

A woman with long brown hair, wearing a white, form-fitting bodysuit, stands in a gym. She is looking off to the side. The background shows a window with white curtains and a piece of gym equipment.

# Shaping Up!

UNDERLINES MAGAZINE SPOKE TO 60 RETAILERS WHO STOCK SHAPEWEAR DURING APRIL AND MAY 2019 AND MAJOR SUPPLIERS IN THE UK TO FIND OUT HOW THE SECTOR IS PERFORMING AND HOW INNOVATION IS DRIVING THE SECTOR. CONTRARY TO LAST YEAR, THE MAJORITY OF RETAILERS WERE ONLY SELLING BETWEEN 1-3 BRANDS (IN 2018 IT WAS 4-6) BUT THIS MAY PARTLY BE EXPLAINED BY THE SPANX DIRECTIVE THAT FROM MARCH THIS YEAR IT WOULD NO LONGER SUPPLY INDEPENDENT STOCKISTS IN THE UK & IRELAND.

The Compression Wear and Shapewear Market Report published in July 2018 by KBV Research forecasts that this sector is a growth one – particularly in Europe, North America and the Far East – with estimated sales of \$6.46 billion (nearly £5 billion) by 2024 and a CAPR (compound annual growth rate) of 5.8%. Of course the report covers highly functional garments for both men and women, fitness enthusiasts and athletes but also body sculpting garments for special occasion dressing.

Every season see new players in the market and Heist launched their new innovative shapewear garment, The Outer Body, just before Christmas 2018, promising a whole new approach to shapewear – but there have been mixed consumer reviews. The most popular shapewear brands according to our respondents are still the American brands – Miraclesuit, Naomi & Nicole and Maidenform but Commando and Wacoal has gathered pace over the last 12 months. And once again we find that these players have upped their game, introducing new products and innovative fabrics to ensure a better consumer experience.

**WHICH FUNCTIONAL SHAPING UNDERWEAR BRANDS ARE YOUR BESTSELLERS?**

BRAND NAME	% INDICATED AS BESTSELLER
MIRACLESUIT	40%
MAIDENFORM	25%
NAOMI & NICOLE	25%
BODYWRAP	15%
WACOAL	10%
ANITA	5%
CONTURELLE (FELINA)	5%
JANIRA	5%

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

Striking result is the increasing lead that Miraclesuit has on its nearest rivals, being by far the most cited bestselling brand (for a record 11th year in succession). However interesting too is the progress made by Maidenform (Hanes) slipping into joint second place with Naomi & Nicole. Wacoal has already increased its standing over 2018 and is the only brand that makes it into both the functional and fashionable shaping underwear tables. Perhaps less surprising is that Spanx although acknowledged as the most 'visible' American brand was not cited by a single respondent. Spanish brand, Janira, enters the ranking for the first time.

**WHICH FASHIONABLE SHAPING UNDERWEAR BRANDS ARE YOUR BESTSELLERS?**

Of those interviewed only 18 shops stocked what they would classify as 'fashionable' shapewear (most regard any brand of shapewear as performing first and foremost the shaping function).

BRAND NAME	% INDICATED AS BESTSELLER
WACOAL	10%
COMMANDO	10%
PRIMADONNA	5%
WAOLFORD	5%

Wacoal enjoys the unique advantage of being cited in both categories. Commando makes its entry 'into the charts' but PrimaDonna loses share, certainly due in part to its new trading policies on fashion garments by Van de Velde. Independent shops are slowly moving away from established brands with whom trading is increasingly more complex to new or innovative brands that can offer them an edge.

**HOW HAVE YOUR SALES PERFORMED IN THE LAST YEAR?**

Most retailers report steady sales year on year (80%) and still felt the market was quite stagnant. Some 15% reported an increase in sales revenue whilst the remainder (5%) reported a fall in sales.

