

SHAPING TODAY & TOMORROW

UNDERLINES ONCE AGAIN TAKES AN INDEPTH LOOK AT THE SUPPLY AND DEMAND CHAIN FOR SHAPING GARMENTS, PARTICULARLY HOW THE MARKET HAS EVOLVED IN THE LAST 12 MONTHS, BY TALKING SIMULTANEOUSLY TO RETAILERS (BOTH LARGE AND SMALL CHAINS AND INDEPENDENT SHOPS*) AND TO LARGE ESTABLISHED SHAPEWEAR PRODUCERS AND NEW BRANDS EMERGING IN THE MARKET. HERE WE REVEAL OUR FINDINGS AND THEY PRODUCE SOME INTERESTING INDICATORS FOR THE FUTURE OF SHAPEWEAR SECTOR.

20% of our respondents this year were large stores or small chains with the 80% balance being represented by specialists and independent shops. Over 50% of all those interviewed have been selling shapewear in some form for over 15 years. However the number of brands represented (even in larger stores) is more restricted than in previous years: 50% sold up to 3 brands with 50% selling between 4-6 brands.

WHICH FUNCTIONAL SHAPING UNDERWEAR BRANDS ARE YOUR BESTSELLERS?

BRAND NAME	% INDICATED AS BESTSELLER
MIRACLESUIT	32%
SPANX	24%
BODYWRAP	16%
ELOMI/FANTASIE	12%
MAIDENFORM	10%
BODYWRAP	10%
NAOMI & NICOLE	6%
TRIUMPH	6%
CONTOURELLE/FELINA	4%
CETTE SLIMSHAPERS	2%

Note: figures do not equal 100% as respondents could identify more than one bestseller

In common with the last 4-5 years American functional brands of shapewear take the top slots.



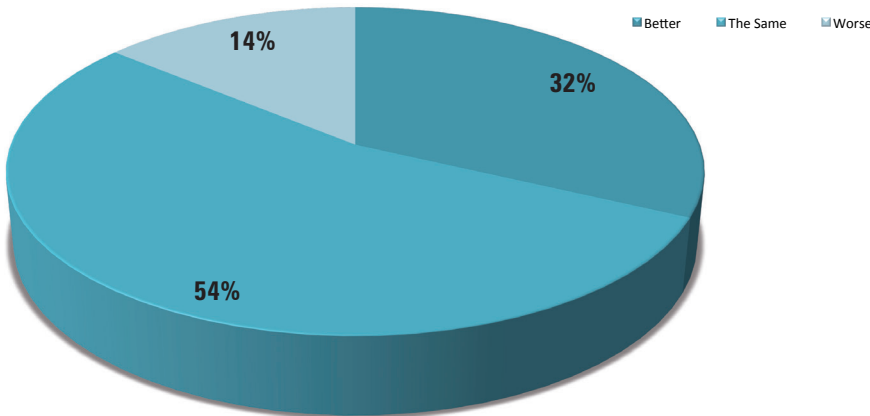
Yummie Cameo high waisted shaping briefs

WHICH FASHIONABLE SHAPING UNDERWEAR BRANDS ARE YOUR BESTSELLERS?

BRAND NAME	% INDICATED AS BESTSELLER
PRIMADONNA/VAN DE VELDE	10%
IMPLICITE	8%
WACOAL	6%
PASSIONATA/CHANTELLE	6%
WOLFORD	2%

38% of those surveyed said they did not believe they sold shapewear which could be regarded as fashionable. The balance of 62% said that their functional offer far outweighed sales over the more fashionable selections so results should be interpreted with caution – some respondents did not indicate a bestseller. Interesting to note however that Wacoal (which previously was labelled in the functional category) is now quoted in the fashionable shapewear sector.

HOW HAVE SALES OF SHAPEWEAR PERFORMED IN THE LAST 12 MONTHS?



Compared to findings in 2013, it does appear that growth of sales of shapewear is slowing down although it is still a fairly robust sector with only 14% commenting that sales had dropped.

However according to a new report by Keynote** shapewear is an area that still offers potential growth due to two separate influences. "Shapewear such as support pants and bodies have become more popular in recent years, as fashion becomes more daring, and so the need for a smooth shape created by lingerie products is ever-more important. NPD in this area is constantly propelling innovative new items into the marketplace and broadening product ranges available to women on the high street."

And the other major influence identified by the Keynote report will be that the female population is an increasingly aging population (with a declining youth demographic) as seen below. Throughout this report we will attempt to find out where areas of growth might be discerned.

