

Best sellers BRANDS and PRODUCTS

480

specialty retailers interviewed

THE RESULTS OF INTIMA MEDIA GROUP'S SOUGHT AFTER ANNUAL SURVEY ARE IN! A UNIQUE TOOL, PROVIDING YOU WITH AN ACCURATE AND TRUSTED OVERVIEW ON SELL OUT RESULTS, TOP SELLING BRANDS, BEST PERFORMING CATEGORIES AND SALES PREDICTIONS FOR 2017 FOR SOME OF THE KEY PREMIUM WHOLESALE MARKETS WORLDWIDE. ENJOY YOUR READING!

THIS SURVEY WOULD HAVE BEEN IMPOSSIBLE WITHOUT THE PARTICIPATION OF THE FOLLOWING STORES. WE WOULD LIKE TO THANK THEM FOR THEIR TIME AND THEIR HIGH QUALITY CONTRIBUTIONS.

USA & CANADA A La Mode • Allure Intimate Apparel • Amazing Assets • Amour • Anna Bella Fine Lingerie • Bellefleur Lingerie Boutique • Beneath It All • Bertha Church • Best Rack Around • Bits Of Lace Fine Lingerie • Bloomers • Bra & Girdle Factory • Bra Genie Perfect Bra Fitting • Bra La Vie • Bra-La-La • Brachic • Bras Galore • C'est Privée • Claire De Lune • Corset Shop Intimates • Coup De Foudre Lingerie • Donna Bella Lingerie • Embrasse-Moi • Étaïn • Everybody Intimates • Fiamour Lingerie • Forever Yours Lingerie • Forty Winks • Freudian Slip • G. Boutique • Gazebo • Gena Lisa Lingerie • Glamour House • I.C.London • Inside The Armoire • Iris Lingerie • Just Like A Woman Speciality Lingerie • Knickers N' Lace • La Petite Coquette • La Silhouette • Lace And Day • Le Boudoir • Le Soutien • Les Boudoirs • Lilies And Lace • Linea Intima • Lingerie Lingerie • Lingerie On Lex • Little Black Bow Lingerie • Maison Jolie • Melmira Bra & Swimsuits • Necessities By Sherrie • Petticoat Fair • Petticoat Lane • Rebecca's Lingerie • Sea Cup And Up • Secrets From Your Sister Inc • Sweetest Secret Boutique • Sweetest Sin Boutique • Sylene Of Washington • The Dain Shoppe • The Lingerie Shoppe • The Pencil Test • Top Drawer • Town Shop • Underthing • Vicanie's • Wigs N More • Zoe & Co. • Zsofias Fine Lingerie

UK & IRELAND All About You • Barbara Ashton • Bare Necessities • Barkers • Beach & Body • Belle Femme Lingerie • Blush Lingerie • Blushies • Boschen • Bravado Underwear • Bustles Boutique • Butterflies Lingerie • Caroline Randell • Carols of Bishops Stortford • Chantilly • Chic Lingerie • Deborah Lingerie t/a Perfect Fit • Dees Lingerie • Eleanor Rose • Elphicks • Fit to Bust • Fleur Lingerie & Swimwear • Foundations • Grasp Boutique • Guilt Lingerie • Harts of Monmouth • Isabella Rose Lingerie • Jolie Lingerie • Annies Just Jane • Kinari • Knicker Locker • Lace • Lincoln Bra Lady • Linda Rose • Little Pleasures • Loubou Lou's Lingerie • Lou Lou's • Marie • McElhinneys • Mimi & You • Mirari • Miss Demure • Mysmartypants.com • Mystique • Odette • Odyssey Boutique • Olivia B • Ouh La La • Perfect Fit by Carol • Pretty Things (Buckhurst Hill) • Pretty Things (Cockfosters) • Ruby & Bettys • See-Saw Lingerie • Sheen Uncovered • Sheer Delight • Shirley Allum • Sipsy Lingerie • Sixty Six Lingerie • Straps of Gourock • Sugar & Spice • Sweet Dreams • Tallulah Lingerie • Temptations • The Bra Closet • The Fitting Room • The Lingerie Boutique • The Lingerie Lounge • The Little Big Bra Shop • Turnbolls • Victoria's Little Bra Shop

FRANCE 12 saint Agricole • A fleur de peau • A fleur de peau • Alice Lange Lingerie • Any Lingerie • Arc en ciel • Au Féminin • Au Petit Paradis • Aux Dames du Faubourg • Blanche Neige • Caprices • Capucine • Charme Absolu • Cléopâtre • Cœur à Corps • Couderc lingerie • Coup de Foudre Lingerie • Crysaldid • Cupidon • Daudé Lingerie • Deci Dessous • Dessus Dessous • Elsa Lingerie • Eve • Eve Boutique • Eve boutique • Falbalas • Femina • Femmes Secrètes • Folie Douce • Fonteyne Lingerie • Galicia lingerie • Glamour lingerie • Iloeva • Iona • Ivoire • Jade Lingerie • Jardin secret • K'nelles lingerie • Kalina • Katline • L.Maggi • La Fée Caprice • La Pince à Linge • Laure Lingerie • Le Boudoir – Alice Lange • Le Paradoux • Lenceria Boutique • Les Dessous des Arcades • Les Saintes Chéries • Lethu Lingerie • Libertine • Lingerie Carrade • Lingerie Simone • Lingerie Weachter • Marizia • Orphélie • Passion de Femme • Plaisir en Soie • Present's Lingerie • Rêve Ligne • Rêves de soie • Sauret lingerie • Sophie M • Sybele Lingerie • Sylvaine • Tazia • Tendence Bleuet • Tendre Passion • Tentations

GERMANY Achatz Wäsche + Dessous • Ansary • Barbara Dessous und Mehr • Bella Donna Dessous • Bodyline • Boutique de Lingerie Michelle • Calida by Eder • Calotta Dessous • CJ Dessous • Dessous - Wäsche - Bademoden Inge Tschetschel • Dessous & Du • Dessous Danielle • Dessous Danielle im Lindenthal • Dessous Madame • Dessous Paradies • Dessous von Bous • Die Lady Dessous and more • Drunterwelt • Ernst Stackmann • Feine Wäsche Jacobs • Grabein Strumpf & Wäsche Galerie • Hassenmeier • Haus der Wäsche • Hautnah • Hautnah Bodyware & More • Hautnah Bruckmeier • Hautnah Dessous für Sie u. Ihn • Heinrich Petzhold • Henschel • Hilde Schönborn • Holzberg Dessous & Mehr • Höptner Lingerie Styling Meer • Hündchen • Karstadt • Karstadt Zentraleinkauf • Keimel Wäsche Hautnah • Kleidsam • Kokett Dessous • Krämer Mode & Dessous • Lady's Secret • Le Sorelle • Lise Charmel • Maren Christine • Marlies Timmer Wäsche u. Dessous • Meislahn • Midas - Feine Wäsche • Modehaus Bullinger • Modehaus Messerich Nô • Wäsche und Mode • Nusser Wäsche Mode • Obenrum • Per la Donna • Pollozek • Reiber Wäsche • Sauer Modehandel • Schilling Wäsche & Mehr • Secrets - Feine Wäsche für jede Größe • Sie Dessous & mehr • SIG Feine Wäsche für Sie + Ihn • Sunny Dessous • Sylvia A. Boehm Dessous und Wäsche zum Wohlfühlen • Sylvia Weber • Vera Meyer Wäsche + Mehr • Warnecke am Hochzeitshaus • Wäsche Graf • Wäscheboutique P1 • Wäschehaus Wildner • Wäschetraum • West 15 Lingerie • Wohlgeformt Dessous-Shop

