

Papers

Developing a glocalisation strategy: experiences from Henkel's product launches in the Middle East and Europe

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Svend Hollensen

SVEND HOLLENSSEN

is the author of globally published textbooks such as 'Marketing Management', 3rd edn (Pearson, 2014) and 'Global Marketing' 6th edn (Pearson, 2014). His work has also been published in numerous internationally recognised journals. He has a PhD from Copenhagen Business School, and his research interests are within relationship marketing, globalisation, global branding and the internationalisation of companies.

CHRISTIAN SCHIMMELPFENNIG

is Director of Executive Education at the University of Liechtenstein. He has a PhD from the University of St Gallen and his research interests lie in the area of advertising and branding strategies.



Christian Schimmelpfennig

Abstract

The glocalisation strategy strives to achieve the slogan, 'think globally but act locally', through dynamic interdependence between headquarters and subsidiaries and/or local intermediaries around the world. Companies following such a strategy coordinate their efforts, ensuring local flexibility while exploiting the benefits of global integration. The challenge is to balance local knowledge with global reach. In the case of Persil Abaya Shampoo (for the Middle East market) and Persil Black Gel (for the European market), Henkel chose a strategy that successfully benefited from the 'economies of scope' in the purchasing department as well as in production and packaging. But by using an adapted product communication, plus individualised packaging designs, product positioning and marketing communications for the two regions, Henkel honoured the cultural heterogeneity of its target markets and used Persil Abayas' particular significance in the Arab world to its advantage. The results document that it has been possible for Henkel's Persil to gain competitive advantages in terms of higher market shares, with the 'glocalisation strategy' in the (Middle East) liquid detergent market.

Keywords

glocalisation, global marketing, internationalisation, standardisation, adaptation

Svend Hollensen,
Department of Border Region
Studies, Alision 2, DK – 6400
Sønderborg, Denmark

E-mail: svend@sam.sdu.dk

Christian Schimmelpfennig,
Fürst-Franz-Josef-Strasse, 9490
Vaduz, Liechtenstein

E-mail: christian.schimmelpfennig@uni.li

INTRODUCTION

With the implementation of new products, many chief marketing officers must decide whether to pursue a global or a local marketing strategy. While global strategies use so-called 'economies of scope'

and therefore go easy on the marketing budget, local marketing strategies promise a greater success due to a better matching of the product to customer needs. A so-called 'glocal' marketing plan combines the advantages of both ways and therefore

represents a promising marketing strategy to introduce a product to the market.

Basically, efficient global marketing means identifying and satisfying global customer needs more precisely than one's competitors. Thus, a lot of marketing experts find themselves stuck in the following dilemma: due to a high cost pressure in an increasing global market, it is necessary to generate cost benefits while using a global product portfolio combined with a global communications strategy. At the same time, marketing experts realise the economic and cultural disparity of clustered target markets. Consequently, the challenge for marketing is to find a balance between a culturally adequate range of products and its commercialisation in order to meet heterogeneous customer needs as well as the use of economies of scope during product development and communication. Therefore, the marketing has to meet the challenge of designing the product along with its marketing as consistently as necessary while being as individual as possible. A 'glocal' strategy aligned with the contrary strategies 'global' and 'local' seems to provide a promising way out in a lot of cases.

The purpose of this paper is:

- to explain and discuss the concept of glocalisation from a company perspective, especially the Henkel (Persil) perspective;
- to develop a theoretical framework for developing a company's glocalisation strategy and refer to recent empirical results regarding glocalisation from the literature;
- to introduce the case of Henkel's glocalisation strategy within Persil's black liquid detergent, especially illustrated by the penetration of the Middle East market in comparison with the European market;
- to analyse development in the liquid detergent market in order to document whether the glocalisation strategy was successful for Persil in the Middle East.

GLOCAL MARKETING STRATEGIES

Within the field of international marketing, the debate over the extent of standardisation or adaptation has occupied a significant part of past research.^{1,2}

Supporters of standardisation view markets as increasingly homogeneous and global in scope and scale and believe that the key to survival and growth is a multinational's ability to standardise goods and services. For example, Levitt argues that the standardisation of the marketing mix and the creation of a single strategy for the entire global market offers economies of scale in production and marketing and moreover is consistent with what he describes as the 'mobile consumer'.³

On the other hand, proponents of adaptation such as Kashani argue that there are difficulties in using a standardised approach and therefore they support market tailoring and adaptation to fit the unique characteristics (eg cultural issues) of different international markets.⁴

Following this discussion, when a company decides to begin marketing products abroad, a fundamental decision is whether to use a standardised marketing mix with a single marketing strategy in all countries, or to adjust the marketing mix to fit the unique dimensions of each potentially unique local market. The expanded marketing mix of seven 'Ps' (product, price, place, promotion, people, physical evidence, process) is often appropriate, in order to relate to companies that belong to the service sector and/or have strong service elements.