Heist The Outerbody launched Winter 2018



## HOW IMPORTANT ARE THESE CRITERIA IN SELLING SHAPEWEAR?

CRITERIA	VERY IMPORTANT	IMPORTANT	NOT VERY RELEVANT
PRICE	30%	60%	10%
MARGINS	30%	15%	55%
AESTHETICS	50%	30%	20%
INNOVATION	50%	30%	20%
COMFORT & FIT	100%	-	-
PRODUCT FITTING/TRAINING	15%	50%	35%
DESIGNER BRANDING	-	15%	85%
KNOWN FIBRE BRAND	-	75%	25%
ADVERTISING/PROMOTION	15%	15%	70%

No surprise that comfort & fit rate as the number one priority for our respondents with aesthetics and innovation coming in second. It seems as if retailers are open to new and innovative products as long as the price is right! The market does continue to be price sensitive (90% consider it important or very important which exactly mirrors last year's results) but interestingly there is somewhat less emphasis on margins offered – some of the best known brands in the UK are already offering favourable margins and replenishment options.

What is evident is that there is not much store set by either designer branding or indeed promotional campaigns, both rating as low in importance in selling shapewear. Buying shapewear with a known fibre brand, particularly LYCRA®, is seen as important and desirable by 75% of our panel – perhaps not surprising as much of the sculpting and control qualities of shapewear can be achieved by fibre and fabric innovation.

## AND THE MOST POPULAR COLOURS & SIZES?

Nude/skintone shades were voted 100% as the top selling colour with black in second place for 80%, followed a far way behind by champagne (30%) and white (20%). Pastel colours or fashion shades were hardly rated at all and only stocked by 10% of respondents.

A real shift from smaller sizes in shapewear to medium (30%) and large, extra large and XXL with 70% of the vote. The smallest sizes were not stocked by any of our panel.

## AND THE MOST POPULAR GARMENT TYPES?

GARMENT TYPE	% STOCKING GARMENT
SLIMMING PANTS/KNICKERS	100%
BODYSUITS	100%
SEAMLESS SHAPEWEAR	80%
THIGH SHAPER	60%
COMBINATION GARMENTS/WYOB	30%
WAIST CINCHER	10%
SLIMMING SLIPS	60%
SLIMMING TUBES	-

Bodysuits are now stocked by all respondents for the first time ever since Underlines started these surveys (12 years ago). Slimming pants/knickers are a given for every retailer and seamless shapewear is more popular than ever. Slimming tubes have experienced demise in independent outlets.

The single most popular garment overall are high waist shaping briefs or shorts with long legs (when combined with cooling fabrics).

## New Brands

There was not a seismic shift in new brands being added but 3 brands had been added by 20% of our panel (that is 12 stores) and they were Commando, Wacoal and Maidenform.

### BEST VALUE FOR MONEY SHAPEWEAR BRAND?

The panel was split evenly on Miraclesuit and Maidenform giving the best value for money with Naomi & Nicole and Bodywrap coming in joint second place.

### And a word from the retailers...

*"Many consumers are afraid of shapewear riding up or falling down – something to further reassure them and combat those fears would be great"*

*"More thong shapewear garments and more seamfree/laser cut edges – only a few brands do this."*

*"A backless, strapless bra in an H cup"*

*"Bodysuits really offer that sleek and fashionable look and it is no different for shapewear."*



Anita continues to rate with some stockists for its comfort corselets offering smooth and comfortable shaping

# New Directions in Shapewear 2019-2020

With the increasingly competitive nature of the shapewear markets and new entrants such as Heist's Outer Body, the major brands have definitely upped their game with a series of innovative performance led garments. And the majority of brands agree that shapewear should never be that emergency buy just for special occasions – they believe that as such a technical product, it needs to be fitted and its benefits transmitted to the consumer. Likewise the 'new generation' of shapewear is offering a level of comfort with control that is unprecedented and more suitable for everyday wear.

## Naomi & Nicole: Wonderful U

From this shapewear powerhouse comes the latest innovation which will be launched in Autumn by Patricia Eve – Wonderful U, The Ultimate Comfort Wire. This unique patented feature has a comfort wire that will adjust to the wearer's shape, fitting the bust naturally – initial garments on the market will be a camisole and bodybriefer with adjustable straps and no 'side show' panels smoothing underarm bulge.