ITALY Abbiati Intimo Ortopedia • Anelise • Arianna Boutique • Armonia • Armony • Bontempi • Bottino • Boutique des Corsets • Brancacci • Café Collant • Casa del Costume • Chris & Barby • Cima • Confidenze • Creos • Criscuolo • Da Titti • Dama • Di Sole e D'Azzurro • Donna • ES II Bello dell'Intimo • Elda Elegance • Filobus • Gaulis • Gaya Boutique • Gianna Intimo • Gimò • Gioydea • Intimamente • Intimo Gilda • Intimo Gnisci • L'ape operaia • L'intimo per due • La Bottega di Alice • La Calza • La Dolce Vita • La Foglia • La Notte Boutique • Le Colibri • Le Perle Monza • Le Perle • Linea Intima • Linea Intima • Massimina • Mia Lingerie • Mineo Intimo • Mirage di Fleana • Nara Intimo Donna • Nicla Abbigliamento • Osè • Paola Boutique • Paolina Bart • Paprika • Penserini Intimo • Private Club • Ripani • Rosacipria • Rubatscher • Saint Tropez • Salzano Umberto • Sary • Segreti Concept • Seta & Sale • Silvia Intimo • Sottosopra • Torre • Uno e Una • Vanità • Vincenzo Leonetti • Vittorio Torregrossa

SPAIN Albà Íntim • Alta Lencería Helena • Amaia Txabarria • Angels Llenceria • Azahar Lenceria • Bonet • Casa Susperregui • Castillo Mendia • Charo Cardona • Corset / Nasma • Corseteria Capri • Corseteria Dayma • Corseteria Hely • Corseteria Llucieta • Corseteria • Valery • Cotilleria Carbo • Cotilleria Mercè • Cotilleria Olga • Cotilleria Vila • Coto Vic • Craywinckel Bodylook • Dora Llenceria • Fajas Mari Carmen • Fajas Reina / Interiores de Mujer • Fajas Ruiz • Femina • Font Intim-Intima • Intima • Intims Esperança • Janina • La Dalia • Lady Corse • Lenceria Antonia • Lenceria Bayon • Lenceria Can-Can • Lenceria Clarita • Lenceria Conchi • Lenceria Crisán • Lenceria Doliche • Lenceria Fiti • Lenceria Lilas • Lenceria Lis • Lenceria Maria Garcia • Lenceria Marisa • Lenceria Montreal • Lenceria Nereides • Lenceria Paraiso • Lenceria Rosa • Lenceria Rosma • Lenceria Soloisa • Lenceria Susana • Llenceria Mallorquina • Llenceria Setí • Lliri D'Or • Maite Llenceria • Marta Blanca Moda Intima • Medias Isabel • Moda Intima Natural • Modilan • Munch Lenceria • Ninfas • Perfumerias Yaya • Raval Llenceria • Rosabel • Rosendo Rodriguez Pérez • Scots Corseteria • Selecciones Desire • Sueños • Svelta • Vestal

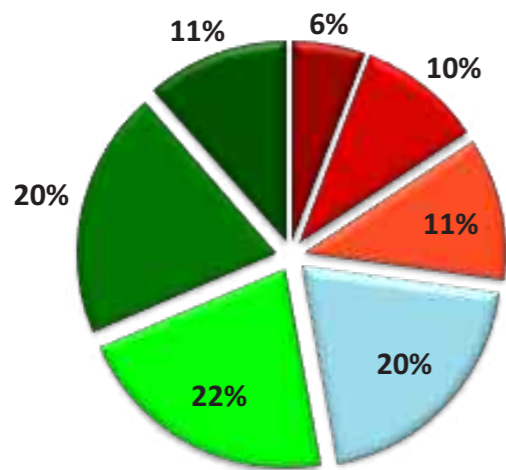
RUSSIA, UKRAINE AND THE CIS Alina • Angel • Barbara • Bell'è • Belleza • Bianka • Blue Bird • Boudoir • Boudoir Boutique • Boutique Belia • Boutique Flirt • Centr belia i kolgotok • Cocon • Den i Noch • Denie • Diola • Dolce Vita • El-Form.ru • Ermolinnia • Feromone • Giulia • Infiniti • Jemini • Kan-kan • Klubnichka • Koroleva • Lady Bust • Le Decollete • Lidia • Lilia • Lilia • Linen • Loren • Lovegoods lingerie • Madame de Charme, Body Charme • Maidenform • Mir belia • Mon Secret • Moon & Sun • Negligé • Nizhnee belio • Orhideja • "One Touch..." • Primadonna • Pyjama • Rich Dreams • Salon nizhnego belia • Sdelay Formu • Sharm • Signora Milanese • Tendence • Toskana • Triumf • Vual • Zefir • Zhenskies shtuchki

USA and CANADA

THE BEST OF INTIMA SPOKE TO A SELECTION OF 70 INDEPENDENT RETAILERS ACROSS NORTH AMERICA. THOSE INTERVIEWED WERE ALL WINNERS AND NOMINEES OF THE BEST OF INTIMA AWARDS AND THEY KINDLY SHARED THEIR UNRIVALLED MARKET EXPERTISE WITH US IN ORDER TO PAINT A REGIONAL PICTURE OF WHAT SELLS BEST NOW.

OVERVIEW

This year 53% of stores report that their business is growing and 20% report no change from 2015. While the picture is far from gloomy, last year's survey reported a 69% increase in sales which indicates that this year's season is not performing as well. When interviewed many stores seemed very happy with their products and their current product offer, often commenting that they only stock products that sell well.