The decision as to whether to standardise or adapt should not be considered

as an either/or decision. Certain academics suggest that the standardisation of certain marketing mix elements (eg product) and adapting others (eg promotion) to different market conditions may be necessary.^{1,2}

Developed by the sociologist Robertson,^{5,6} glocalisation is a theoretical concept that combines the two words 'globalisation' and 'localisation'. Glocalisation refers to the interface between a global and a local marketing strategy by combining dynamics of cultural homogenisation and heterogenisation. Whereas globalisation, in and of itself, stresses the omnipresence of corporate or cultural processes worldwide, glocalisation stresses particularism of a global idea, product or service. Glocalisation is not merely another take on niche marketing, now global. Rather, glocalisation also adds accuracy to the present globalisation approach among scholars and practitioners.

Glocalisation theory fuses relationships, balance and harmony between cultural homogenisation and heterogenisation, standardisation and adaptation, homogenisation and tailoring, convergence and divergence, and universalism and particularism. Glocalisation is important because it questions the very model of Western cultural imperialism. From this vantage point, globalisation strengthens the consciousness of the world that pervades both the local and the global. This opposes the argument that globalisation is a fully homogeneous process. On the contrary, while globalisation gears towards some degree of cultural homogenisation, glocalisation simultaneously permits people to identify more strongly with their local culture.

Glocalisation emphasises that relocating a theme, product or service elsewhere has a higher chance of success when it is accommodated to the local culture in which it is introduced.

This glocalisation strategy strives to achieve the slogan, 'think globally but act locally', through dynamic interdependence between headquarters and subsidiaries. Organisations following such a strategy coordinate their efforts, ensuring local flexibility while exploiting the benefits of global integration and efficiencies, as well as ensuring worldwide diffusion of innovation.

Principally, the value chain function should be carried out where there is the highest competence (and the most cost effectiveness), and this is not necessarily at the headquarters.

The two extremes in global marketing, globalisation and localisation, can be combined into the glocalisation framework, as shown in Figure 1. The glocal strategy approach recognises that there has to be a balance and overlap between the standardisation versus the adaptation. This focus of balance between globalisation and localisation is crucial in the development of a company's glocal marketing strategy.⁷

Consequently, successful global marketing is increasingly dependent on the managers' ability to:

- develop a global marketing strategy, based on similarities and differences between markets;
- turn the heterogeneity of the target markets into a competitive advantage;
- exploit the knowledge of the headquarters (home organisation) through worldwide diffusion (learning) and adaptations;
- transfer knowledge and 'best practices' from any of its markets and use them in other international markets.

While implementing a glocal marketing strategy in the Middle East and Europe, the Henkel group considered these four factors of success (see also the case of Henkel's Persil).

