

# Beachwear Report 2016



Maryan Mehlhorn 2016 – a perennial favourite in European markets

*This year, 430 retailers were interviewed by magazines of the group in North America, France, Italy, Germany, the UK and Ireland, as well as Russia, Ukraine and Kazakhstan. Carefully selected by the editors in each geographical market, most of the panel were recognised as their country's best sector retailers in the annual Best Shop Awards organised in collaboration with the trade's leading brands. The resulting in-depth, comprehensive survey is highly regarded by industry insiders. Based on retailer feedback, this survey doesn't merely spout back financial figures, but sheds much-needed light on the season's bestselling styles and retail trends. So far, 2016 has shown a wide disparity of results between countries, marked by strong showings by national brands. Another key point is the increased importance of a wider and more diversified size range – something that allows a store to truly stand out. Enjoy the read!*

## SWIMWEAR & BEACHWEAR SALES IN 2016

The question was to compare sales in 2015 with the current year to date in 2016...

	UK/Ireland	USA/Canada	Germany	France	Italy	Russia
Better than 2015	25%	32%	28%	5%	18%	29%
The Same as 2015	50%	53%	48%	38%	38%	34%
Worse than 2015	25%	15%	24%	57%	44%	37%

The market in general got off to a slow start in most of the countries covered in this survey. In the UK/Ireland with an early Easter, there was a negative impact on sales figures but things improved in April and May. Increasing popularity of spa breaks have meant many British women are shopping for new swimwear and cover-ups.

In North America it was a positive picture with only 15% reporting lower sales than normal. Moving to Germany, extreme weather conditions affected sales (and indeed in most of the European markets). Heavy rainfall put consumers off and it was not until the end of May that things started to pick up.

France also experienced this adverse effect on sales due to inclement weather coupled with enduring insecurities about the economy and lower spending power exacerbated by the fear of terrorist attacks. Retailers suffered from the private sales organised by the brands and indeed a few retailers stated they would no longer work with brands whose e-commerce strategy overshadows bricks and mortar.

The retail boost in Italy seen over the last two seasons is no longer a reality – 44% reported a drop. Once again bad weather had a role to play (particularly in Northern Italy) and Italian tourism abroad has been affected – cancellation of holidays and of course beachwear purchases.

In Russia, Ukraine, Belorussia and Kazakhstan, despite a somewhat unstable economic climate and political embargo (e.g. for Russian tourists to Turkey and Egypt) swimwear sales have shown some improvement. There are already positive signs but the peaks in their sales usually come after our review (high summer).

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## THE BEST SELLING BRANDS

TOP 5 BRANDS IN THE UK/IRELAND	
1	Fantasia/Freya
2	Anita/Rosa Faia
3	Maryan Mehlhorn/Charmline
4	Miraclesuit = Seafolly
5	Sunflair = PrimaDonna Swim

Overall the offer is balanced with 73% of those interviewed stocking between 6-10 brands (20% up to 5 and some 7% offering more than ten individual brands). Great fit and larger cups are key selling points for British boutiques – a fact reflected in the top five, which features plus-size specialists. Domestic brands Fantasia and Freya (part of the Wacoal Group) are in the lead. Seafolly has slipped from 1st place to fourth whilst there is a strong showing from German labels (60 retailers interviewed).

TOP 5 BRANDS IN THE USA/CANADA	
1	PrimaDonna
2	Anita = Freya
3	Fantasia
4	Elomi
5	Shan

The number of swimwear brands sold by lingerie stores depends on their location and retail surface area. Over half (53%) sell no more than 5 brands, 23% sell between 6-10 and the balance (24%) more than 10 labels. PrimaDonna has made great strides taking top slot. So too Anita (largely thanks to MD Joy Haizen's leadership) in second place with British brands (Freya, Fantasia and Elomi) having a popular market with its specialisms and it is Shan (the only swimwear specialist) that takes 5th place. Once again, expertise in fit, support and construction is all important (50 retailers interviewed).