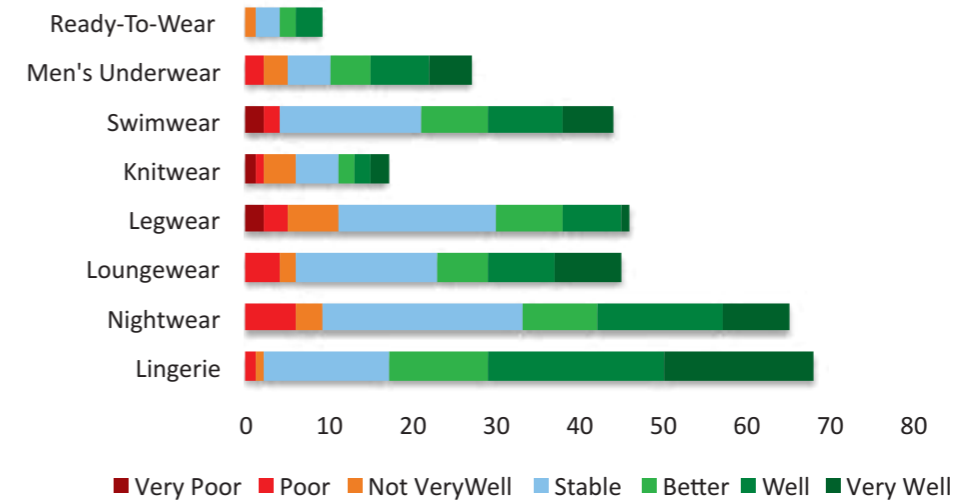
■ Very Poor (-10% or more)
 ■ Poor (between -5 and -10%)
 ■ Not Very Well (-5%)
 ■ Stable
 ■ Better (+5%)
 ■ Well (between +5 and +10%)
 ■ Very Well (more than 10%)

BEST SELLING CATEGORIES

Once again, **BRAS** are the "bread-and-butter" product for American lingerie stores, stocked by 97% of boutiques, who also report that the segment is performing better than last year. The **Van de Velde** group is having an excellent season with **PrimaDonna** leading the charge along with **Chantelle** while **Marie Jo** is increasing its popularity. **Wacoal** follows very closely, in second position. Many storeowners told us that they are seeking to present bras that reach a much higher aesthetic, and perhaps for this reason, typically classic and elegant brands such as **Empreinte** and **Simone Pérèle**, have entered the TOP 5 this year. **Eveden** is also having quite a positive season even if retailers could not always specifically name one of its brands. **Natori's** lingerie range is also heating up for the American market as it is reaching new levels of success this year! **NIGHTWEAR** is continuing to grow as a segment with an average of eight brands per store; this year 48% of respondents report that the category is growing compared to just 27% in last year's survey. The best selling brand is **Eberjey**, maintaining its pole position, closely followed

by **PJ Salvage** and **Cosabella**, with **Fleur't**, **Hanro** and **Natori** also enjoying notable success this year. The same top selling brands and similar positive sales results were reported for **LOUNGEWEAR**, offered by 64% of the participants. **LEGWEAR** remains stable and this year's top-sellers are **Commando**, closely followed by **Wolford**, then **Spanx**. The performance of Ger-

man brand **Falke** this season should be specially noted for its growing popularity. As our summer survey pointed out, the swim category was slightly less dynamic than usual, even if plus-size **SWIMWEAR** preformed very well in 2016. The world of **MEN'S UNDERWEAR** was yet again dominated by **Saxx**. **DAYWEAR AND KNITWEAR** and **READY-TO-WEAR** are not popular

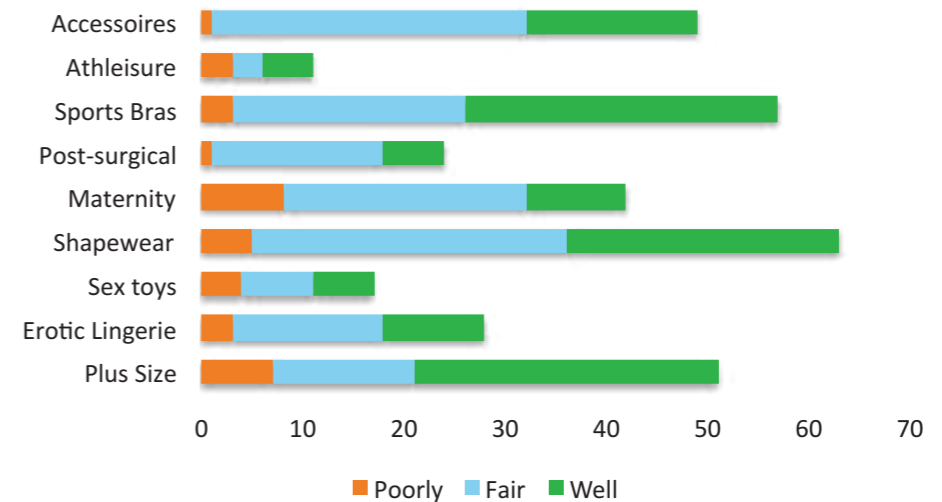


with North American stores as owners decided to focus on core products rather than expanding their reach.

majority of stores but performed extremely well for those who do! Brands like **Aubade**, **Oh Là Là Chéri** and **Maison Close** are the favorites for North American stores. **Spanx** continues to dominate the world of **SHAPEWEAR** coming in at number one yet again, followed at a distance by **Yummie Tummie** and **Simone Pérèle**, who is making its first entrance amongst the

BEST PERFORMING SEGMENTS

EROTIC LINGERIE is still not offered by the ma-



USA AND CANADA BEST SELLERS

BRA: Chantelle, PrimaDonna

PLUS SIZE: Elomi

NIGHTWEAR \ LOUNGEWEAR: Eberjey

LEGWEAR: Commando

SHAPEWEAR: Spanx

MEN'S UNDERWEAR: Saxx

MATERNITY: Anita, Cake Lingerie

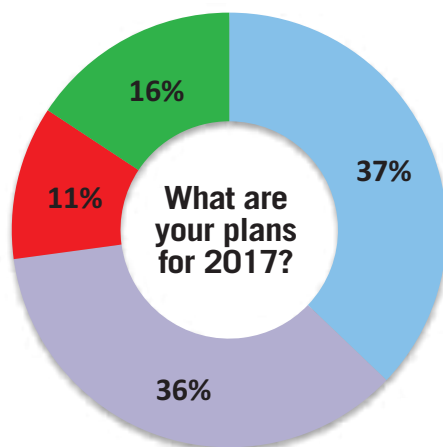
SPORTS BRAS: Anita Active

best sellers; brands such as **Commando**, **Rago**, **Bodywrap**, **Janira**, **Leonisa** and **Julie France** are also popular in this segment. **Elomi** is overwhelmingly America's **PLUS SIZE** brand of choice, joined by **Empreinte** and **Goddess**, then **PrimaDonna** and **Hanky Panky**. **NURSING BRAS** remain stable and **Anita** and **Cake** are in the lead. **SPORTS BRAS** are a staple for most of our respondents who reported **Anita Active** and **Panache Sport** as the firm favorites. Stores report an increase in beautiful **POST-SURGICAL LINGERIE** and **Anita** and **Amoena** can be seen at the head of this

trend. **ATHLEISURE** is not popular as many storeowners were put off due to fierce competition from specialist stores. Compared to their European counterparts, American stores carry a much wider range of **ACCESSORIES** and popular products included **Soak Wash** and **Eucalan**, alongside, **Braza**, a very diverse global solutions brand.

