

Survey

Shaping Up!

UNDERLINES MAGAZINE SPOKE TO BOTH RETAILERS AND SUPPLIERS OF SHAPEWEAR IN APRIL-MAY 2018 TO FIND OUT HOW THE SECTOR IS PERFORMING. THE MAJORITY OF THOSE INTERVIEWED INDICATED THAT THE OPTIMAL NUMBER OF BRANDS THEY SOLD WAS BETWEEN 4 TO 6, GIVING A SPREAD OF FUNCTIONAL AND FASHION-LED ITEMS. A REPORT BY ALLIED MARKET RESEARCH* IN 2017 INDICATED THAT THE GLOBAL COMPRESSION AND SHAPEWEAR MARKET WOULD REACH \$5,576 MILLION (£4120M) BY 2022 (BUT REAL GROWTH COMING FROM THE ASIA-PACIFIC AREA). THE UK IS ALREADY WELL SERVICED BY SHAPEWEAR BRANDS (MAINLY FROM AMERICA) BUT THE 'NEW GENERATION' OF SHAPEWEAR BEARS LITTLE RESEMBLANCE TO THAT OF EVEN 10 YEARS AGO AND OFFERS NEW OPPORTUNITIES.

Recent advances in fabrics incorporated into compression wear and shapewear have supplemented the growth of this market. Technologies such as bonding and laser cutting have transformed shapewear by eliminating seams, hems, and bulky fastenings. Lycra®, neoprene, spandex, and nylon are the most commonly used fibres & fabrics and these improved fabrics are softer, more breathable, and have sculpting properties. Antibacterial, Aloe Vera treatment and temperature controlling properties within the fabric itself continue to fuel growth and interest in shapewear and is attracting a younger consumer.

And whilst some believe that the market has nearly reached its saturation point, others believe that for swimwear particularly, there are still significant gains to be made.