Antigel 2016 – again number one in France



Agogoa

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TOP 5 BRANDS IN GERMANY	
1.	Sunflair
2.	PrimaDonna
3.	Charmline
4.	Lidea
5.	Maryan Mehlhorn

43% of the panel sell between 6-10 brands with a third (33%) offering more than 10. Bestseller once again this year is Sunflair (Adolf Riedl) followed by PrimaDonna Swim and all the remaining slots taken by brands in the Maryan Mehlhorn Group (Charmline, Lidea and MM) 70 retailers interviewed.

TOP 5 BRANDS IN FRANCE	
1	Antigel
2	Maryan Mehlhorn
3	PrimaDonna
4	Lise Charmel
5	Pain de Sucre

Many retailers decided this year to focus on a limited offer – 51% stock up to 5 brands only, whilst 42% sell between 6-10. Over 50 brands were mentioned in the topselling list but the top five remain pretty much as last year. French and German brands perform well (100 retailers interviewed).



TOP 5 BRANDS IN ITALY	
1	Pin-Up Stars
2	Maryan Mehlhorn
3	Twin-Set Beachwear
4	Miss Bikini = Raffaella d'Angelo
5	Agogoa = Domani

Italian retailers have faith in beachwear – nearly half of the panel (47% sell more 10 brands, a European best!). This year the top five features last year's top performers with the distinctive handwriting of Pin Up Stars followed by the fit and style of Maryan Mehlhorn. Twin-Set is still rated highly with the colourful Miss Bikini brand, Agogoa (part of Pin-Up Stars) and Domani with exclusive prints (100 retailers interviewed).

TOP 5 BRANDS IN RUSSIA & THE CIS	
1	Marc & Andre
2	Jolidon
3	Gottex/Charmante/Pain de Sucre/Infinity
4	Emporio Armani/Raffaella d'Angelo/Seafolly/Tribuna/Lora Grig
5	Anabel Arto = Magistral

The majority sell a wide range of swimwear and the best selling brand so far this season is Marc & Andre with its broad offer of sporty styles, plus-size swimwear and men's swimwear. Distinctive design from Pain de Sucre and Gottex ensure they are in the top 5. Two Russian brands (Tribuna and Lora Grig) make the top five for the first time (50 retailers interviewed).

## THE MOST POPULAR PRODUCTS

### UK/IRELAND



97% voted one-piece as the must-have with a leaning towards bandeau construction. Tankinis (most suited to northern European tastes and body types) are making a comeback and kaftans/tunics are the most popular style of cover-up. Plus sizes are highly sought after with Miraclesuit as the go-to brand for beach shapewear. Serious performance swimwear remains largely the reserve of sports outlets but sporty styles such as Seafolly 2016 do appear.

### USA/CANADA



One-piece and bikinis are the most popular but there is also a strong interest in tankinis with demand for separates. Beachwear and cover-ups are performing well (including kaftans, tunics and dresses) with shaping swimwear also on the rise (53% are stocking these). And whilst athleisure has been a key trend across the industry, sports swimsuits are only sold by 15% with men's styles under-represented.

### GERMANY



The one-piece comes out just ahead of the bikini with 3rd place taken by kaftans, tunics and short dresses. Sold by 87% of those interviewed, plus sizes are still performing well with a special mention to PrimaDonna Swim as the top brand in this category. Charmline is really the go-to brand for shaping swimwear (sold by 65%) and there is a growing interest in sporty swimsuits (brand mentioned was Arena).

### FRANCE



The one-piece keeps gaining in popularity, a real must-have and no longer overshadowed by the bikini which is a summer staple. On the design front – simple, clean lines are selling best especially in shaping variations. Beachwear and cover-ups are selling more with tunic/kaftans making up 30% of sales. New shopping habits are forming with a desire to invest in more durable pieces that can last more than one season. Shaping swimwear and plus sizes are more in demand (50% sell the former whilst 88% stock the latter).

### ITALY



The bikini is queen of the beach (86%) with a strong demand for triangle tops over strapless styles. However one-pieces are on the rise and manage to appeal to a younger crowd thanks to the directional graphic cut-outs. The kaftan is the cover-up of choice, just ahead of the short dress while sarongs are considered on the way out along with mini-skirts which are hardly offered now. Demand for bigger cup sizes has risen in Italy and here brands such as Maryan Mehlhorn (and Chantelle and Bernè) are popular.