THE OUTLOOK FOR 2017

Almost one third of stores are satisfied with their current product offer, which is up by more than 10% from last year's results. However, another third of boutiques are considering renewing their brand portfolio. Without a doubt, the main interest for America's lingerie stores is, and perhaps always will be, bras with many retailers wanting to invest in high quality bras in classic styles. A majority of stores also tell us that they are aiming to attract a younger demographic and are, therefore, looking for trendy styles such as bralettes.



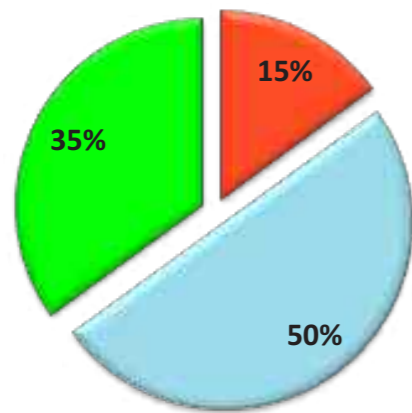
- Keep the same number of brands
- Keep the same number of brands but change suppliers
- Reduce the number of brands
- Increase the number of brands

UK and IRELAND

OUR PARTNER MAGAZINE UNDERLINES INTERVIEWED 70 INDEPENDENT RETAILERS ACROSS THE UK AND IRELAND IN ORDER TO GIVE A REGIONAL PICTURE OF WHAT SOLD BEST IN 2016.

OVERVIEW

Despite, the current climate of uncertainty in the United Kingdom and Ireland, sales are still relatively positive with 35% of businesses reporting a slight increase in sales. Nevertheless, many retailers feel very worried about Brexit (the UK's planned separation from The European Union) and the effect that it is having on the cost of imported goods from Europe.



■ Very Poor (-10% or more)
 ■ Poor (between -5 and -10%)
 ■ Not Very Well (-5%)
 ■ Stable
 ■ Better (+5%)
 ■ Well (between +5 and +10%)
 ■ Very Well (more than 10%)

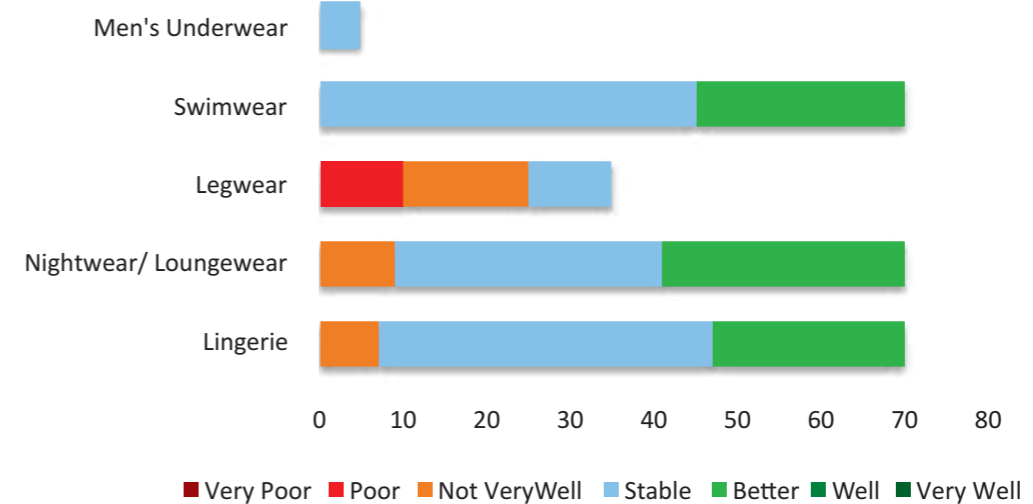
BEST SELLING CATEGORIES

Like last year, **LINGERIE** is key for UK and Irish stores, indeed, all of the stores in the panel do stock bras and 33% saw their sales grow in 2016, with brands that offer larger cup sizes being of particular importance. The **Wacoal** group had an excellent season, with **Fantasia** and **Freya** sharing the top spot, closely followed by **PrimaDonna** and **Panache** who are gaining popularity in the UK and Irish markets. **Empreinte** in particular has found favor in the UK and Ireland despite their premium price. In the UK & Ireland, stores do not differentiate between **LOUNGEWEAR** and **NIGHTWEAR**, which highlights the blurred boundaries between these two categories. **Cyberjammies**, with its high quality and medium price point, proved to be the overall favorite and now also offers collections for children and men. On the other hand, **LEGWEAR** is not doing well, with falling sales in many outlets, at best it can be considered a static sector. **SWIMWEAR**, like in the North American market, continues to reflect the importance of larger cup sizes. **MEN'S** offerings are negligible and the

only two brands that were mentioned were **Jockey** and **Waxx**. Like in North America, **DAYWEAR** and **READY-TO-WEAR** are not popular with UK and Irish stores, who again are choosing to focus on their core products and offer a diverse range of sizes rather than a diverse range of products.

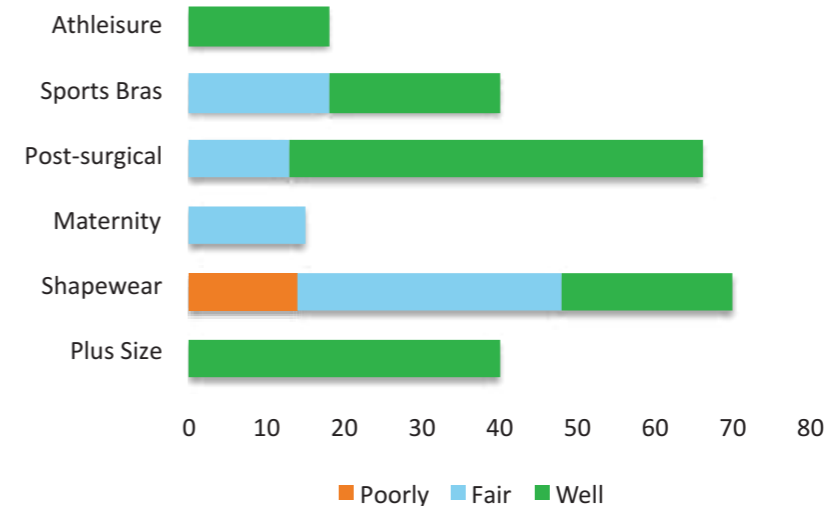
BEST PERFORMING SEGMENTS

PLUS SIZE has seen great growth in the last twelve months and was stocked by over half of the stores interviewed, who all reported that it was selling well. **Elomi** was by far the



most popular plus size brand of choice for the 57% of stores which stock this segment. In the world of **SHAPEWEAR** American brands reign supreme with **Miraclesuit** keeping its position as the number one top seller. Shapewear represents an important part of the market as it is offered by all of the stores we spoke to, 80% of which reported that it

was performing well. **Anita**, once again, proves to be the specialty lingerie brand of choice as it comes in top for both **NURSING BRAS** and **POST-SURGICAL LINGERIE**, followed by **Royce Lingerie**, who also came in second place last year for nursing bras. **Royce Lingerie** is well positioned due to its considerably lower price point. While only 21% of stores of-