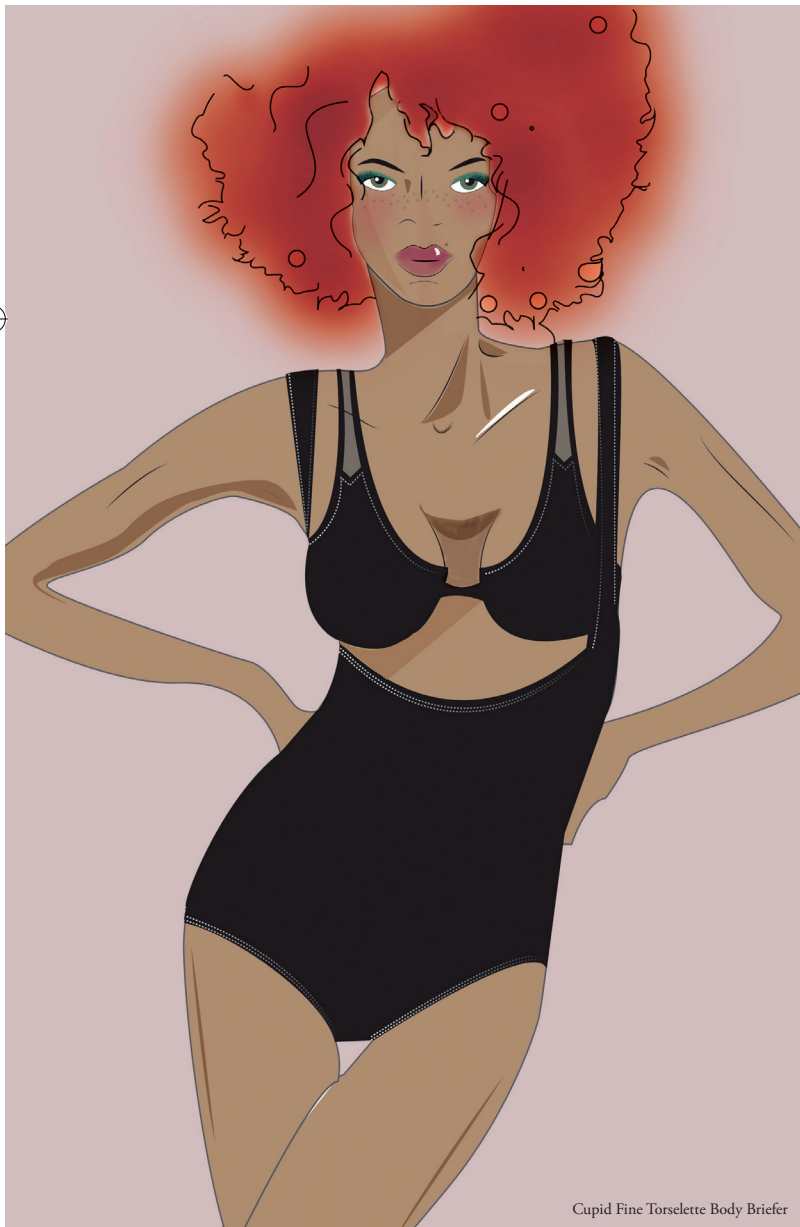
Wacoal Sexy Shaping Dress

WHICH FUNCTIONAL SHAPING UNDERWEAR BRANDS ARE YOUR BESTSELLERS?

BRAND NAME	% INDICATED AS BESTSELLER
MIRACLESUIT	38%
BODYWRAP	22%
MAIDENFORM	10%
SPANX	10%
NAOMI & NICOLE	6%
MAGIC BODYFASHION	4%
CONTURELLE (FELINA)	4%
COMMANDO	4%
AMBRA	2%
WACOAL	2%
PLAYTEX	2%

Note: figures do not equal 100% as respondents could vote for more than one brand.

This year there was a slightly more diverse response but for an incredible 10th year running Miraclesuit held onto (and even expanded its lead!) as the number one bestselling brand across the retailers interviewed.



WHICH FASHIONABLE SHAPING UNDERWEAR BRANDS ARE YOUR BESTSELLERS?

BRAND NAME	% INDICATED AS BESTSELLER
SIMONE PERELE	10%
WOLFORD	10%
PRIMADONNA	10%
CHARNOS	4%
CHANTAL THOMASS	2%

The majority of retailers only stocked what they would classify as 'functional' shapewear but there were a select number of brands identified with a strong fashion element.

HOW HAVE SALES PERFORMED IN THE LAST 12 MONTHS?

Again this year in the shaping underwear market many respondents reported same year on year sales with over 80% reporting a fairly stagnant market (10% reported better sales and 8% replied that sales had gone down in the last 12 months). The picture was slightly more encouraging in shaping swimwear with some retailers believing that there were sales gains to be made.

HOW IMPORTANT ARE THESE CRITERIA IN SELLING SHAPEWEAR?

CRITERIA	VERY IMPORTANT	IMPORTANT	NOT RELEVANT
PRICE	10%	80%	10%
MARGINS	-	90%	10%
AESTHETICS	50%	46%	4%
TECHNICAL INNOVATION	50%	40%	10%
COMFORT & FIT	84%	16%	-
PRODUCT TRAINING & FITTING	26%	50%	24%
DESIGNER BRANDING	-	76%	24%
RECOGNISED FIBRE BRAND	-	64%	36%
ADVERTISING/PROMOTION	12%	70%	18%

As you would expect, comfort and fit were the top criteria in selling shapewear with aesthetics ranked second – due no doubt to the fact that most retailers said these garments are bought for sculpting and contouring the body (and not for fashion). The vast majority were aware of the need for technical innovation and welcomed the introduction of lighter weight fabrics that still offer shaping properties – in both underwear and swimwear.

64% felt that recognised fibre brands in shapewear was important – the innovations with fibres such as LYCRA® BEAUTY COOLING technology has heightened consumer awareness of the benefits of coolness and dryness offered when wearing shapewear.