Table 1.3: UK Female Population Estimates and Forecasts by Age Group (000), Selected Mid-Years 1971-2026

	<16	16-24	25-34	35-44	45-54	55-64	65-74	75+	Total
1971	6,938	3,626	3,441	3,241	3,482	3,464	2,765	1,802	28,761
1981	6,104	3,966	3,975	3,365	3,148	3,240	2,931	2,218	28,946
1991	5,709	3,691	4,466	3,968	3,296	2,971	2,795	2,633	29,530
2001	5,786	3,220	4,260	4,465	3,920	3,186	2,640	2,804	30,281
2010	5,665	3,638	4,013	4,456	4,332	3,743	2,827	2,944	31,619
2011	5,708	3,627	4,095	4,362	4,424	3,756	2,886	2,976	31,833
2016	6,031	3,481	4,476	4,046	4,648	3,819	3,325	3,174	33,000
2021	6,380	3,336	4,566	4,201	4,343	4,282	3,437	3,565	34,110
2026	6,479	3,518	4,369	4,565	4,031	4,507	3,521	4,163	35,153

Note: figures are mid-year estimates for 1971 to 2010; figures for 2011 to 2026 are 2010-based projections; totals may not sum due to rounding at source.

Source: Measuring National Well-being, Social Trends 42 — Population, National Statistics website © Crown copyright material is reproduced with the permission of the Controller of HMSO (and the Queen's Printer for Scotland)



BodyWrap – new colours offered this year



New Miraclesuit product: sheer singlette

Control Body



HOW IMPORTANT ARE THE FOLLOWING CRITERIA IN SELLING SHAPEWEAR?

CRITERIA	VERY IMPORTANT	IMPORTANT	NO REAL RELEVANCE
PRICE	50%	40%	10%
MARGINS	40%	50%	10%
AESTHETICS	-	76%	24%
TECHNICAL INNOVATION	-	80%	20%
COMFORT/FIT	92%	8%	-
PRODUCT/FITTING TRAINING	6%	92%	2%
DESIGNER BRANDING	-	6%	94%
RECOGNISED FIBRE BRAND	-	50%	50%
ADVERTISING & PROMOTIONS	2%	74%	24%

Of course comfort and fit is a pre-requisite for all retailers interviewed followed by their other obvious concerns in pricing and margins for the products. What is revealing over last year's results is the higher level of desire and knowledge for technical innovation and product fitting and training which have risen dramatically. More retailers are also aware of recognised fibre brands and the benefits they can offer to any particular shaping garment.

Equally instructive is that designer branding is considered of virtually zero importance in the selling of shapewear to their customers (94%).

WHAT ARE THE MOST IMPORTANT COLOURS IN SHAPEWEAR?

No real surprises here as only 25% of the 100 respondents even stock anything beyond black, nude/champagne or white. Of the most basic tones 90% stocked nude/skintone as their No. 1 choice followed by black (stocked by 75%) and then champagne (37%) with white additionally stocked at 25% of outlets. Pastel tones and fashion colours do not seem to be a popular buy but where stocked it was to add variety to the shapewear offer.

AND THE GARMENT TYPES YOU STOCK?

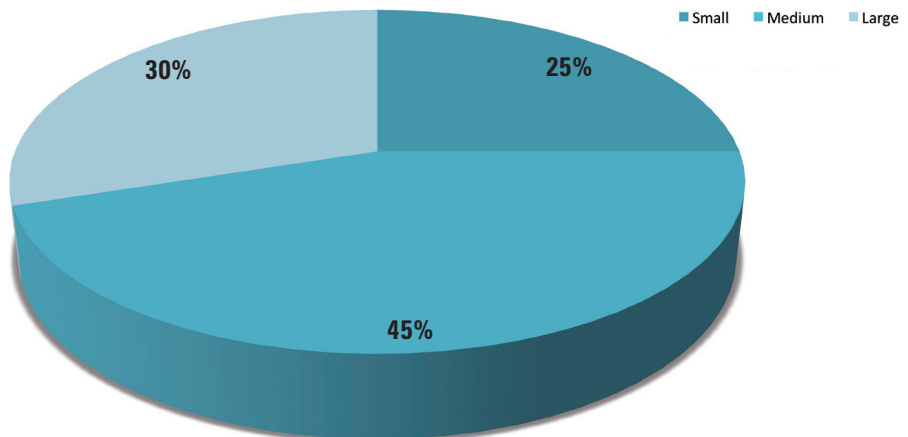
GARMENT TYPE	% STOCKING GARMENT
SLIMMING PANTS/KNICKERS	96%
BODYSUITS	64%
SEAMLESS SHAPEWEAR	74%
SLIMMING TUBES	12%
WAIST CINCHER	60%
SLIMMING SLIPS	76%
THIGH SHAPER	40%
COMBO (BUM, TUM & THIGHS)	74%

The single most popular garment stocked continues to be slimming pants/knickers. The waist cincher continues its healthy growth from last year and bodysuits and seamless shapewear increase in importance in the product mix year on year.

