



Empreinte expands its distribution in the UK with Melody and Cassiopée cited as favourite styles – featured here is Cassiopée in new continuity colour (silk)

In November, Underlines did an in-depth study of the opinions of 70 shops and stores to give a rounded picture of this market sector. The data published comes from mainly specialist outlets who all have bricks and mortar (although many also have active e-commerce sites).

As always we advise against making sweeping generalisations after asking just 70 independent shops their opinions on the market sector, but it is useful to see which brands are performing well, which sizes are most in demand and how sales of particular categories (shaping or sports) are performing.





Cleo by Panache Lyzy

Corin's Jacqueline



Corin's bestselling Virginia in red

## HOW HAVE SALES PERFORMED OVER THE SAME PERIOD IN 2017?

The majority of retailers reported that it had been a struggle to even maintain sales over the course of the year (and that it was swimwear which actually saved the day in terms of their yearly turnover as the summer selling period was longer than usual). 70% reported sales on par with 2017, 20% reported a fall with only 10% seeing an increase in sales turnover.

## WHICH BRANDS ARE YOUR CONSISTENT BESTSELLERS?

These percentages do not take into account ALL the brands sold – simply those that sold the best. Some retailers indicated more than one brand as a consistent bestseller.

BRANDS	%
FREYA/FANTASIE/ELOMI/WACOAL	24%
PANACHE/SCULPTRESSE	16%
PRIMADONNA/MARIE JO & L'AVENTURE	13%
EMPREINTE	13%
CORIN	8%
MAISON LEJABY	8%
TRIUMPH/DOREEN	5%
CHARNOS/LEPEL	5%
CHANTELLE & PASSIONATA	3%

Other brands mentioned include Anita, Felina & Conturelle, Simone Pérèle, Goddess & Eprise.

Notable this year is that The Wacoal Group has returned to its top slot pushing Van de Velde brands down the ratings. What is even more marked is that Panache and Sculptresse have climbed up to 2nd position. Empreinte continues to make excellent progress with UK retailers and Corin is a new entrant to the top 5.



## AND WHICH RANGE/COLLECTION SELLS BEST FROM THE BRAND?

BRANDS	BESTSELLING STYLE/S
FANTASIE	ALL SIDE SUPPORT SIDES INCLUDING JACQUELINE, ELODIE AND BELLE
ELOMI	MORGAN, ENERGISE & CATE
FREYA	IDOL
WACOAL	HALO LACE
PANACHE	ENVY & CLARA
SCULPTRESSE	GINA & CHI CHI
PRIMADONNA	DEAUVILLE FULL CUP
MARIE JO	AVERO
EMPREINTE	MELODY & CASSIOPÉE
CORIN	VIRGINIA & T-SHIRT BRA
MAISON LEJABY	HANAE FULL CUP
TRUMPH	AMOURETTE 300 & MODERN FINESSE
DOREEN	LONGLINE & LUXURY
CHARNOS	SIENNA & OLIVIA
LEPEL	FIORE
CHANTELLE	T-SHIRT BRA
PASSIONATA	BROOKLYN

## WHAT IS YOUR PERCENTAGE OF SALES (IN YOUR ENTIRE TURNOVER) THAT IS IN LARGER CUP SIZES?

Large cup sales are a hugely important part of business for the independent shops. Only 6% said it was less than 30% and an amazing 80% of respondents stated that larger cup sizes accounted for over 75% of their entire annual sales. Where indicated it is also evident that plus sizes is playing an increasingly important role in over half of the respondents – the brands cited were Elomi, Sculptresse and Chantelle's one size range.

## AND THE SIZES MOST IN DEMAND?

BRANDS	%
E	8%
F - G	60%
GG - H/HH	32%

## WHICH SWIMWEAR BRANDS ARE YOUR CONSISTENT BESTSELLERS?

Only 2 of 70 shops interviewed did not sell swimwear: the traditional corsetry brands who also produce swimwear did perform well – Panache & Fantasie in level pegging with Empreinte deserving second place. Miraclesuit, Profile by Gottex, Anita, Sunflair and Charmline jostled for 3rd place with other notable bestselling brands including Roidal, Moontide, Lepel and Pour Moi. Elomi was the undisputed leader in plus sized swimwear.

## WHICH SPORTS BRANDS ARE YOUR CONSISTENT BESTSELLERS?

Over half (38 replies) now stock sports bras to some degree with the most popular brands cited as Anita Active, Panache Sport, Triumph Triaction and Shock Absorber. The most requested cup and band sizes were 34E, 34F and 36F/G/H.

## WHAT CHALLENGES DO YOU SEE FOR 2019?

The continuing challenges cited are the uncertainty of pricing and supply from the European community and the competition from online e-commerce only operators. There is a glimmer of hope in that independents are now getting together via the national Lingerie Guild but also on a local and regional level with their Chambers of Commerce and independent trading associations.