Price and margin offered by the suppliers of shapewear is more important than ever in a crowded marketplace and 82% stressed the importance of advertising and promotion of the shapewear sector.

AND THE MOST POPULAR COLOURS & SIZES?

All of those interviewed commented that they sold nude and black (with nude being the number one top-selling colour with a 100% score!). Rather surprisingly over 60% sold up to 4 other colours (champagne coming in after black in 3rd place, white in 4th place, pastel shades in 5th with fashion colours lagging behind in 6th place).

Medium to Large was the most requested size with 60% (Small to Medium = 36% and XL = 4%).

AND THE GARMENT TYPES YOU STOCK?

GARMENT TYPE	% STOCKING GARMENT
SLIMMING PANTS/KNICKERS	80%
BODYSUITS	96%
SEAMLESS SHAPEWEAR	60%
THIGH SHAPER	84%
COMBINATION GARMENTS	68%
WAIST CINCHER	40%
SLIMMING SLIPS	76%
SLIMMING TUBES	60%
CONTROL/SHAPING SWIMWEAR	88%

In 2018 there has been a great deal of movement in the type of garments sold. Whilst slimming pants are still one of the most popular choices, they have been overtaken by the BODYSUIT! Likewise waist cinchers, slips and slimming tubes have leapt up the popularity stakes. The majority of those interviewed also sold some form of control or shaping swimwear.

New Brands?

The underwear shaping market has a wide range of suppliers already but a handful of retailers said they had introduced new brands which had favourable quality/price ratio or a heightened promotional campaign. The consumer purchasing decision is still largely led by a need for a special occasion but several commented that the new lightweight fabrics and seamless options meant that some consumers could buy for everyday wear.

The new brands now being offered by 20% of our panel are WACOAL, JANIRA and POUR MOI.



Naomi & Nicole
high waist brief

And the retailers' views...

"Please no seams up the front of the garment"

"Many manufacturers still don't care too much about showing the effects of shapewear and don't really do marketing campaigns. They need to show more diversity and originality in their shoots!"

"More cup sizes in swimwear control and shaping suits"

"Although this sector is not a major part of our turnover, shapewear and shaping swimwear is now expected as standard in any specialist shop"

"Bodysuits offer a sleeker and often more fashionable look for shapewear"

"Swimwear that offers control with lighter weight fabrics such as Miraclesuit is perfect for the beach"

"Although there are a lot of brands out there, there is room for some more bridal shaping underwear"

*www.alliedmarketresearch.com

Kind thanks for illustrations to www.bokgoodall.com

New Directions for 2018-2019

Where shapewear design and innovation is concerned, it is largely driven by fibre and fabric innovation –‘intelligent’ fibres can now be implemented into fabrics that have superb control and shaping properties without the excess weight and heat of the heavier control fabrics that were previously used (or additional linings in swimwear). It has been a quiet revolution but has opened up a new market of consumers who could be attracted to this ‘functional’ product that is now both very comfortable and indeed fashionable.



Blackspade Body Control Singlet



Amoressa 'You Only Live Twice' Horizon suit

Shapewear Powerhouse: Patricia Eve

Patricia Eve Ltd are the largest provider of branded shaping underwear and shaping swimwear in the UK with 3 swimwear lines – Amoressa (new for 2018-19), Miraclesuit, Miradonna – 4 underwear ranges: Naomi & Nicole, Cupid Fine, Body Wrap and Miraclesuit - and Blackspade control wear for men. Despite some price sensitivity Miraclesuit continues to take the top slot in our independent shapewear survey by some margin. With the swim and underwear collections aimed at different target markets they have a wide demographic consumer appeal.