Where retailers indicated their single bestselling garment high-waisted shorties and bodysuits came neck and neck in front with 20% of the vote each.

MOST POPULAR SIZES SOLD?

Again we see a shift in the results – where previously small was the most popular size sold medium and large are taking a greater share of all sales. Does this suggest that shapewear is increasingly being bought for more 'functional' and slimming purposes rather than 'vanity' purchases e.g. obscure the party line under close fitting clothes?



Embrace

HAVE YOU ADDED NEW BRANDS IN THE LAST 12 MONTHS?

If ever there was a clear indicator that retailers were cautious about the shaping underwear market then it is evident from our responses: only 4% said they had added a new brand and in all cases that brand was Maidenform. In the case of larger department stores and small chains, a few have launched their own label shapewear.

AND WHICH BRAND COMES INSTANTLY TO MIND?

For those who indicated a brand name it was overwhelmingly Spanx (24%), Miraclesuit with 12% and Cetto/Trinny & Susannah with 4%. In the case of Spanx, half those indicated they did not stock Spanx due to price restrictions but offered consumers an alternative brand.

AND THE REASONS FOR BUYING SHAPEWEAR?

Perhaps disappointingly for shapewear producers ALL of the respondents said that the main buying motivator for any type of shapewear was a special occasion, be that a wedding, party or to go under that very special dress. So at the moment, shapewear is not viewed as an everyday purchase but rather a product to provide solutions. There seems a long way to go yet to make shapewear a 'must-have' everyday purchase.



Elomi Curve Caitlin



Ambra underbust slip

AND YOUR SUGGESTIONS...

"I feel the market is saturated and the customer is not really looking for anything new."

"More comfortable garments, prettier and sexier"

"As a smaller shop it would be great to have shapewear in all sizes but space is at a premium so smaller minimum orders and better mark ups would encourage us to drive more sales."

"Bodysuits in two lengths would be a real boon to suit both shorter and taller consumers."

"Stop making briefs which start and end at the waist and bottom! What IS the point? If you are fleshy enough to need a shaping garment, anything that starts or ends there is simply going to cut into that flesh and defeat the object! There are only really a couple of shapes which are necessary and the fact that so many companies, and especially Spanx, make a gazillion different shapes simply proves that they cannot get it right in a few but effective styles!"

PRETTY POLLY: SHAPE IT UP!

British brand, Pretty Polly, who have spent nearly 100 years looking after women's legs has extended its Shape It Up! collection with a new range of garments to give total control and a quick boost to the figure. February 2014 saw the introduction of shaping shorts, lace shorts, leggings and a cami-sole top (with garments using Lycra® Beauty Shaping) to supplement their existing collection of tights styled aimed at tummy, bum and thigh shaping. The garments are versatile enough to be worn as both daywear or evening party wear at competitive prices to create that smooth silhouette.

LACE TUM & THIGH SHAPING SHORTS in black with 3D waistband and flat seamed cotton gusset £12.00

PERFORMANCE LEGGINGS – tum and leg shaping with 3D waistband, seam free design and mesh gusset at an appealing £22.00

SOPHISTICATED BLACK TUMMY SHAPING CAMISOLE – adjustable straps, bust support and tummy control smooth those lumps and bumps and ideal for everyday wear in black at £15.00



TUM, BUM AND THIGH SHAPING SHORTS – this combination garment is sold at an attractive £15.00 in black and nude shades and is an all rounder.

TUM AND TUM SHAPING BOY SHORTS – to wear under short skirts/dresses with a comfortable 3D waistband and mesh gusset (£12). Available in black, nude and stunning hot pink pictured here.