UK AND IRELAND BEST SELLERS

LINGERIE: Freya / Fantasie

PLUS SIZE: Elomi

NIGHTWEAR/LOUNGEWEAR: Cyberjammies

LEGWEAR: Charnos

MEN'S UNDERWEAR: Jockey

POST-SURGERY LINGERIE: Anita

SHAPEWEAR: Miraclesuit

MATERNITY: Anita

SPORTS BRAS: Panache Sport

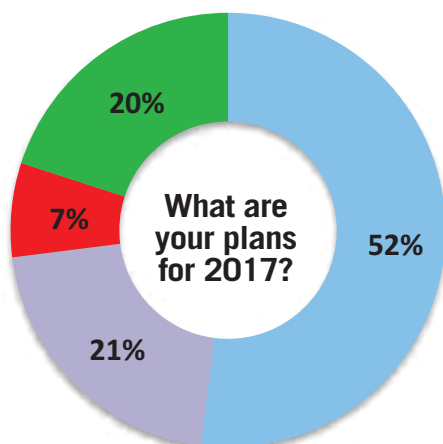
ferred nursing bras, post-surgery lingerie is now becoming a product staple, on sale in 94% of the stores, compared to 70% in last year's survey. **Panache Sport** keeps the gold medal for **SPORTS BRAS** made popular by its price point, adaptability and colorful new additions each season. They also did a popular advertising campaign with Olympic boxing champion, Nicola Adams. There is growing interest in **ATHLEISURE**, but at the moment it is a category that is mostly left to specialist shops rather than lingerie boutiques. For

those who do stock it, well-known brands such as **DKNY** and **Sloggi** are doing well. **SEX TOYS**, **EROTIC LINGERIE** and **ACCESSORIES** proved to be unpopular in the UK and Irish specialist independent stores, as they were not sold by any of these but in specialist erotic themed shops.

their portfolio. Storeowners plan to continue focusing on larger cup sizes, fitted bikini tops and are making swimwear a priority for 2017. They also want to invest in sports bras in larger sizes, as there is a high demand for these products. We should also see athleisure entering more stores and there is growing interest in this sector. Despite shapewear's strong performance in 2016, retailers are not planning to focus on this product next year as they feel that the market is currently "swamped".

THE OUTLOOK FOR 2017

The majority of stores are happy with their product offer and are not looking to change



- Keep the same number of brands
- Keep the same number of brands but change suppliers
- Reduce the number of brands
- Increase the number of brands

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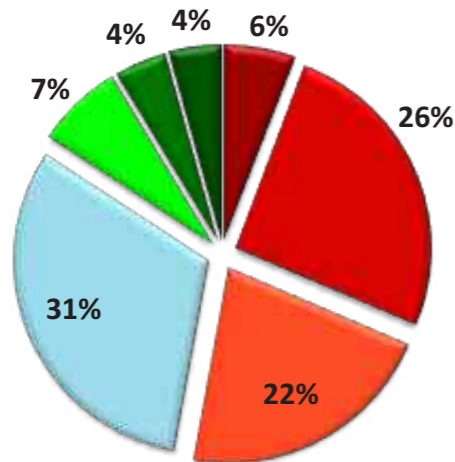
FRANCE

IN ORDER TO PROVIDE AN ACCURATE OVERVIEW OF THE FRENCH MARKET, INTIMA INTERVIEWED 70 INDEPENDENT, MULTI-BRAND STORES CHOSEN AMONGST THE NOMINEES OF THE BEST FRENCH RETAILERS CONTEST TOP 100 – MEILLEURES BOUTIQUES DE FRANCE.

OVERVIEW

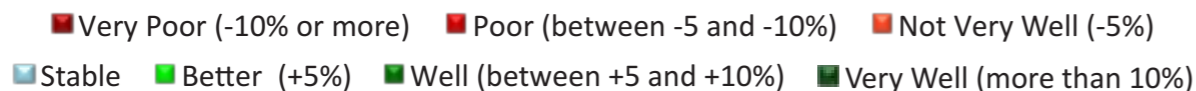
2015 was a good year for sales but was also a year that had a deeply sad ending with terrorist attacks in the French capital, meaning that 2016 got off to a bad start. More than half of French stores interviewed report lower sales figures. Many boutiques complain about the morose atmosphere that followed the terrorist attacks, saying that shoppers didn't want to go into city centers, while frequent protests in French cities created problems, which went in the favor of E-

retailers. Continuous and unregulated promotions remains a key problem for French stores. Perhaps this is why only 15% of retailers estimate an increase in their sales in 2016 compared to 40% in 2015. As a matter of fact, customer's buying habits are changing and retailers must adapt. But a definitive solution is hard to find... Some are trying new marketing strategies using social media, some are grouping together with other local retailers to launch new group incentives. Nevertheless, 31% of participating stores report that, thanks to an increase in mid-range customers, they are maintaining stable sales.



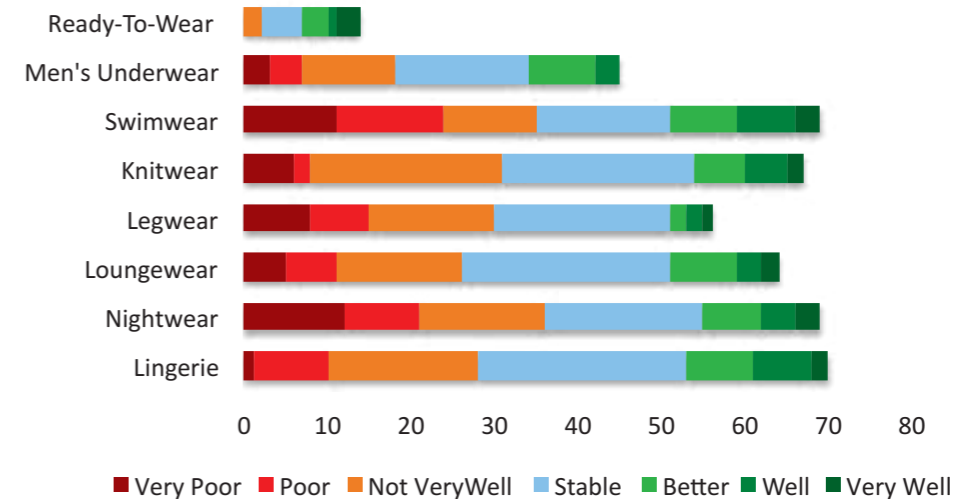
BEST SELLING CATEGORIES

LINGERIE is still the leading product category for French stores, stocked by all of the panel, who generally have five to ten brands on offer. Surprisingly, comfortable, well-made bras seem to be more popular than seductive styles and stores affirm their loyalty to brands that are well known for meeting specific needs. This year **PrimaDonna** rises to first place, next to France's favorite brand, **Lise Charmel** and then followed by **Aubade**, **Simone Pérèle**, **Chantelle** and **Marie Jo**, with similar scores. Like last year, **NIGHTWEAR** is decreasing. Even



though it is stocked by 99% of French boutiques, the problem of space is often mentioned. Nevertheless, three French brands emerge as the best-sellers: **Canat**, **Le Chat** - also occupying the top two spots for **LOUNGEWEAR** - then **Marjolaine**, **Régence** and **Ringella**, followed at a distance by **Antigel**, who enters in the TOP 5 for the first time. **LEGWEAR** is in a similar situation as its popularity