Amoressa

This most recent addition to the 'Miraclesuit' family is a contemporary and modern collection in bold colours and all garments have shaping properties. Featured here is their bestselling Horizon suit from the "You Only Live Twice" series which managed to sell more than twice any other range! Chris Eve comments: "Colour, fashion and prints will of course drive interest and demand in swimwear as it is a seasonal product but there are styles that feature season on season due to consumer loyalty."

Blackspade

Patricia Eve has had good success with the Blackspade brand which they took on several years ago and indeed the bestselling garment in the men's ranges is the singlet from the Men's Body Control Collection. "We find that the majority of accounts want and relish the continuity of shapewear, it gives them great scope to only hold what they need and replenish from our stocks. When there are seasonal offerings, they tend to come from new technology in fabric or finish and accounts use these to freshen up the appeal."

Body Wrap

Body Wrap shapewear is a brand that specialises only in seamless shaping underwear – soft, comfortable and breathable enough to be part of the everyday wardrobe. The control/slimming element is achieved by having panels with different levels of control in each style.

Largely sold on a continuity basis, the most popular colours are nude and black as they offer the solution for multiple outfits. Chris comments: "The high fashion colours might have more hanger appeal, but ultimately, they will sit in the lingerie drawer more often than not..."



Body Wrap seamless high waist brief



Charmline 'Look One Size Smaller'

Charmline Swimwear

Charmline is one of the brands in the Maryan Mehlhorn Group and is well established in the swimwear shaping market being one of the very first to develop a range of swimwear offering different levels of control (light, medium or strong) into a mainstream offering. Their specially developed power material (MicroForming) has 59% polyamide combined with 41% elastane offering reliable support and promises the wearer to 'Look one Size Slimmer'.



Conturelle Minimizer maxi slip

Conturelle

Conturelle (by Felina) is represented by Alba Associates and Richard Barnes believes that the market has not hit saturation point just yet. The basis of the Conturelle brand is all continuity and parent company, Felina, have a NOS programme. As with most of the shapewear brands, there is usually a single product that out performs year in and year out and with Conturelle it is the maxi slip- a high waisted smoothing full brief that can be paired with co-ordinating bra styles. Alba plan to encourage Autumn/pre-Christmas sales to retailers with special discounts.

Cupid Fine

Fabrics are important across all the brands in the Patricia Eve portfolio and nowhere more so than the Cupid Fine brand – the finest materials are employed to offer ‘total control, total comfort’. Again the brand works best as a continuity product and their continuous bestseller is the Torsette Body Briefer which can be worn with the wearer’s own bra and means there is better scope for an excellent fit with full length body torsettes as in the slip or body.

Flexibility from shipping from stock is one of the key advantages that Patricia Eve can offer stockists. "Service, service and service. I know it sounds clichéd but I honestly am a firm believer that without our accounts and their business, we are nothing. We are still a small family run business at our core, that holds traditional values at the forefront of our business partnerships. Same day shipping, no minimums and six differing brands covered from our continuity holdings."

Despite having an enviable portfolio of brands, Chris does not believe the market is over-saturated. "As we all become more and more body conscious, I don't see this happening, not matter what size you are, we all have that part of the body we wish for some help with! Real shapewear covers a multitude of uses, from day-to-day to the killer outfit you have always wanted to wear. You find a bra or pair of pants that suits you and feels good, you continue to purchase more as you need, the exact same is the case for shapewear too".



EVA wear your own bra fine shapewear body

Gottex Swimwear

Fabric construction is very important in the shaping swimwear offered by Israeli brand, Gottex. Made with an exclusive Contour fabric from Eurojersey in Italy, its employs 40% more LYCRA® to slim the silhouette without adding extra weight to the garment. Of course the swimwear offerings are seasonal in terms of prints and colours but shapes are retained from year to year. Featured here is the bestselling Landscape Crossover suit but a new Contour swim range (Vista) with new shapes and new colours will be offered for 2019. Richard Barnes comments: "There is definitely room for growth in this sector of shaping garments – a well-fitting swimsuit offering contouring elements plus support for the bust is always going to be a winner."