THE SUPPLIERS' VIEW

There seems to be a conflict of opinion in terms of supply and demand. Most retailers now feel they have enough brands in their shapewear offer and that the market if anything is saturated with products, most of which are bought for special occasion wear and not an everyday purchase such as lingerie or legwear. However market analysts, research companies and most (but not quite all) of the supply chain believe that there is room for development within outlets that do not actually even stock shapewear yet. There is an air of caution amongst a few of the suppliers to the market: "I don't think it has quite reached saturation point but the UK shapewear market as any other European market has been overloaded with shapewear. Only a few brands will lead, winning with expertise, innovation and unique products and market", says Linda Leestmaker of MAGIC Bodyshapers.

Overleaf we take at a snapshot look at brands that have been working in shapewear for some years but also take in some of the newer brands offering a distinctive shapewear product. The importance of the category cannot be denied as major retailers launch their own brand lines, targeting top selling product lines in the category. Should we even be worried that there is a greater depth and variety of offer in the market? After all, products that can offer something new will always find a market niche, even in the most saturated of sectors. And to this observer, whilst there is a strong and well produced offer in the more 'functional' area of the market, there still seems room for shapewear that can offer a high fashion element for younger women who may have no particular figure problems but enjoy the level of security and smoothing that modern shapewear can deliver (Scandale, Berlei and now Grace & Wilde). The ageing female population identified by Keynote earlier in this report are a generation used to a level of choice unparalleled by any previous generation.



Freya Deco Shape



dMondaine (Resultwear)



Simone Pérèle Inspiration



The high waisted control brief in "bark" colour: part of the Marie Meili Collection of shaping brief, thigh and tummy long short, dress, bodysuit and control top



From the AW/2014 collection of Conturelle by Felina: fashion style 895 featuring reinforced tummy panel and clever laser cutting



Julie France

Anita UK is one of those brands which thinks the market is close to saturation point: "I believe that shapewear has peaked and will level out for a time," says Jemma Barnes, MD. "And it is increasingly important that we refer to social media as consumers really like to read other people's genuine views on particular products. We can get direct feedback."

Identified earlier is an increased interest in seamless shapewear – garments offering levels of control that are comfortably constructed and 'invisible'. Some of the best known brands in the UK include Naomi & Nicole, BodyWrap and Ambra. Spokesperson for the Patricia Eve agency, who distribute the Naomi & Nicole and BodyWrap products in the UK and Ireland, commented: "One of BodyWrap's most important selling points is the fact that the garments are seamless, therefore they appear invisible under any type of outer garment. Likewise the Naomi & Nicole products offer the Wonderful Edge® which is a silicone finish placed at the leg openings, waists, tops and bottoms of many of the products which prevents rolling and eliminates the need for seams or elastics." Despite the fact that the company represent no less than 3 shaping brands (Naomi & Nicole, BodyWrap and Miraclesuit) they believe there is still room in the market. "With many larger stores creating their own shapewear ranges as well as new companies in the UK market, there has been an influx of ranges over the last couple of year. However, I still don't believe the market is saturated as with technological advances and new fabrics being developed there is just a wider range and quality of availability."



Magic – candy bubble shade



Fashionable PrimaDonna Twist La Folie slip



Naomi & Nicole – high waist thigh slimmer

GRACE & WILDE™ – IS THIS THE MOST EXPENSIVE SHAPEWEAR YET?

First launched in November 2013 with a London launch in January 2014, this luxury line of shapewear has been created by design duo, Serena de Maio and May Carmen Basco-Buisson. The first collection includes slip, dress, boned bustier, front-hook waist cincher, body and high-waist-mid-thigh pants.

Not a single garment is produced in flesh tone as the palette is black (Black is a girl's best friend), red (Lady in Red), chocolate (Hot in Chocolate), blue (Midnight Blue Rendezvous) and blush (Blush at First Sight).

So what distinguishes these garments which range in price from £176 to £350?

The shapewear is designed to be flattering and body-sculpting in ultra-fine gauge polyamide cotton Lycra® and revolutionary bonding technology that makes them virtually seamless. Tailored fits and couture finishes offer comfort, sculpting and smoothing and hidden control stomach panelling.

The key pieces are the dress, body and boned bustier, all fitted with the brand's Perfect Cleavage Adjustable Bra™. Satin ribbon and a patent-pending design enable the wearer to reposition the bust

to suit the cut of different garments (high crew cut neck, v-neck or even deep décolleté) – something of a first in shapewear design! www.graceandwilde.com.