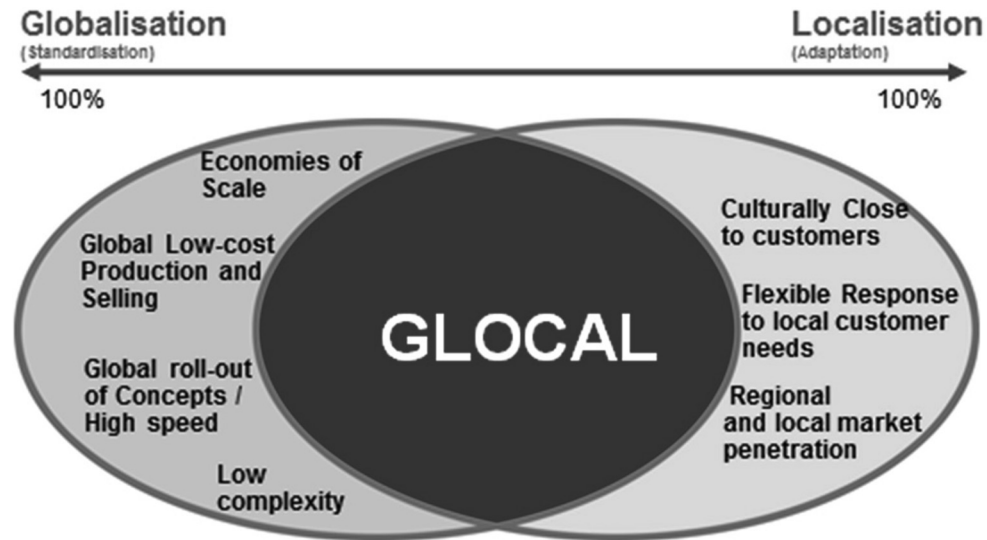


Figure 1 The overlap of globalisation + localisation = glocalisation
 Source: Based on Hollensen, S. (2014) 'Global Marketing', 6th edn, Pearson Education, Harlow, p. 22.

RECENT EMPIRICAL RESEARCH ON GLOCALISATION STRATEGY

In what follows, this paper will go through the most recent empirical research on the company's use of the glocalisation strategy.

Jiang and Wei⁸ examined the advertising strategies of multinational corporations (MNCs), selected from North America, Europe and Asia, which advertise in two culturally different markets — the USA and China.

Jiang and Wei⁸ demonstrate that MNCs are found to be more likely to adopt the glocal advertising strategy in culturally distinct markets, in which creative strategy is standardised and execution is localised and differentiated across borders. The popularity of the glocal strategy makes sense because it follows the contingency perspective — the best advertising strategy depends on the cultural context in which the most effective advertising combines the standardisation and differentiation approaches.

According to Jiang and Wei, EU-based MNCs are the most likely to pursue

the standardised advertising approach, whereas North American MNCs tend to standardise less, and Asian MNCs are the least likely to standardise their international advertising.⁸ What accounts for these region-based differences? From the global marketing strategy perspective, MNCs are more likely to follow a strategy if the environment from which they originate is conducive to that strategy. As EU markets further integrate, the integration will lead to a higher level of standardisation of advertising across borders. Asian MNCs are less likely to pursue advertising standardisation in the era of globalisation as compared with their counterparts in other continents. Major markets in Asia, such as China, India and Japan, remain distinctively different markets with no integration compared with the EU countries.

Finally, and most importantly, Jiang and Wei provide empirical support for the argument that global marketing practitioners have experienced a 'paradigm shift', from globalisation to glocalisation, where

products and message development no longer rely on maximising economies of scale to be effective, but are focused on developing a strategy where local consumers' specific needs and local conditions are being taken into account.⁸

According to Chung *et al.*,⁹ in large companies (like Henkel) the use of the glocal strategy leads to higher market shares than the use of localised strategies. These authors show that, if the cultural distance is high, the company's standardisation of the product and the adaptation of the promotion lead to overall higher market shares.

CASE STUDY

A glocal marketing strategy made by Henkel in the detergent market: Persil Abaya Shampoo (Middle East) and Persil Black Gel (Europe)

Before going into the specific Henkel (Persil) case, the paper will present a short overview of the detergent market in Europe and the Middle East.

The market for detergents in Europe and the Middle East

For powder detergent, Western Europe still held 12 per cent of global volume sales in 2010, but demand has been falling as consumers switch to the more convenient liquid detergent products. The powder detergent category is coming under increasing pressure from liquid detergents. Liquid detergents are particularly popular in North America and Western Europe. In Europe, liquid detergents account for 40 per cent of the detergents category by value.

While there are convenience benefits for the consumer in using liquid detergents, the key benefits are for the manufacturer. They are cheaper to produce and

so their margins are a lot greater — it is therefore in their interests to promote them.

The Middle East accounts for only 7 per cent of the worldwide detergent ingredient volumes, but posted the fastest growth between 2005 and 2010 with a 10 per cent annual growth. The Saudi Arabian laundry detergents market currently stands at US\$166m, while that of the United Arab Emirates (UAE) stands at US\$45m. While these markets are relatively small on a global scale, they are by far the largest of the Gulf nations. In addition, both are currently registering strong growth in the category.¹⁰

Generally in the detergent market, both in Europe and in the Middle East, Procter & Gamble (with Tide and Ariel) stands in the first position regarding market share, Unilever (with OMO) is second and Henkel is third.