The product was developed to answer the query of why more women would not wear total body shaping pieces? With women's figures all being unique, getting a bodyshaper to fit from top to bottom was not easy but Naomi & Nicole believe they have cracked the problem with Wonderful U. The underwires are anchored on a stretch band under the bra cups. In addition, the usually rigid centre front of the bra is now constructed with a flexible material. These two flexible elements allow the underwire to float and rotate around the breasts for great comfort and support. The profile is much more personalised and the comfort means that consumers do not even remember they are wearing an underwired garment.

## Wacoal roll out Fit & Lift™

After the successful launch of their Beyond Naked and Sexy Shaping programmes a few seasons ago, Wacoal is rolling out its new Fit & Lift™ series from October this year. The product has an innovative nano-fibre band which holds the garment in place at the waist, lifting and defining the bottom, with its cleverly engineered panels. Spokesperson for Wacoal shapewear commented: "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 ... shapewear has moved on considerably over the years and the fabric and engineering of shape is where we can offer a point of difference." As well as a full instore kit for stockists Wacoal will be working on all levels of social media and investments with influencers both in the UK and Europe.



Janira's new Greta programme introduced last year offers firm control with stylish lace trim



Wacoal's Fit & Lift™ shaping



Naomi & Nicole nude camisole with Wonderful U technology

### Maidenform launch FitSense™

Maidenform is an 'old hand' at shapewear and most of their garments are being bought all year round and not simply as an occasion-based purchase. A spokesperson for the brand explains: "more and more shapewear is considered throughout the year with many outfits, due to the variety of shapes and levels of shaping on offer as well as improved fabric innovations making shapewear light and comfortable – this is obviously good news for retailers and brands alike."

This has led to a high demand for shaping briefs that can be worn all day and last year saw the successful launch of Maidenform's 'Tame Your Tummy'.

The big news for 2019-2020 is the launch of the new Maidenform LYCRA® FitSense™ which features innovative liquid LYCRA® application brushed onto the fabric giving lightweight but targeted, ultra-firm control. Initially the FitSense™ will be available in 3 key shapes – thigh slimmer, high waist thigh slimmer and high waist brief. The garments are also treated with Cool Comfort™ cooling technology to keep women cool and comfortable and a comfort self-fabric covered waistband.

In terms of the potential of the shapewear market they further add: "The UK is a market that can still recruit new users with existing and new shapewear products. The latest innovations such as Maidenform FitSense™ are making firm shapewear attractive and even more comfortable to wear which can help overcome any preconceptions that consumers may have that shapewear is unsightly, uncomfortable or restricting."

Maidenform will be launching a 360° programme involving both retailers and consumers with good service and social media/bloggers.



Maidenform's FitSense™



Super control body by Magic Bodyfashion

### Magic Bodyfashion – new additions

This Dutch company introduces regular shapewear additions (and not just seasonal) as they guarantee that all their shapewear products are continuity and never out of stock. Their slogan of 'The only Total Body Solution Brand' by women, for women, means they have a very extensive collection of shapewear, legwear and all manner of accessories for sorting out those dressing and fashion problems.

Their bestselling Maxi Sexy Shapers Collection is complemented by a monthly focus on particular products e.g. in August they have a Magic Think Green campaign planned which focuses on their new bamboo collection and a premium line made of plastic bottles.

For 2019 they are just launching 'Tape That Thigh' in their new thigh solutions garment and have just brought to market 'Be Sweet to your Legs' which prevents thighs rubbing together and has been an instant hit with stockists. Their Magic Mommy series introduced earlier this year will see new bras launching May-June. A spokesperson said that attitudes are changing: "Social media is very important...in the past, shoppers were reluctant to post about shapewear but now when they find the perfect shapewear they share it with friends and followers. They also tell us how they love their new silhouette."



Commando body and faux leather leggings

**Commando – new approach**

This is an American brand that has been around since 2003, created by Kerry O'Brien, and introduced to the UK just a few seasons ago. This is shapewear that is designed to be worn all year round to create the best foundation for clothing. Bestselling garments are their control short and control thong but their shaping leggings with multi-dimensional stretch are fashionable, comfortable and shape enhancing all the same time.

