen, for example, in the growth of a high-end fashion-industry in India from the mid-1980s (Khaire, 2011). In beauty, this trend has stimulated a re-assertion of local traditions, and a new confidence that Asians or Africans are just as beautiful as anyone else.

While the spread of mega brands might be seen as driving the further homogenization of beauty ideals, in fact, the outcome was often more nuanced. While the core claims, and usually the core technologies, of such global brands were the same worldwide, companies paid evermore regard to ensuring that the form in which such claims and technologies was delivered, whether in jars or creams, and the scents employed, were relevant to consumers in each market. Global marketing campaigns increasingly incorporated considerations of cultural and ethnic differences in markets. Mass consumer brands had long tended to contain a substantial degree of local content in their presentations, but now even while prestige brands reflected the trend.

A significant example may be drawn from the strong preference for skin whitening products in Asia. During the postwar decades, Japan, among other countries, emulated the Western preferences for suntanning, but this fashion declined steeply towards the end of the century. In its stead, there was a reversion to traditional preferences for very pale skins, and the products which promised to deliver such skin tones. Shiseido launched a successful Whitess essence cream in 1989, and many Western companies such as Chanel, Christian Dior and Yves Saint-Laurent also sold whitening cosmetics for the Japanese market by the middle of the 1990s (Ashikari, 2005).

Western firms drew on their expertise with Japanese lightening creams as the Chinese market opened, hoping to cash in on a similar historical preference for fair skin. Lancôme, for one, rapidly established itself as the leading prestige brand in China after its launch in 1999, primarily thanks to its skin-lightening products. Although globally Lancôme sought to maintain a consistent brand image, the historical development of the brand meant that it needed to communicate its values in different ways in different regions. By the first decade of the new century, two-thirds of the brand's sales in Asia were skin care products, but in the United States half its sales were make-up and most of the remainder skin care products. In Europe, sales were more evenly balanced between skin, make-up and fragrance. While in the United States the brand heavily emphasized efficacy in fighting things like wrinkles; in Europe marketing carried more emotional images about skin; while in Asia the brand emphasized its impact on the purity and lightness of skin (Jones, 2010a: 324).

The Lancôme story played out in China, as well as other East Asian markets. Western and Japanese brands retained enormous aspirational value compared with the local Chinese brands they had secured after entering the country during the 1980s, but consumer demand for more local content also grew stronger, and resulted in the inclusion of more local models in advertisements. Still, luxury brands as a whole remained wary of giving too much ground to localization, and cautious about using local models, but a search for local relevance has also been apparent in recent years. In China, as well as Japan, South Korea, and Taiwan, prestige advertisements in beauty magazines began to appear in the form of a Western global spokes-model in the front of a magazine, but with three to six pages of local models near the end. There was also a demand for more local ingredients, and while Chinese consumers embraced the aspirational values of leading American and French beauty brands, they also sought out Western shampoos including such familiar, local ingredients as ginseng (Jones 2010a: 326).

Globalization came to serve as a diffuser of non-Western beauty norms. A case in point was Unilever's highly successful skin whitener, Fair and Lovely, launched in India in the 1970s (Jones, 2010a: 174). The brand was so successful that it held well over half of India's $200 million skin lightening market in the first decade of the new century. Unilever also began to globalize, or at least regionalize, the brand. It was launched in Sri Lanka in 1992, and then in nearly forty countries in Asia, Africa, the Caribbean and the Middle East over the following two decades. Unilever, a leading Western consumer products company, is now globalizing a non-Western vision of beauty. There are major issues of legitimacy here: the brand's association of fairness with female beauty, a long-established tradition in India which predates the

British colonial era, and claims that its use enables women to find a better husband or better employment, would do more than raise eyebrows if it was sold in the United States or Europe. In India itself there is substantial criticism that such advertizing was both racist and demeaning to women, as well as to men who were increasingly also buying such creams (Johnson, 2007; Kazmin & Lucas, 2011). Nevertheless the brand can be seen as part of a wider trend of the globalization, or regionalization, of brands which has proved a strong trend over the last two decades (Cayla & Eckhardt, 2008).

The rediscovery of local ideals and ingredients previously swept away by the era of industrialization—or at least a re-imagination of such local traditions—also provided new opportunities for local firms in an industry in which American and Western European firms had so long dominated. Korres, a Greek firm which grew from a single Athens pharmacy in the 1990s, making natural products using traditional knowledge of herbs and flora in the country, has expanded rapidly throughout Europe and the United States over the last decade. In Brazil, now the world's third largest beauty market, locally-owned Natura, has sales of over $1 billion and is market leader in the country. This 40-year old direct sales company, pursues a remarkable social and environmental agenda, which includes sourcing ingredients from indigenous peoples in the Amazon. One of its founders even ran as the Vice-Presidential candidate for the Green Party in the recent Brazilian election. It has, in recent years, also opened businesses elsewhere in Latin America, and even in France, the capital of beauty.

In China, local firms such as Shanghai Jahwa are building brands using past traditions. This firm has its origins in 1898, and its first brand, Shanghai Vive (Two Girls) excelled in a market otherwise dominated by foreign products. The company fell on hard times during the era of Mao Zedong, when it was reduced to making household cleaning products, but in recent years it has flourished again in beauty. The Herborlist brand, launched a decade ago, builds on the traditional Chinese herbal ingredients used in Chinese medicine to enhance the condition of the skin. More recently the Shanghai Vive brand has been revived; it's packaging and marketing drawing heavily on images of style and opulence in old Shanghai. Shanghai Jahwa, like Natura, sells its products in France, and has expressed global ambitions (Deighton, Kornfeld, He, & Jiang, 2010).