While powder detergents are currently most popular in the UAE, accounting for 85 per cent of all detergent sales, the liquid detergent trend is beginning to take off, with standard liquid detergents growing by 17 per cent in 2008. Likewise in Saudi Arabia, powder detergents account for the majority (71 per cent) of laundry detergent sales, with liquid detergents remaining a negligible category. In both markets, however, the demand for liquid detergents is steadily growing, although from a small base, and a wider variety of products are hitting the shelves. Recent launches include Procter & Gamble's Ariel Shampoo.^{10,11}

Henkel and Persil

The Henkel Company was founded in Aachen in 1876 by Fritz Henkel under the name 'Waschmittelfabrik Henkel & Cie' and started to produce one single product: a washing powder named

'Universalwaschmittel' (universal washing detergent).^{12,13} Nowadays, Henkel is the leading company in washing and cleaning supplies, cosmetics and adhesion, generating sales of €16.4bn and net profits of €1.6bn in 2013.^{14,15} In 2013, Henkel reinforced its position in the emerging markets, where 50 per cent of its sales are generated and 55 per cent of its total workforce of 46,850 is employed. Therefore Henkel is also a member of the Fortune 500. Most consumers are well acquainted with the brand names Pril, Weißer Riese, Perwoll, Spee, Somat, Schwarzkopf, Schauma, Taft, Pritt and Pattex.

The brand 'Persil' was established in 1907. Kick-off was the advertisement for the first 'needs-no-pres soaking detergent' in the world, appearing on 6th June in a Düsseldorf newspaper. At this time, the launch of Persil, the name of which is the abbreviation of its two main ingredients, PERborate and SILicate, was a true product innovation. It revolutionised the time-consuming and strenuous washing procedure of its time. Laborious rubbing, swinging and tumbling of laundry was a thing of the past with this innovative detergent: 'Let the laundry rest in the liquid for a few hours or even overnight. Sporadic agitation is preferable', were the package instructions.

The marketing concepts for the Persil brand were also ground-breaking at the time: starting with men dressed all in white, carrying white umbrellas through the streets of Berlin in 1908 attracting attention long before the terms 'promotion' and 'walk-acts' found their way into marketing jargon; leading on to the 'Persil woman', dressed in white,¹⁶ who marked German publicity from 1922 onwards; and reaching to skywriting planes that wrote the brand name in the sky in the 1930s. The so-called 'Persil schools' became equally legendary, where from 1928

onwards housewives, laundry staff and sales representatives were trained in the correct washing procedures as well as the right handling of laundry detergents. In 1932 Henkel even produced a feature-length movie, 'Wäsche, Waschen, Wohlergehen' (Laundry, Washing, Wellbeing), that was watched by 30 million people in the run-up to the Second World War, and was followed by a cartoon in 1948. When on 3rd November, 1956 the first commercial was shown on German television, it was Persil again that extended its marketing activities skilfully to this new advertising medium.

In the following decades, Persil consistently grabbed attention through product innovations and catchy marketing campaigns. Today, Persil is one of the best-known German brands and holds a lion's share of 1.3 billion washer loads per year. But Persil is not only well known in Germany: the detergent is on the market in 60 different countries, but due to trademark rights under different brand names such as 'Le Chat' in France or 'Dixan' in Italy.

For decades, Persil has also been available in the Middle East. Starting in Lebanon, the detergent quickly found its way to Egypt and shortly to other markets on this continent. For a long time, the brand basically used its German 'country of origin' effect to approach these countries by emphasising 'Made in Germany' in their communications strategy. Persil concentrates on German technology in its sales promotion. Obviously, this works well.

In 2007, however, Persil hit the bull's-eye with the introduction of a brand-new detergent by using a glocal marketing strategy. A liquid laundry detergent offering cleaning power and anti-fade protection for black clothes was launched in the Middle East under the product name of 'Persil Abaya' and two years later in



Figure 2 Persil Black Gel for the Portuguese market

Western Europe under the name 'Persil Black Gel' (see Figure 2). 'Abaya' stands for the traditional black Arabian garment worn by most Arabic women. But in Western countries as well, black clothes have gained constant popularity over the last few years. The new formula for black is therefore an excellent addition for both the Arabic and Western European product range.

Both products are based on the same chemical components, but they are tailored to different cultural regions by using various fragrances. The packaging and product presentation also accommodate differentiated customer expectations.