Versatile bustier



Body con shaping dress



Naturana high waisted bodyshaper

Helen Austen in charge of Ambra in the UK, concurs: "Not yet, there are still many retailers within the UK both online and on the High Street that are not supplying shapewear – there is still room to expand as we consider shapewear to be an integral part of the lingerie offer. We think that Ambra offers a perfect opening price point with a fast stock replenishment meaning there is low risk for the retailer."

Relative newcomer to the UK market is Yummie, again based on seamless, comfortable but supportive shaping technology. After a brief approach to the market a few years ago, the American company has appointed APM agency to represent them here and to expand the European market. The Yummie brand is slightly different in so much as the brand originated from a single garment: the tank which was devised by Heather Thomson, a busy mum who wanted something comfortable to wear to work that gave her a slightly trimmer appearance after pregnancy. From the beginnings the brand has grown to encompass core products of high waist briefs, high waist long leg short, Capris, shorties, leggings, thigh shapers, thong shapers, slips, bodysuits, bras, camisoles, cami and plunge bras and of course a wide range of tanks! The brand also offers competitive multipacks in different colours (both basic and fashion).

"THE ONUS IS DEFINITELY ON BRANDS TO BRING MORE INNOVATION AND SOME FASHION IN ORDER TO STAND OUT AGAINST STRONG OWN BRAND RANGES"

Speaking with a number of producers from around the world it appears that many do believe that keeping close to technical innovations and fibre/fabric developments can enhance their own brand profile. The technical ability to add support at a number of levels without bulk is very reliant upon the finer yarns being developed that can offer strength with a light handle: it is something that Maidenform has taken on board with their latest garment introductions especially the Sleek Smoothers range being introduced this year in the UK. Marguerite White, Director of Retail Marketing, comments: "This collection is minimally constructed with our finest yarns to help shape without bulk. The elastic free

construction offers a no show through look under clothes. It offers an everyday solution as it is lightweight, smooth and can be worn with your own bra." On the subject of market saturation, Jane Denereaz, Commercial Director for UK/Ireland for Maidenform, adds: "There is always room for innovation in this sector, but certainly the consumer has experienced an explosion of choice over the last two years. I can foresee the expanse of own brand shapewear reducing as retailers scale back on duplication that has been an issue recently. The onus is definitely on brands to bring more innovation and some fashion in order to stand out against strong own brand ranges." Jane thinks that the best and more market attuned products will still win out: "This is where social media plays a major role. Shapewear consumers love to share different wardrobing tips and recommend styles and social media is a great channel. Additionally these consumers are very passionate. When they find a product that they love, they want to talk about it. Expect a lot of buzz around Maidenform Power Slimmers and Sleek Smoothers."

Another company who is convinced that there is all to play for is Julie France Body Shapers. Spokesperson from their UK representative commented: "Shapewear is a year round fashion necessity – it may be that choices will shift dependent on weather to lighter weight options with breathable qualities. But we definitely do not think the market has reached saturation point. Shapewear, just as in any other market, is continually evolving and changing. It is a dynamic industry: changes in styles, technology, fabrics, designs and wearers will be the undercurrent carrying shapewear forward."

Wacoal Eveden who now encompass a family of brands has a strong interest in the shapewear sector, particularly through the Wacoal and Elomi brands and with their strong and well established social media networks, they are closer than most other underwear brands to their end consumer. Company spokesperson commented: "social media is key, it's a really important channel we use to help us share the collections we are launching as well as to shout about the marketing campaign activity we are doing and make sure our fans know all about our collections and brand news. The Wacoal and B.tempt'd brands are just growing their social presence but the Elomi consumer is already online savvy and very vocal about what they like." On the subject of the market reaching its peak



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Couture Standards

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they are optimistic: "No, it has not reached that point yet. We do have to be more selective with shapewear that we choose, combining the right amount of high quality function with fashion at the same time. We have to design for each customer in mind whether she is fuller figured, fuller busted or smaller so we constantly need to develop our collections further. Wacoal in particular is always looking to use new technology and fabrics in their shapewear and their fantastic Design Institute works constantly on this."

Panache Lingerie take a slightly different view. "For current product such as shaping shorts, we do believe that there is a degree of saturation. However there is always new product development which can bring something innovative or new (for example our cup sized Panache Swim Silhouette shaping suit)."

Relative newcomer, Italian brand Control Body, is distributed by Alterego, and Alan Gordon-Freeman says: "There are a lot of confusing choices out there – indeed some very dubious quality, and a massive different in price point so sometimes you actually do not get 'what you pay for'."