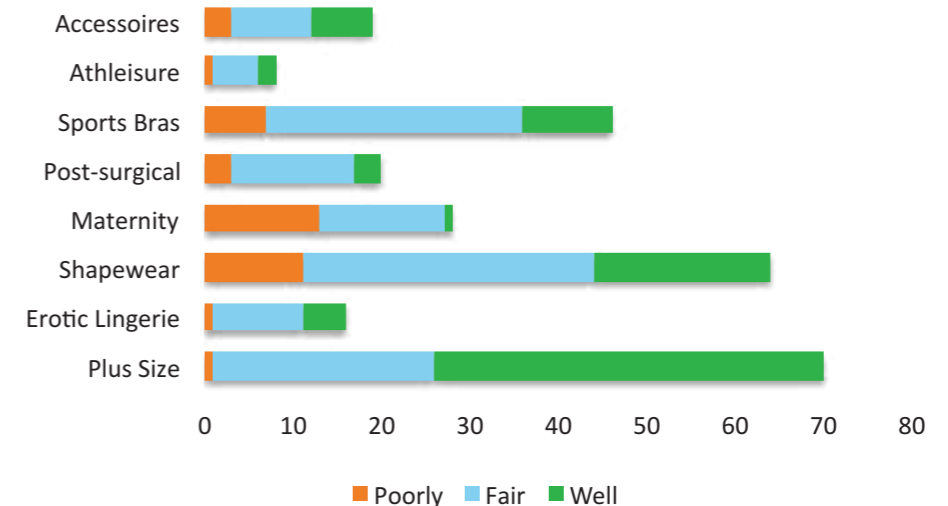
is decreasing with French retailers, typically, tending to only stock one or two brands to meet the needs of existing customers. **Wolford** is the brand of choice for one third of stores, followed by **Trasparenze** and then, tied in third place, **Gerbe** and **Chantal Thomass**. Italian brand **Oscalito** continues to reign supreme in the world of **DAYWEAR**; stores also mentioned **Lisanza**, followed by **Hanro**



and **Madiva**. Despite the high quality of brands' collections, **SWIMWEAR** did not float for more than half of the panel as the late arrival of summer meant it did not coincide with the sales. **Hom** is leading the **MEN'S UNDERWEAR** category by far, followed by **Aubade** and **Impetus**, **Eminence** and **Eden Park**, all very close. **READY-TO-WEAR** has a small presence in France and is only stocked by 20% of stores; **Christies** and **Suggest** are amongst the brands the most mentioned.

BEST PERFORMING SEGMENTS

The demand for **PLUS SIZE** is growing in the French market and 63% of the stores interviewed were more than happy with their sales in this segment. Brands that offer both comfort and style were by far the most popular. It is, therefore, no surprise that **PrimaDonna**, the Van de Velde group's leading brand, was the



FRANCE BEST SELLERS

LINGERIE: Lise Charmel, PrimaDonna

PLUS SIZE: PrimaDonna

NIGHTWEAR/LOUNGEWEAR: Canat, Le Chat

LEGWEAR: Wolford

DAYWEAR: Oscalito

SHAPEWEAR: Wacoal

MATERNITY: Anita

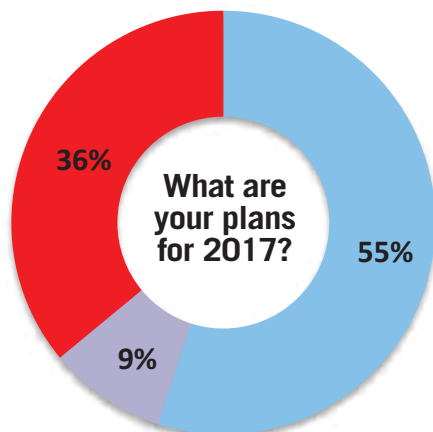
SPORTS BRAS: Anita

best seller, followed only by **Empreinte**, with a significant score. In regards to other specialist segments, the results are also positive with sales either remaining stable or growing. **Wacoal** takes the crown for **SHAPEWEAR** but Spanish **Janira** is also quite popular in France. **Anita** is having an excellent season, coming in as the second best-selling brand in shapewear and taking the gold medal for both **NURSING BRAS** and **POST-SURGICAL LINGERIE**, two segments which are growing in France but are still not widely stocked. **SPORTS BRAS** are following current media trends and are on the up, stocked by 66% of stores who report that **Anita** is their bestseller, followed by **Freya**, **Chantelle** and **Triumph**. On the other hand, only 11% of stores carry a range of **ATH-**

LEISURE. EROTIC LINGERIE is not a key segment for French stores, but it must be said that **Aubade's** 'Boîte à désirs' (Box of Desires) proved to be very popular. Sales were also good for **ACCESSORIES**, even if only sold by 30% of retailers, mostly mentioning **Lise Charmel's** jewelry collection.

THE OUTLOOK FOR 2017

Surely worried by the past year results, French boutiques, normally quite conservative, aren't planning to make many changes in 2017: 55% are willing to maintain their current brand portfolio. None want to increase the number of brands and only 9% want to diversify their portfolio. The remaining 36% is planning to cut back on categories that are not performing well, such as legwear and nightwear. A number of stores are worried by climate change and the effect it has on the weather, and so, are planning to take fewer risks in 2017 and order less swimwear. Instead, they plan to focus on classic bras, comfortable styles, plus size and finding a good compromise between quality and price in order to meet the needs of their existing customers.



- Keep the same number of brands
- Keep the same number of brands but change suppliers
- Reduce the number of brands
- Increase the number of brands

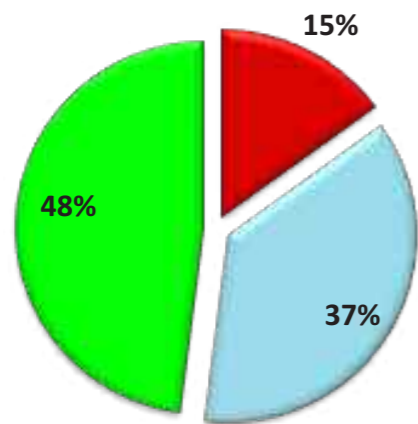
G

GERMANY

INTIMA'S PARTNER MAGAZINE SOUS INTERVIEWED A PANEL OF 70 STORES CHOSEN FROM ITS STERNE DER WÄSCHE NATIONAL BEST RETAIL CONTEST, THE GERMAN VERSION OF THE BEST OF INTIMA AWARDS.