While promoting the product in Western Europe, Henkel mainly uses television commercials and print advertisements, along with social media activities such as a Facebook game.

In the Gulf states, however, Persil Abaya Shampoo (see Figure 3) was introduced to the market through a mix of commercials and a viral marketing campaign. An interactive website was developed, along with a Facebook page that generated over 56,000 'likes'. Moreover, Henkel also strove to



Figure 3 Persil Abaya Shampoo for the Gulf States

create a media buzz by initiating a television show named 'Arwa3 Abaya', where an amateur designer presents new Abaya styles. This completely new approach enabled Arabic women to present their enthusiasm for Abaya fashion to a broad public on national television. The success almost doomed the company when competitors introduced a similar campaign. Hence, after two successful seasons Henkel looked for a strategy to reposition its product and thereby differentiate itself from its competitors. The locals responsible for marketing knew that no other market is so susceptible to luxury goods as the Middle East and identified the preferred

fashion brands of Arabic women. This led to a new television format and brand partnerships with Swarovski, Armani and Hanayen — a high-end Abaya wholesale chain. The latter integrates the typical elements of reality television shows and thus utilises its huge popularity among Arabic women. These newly published 'Arwa3 Abaya' shows contain design challenges which are presented by influential celebrities, and the evaluation of these designs by the famous members of a jury. Thereby, top designers invite candidates to Swarovski stores and Hanayen studios, where they get advice on how to enhance their designs. The big finale takes place in Armani's exclusive Privé Hotel Dubai. The show is complemented with interactive elements and provides the possibility of communicating with candidates through a specifically created social media platform. And the results? Market surveys showed that more than 50 per cent of the female audience attribute their purchase intentions to the show. Moreover, the data concerning customer loyalty and brand awareness of Persil Abaya Shampoo rose significantly. After the third season, product sales went up over 80 per cent compared with the previous year.¹⁷

Not only the marketing, but also the product name accommodates cultural and regional distinctions. Persil Black Gel is simple and catchy as well as internationally understandable and usable. Therefore, the product was introduced to all the European markets and also to the German-speaking DACH-region (Germany, Austria and Switzerland) under this name (see Figure 4). In the Gulf states, however, shampoos are used for the cleaning of the traditional Arabic garments in order to avoid the fading of precious Abayas by using aggressive washing detergents. The name 'Abaya Shampoo' supports this acquired product use and reflects the gentle effectiveness of



Figure 4 Persil Black Gel for the German-speaking markets

this new and technologically sophisticated washing gel.

Persil Black Gel or Persil Abaya Shampoo is an excellent example of what can be attained by combining global technology and local market expertise, confirmed Ashraf El Afifi, Regional President and Corporate Senior President for Laundry & Home Care in MEA. To discuss cultural distinctions and share experiences and expertise regarding the development of regional products, he gets together with his colleagues in the corporate headquarters in Düsseldorf on a regular basis. On these occasions, he also meets with Dr Dagmar Preis-Amberger, Head of Laundry Production, to discuss the cultural and local similarities and differences and their impacts on the production of Persil Black Gel.

In the German Henkel (Persil) headquarters they are able to use the expertise of their colleagues in the Gulf states when it comes to the centralised production of Persil Black. Their knowledge is indispensable for the whole process — from central production (in Germany) to local marketing in the Gulf states. The successful introduction of global innovations in various markets is due to the expertise of the different regions and this is one of Henkel's unique assets.

Henkel shows how glocal marketing works. It is no wonder that Persil was honoured as the best local implementation of a global brand at the 23rd M&M Awards in London.¹⁸

In contrast to Henkel, Procter & Gamble pursues a different strategy with its brand 'Tide' in Morocco, where the product claims a market share of 50 per cent. In fact, Moroccans use the word 'Tide' in a generic manner to describe a detergent. In contrast to Persil Abaya Shampoo, however, Tide is not a liquid

washing detergent but a washing powder, which can also be used for hand-washing clothes. Eighty per cent of the Tide customers in Morocco still wash by hand using a wash board, even though washing machines have become increasingly more popular. With this in mind, an updated version of a commercial from 1969 is shown on Moroccan television, where a happy, traditional woman repeats the same phrase over and over again: 'I only buy TIDE!' Obviously, this product and the matching marketing strategy were developed for this specific market and would not work elsewhere. In 2007, however, Persil introduced its Abaya Shampoo in Egypt (as they did in the other Gulf states) and have already obtained a market share of more than 25 per cent of the liquid detergent market.