French brand, Simone Pérèle, believes that if shapewear is presented attractively, that is key to growth. Carole Launchbury, comments: "Shapewear is a great 'add on sale' when you have the customer in the fitting room. Usually it is only ever shown to the customer if she specifically asks, but we really feel that pretty shapewear can be displayed too!" And on market saturation Carole strongly believes there is still a lot of potential: "Innovation with new fabrics and fashion style is extremely important in this industry and keeps shapewear

products interesting and a 'must have' in the customers' lingerie wardrobe."

Simone Pérèle launched their new brand platform earlier this year with new logo, updated imagery and new products (worked with fashion photographer, Mary McCartney) and is upping its social media profile with a key fashion blogger 5 Inch & Up, Sandra Haglestam, to promote the brand to her fans and followers.

So although some of the main brands may differ on their view of the British and Irish markets and potential for further development, they seem to be more in agreement that differentiation and strong marketing will be crucial to any market advances in the sector. Whether this strong marketing takes the form of substantial attention to social media, special offers at point of sale or multi-platform is down to the particular strengths of the company and brands. For Wacoal Eveden the approach is multi-platform via advertising, pr and online marketing. Advertising is both online and outdoor and in key fashion titles. Brands will be supported with a regular run of in-store activities, promotional gifts and retailer pos kits that can be used to promote their display in store.

Other brands such as Magic Bodyfashion take a slightly different approach using their strongly visual differentiation at point of sale as starting point. Linda Leestemaker, owner, comments: "MAGIC Bodyfashion has a strong market position due to a complete and unique range of products displayed in funky packaging or with labelling in the same way. Important strength is that besides shapewear we offer bras and accessories which again are underwear solutions."



Panache Envy control high waisted brief



New shorty shaping style from ITEM m6 – tummy flattening and perfect shaping for thighs and buttocks, available in black and caramel (s, m and l)



The new Power Slimmers hi waist thigh slimmer from Maidenform available in black and latte lift. The garments use innovative 'smart yarn': ultra thin, breathable and cool on the body (perfect for summer wear)



The Sleek Smoothers WYOB Bodybriefer by Maidenform is minimally constructed with the finest yarns to help shape without bulk in Black and Paris Nude (S-2XL)



Rosa Faia Twin Shaper Dress



Wacoal Smooth Complexion

Grace & Wilde is firmly at the luxury end of the market (see inset box) and speaking with Serena de Maio, co-founder of the brand which launched earlier this year, they have clear opinions on the shapewear market. "We think that it is time for shapewear brands to stop proliferating cheap, unsightly garments that don't really do much to help shape and slim and that women don't feel beautiful wearing. It is imperative that at our end of the market we move innovation forward and find better ways to deliver the great shaping performance, beautiful aesthetics and everyday wear comfort that Lycra®'s Secret of Shaping embodies and women demand, that is certainly our commitment at Grace & Wilde." Serena adamantly disagrees that the market has reached saturation point: "No we don't. We believe that any time is a good time to grow a market if you have a truly unique proposition meeting an unmet consumer need, as is the case with Grace & Wilde. In the UK specifically, most major retailers have embraced shapewear. For consumers, it has become a must-have for special occasions and everyday wear for many. This has led to brand proliferation and to some retailers even launching their own lower priced lines. But we are also seeing that many boutiques and high-end retailers have opted out from carrying shapewear because they don't believe the aesthetic of current shapewear brands match with the other exquisite items they carry and the aspiration environments that they have created in their stores. This is proving to be a very nice fit for our brand and high-end retailers and bridal boutiques are embracing us." Spurred on by their



Flexible and light in polyamide and Lycra® with Chantilly lace, embroideries in contrasting colour or flamboyant Swarovski® Elements by Christies: part of a new AW2014 collection of shape dresses, skirts, trousers and blouses

success the founders plan a launch in Germany this summer with next stop the USA.

Also at the top end of the underwear market, Embrace Lingerie which just a few years ago launched an entirely new bra structure also introduced last year their Slimming Line which founder Reenagh McCall hesitates to even label shapewear. The range includes bras, chemises, camisoles, hourglass knickers, high shorts and high waist leggings. "I am not even sure about calling the slimming line shapewear as such. It does indeed have a lot of properties of shaping underwear but it is much lighter than most of the other products on the market. And of course we have used fabrics that have additional benefits to slimming – cellulite reduction, skin smoothing and anti-ageing ingredients – all guaranteed to last up to 100 washes. Using microencapsulation technology we can bring the benefits of proven elements such as Aloe Vera, caffeine, retinol, Vitamin E and fatty acids." Certainly results of a recent road test performed by RTE (Ireland's national broadcaster) have borne out the claims of the product with 8 listeners trying out the leggings product and scoring it between 8 and 9.5 out of 10. Smoother, toned skin, cellulite reduction and a significant reduction in measurements were mentioned by all.