### RUSSIA AND THE CIS



Unlike last summer, one-pieces are becoming more popular sharing top slot with the bikini. Beach cover-ups (especially kaftans and tunics) are regular second buys and the maxi dress in lightweight, natural fibres is a winner. In shaping beachwear, Gottex is the go-to brand, being stocked in 43% of stores and for plus sized swimwear the brands most commonly cited are Tribuna and Empreinte.



Lise Charmel joins Antigiel in the top 5 brands in France

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## THE POPULAR CHOICES FOR COLOURS AND PRINTS

### SOLIDS OR PRINTS?

	UK/Ireland	USA/Canada	Germany	France	Italy	Russia & CIS
Prints	67%	50%	36%	58%	75%	37%
Solids	33%	50%	64%	42%	25%	63%

### COLOUR TRENDS IN 2016

	UK/Ireland	USA/Canada	Germany	France	Italy	Russia & CIS
1	Blues	Blues	Blues	Blues	Blues	Blues
2	Black/White	Black	Black	Orange	Red	Red
3	Green	Red	Black/White	Green	Yellow	Yellow

### PRINT TRENDS IN 2016

	UK/Ireland	USA/Canada	Germany	France	Italy	Russia & CIS
1	Floral	Floral	Stripes	Floral	Floral	Floral
2	Stripes	Stripes	Floral = Polka Dots	Geometric	Stripes	Stripes=Polka Dots=Graphic
3	Polka Dots	Geometric	Animal	Animal	Figurative Prints	Geometric

Like most of Europe, the **UK & Ireland** are mad about prints – they are on trend for 67% and in their ultra-colourful, tropical-style and floral versions. Stripes are still popular and polka dots are up there for a safe bet. Generally speaking geometric, animal and ethnic prints are out. Blues in all their varieties are stocked in 90% of British and Irish retailers along with black and white combinations. White as a solid is less and less popular every year. Bright, jewel tones are on trend with emerald green ahead of orange, yellow and pink.

On the colour front, it is business much as usual for our **North American** retailers, who reported very similar results in 2015. Blue and black on top with deep reds, lighter pinkish tones taking 3rd place. Across the rest of the colour palette, green is favoured over yellow, brown and white. Floral prints are wildly popular, especially in more exotic interpretations, with stripes a safe bet. Animal prints are losing ground mainly to geometric designs.

**German** customers favour prints over solid hues and 78% stock stripes as a sure thing just ahead of florals and polka dots. Animal prints made it into the top three and are still selling well according to 70% of retailers there, which does fly in the face of the global trend away from these type of prints. However business as usual with the identical top selling colours as in 2015: blue, black and black & white.

**France** this year is all about prints with 58% reporting that they sold better than solids. Florals are the top prints (again colourful, tropical and exotic) although graphic & geometric prints are still highly rated. As in Germany animal prints are holding on (zebra and leopard mixed up with neon and modern details). Blue is still queen of the crop in terms of colour (from pastel hues right through to deep cobalt and navy) with orange another clear favourite and green in all its many variations is still going strong.

**Italy** also opts for prints (75%) with colourful florals at the top (macro and micro prints, folk-inspired motifs, tropical designs or romantic blooms). Although stripes come second they are some way behind florals (nautical stripes as seen in r-t-w are still rated by many retailers) but it is figurative prints that are the true revelation – 67 stores sell them and 40 stores report they do very well. Blue for 82% is a must-have colour especially in intense shades with reds (Ferrari, red and coral) taking second place for beachwear and r-t-w. Bright and fresh yellow is another favourite with perhaps surprisingly green dipping in popularity. And perhaps a special Italian trait is the popularity of artisan-style detailing to ensure standout beachwear (lace, embroidery, macramé ...).

In **Russia and the CIS** prints are now selling well but the earlier part of the season saw good sales in solid hued designs. And the print of choice is floral designs with nautical stripes and graphics next. Geometrics come third with a mixed review with the abstract versions performing best. The big change is away from animal prints which are no longer highly sought after by Russian shoppers. Blue in every shade is the No. 1 choice followed by red (especially coral hues) and yellow.