KrisLine Arianna

## AND ANY PLANS FOR 2019?

"We intend to continue with the same suppliers – we can focus on excellent fit, especially full cup bras, with perhaps more continuity choice for customers."

"Larger back and cup sizes are always in demand for 34 to 38 F-GG being very popular. We intend to stock a greater choice of larger back and cup sizes in swimwear."

"Anita, Elomi and Fantasie swimwear in bigger cup sizes works well for us but most of it is fashion as we don't have an all year continuity style."

"We see a need to increase swimwear choices for larger back sizes and indeed more continuity stock. There has been a noticeable increase in demand for shapewear and cup sizes in excess of H cup."

"My attention will be focussed on nightwear, the care sector, shapewear and brands to replace Marie-Jo and PrimaDonna!"

"I will be looking to more efficient stock holding of the bestselling continuity lines from key brands, more timely delivery of fashion lines throughout the season rather than front-loaded, and an improved swimwear offering (variety across brands, shapes, styles)."

"Initiatives such as the Panache Click and Collect played a big part in my increased swimwear sales this year and we really promoted it to our customers, we will be continuing with this successful programme."

"One of our key focuses next year will be to find brand/s to replace Van de Velde. After such a dramatic dip in sales at the beginning of the year due to the Beast from the East, we have only now managed to recoup that loss so no sales increases: on par with last year. The fantastic summer weather this year helped us increase bra sales – more bras on show!"



## BRAND NEWS & INNOVATIONS



Curvy Girls

Leading brands in the market continue to push the boundaries in terms of innovation with fit and fashion. Recent television programmes such as *Curvy Girls Stripped Bare* (Channel 5 in November/December) focussed on the MiLK Model Management Agency and a fashion industry that is worth an estimated £4.7 billion every year. Wacoal report on the runaway success of their Elomi brand, both in the USA and the UK, with the influencer and body positive community playing a big role in their increased sales. So where the market before was concentrated on larger cup sizes, it is the plus size market which is the real growth opportunity for many specialist and independent retailers.

### ANITA

New for 2018 is Lucia – a delicate, sophisticated floral look with petal embroidery in a graphic design. Soft foam wrapped straps (with wider options for larger sizes) are featured on wireless bra and corselet with four-section cup. Available in black with co-ordinating briefs in black only with 34-48B-F sizes as standard.

### CLEO BY PANACHE

The young brand offers bold electric, petrol and violet shades alongside blush, chiffon and latte. Updates to bestselling Lyzy and Hettie are fresh colourways and a sporty all over lace design in Hettie. Hero fashion pieces include the Everly high apex plunge in electric blue (pictured), Atlanta non-padded plunge with decorative back panel detailing and Piper midi balconnet in bold violet.



Contourelle Secret Garden





Curvy Kate





Panache Tiana



Empreinte Norah



Miraclesuit

#### CORIN

This Polish brand was only introduced to the UK market a few seasons ago but some of its styles are already rating on the bestsellers list. Virginia is the bestseller of all not just in the UK but in other markets with its wide back and cup size offering and specially designed cups which means it can be worn strapless (Karolina). The Virginia bra won the Diamond Award presented by the Polish Bra fitting Association this year.

Another popular range is Jacqueline 875 – a more ornate garment with embroidered thread and soft cups, chic and offered right up to K cup – pretty and feminine with a double layer of tulle at the bottom of the bra, which also helps to lift breasts in a natural silhouette.

#### CURVY KATE

Curvy Kate is exclusively designed for larger cup sizes – starting at D cup with styles running right through to K cups (28-46 backs). The AW2019 Collection includes 3 styles (pictured here) with a first ever wired boy to be worn both as underwear and outerwear, a flirtatious bra and babydoll range with maximum uplift and projection and their every lowest plunge bra with clever foam padding lifts.

#### ELOMI

The brand has pulled out the stops with new collection – Eugenie – striking strapping detailing in rich purple berry tone. Ultimate style and comfort the underwired plunge bra goes to 40JJ cup with two coordinates (waist high brief and thong). New too is Roxanne (based on the Matilda style) with embroidered foil finishes for a wet look shine in underwired plunge bra (36DD-40JJ) with a low centre front as well as side panel for shape and uplift. A more everyday collection is offered with Meredith in sahra and black and popular style Charly returns in vibrant blue and on-trend rose gold with a new undewired bandless spacer moulded shape.

Elomi has enjoyed a very successful year with the launch of the Live Limitless Campaign and a series of influencers promoting the brand via social media.