The brand has become well established with fashion designers, celebrities and stylists and opens up new opportunities as their UK agency explains: "There are always new opportunities – we have new styles, fashions and innovations coming through in shapewear. Social media is really important to this brand – it has a lot of influence and has proven very beneficial in getting the Wear Commando message across."

Cupid Intimates





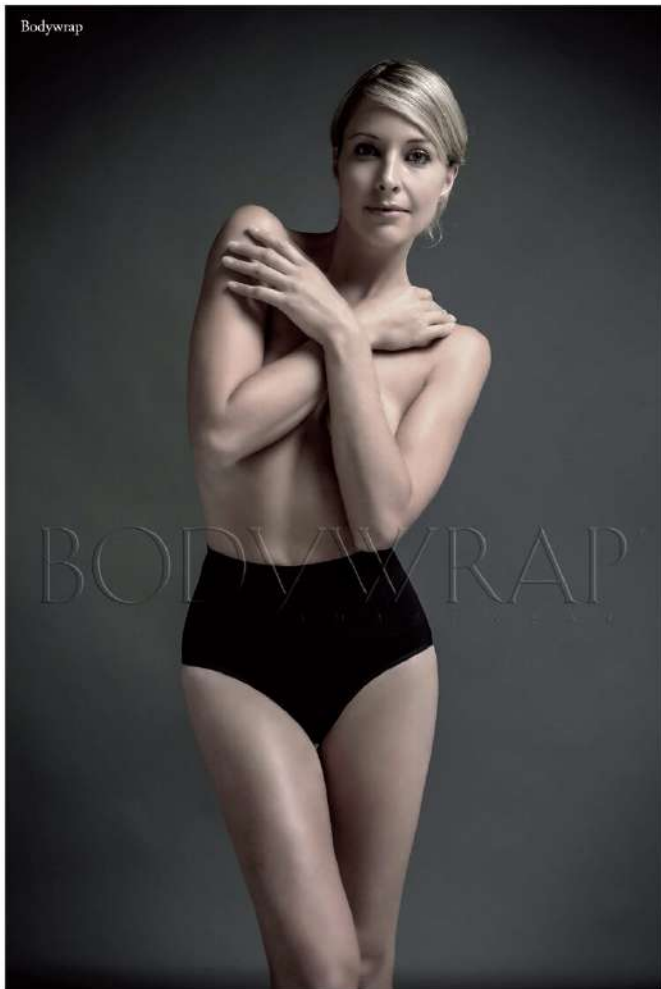
### Miraclesuit

Miraclesuit continues to be the number one choice for independents throughout the UK & Ireland – both in shaping underwear and swimwear. Their continuing popularity is in no small part to the level of customer service which is rated highly. Chris Eve of Patricia Eve Ltd (who represent Naomi & Nicole, Cupid Intimates, BodyWrap and Miraclesuit), commented “All our marketing, advertising and promotions are solely aimed at our customers, driving all sales and business their way, in exactly the same way as our website, purely a tool to try and help our stockists and guide the end consumer to where to buy. Bricks and mortar stores are hugely important as you cannot beat going in and physically trying on something and have the key features and benefits explained.”

This approach of B2B selling has struck a chord with retailers around the country and the integrity, product and supply of companies such as Patricia Eve are something of a very rare ‘animal’ indeed. There is a high level of expertise behind both the Miraclesuit underwear and swimwear with technical fabrications such as their own patented Miratex design in swimwear and cross-control panels in the ‘Tummy Tuck’ series.

Other brands under the Patricia Eve ‘umbrella’ include **Naomi & Nicole** (see above) and **Cupid Intimates** who will both be introducing the Wonderful U shaping solution this Autumn/Winter, a comfort and fit innovation with floating underwire which ensures a better shape from bum to bust.

Alongside **BodyWrap**, the company report that sales in slip based garments are a hit this year (skirted, full length and even plunge versions) with high-waist and mid-rise briefs in the most popular shades of nude and black but with the addition of midnight blue.



Miraclesuit's popular 'Tummy Tuck'