It remains to be seen whether Henkel Persil Abaya Shampoo will become established in Morocco as well. It will be a tough challenge for Henkel to establish Persil as a brand in Morocco, however, as it has a current total market share (in 2013) of the overall detergent market of less than 1 per cent. This would require intensive educational and awareness training in order to revolutionise Moroccan washing habits and lead the country to take a further step towards an emerging market.^{19,20}



Figure 5 Persil Liquid Detergent for White Thobes

Persil is further strengthening its position in the Middle East liquid detergent market

In December 2009, 'Persil Liquid Detergent for White Thobes' was launched across the Middle East (Figure 5). Prior to the launch of the specialist detergent, most Arabian consumers mixed powder detergent with bleach to wash their robes.

Henkel's launch is unique in that it is the first in the region to specifically target the needs of Arab men, although given the prevailing culture in the launch countries,

the product will actually be used by wives or maids rather than husbands. Persil White liquid detergent, however, is marketed as ensuring thobes 'remain bright white wash after wash'. The product was introduced in two sizes, one and two litres.

In 2013, Persil Liquid Detergent for White Thobes (with Oud Fragrances) was voted 'Product of the Year' in the Gulf region. Ninety per cent of the consumers who had tried the product would like to re-purchase it.^{21,22}

Results of the Persil glocal marketing strategy in the Middle East and Europe

In 2008, 25 per cent of women in the Gulf region recognised Persil 'as an expert in Abaya care'. This figure increased to 37 per cent in 2010.

The sales volume of Persil Abaya increased 24 per cent in 2009 and a further 33 per cent in 2010. The Persil market share of liquid detergent in the Gulf region increased from 25 per cent in 2008 to 40 per cent in 2010. This provided Persil with the first place in the liquid detergent market in 2010.²³

The launch of Persil for White Thobes added a further two percentage points to the brand's market share of the liquid detergent market in the Gulf region.¹¹

In Europe, the launch of Persil Black resulted in increasing sales of the black liquid detergent (increased 'scale of economies'), but in terms of market share it only resulted in a small increase in the European liquid detergent market (less than 1 per cent); however, it created some media buzz that Persil had actually used the same product as in the Middle East.

By using a glocal marketing strategy, the resulting increase of Persil's market shares in the liquid detergent market are by line with the empirical results shown by both Jiang and Wei⁸ and Chung *et al.*⁹

CONCLUSIONS AND RECOMMENDATIONS

Starting from the model above (see Figure 1) from 100 per cent global to 100 per cent local, it is essential for every company's marketing to develop an individual strategy in order to balance economies of scope and a higher chance of market success through stronger localisation. The ideal strategy depends on the particular range of products and services, as well as on the cultural sensibility of the target markets. If the latter is rather low, we recommend applying a global marketing strategy to benefit extensively from economies of scope during product development, production, commercialisation and communication. If the cultural sensibility is rather high, however, we suggest using an individual marketing strategy in order to tailor products, as well as positioning and communication to the needs and expectations of culturally strong diverging markets and therefore increasing market success through localisation.

Ideally, the advantages between the poles of a global versus a local marketing strategy may be combined by using a glocal approach. In the present case of Persil Black Gel and Persil Abaya Shampoo, Henkel chose a successful strategy to benefit from the economies of scope in the purchasing department, as well as in production and packaging. But by using an adapted product composition, plus individualised packaging designs, product positioning and marketing activities, Henkel honoured the cultural heterogeneity of its target market and used Abayas' particular significance in the Arab world to its advantage. When Persil had established a significant foothold in the women's black Abaya market, it further expanded its Middle East market share in the liquid detergent market by launching the Persil liquid detergent for men's white thobes.

The results document that it has been possible for Henkel's Persil to gain

competitive advantage, in terms of higher market shares, with the glocalisation strategy in the (Middle East) liquid detergent market.

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- (23) See <http://www.youtube.com/watch?v=NllybMnrips>; however, it should be remembered that Procter & Gamble (with Tide and Ariel brands) is still the Gulf region's clear market leader in the overall detergent market, with 35–40 per cent market share, followed by Unilever (OMO) with approximately 15–20 per cent market share. Henkel is third with approximately 10 per cent market share of the overall detergent market.