## EMPREINTE

Empreinte continue their successful Revolution collection of invisible/seamless garments including the ever popular Melody and Cassiopée. Other highlights include Carmen, delicate and highly decorative embroidery with pleated straps and pearlescent bead and available for the first time for AW2019 in an underwired low-necked bra up to H cup. The Jazz range is supersoft with monochrome embroidery but the Underlines' favourite is Norah – graphic swirls with tiny flowers decorating neckline and straps.

## FANTASIE

Two main brand introductions under the Fantasie brand are Aura and Anoushka. Aura has two smooth bra shapes which can be worn in a variety of multi-strap styles – the strapless bra cut and sew has a 3-section cup for support and has stay for sure gripper to reduce slippage. There is also an underwired moulded full cup bra with smooth rounded profile in sizes 30-42D-G.

The stunning Anoushka collection has a moulded embroidery bra shape (a first for Fantasie), a full coverage style with smooth outer cups and high apex styling.

## FREYA

Freya's new range Expression features a crochet look lace with geometric mesh blend in black, California gold and ruby and you will see a brand new bra style – the demi moulded plunge (up to HH cup) offering a smooth shape, uplift and an enhanced cleavage.

The youthful new Wild Collection balances delicate lace with two bold animal prints – launching in grey leopard and black zebra the prints can be mixed and matched.

Maison Lejaby Wings



Anita – new Lucia range



Fantasie Anoushka





**FELINA & CONTURELLE**

Felina will be launching their first ever K cup for 2019 with the development of a new 4-section cup providing excellent support and an additional ergonomic panel to give more depth. The Conturelle Collection has a more seductive appearance with 2 new ranges (cup sizes up to H). The Secret Garden and Tiffany ranges will be also be NOS options making it easier for retailers to stock and re-order.

**KRISLINE (SEE INSET)**

KrisLine has a startling array of back and bra sizes with options up to size O in some styles. Featured here is their Arianna soft side support bra – the semi-soft bra has foam in the lower part with the top half in soft pretty decorated fabric. There is additional side support in the form of the foam left stretching right to the strap guaranteeing smooth lines.

**MAISON LEJABY**

Lejaby+ is Maison Lejaby's brand dedicated to bigger sizes with cup from D-G (up to 40 backs). The range includes many technical features including rigid lining and front shape, 3 part cup or cups reinforced outside half moon, deeper wings, closer wires, rigid front strap and U shaped back enabling support and projection. Karen Piekarski, Head of Collections & Product Manager, comments: "All the bras are made internally in our French atelier and worn by different women, who help us to always take the best decision in the pattern, fabric and finishings to apply to answer the needs of the vast majority of our clients."



PrimaDonna Deauville – consistent bestseller





#### PANACHE

AW2019 sees the introduction of 3 new styles to the Panache fashion range: Corinne balconnet (key design elements taken from Tango and Nouveau and perfect for party season), Tiana balconnet (toile bottom cups in purple flora with Swiss embroidered top cup for a delicate look) and the Amelie full cup (in moody winter floral print).

Envy is updated in burnt Sienna colour' Clara with two new shades (two-tone pink & champagne and premium olive & black).

#### SCULPTRESSE

Glamorous opulent designs are seen on both additional styles and colours in Logan and the classic Chi Chi with Dionne in fashion forward python and Estel in burnt red with stretch lace cups for an enhanced shape (pictured here).

#### KRIS LINE: BEAUTY IN A BRA!



Polish brand, Kris Line, has developed since its launch in 1992 from a family company offering regular bra sizes into a brand that offers a vast range of bra cup and back sizes – from A to O (28-50).

From the outset, the company knew that the aesthetics would be just as important as the functionality of their products so they work with international suppliers of high quality lace, embroidery, tulle and knitted fabrics, adapted to fashion trends.

The developed collections are now divided into basic, fashion, beachwear and sportswear and wholesale prices start at £15 with the RRP coming in between £39-£49. The brand's competitive price positioning and flexibility means it is already known in overseas markets including Australia, USA, Canada, Germany, Italy, Spain, France, Czech Republic, Slovakia, Bulgaria, Greece, United Arab Emirates, Nigeria, Republic of South Africa, Russia, Georgia, Ukraine, Israel and Iran.

Their ambitions for the British market are to bring their expertise, competitiveness and their experienced bra sizing and fitting to consumers here. The company as a whole is a solid and entrepreneurial one having been awarded the Gazele Biznesu (awarded to dynamic developing enterprises) and Quality of the Year Awards – Silver in 2012, Gold in 2013, 2014, 2015 and 2016, Diamond in 2017).

Their bestsellers are the Afrodyta, Betty, Brillant, Charm (pictured here) and Fortuna models, which are offered in many colours and are constantly available on stock.



The company is now part of the AIS Group and if you would like further information contact their UK Agent, Russell Gotkine, on 07508 031219.