Gottex Landscape Crossover suit







Janira bustier and Greta shorty

Janira

As market leader in their home market in Spain, the brand is expanding rapidly in France, Italy, Germany, Canada, Russia and Ukraine (already amongst top 5 brands) and of course now in the UK. Their bestselling Secrets range has already been introduced onto the UK market and is recognised for its comfort, lightness, invisibility and good quality/price ratio. Their 'string' effect tummy control brief is a favourite. Earlier in the season they introduced Magic Band, panties that offer feminine, attractive and contemporary styling; light, fresh fabric which stays in place and an extra flat lace without edging for that 'invisible' appearance.

However a major new collection is being launched this year which is Greta Shape, figure control garments in sophisticated floral lace and functional shape fabrics (see pages 50-51). A comprehensive range of sizes (S-XL) has three key styles: Silueta Foret Greta (high-waisted garment with ergonomic cut) and firm compression for one size smaller; flat tummy panties with floral lace controlling tummy and lower back and Greta slip form, panties with tummy and lower back control and slimming reduction.

Across their ranges, Janira normally offer styles for everyday as well as special occasion such as the Secrets Vientre Plano, which offer optimal functionality but are comfortable enough to be worn all day.

The company invest heavily in above the line promotions in the countries in which they are already well established but for the time being are working with specialised magazines in the UK to extend their distribution network first. With a target audience of 35 years plus, they believe that there is still room in the UK for good innovative offers – modern, light, fashionable – with added value at reasonable prices.

Leonisa

This well established intimate apparel brand with headquarters in Colombia produces lingerie, swimwear, men's underwear, co-ordinates, sports underwear, post-surgical compression garments and last but not least, an extensive range of shapewear. It has ranges targeted at more 'traditional' consumers, young consumers and plus sizes and they provide a high quality product at a competitive price with all garments using LYCRA® fibre. As you would expect from a company producing intimate apparel since 1956 they offer a number of different levels of control in a wide range of product types.



Leonisa for larger sizes



Leonisa stylish high waist briefs



MAGIC Bodyfashion – Super Control Range

MAGIC Bodyfashion

Magic Bodyfashion has just celebrated 25 years in business and were one of the first companies to launch both bra solutions and shapewear and now offer innovative solutions from top to toe. Continuity products are the backbone of the shapewear business and they have a 100% NOS programme to make it easier to ship to customers. Director Linda Leestemaker thinks there is still room in the UK market “There is saturation but only with traditional shapewear. We notice great growth in the UK with our brand as we offer a modern and unique Total Body Solution Concept connecting all the dots.”

Leading categories for the brand are backless garments and now shaping bodies and shapewear in exclusive materials. Focusing on the Super Control Collection (luxury shapewear in exclusive mesh & lace) and Dream (wireless and comfortable bralettes) the company will be supporting them with promotions and advertising.



MAGIC Bodyfashion – Dream

Miradonna

Miradonna offers a very contemporary and sophisticated range of swimwear (and from 2019 a capsule collection of dresses) – all will be fashioned in their exclusive Mirashape fabric which sculpts the body without tightening. All the comfort and support of a ‘classic’ swimsuit but in modern silhouettes. Solid colours with new sheer fabrics (showing just a hint of skin) such as Gaia have been very popular in black, Italian blue and Clematis pink as favourite shades

The range of dresses and cover ups being introduced for 2019 will have stylish embellishments to make them perfect for evening wear.



Miradonna – Gaia Swimsuit



Miraclesuit Madero suit

Miraclesuit Shapewear

The consistency of the Miraclesuit offer has ensured its continued penetration of the UK market since being introduced in 2001. Guaranteed compression and shaping which provides extra firm control, with its breathable Wonderful Edge® silicone finish to prevent each shaper from riding up or rolling down, and the Wonderful Panel® technology which places stitch-free control panels away from seams to restrict stretch, provide fit adjustability and deliver targeted shaping results.