It remains to be seen how far the global ambitions of Brazilian and Chinese firms will be realized. Japanese companies such as Shiseido and Kao have pursued global markets since the 1960s, if not earlier, only to find Western consumers skeptical, and have increasingly reverted to a focus on their regional market, where their brands find acceptance with consumers. South Korean firms such as AmorePacific have repeated this story more recently (Jones, 2010a: 314-315). Moreover, Western firms are eager buyers of successful, especially premium, brands in emerging markets, which they can use both to grow businesses in those countries, and to respond to growing Western consumer interest in non-Western beauty ideals. In China, L'Oréal acquired Yue-Sai in 2004, Beiersdorf acquired C-Bons in 2008, Johnson & Johnson acquired Beijing Dabao in 2008, and Coty acquired TJoy in 2010. In India, which has even fewer good quality local brands than China, Estée Lauder acquired control of Forest Essentials in 2008. In 2010 LVMH Moët Hennessy Louis Vuitton acquired a controlling majority stake in Sack's, an online retailer of fragrances and beauty products and one of the leading companies in Brazil's specialty beauty distribution channel.

While globalization in the past, then, led to a homogenization of beauty ideals and practices, today there is a revival of local traditions, real or imagined. Globalization is also enabling alternative visions of beauty, whether Chinese or Brazilian, to be offered to consumers worldwide, both by local firms and by Western firms anxious to offer their consumers more choices. Whether, or if, Shanghai and Rio de Janeiro become as globally relevant as beauty capitals as Paris and New York, remains to be seen. However, it is evident that there is a new pluralism in beauty markets worldwide. This is facilitated by the breakdown of once rigid distribution channels, as specialty stores, television shopping channels, and e-commerce offer consumers more choices. The web and social networking has also empowered consumers of beauty products to make choices compared to two decades ago.

They have far more knowledge, and more confidence in themselves, and the power of corporate behemoths to dictate beauty standards has waned. Brand managers today ignore bloggers at their peril.

Finally, a word of caution is needed. The revival of the local in beauty looks strongest when the focus is on beauty products, where local ingredients and local models resonate with consumers. The enduring legacy of the past era of homogenization is much more evident in the cosmetic surgery industry. In particular, East Asian demand for double-eyelid and nose surgery, designed to make people look more Western, which first appeared in Japan as early as 1896 (Sergile & Obata, 1997), shows no sign of abating. In South Korea, this has driven the world's highest rates of cosmetic plastic surgery, followed at some distance by Taiwan and Japan. Even if such high rates as those seen in South Korea were driven by local social pressures for conformity, the end-result has been the Westernization of female (and some male) facial ideals (Kim, 2003).

## VI. Conclusion

This article has explored the impact of globalization on worldwide beauty ideals and practices. As the world globalized, there was an unmistakable homogenization of beauty ideals and practices around the world. In the age of imperialism, Western and white beauty standards emerged as global ideals. This was historically contingent on the unique circumstances prevailing at that time, but once the ideals were in place, the strategies of business enterprises helped reinforce it. As the beauty companies built international markets through exporting and foreign direct investment, they diffused perceptions of beauty and not simply skin creams and lipsticks. Firms turned societal and cultural ideals into aspirational brands, artfully taking norms around the world, in part through using their marketing skills to make them appear locally relevant. The momentum behind this standard was reinforced by the impact of Hollywood and other drivers of an international consumer culture, despite the spectacular breakdown of the first global economy due to world wars, the Great Depression, and the spread of nationalistic regimes. Beauty companies formed an important component of a wider business eco-system, which including movie studios, pageant organizers, and fashion magazines.

Yet the process of homogenization, powerful as it was, was never complete. The local was never entirely subsumed by the homogenized global. Convergence and homogenization were stronger in aspirations than in preferences for particular products or scents, which remained more persistently local, despite the spread of global brand names. Moreover, the multinational firm was never monolithic, in beauty or any other industry, while fundamental cultural and social values and preferences proved deeply ingrained.

The more recent era of globalization—that since the 1980s—has coincided with a strong revival in interest in local traditions and practices, which is particularly noticeable in some of the fastest growing emerging markets, such as China. Certainly, as trends in cosmetic surgery illustrate, the legacy of the first wave of globalization and its emphasis on the Western beauty ideal, persists. But the leading firms in the beauty industry certainly now find themselves struggling with the challenge of how to respond to consumers who require increasingly nuanced mixtures of the global and the local in the brands they buy. The strong market positions of a number of very large companies mean that we are seeing to some extent an "orchestrated" diversity, but the current fragmentation of distribution channels, the empowerment of consumers through the web, and the rise of new entrants, has also set constraints on the ability of large corporations to orchestrate. If Henry Kissinger was right that globalization in the past was another name for Americanization, or at least Westernization, this is not the case now. In beauty, as in many other things, globalization is no longer a one-way street. Beauty is at the epicenter of the contradictions in today's world, which is simultaneously growing evermore flat, and evermore spiky, as the local re-asserts itself, and the wealth of countries and regions beyond the West grows.

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# 全球化與美：史學與企業研究的視野

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## 摘　要

本文以美麗產業為例，探討全球化長久以來的影響。當近代第一波的全球化在十九世紀開展之後，全球對於美的觀念開始邁向同質化的趨勢，此趨勢多少延續至今，並對社會及文化帶來巨變，而企業也在這過程中扮演極為重要的核心角色。本研究探討企業家與企業如何將社會價值轉化成品牌，並將其推展至世界各地，最後進而改變整個社會對美的認知。本文也揭示，儘管在全球化最激烈的時刻，由企業所推動之全球同質化的成效相當有限，最後本文提出有力論據，證明全球化浪潮再次有助於當代美感觀念的更多元化發展。

**關鍵詞**：美、全球化、文化