

Key findings

Unilever's top-selling beauty brand bolstered by line extensions and new product launches

Dove represents one of the 12 core brands at Unilever that generates sales of over than US\$1 billion. Entrance into men's grooming with Dove Men+Care in 2010 responds to the company's strategy of "winning in the marketplace" by extending its deodorant and bath and shower lines to the male demographic, whilst Dove VisibleCare and Visible Effects indicates Dove's continuing dedication to product content innovation.

HDPE enjoys widest cross-category use

In Dove's leading applications of body wash/shower gel, hair care and body care, HDPE is the standard polymer specified for all rigid plastic bottles, stemming from Dove's iconic white bottle with blue contrast colour cap; such widespread specification of HDPE can enable the brand to garner economies of scale in sourcing packaging materials.

Understands the provision of customised pack type and size solutions applicable to local needs

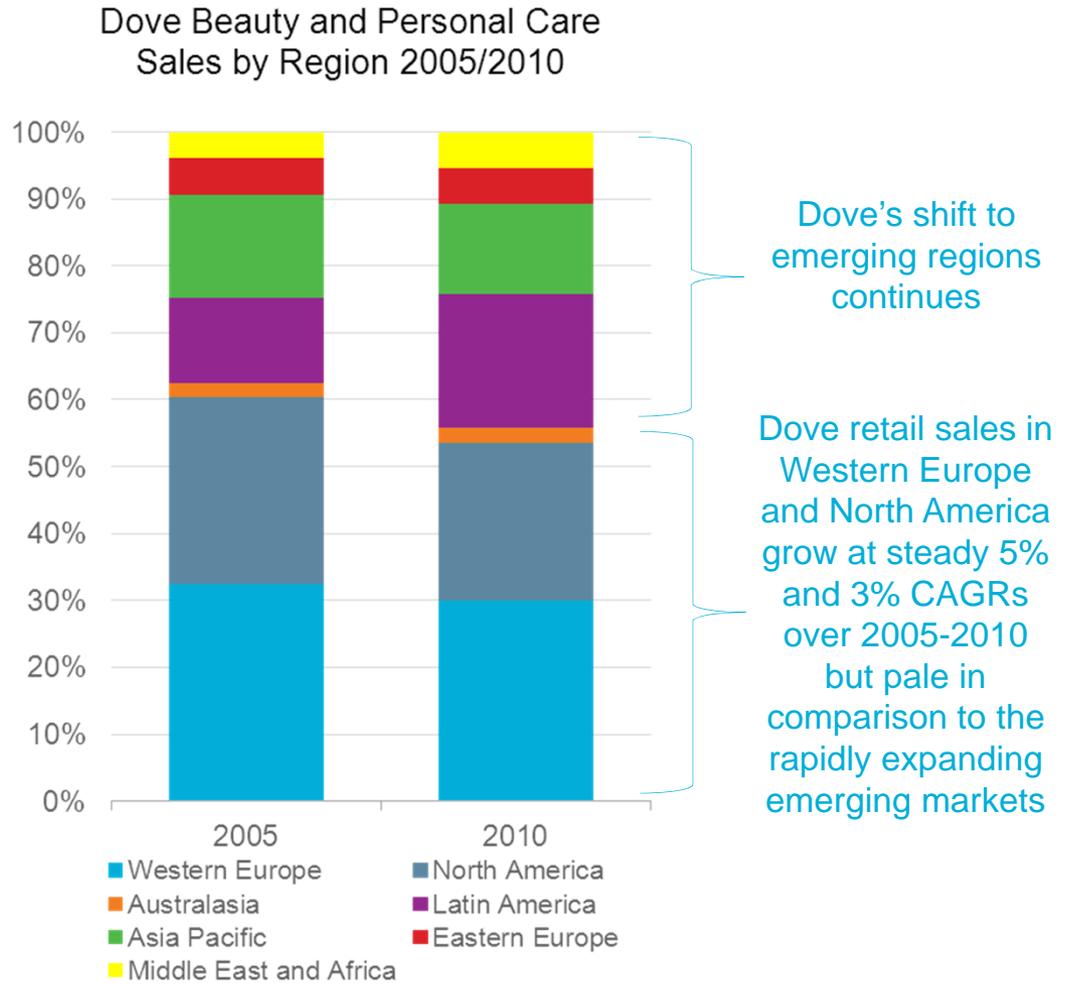
Across Dove countries, there is a commonality in packaging type and size in evidence with 200ml HDPE bottles a very popular sight for Dove body wash. The brand, however, illustrates an understanding of how local buying patterns can vary, adjusting packaging accordingly, critical to any brand's success. It retails 8ml hair care sachets for its rural customer base in India, whilst 400ml body wash bottles are retailed in Spain where there is a culture of buying bigger sizes.

Coherence of Dove's packaging family to be retained in brand's expansion

As Dove diversifies its country and category reach, entering into new categories like lip care and adding new product lines like Dove VisibleCare and Dove Men+Care, it is essential that the brand's packaging design clearly communicates the essence of the Dove brand to avoid any loss of brand recognition.

Regional shift sees Dove sales in emerging markets rise in stature

- Dove is a truly global brand with 2010 retail value sales quite evenly divided between developed and developing regions with 56% of global sales derived from the established world regions of Western Europe, North America and Australasia.
- The geographic balance of power is, however, shifting in favour of emerging regions, with Dove retail sales in Asia Pacific, Eastern Europe, Latin America and Middle East and Africa up from 37% of global sales in 2005 to 44% in 2010.
- The brand's strong position in key growth countries like India and Brazil puts Dove in good stead to further its already influential emerging market presence. Asia Pacific offers ample opportunity, with China, a largely untapped market for Dove but one that offers lucrative gains if developed.



Importance of traditional retail outlets to future Indian sachet sales

- A traditional retail infrastructure with Kirana stores in India and Warung stores in Indonesia contributes to driving small sachet sales over larger rigid plastic bottle sales in shampoo.
- In India, such traditional, small grocery retailers account for 54% of hair care sales as opposed to less than 1% in the US where specialist health and beauty retailers are most significant, indicative of just how different shopping patterns can be between developing and developed countries.
- India's pack mix clearly shows the absolute need for Dove to supply in a pack appropriate to diverse consumer needs and ways of buying; this will be pertinent to the brand's success as it aims to grow position in emerging markets.



Kirana stores in India and Warung stores in Indonesia where sachets of shampoo and conditioner are a common sight

Dove shows continuity in body care bottle shape, variation in colour

- Dove specifies a similar shaped bottle across many of its body care lines, but shows variance in colour. Whilst many adopt the Dove signature white, colours vary in Dove pro-age where a rich red is the dominant colour chosen for all Dove pro-age product lines, irrespective of the product type or pack format specified.
- The brand uses HDPE for all plastic bottles in body care; this global specification of HDPE enables the brand to procure economies of scale in its purchasing of packaging, further beneficial as HDPE is also specified in bath and shower and hair care. Dove Visible Effects launched in January 2010, in contrast, is filled in a tottle.

