



# DOVE FLIES HIGH; PANTENE WAITS IN THE WINGS

*HUL's premium hair care brand is in the driver's seat now, but things could change as P&G has relaunched Pantene*

VIVEAT SUSAN PINTO

**W**hen Hindustan Unilever (HUL) chose to give a tongue-in-cheek response to Procter & Gamble's 'Mystery Shampoo' teaser campaign on hoardings across Mumbai, the spotlight fell on the brand it selected for the purpose - Dove.

HUL used Dove cleverly to announce that it was indeed the leading shampoo at the premium end of the ₹3,600-haircare market.

Numbers support the claim. Nielsen's latest data (for the month of July 2010) show that in modern trade, Dove is ahead of Pantene by a large margin in the category of shampoos. Its value share is 18.6 per cent to Pantene's 10.1 per cent. In the top six metros of the country, Dove has a value share of 12.6 per cent to Pantene's 11.7 per cent. In urban

India, Dove's share is marginally behind Pantene's 11.1 per cent at 10.6 per cent, while, on an all-India basis, Dove is 7.9 per cent to Pantene's 9.4 per cent.

"Our hair category performance," says Gopal Vittal, executive director, home & personal care, HUL, "has been a source of pride for us." HUL's hair category market share stands at 46 per cent at the moment. "The challenge for us is to keep growing this category. In the process, if we get to 50 per cent share, that is terrific," says Vittal.

Brands that will play a key role in this endeavour will be Dove, among other products.

"The core of Dove," he says, "is about moisturisation and prevention of dryness in a way that is relevant to every category it has been extended to."

Vittal isn't off the ball here. From cleansing bars to shampoos, conditioners, face washes, body washes and deodorants,

Dove has been extended with the same two principles in mind - moisturisation and prevention of dryness. At times it hasn't been easy - like in deodorants - which depends largely on fragrance and freshness, but HUL has found a way out there.

Vittal explains, "Though fragrance and freshness are key, women are also concerned about the underarm skin being darker than the skin across other parts of the body. Under arm skin is darker because it is less moisturised and drier. Dove Deo addresses this concern with a product that helps the underarm skin get moisturised and therefore lighter with regular usage even as fragrance and freshness is delivered."

This is not all. Dove's anti-dandruff variant, launched earlier this year, also addresses the dry-hair concern that women have, besides, of course, dealing with the issue of dandruff control, says

Vittal. "What we learnt prior to the launch is that women were concerned about their hair turning dry with regular usage of anti-dandruff shampoos. That Dove prevents dryness besides containing an effective anti-dandruff agent has helped the variant pick up in the marketplace. Response has been good from consumers."

It is not only the recent anti-dandruff shampoo, but most extensions, say industry experts, that have been well received thanks to the twin properties of moisturisation and prevention of dryness. As things stand now, Dove's total turnover is over ₹500 crore. The extensions, says Vittal, have happened in the last three years, beginning with shampoos in mid-2007. "We have steadily expanded," he says.

But, with P&G upping the ante in the crucial segment of shampoos, analysts say Dove's position could be challenged in the future.

P&G has relaunched Pantene with a new formulation and packaging in five Asian markets including India, say industry sources. The pricing is also competitive - a 90-ml Pantene bottle is available at ₹59, while a 100-ml Dove (there is no 90-ml bottle) is priced at ₹64 respectively. Pantene's 200-ml bottle, meanwhile, is available at ₹117, which is also the case with Dove, though the latter's anti-dandruff variant is available at ₹134 for a 200-ml bottle. "The relaunch of Pantene is an attempt to gain lost ground," says Shirish Pardeshi, senior FMCG analyst at Mumbai-based brokerage firm Anand Rathi. When contacted, a P&G spokesperson declined to comment about the rationale behind the relaunch of Pantene as well as the company's marketing plans to gain share in shampoos.

But, persons familiar with the development say the real challenge for Dove will emerge in about three to six months, when the old Pantene inventory will be exhausted and offtake for the relaunched product will begin to show. "At this stage, traders are still clearing the old Pantene stocks. Most of them prefer to do it that way. So sales for the relaunched product will not be truly reflected at this stage. Once the old stocks are cleared, sales for the relaunched Pantene will begin to show," says a person in the know.

Till then Dove has a smooth going.