OVERVIEW

Sales in 2014 were fine, in 2015 they were good and they still are in 2016. Morale is, therefore, at a high amongst German retailers. Almost half of which (48%) report sales which have increased by 5% compared to 2015, thanks to a winning combination of brands and products. Plus size is definitely the main driver for German retailers, some of which report that over half of their annual sales have come from this category alone,



■ Very Poor (-10% or more)
 ■ Poor (between -5 and -10%)
 ■ Not Very Well (-5%)
 ■ Stable
 ■ Better (+5%)
 ■ Well (between +5 and +10%)
 ■ Very Well (more than 10%)

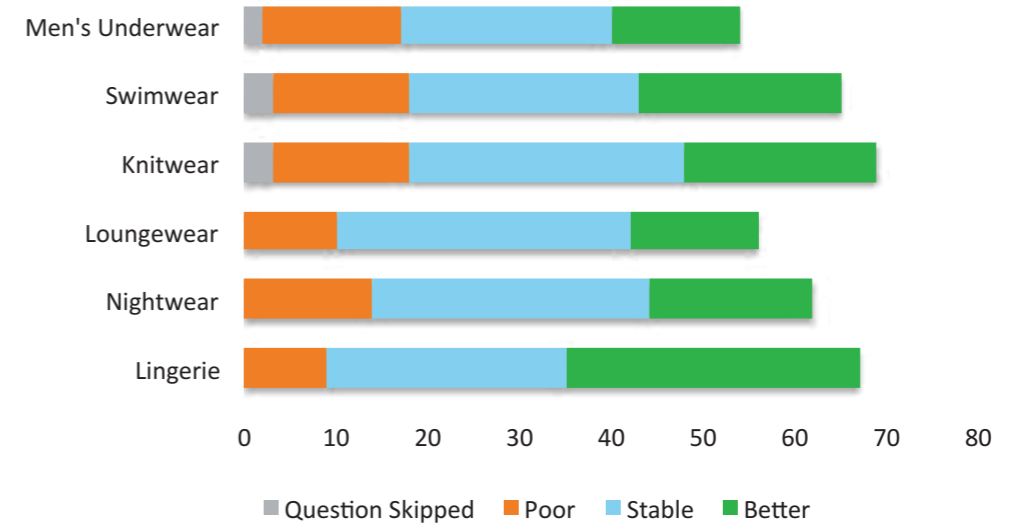
with both plus size lingerie and swim selling extremely well. Manufacturers understand this situation well and continue to expand their range of sizes and designs, adding a much younger twist! As for the rest of the panel, 37% of stores reported stable sales meaning only 15% saw a drop in 2016.

BEST SELLING CATEGORIES

LINGERIE is by far the best selling product for German stores, particularly specialist lingerie. Once again, the **Van de Velde** group had spectacular results in Germany with **Marie Jo** proving to be the overall favorite followed at a distance by **Triumph**, **PrimaDonna**, **Simone Pérèle** and **Chantelle**. As for **NIGHTWEAR**, offered by almost all of the participating stores, with positive or stable sales, Swiss brand **Calida** comes first, in second place **Mey**, then **Hanro**, followed by the trio **Ringella**, **Rösch** and **Shiesser**. **LOUNGEWEAR** did slightly better than nightwear; it is characterized by a wide variety of brands on offer, even if the three names **Calvin Klein**, **Mey** and **Taubert** were said more than others. **Mey** also

dominates the market for **DAYWEAR** followed in this order by **Calida**, **Hanro** and **Nina von C**. German retailers were unhappy with their **SWIMWEAR** results caused by bad weather at the beginning of the season, meaning that the percentage of stores with increasing

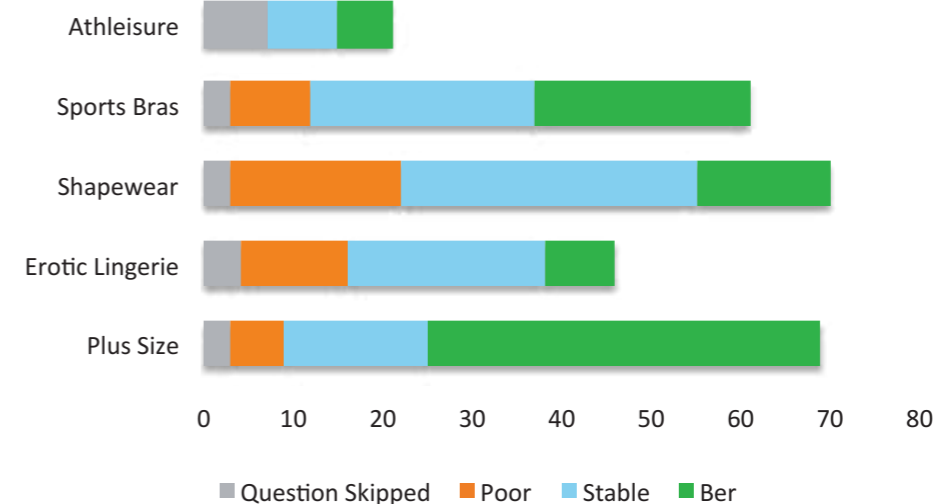
sales dropped from 46% to 35%. **Mey** again!- continues to shine for the **MEN'S** category, doing well due to its well-rounded offer of not only underwear but also pajamas and loungewear; **Calida** and **Schiesser** are also mentioned.



BEST PERFORMING SEGMENTS

German stores are united in their love of **PLUS SIZE**, 67% of which saw this segment grow in 2016. Naturally, **PrimaDonna** is leading the charge, followed by its sister brand **PrimaDonna Twist** and German brands **Ulla** and **Felina** in third place.

SHAPEWEAR is widely available in German stores and continues to be dominated by **Spanx**, closely followed by **PrimaDonna** who is also very present in this segment. **Triumph** and **Felina** are both doing equally well, closely followed by **Chantelle** and **Wacoal**.