Gottex 2016 – a popular choice for shaping swimwear in Russia

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Jolidon 2016 hits the number two slot in Russia



## THE KEY ACCESSORY OF THE 2016 SEASON

### **UK/Ireland**

Beach bags/cover-ups  
Flip-Flops

### **USA/Canada**

Sun hats  
Large beach totes

### **GERMANY**

Beach footwear/flip flops

### **FRANCE**

Hats, totes and flip flops  
Styles that double up as outerwear

### **ITALY**

Footwear (flip-flops, sandals or embellished clogs)  
Beach towels/totes

### **RUSSIA & THE CIS**

Hats/Beach Totes

Freya Swim 2016 – a big hit in the UK and the USA



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Seafolly 2016 – still a top ranked brand in the UK and increasing its share of the Russian market



## PREDICTIONS FOR 2017?

**UK/IRELAND:** 40% are happy to keep the same brands as this year but 46% stated that they were open and indeed ready to change the brand mix they now display (brands mentioned were Sunflair, Panache, David and Miraclesuit). Only 7% said they wish to reduce their brand offer.

For many British retailers, the number one issue today is the financial juggling act related to stock management as most aim to offer a varied selection of brands in a deep variety of sizes, right from the very start of the season (and that is February onwards).

**USA/CANADA:** 50% will leave their selection untouched but good to see that 32% wish to expand the offer to appeal to wider demographic groups. Most sought after are brands offering a good selection of sizes and/or smaller designer brands with plenty of visual appeal. 12% are thinking of reducing the offer.

**GERMANY:** Over half (52%) will keep the same brand mix (although many expressed concern about late deliveries and lack of flexibility from suppliers) and thus 23% are looking to update the brand mix as a result. 17% expect to stock fewer labels.

Retailers blame decreased performance on promotional activities by large retail chains where discounting has made consumers reluctant to buy full-priced items. This has an effect on average budget which is shrinking and high-end swimwear is now being bought mostly at the end of the season.

**FRANCE:** Whilst 53% are intent on keeping the same brand mix, many retailers complain about fierce competition from digital retail and the lack of support from suppliers in trying to maintain their own business. At this point some 29% of boutique owners are considering reducing their brand mix to retain their profitability and a further 17% are considering changes to brands who prefer to work closely with bricks and mortar outlets (as opposed to e-commerce). There was a degree of pessimism in light of terrorist activity (and fear of).

**ITALY:** Italy is always in touch with weather conditions as far as beachwear sales are concerned and whilst online sales are a reality, there is less competition than in other markets. Customers may spot their dream bikini online but they would rather go for the instore experience where they can touch, try and receive expert advice. Retailers were more concerned with the proximity and competitiveness of major retail chains.

**RUSSIA & THE CIS:** An encouraging 43% now intend to expand their beachwear portfolio in order to renew their offer and attract customers. Only 6% plan to reduce their brand offer. In difficult times, retailers are still fighting to sustain their business while striving to adapt to an ever-changing market. They prefer to order less and restock mid-season, in order to focus on the specific tastes and needs of their most dedicated customers.

< PrimaDonna Swim 2016 – well appreciated cup sized brand

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## MEN'S SWIMWEAR

In the UK and USA, there were no observations on men's swimwear as none of the respondents actually currently stock men's garments.

In Germany, over 57% stock men's swimwear with the bestselling brands being domestic e.g. Schiesser. For France 31% sell men's items and again it is dominated by domestic brands (e.g. Hom, Geronimo and Eminence).

Italian shops reported that 70% of them stock men's swimwear and they tend to go for the big brand names such as Emporio Armani EA7, MC2 Saint Barth and to a lesser extent, Zeybra, with its distinctive prints.

For Russia and the CIS, men's swimsuits were one of the casualties of the limited buying budget allocated to beachwear and some immediately ceased stocking them. Of those who do, the brands mentioned were Olaf Benz, Emporio Armani, Marc & Andre and Jolidon.

Rosa Faia 2016 – Anita has a great position in the American and UK markets



Sunflair 2016 – fit and fashion appreciated by German and British consumers