New this year and incorporating the need for enhanced comfort features is a group with “cooling” properties, using a fabric that is topically treated with a cooling agent. When the wearer is active it will cool the body up to 2 degrees, with the addition of a stretch mesh to further enhance breathability and wicking. The new fabric is creating a real point of difference in garments that offer firm compression.

Miraclesuit Swimwear

10lbs Lighter in 10 Seconds – the promise holds true to the brand’s heritage of fit, form and function and begins with the brand’s exclusive and innovative fabric, Miratex®. This fabric delivers three times the control of ordinary swimwear fabrics, without relying on inner linings and constrictive control panels to shape and trim, and the high concentration of LYCRA® spandex means that Miraclesuit® swimwear keeps its shape while keeping yours. The latest season was inspired by bold graphic patterns, engineered florals, European inspired prints, new takes on animal skins and classic dots, and the swimwear is full co-ordinated pareos, scarves, shirts and dresses. Of course the stunning solid colours are revitalised every season.

Naomi & Nicole

Naomi & Nicole® shapewear offers firm and extra firm control through silhouettes made for the upper torso, lower body, and complete figure. Most styles feature revolutionary Wonderful Edge®, Wonderful Panel®, and/or Wonderful Seam® technology that deliver stitch-free smoothness, unrivalled comfort, fit adjustability, garment stability, and targeted shaping results. New for 2018 is a revolutionary shaping collection with cooling properties, featuring fabrics that have been topically treated to provide the wearer with a real cooling effect whilst moving.

Naomi & Nicole is another of the brands in Patricia Eve’s offer and all are being promoted via B2B and pr activity. As Chris Eve comments: “Our goal is to promote where the products are offered and sold, generating more demand at the point of retail, thus offering as much help as possible to our customers.”



Spanx – more feminine lace with soft control range



Naturana

The Naturana company sell shapewear across their 3 brands – Naturana, Cybele and EVA – and note that the very rigid and confining styles are shifting to lighter and more comfortable everyday alternatives. Featured here is the Eva lighter, transparent Pure Shape “Wear Your Own Bra” body and high waisted briefs.

Spanx

A more feminine and lighter look from this American brand ‘Spotlight on Lace’ is designed with graduated mesh that targets the tummy, the bodysuit is lingerie that does more for you while offering the softest, lightest shaping possible. Targeted tummy-shaping panel provides a flawless finish, while the pretty flexible lace moves with you for a comfortable fit. The style is free of underwire and padding for total comfort, and can be worn in five ways thanks to its convertible straps.

Triumph

The new launch for AW2018 is Infinite Sensations - innovative, lightweight and super stylish shapewear. With a younger feel the shapewear uses Magic Wire® technology to offer superior control, smoothing and a lighter feel on the skin. Chic and versatile, style updates include a sports inspired bra detailing and the ‘must-have’ waist panty (going to store at end of August 2018).

Wacoal Europe

Beyond Naked remains the most popular of Wacoal shaping ranges in the UK with particular uplift in sales of shapewear bodies. Smooth fabric with innovative dots that help the fabric stretch and breath in the targeted areas of control means that Beyond Naked body is a topseller. In addition to this capsule collection of body, briefs and bralette, the Sexy Shaping range with no silicone (new technology for the brand which uses non stick nano elastic) is soft and comfortable but still holds shapewear in place. There are two new ranges being planned for SS2019 but in the lead-up Wacoal will be putting in place in-store kits for retailers to promote Sexy Shaping and shapewear collections with packaging improvements.

Regarding market saturation, a spokesperson for the brand commented: “It is a very mature market and very competitive. Innovation and new concepts are key in offering an improved experience for the consumer – they are always looking for something that can be worn longer with more comfort in all types of weather and fashion trends. Shapewear has moved on considerably over the years and the fabric & engineering of shape is where we can offer a point of difference.”