*100 points of sales in the UK/Ireland were interviewed in Underlines research between April and early May 2014

**Keynote Market Report (Lingerie): March 2014

MARISOTA: SHAPEOLOGY

Marisota, part of the J D Williams group (the UK's largest independent multi-channel home shopping retailer), launched its Shapeology concept last year. The concept takes a holistic approach to fashion (both innerwear, outerwear and accessories) offering women of all shapes and sizes the chance to wear fashionable pieces – enhancing figures and boosting confidence.

The move was hastened by Marisota's own research that many women over 40 do not attend special events as they simply do not know what to wear. Speaking to 1,150 women aged between 45 and 65 (from sizes 12 to 26+) the results showed that more than a quarter of women were depressed about their body shape and over 30% rated their hair-do as their favourite 'body part'!



Marisota's shaping undergarments using Shapeology

The company enlisted stylist, Mark Heyes, to bring the Shapeology concept to the high street through a series of pop-up shops throughout the country in March this year.

Melissa Odabash continues her collaboration with the brand in her Sea by Melissa Odabash which again uses the Shapeology concept in a series of 4 timeless styles including a bikini, swimdress, bandeau swimsuit and classic ruched one piece with sarong and maxi kaftan. All have been designed with shape in mind – control panelling, moulded cups and cleverly positioned ruching.



Sea by Melissa Odabash, classic one-piece

BRAND	B/S UNDERWEAR	CONTINUITY V. SEASONAL	B/S COLOUR/STYLE
AMBRA	Killer Figure Bum & Tum Lifting Short & KF Waist Killer Brief	Continuity	Underbust shaping slip. Black and bare colours
ANITA	Rosa Faia Twin Shaper Dress	Continuity	Shaping dresses as it smoothes everywhere, is comfortable and more glamorous than briefs
BODYWRAP	47005 Wear your Own Bra Bodysuit (Lites)	Continuity	Black and Nude depending on season. The 3 ranges – Lites, Regular & Fuller Figure – all offer seamless shaping and high waist briefs are popular across all 3
CONTROL BODY	Shaping slip with firm support	Continuity	Skintone Full slip shapewear as it is very versatile
dMONDAINE (RESULTWEAR)	Jane Bra	Continuity	Black and nude (50/50)
ELOMI WACOAL EVEDEN)	Elomi Curve	Continuity	Ivory and black
FANTASIE (WACOAL EVEDEN)	Elodie Control Brief & Short	Continuity	Ivory and black
FREYA (WACOAL EVEDEN)	Deco Shape	Continuity but essential to keep ranges fashionable and stylish	Ivory – especially for wedding season and summer (& black) The moulded smooth seamfree Deco bra with high waisted briefs
GRACE & WILDE	The Shaping Dress with Perfect Cleavage Adjustable Bra™	Continuity but we must offer fashionable and seasonal colours/styles	Black and blush
HUIT (WACOAL EVDEN)	Grand Jeu	Continuity with an eye on fashion	Ivory and black
JULIE FRANCE	Leger High Waist Boxer Shaper JFL13	Continuity but seasonal colours and weights are important	Styles that offer Loop and Strap system are in great demand Nude and Black
MAGIC BODYFASHION	Seamless Bodydress (15BD)	Continuity/Core Product lines	Black & Skin Shapewear you can wear with your own bra is perennially popular
MAIDENFORM	WYOB Firm Control Full Slip	Continuity continues to account for largest percentage	Nude closely followed by black Longer pieces (e.g. full slips, singlets...) are popular
MIRACLESUIT	Hook & Eye waist cincher	Continuity	Black and nude Waist cincher historically bestseller but high waist brief is in high demand
NAOMI & NICOLE	High waist brief (775)	Continuity	Black and nude. High waisted briefs
NATURANA	High waisted bodyslayer	Continuity is at the core of the range	Black, white & neutral. colours. The idea of 'an all in one' underwear solution is very popular
PANACHE	Envy Set Silhouette Swim	Continuity is very important for shaping ranges	Black and nude The Envy high waisted shaping brief is on trend and in demand
SIMONE PÉRÈLE	Model High Waist shaper & Top Model Dress	Continuity is always popular	Nude and black for AW season The model dress is the most popular and the Plus Top Model lace matches the feminine demand
WACOAL	Smooth Complexion & B Smooth	Continuity	Nude but in a wide variety of nudes! The Smoothing Sensation hi waist brief and long leg shaper from Smooth Complexion

	INNOVATION/FIBRES	NEW PRODUCTS	RETAILERS COME FIRST
	Ambra is a seamfree shapewear and underwear specialist, customers are less concerned about fibre content than the fact the product is actually doing what it is designed to do	Ambra Featherlights in late 2014/early 2015	Stock availability with fast & accurate replenishment are key strengths
	Rosa Faia shaping meets the Lycra® Beauty criteria		Good delivery and customer care
	With an influx of shapewear ranges it is important to constantly develop and take advantage of technological and fibre developments	3 new colourways (nude with cream polka dots, black with nude polka dots and cheetah print)	Prompt delivery service, orders placed before 2.30pm delivered next day
	Important, the consumer can identify with established fibres/fabrics and it adds confidence in the product	Control Body just entered the UK market in 2013 so we are marketing it heavily to show how good Italian control wear can be!	No minimum orders, all stock held in UK for continuity of supply, great RRP's and margins, very fast delivery
	Very important to selling our products: there are more innovations coming all the time and that helps foster growth	A shaping sexy Nursing bra and seamless panty	Producing unique luxury products on time with superior quality
	Important (see Fantasie)		Design, quality, efficiency, regular communication and understanding are key
	It is an important factor – fabrics are carefully selected for the required level of control. Benefits are clearly indicated on all point of sale materials. Many of our collections use Lycra® Beauty and Xtra Life Lycra® as well as Sensitive® fabrics	Ivana range for AW2014, a more premium collection under the Fantasie label	Design, quality, efficiency, regular communication and understanding are key
	Important (see Fantasie)	Deco Rebel & Enchanted (based on Frankie an old favourite)	Design, quality, efficiency, regular communication and understanding are key
	Most definitely, it reassures consumers of the product's high quality standards. We actively communicate to consumers that Lycra accounts for 21% of our premium dual-facing fabric (cotton inside)	The Perfect Cleavage Adjustable Bra™ and virtually invisible bonding seams (both patents pending)	Excellent customer service, unique product bringing in new luxury clients, much higher margins for retailers than other brands
	Important (see Fantasie)	Nouvel Emoi for AW14	Design, quality, efficiency, regular communication and understanding are key
	It is a high selling point as our microfibre, seamless bodysapers are supersoft and are paired with highest compression technology	New developments underway for 2014/2015	We support them by not selling directly to the public. We have a one of a kind Retailer Referral System so buyers can order from us online.
	Very important as buyers want innovation not just in design but also in materials, we work with the Lycra® Beauty programme	Special lace category added into our current seamless bestselling products	Short lines as we are a small company with a flat organisation which has the possibility to take prompt decisions
	Yes very important, branded fibres give the consumer confidence	Power Slimmers & Sleek Smoothers	Stock availability, quick turnaround of order, good product information
	Very, particularly in shaping swimwear under the label which uses Miratex fabric and also Xtra Life Lycra®	The Sexy Sheer Singlette (2781) and 2788 Sexy Sheer Waistline Brief just launched this Summer	Prompt delivery service, orders placed before 2.30pm delivered next day
	Naomi & Nicole has the advantages of Wonderful Edge® technology	Sensual sheer group of hi cut brief, hi waist brief and hi waist thigh slimmer	Prompt delivery service, orders placed before 2.30pm delivered next day
	A key part of Naturana's marketing strategy is the fact that the shapewear is designed with Lycra® Beauty, known for its durability, comfort and fit	Shapewear cami tops and matching briefs will be launched in AW2014	Est'd in 1917, Naturana is a heritage brand, offering a solid range of quality core products, delivered in full and on time
	Branded fibres do add a level of trust for the consumer		
	Extremely important, we have tags assuring consumers of fibre brands such as Lycra® Beauty	Our key focus is fit, function, quality and comfort. Our latest innovation is Inspiration with the 'Lotion Touch' microfibre	Innovative products with expert fit and quality as Simone Pérèle is dedicated to producing collections that are beautiful as well as functional
	Yes important especially in shaping products	Amazing Assets with back strap; Beauty Secret Summer with Coolmax® for summer wear	Design, quality, efficiency, regular communication and understanding are key