GERMANY BEST SELLERS

LINGERIE: Marie Jo

PLUS SIZE: PrimaDonna

NIGHTWEAR: Calida

LOUNGEWEAR: Calvin Klein, Mey, Taubert

DAYWEAR: Mey

MEN'S: Mey

SHAPEWEAR: Spanx

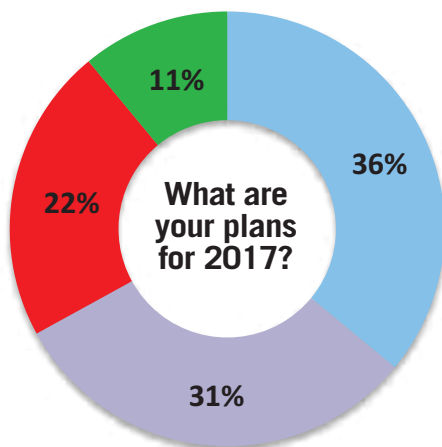
EROTIC LINGERIE remains a niche product but tends to do well when it is on offer, especially styles which are sexy and playful without being vulgar. **Aubade's** famous 'Boîtes à Désirs' (Box of Desires) is

particularly popular with German consumers, alongside **Lise Charmel**, followed by **Maison Close** and **Lascana**.

THE OUTLOOK FOR 2017

2016 has been a good year for German retailers and they are feeling confident about 2017. 36% of them have found a good

balance between exciting new categories and traditional suppliers who know how to meet their client's needs and want to keep the same brand portfolio. 31% are planning to maintain the same number of brands but change some of the names that they have on offer and 11% plan to increase the number of brands in order to focus on the categories that have performed the best in 2016! Finally, 22% want to reduce the number of brands that they carry in order to focus on what is selling best - plus size!



- Keep the same number of brands
- Keep the same number of brands but change suppliers
- Reduce the number of brands
- Increase the number of brands

ITALY

LINEA INTIMA INTERVIEWED 70 OF ITALY'S MOST PRESTIGIOUS BOUTIQUES WITH A SPECIAL FOCUS ON THE LATEST EDITIONS' WINNERS AND THE FINALISTS FROM 2016 AND 2017'S "STELLE DELL'INTIMO", TOP STORES COMPETITION.

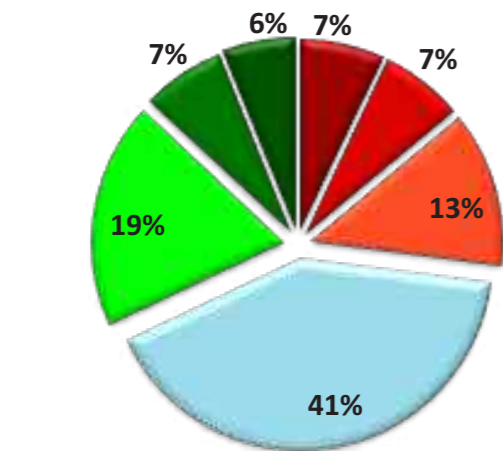
OVERVIEW

Set against a backdrop of uncertainty, Italian stores' sales figures stayed positive in 2016. 41% of the panel indicated stable sales while 32% happily reported rising sales figures. However, in 2015, 47% of stores saw an increase in sales and this dip influenced the general mood amongst Italian retailers. Stable sales were not a good thing for those who hadn't performed well in the previous years, but also those who saw an increase in 2015 had expected this to continue. In a climate of insecurity due to factors such as an unstable market, unpredictable weather, the threat of terrorism and multi-channel competition, Italian stores were unable to perform consistently during the year and felt disorientated.

While SS16 went relatively well, for some stores sales slowed down in September due to an unusually warm fall. However, the top Italian stores still managed to successfully launch modern layouts, renovations, events, promotions and engaging communication strategies.

BEST SELLING CATEGORIES

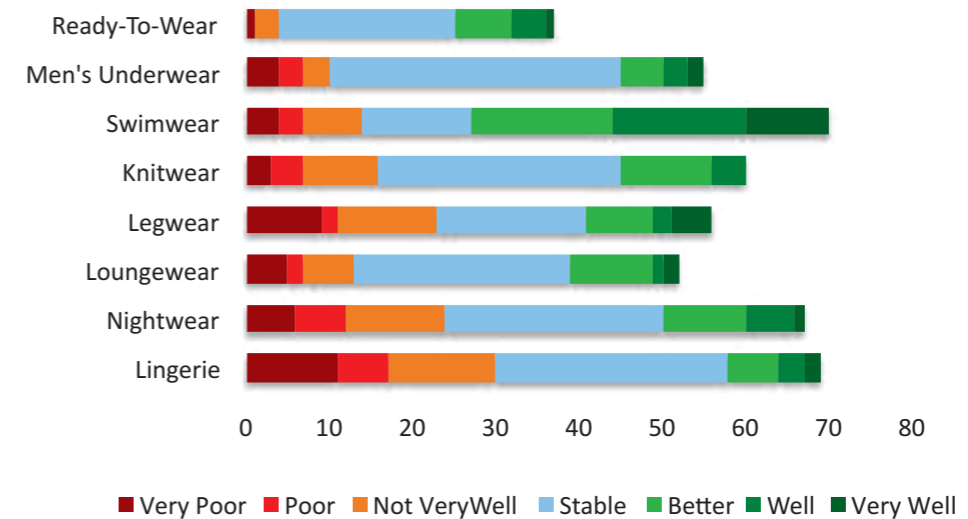
SWIMWEAR is the strongest category for Italian boutiques right now. It is carried by all of the stores we spoke to, 61% of which report that it is an area where sales are growing. On the other hand, despite signs that **LINGERIE** was picking up in 2015, sales have fallen for 43% of the panel in 2016. Specialist lingerie is doing well when it manages to combine function with style and gives independent stores an edge over their monobrand competitors. Unsurprisingly, Chantelle is the best seller for the fourth year in a row, followed by **Twin-Set**, as its style and quality-price point appeal to a younger audience. **Simone Pérèle**, known for its seductive yet comfortable style, is a new entry into the top three, marking a high point in its new brand strategy. For premium brands, 2016 was a great year for **Paladini** who came in first place for **NIGHTWEAR**, its core category, but who's lingerie range also did quite well. Followed at a great distance by **Twin-Set** and **Pepita**, in second and third place. These three brands continue to do



Very Poor (-10% or more) Poor (between -5 and -10%) Not Very Well (-5%) Stable Better (+5%) Well (between +5 and +10%) Very Well (more than 10%)

well for **HOME AND LOUNGEWEAR** where this time **Twin-Set** takes the top spot, followed by **Paladini** and then **Pepita**. These two categories were slowed by the warm fall but still managed to remain relatively stable. On the other hand, **LEGWEAR** seemed to lose some of its appeal this year for 41% of our panel...They chose to offer just one or two high-quality brands and tights and even 2015's cult accessory, fashion socks,

were not a hit. Nonetheless, **Wolford** is leading this category, followed by **Pierre Mantoux** in second place and **Girardi** and **Philippe Matignon** in third place. **Oroblù** and **Omero** are always popular. **DAYWEAR** and knitwear remained stable for Italian stores in 2016. **Lisanza** leads the charge thanks to their new, expanded collection which works well with the current 'innerwear as outerwear trend', followed by **Oscalito** and **Twin-Set**.

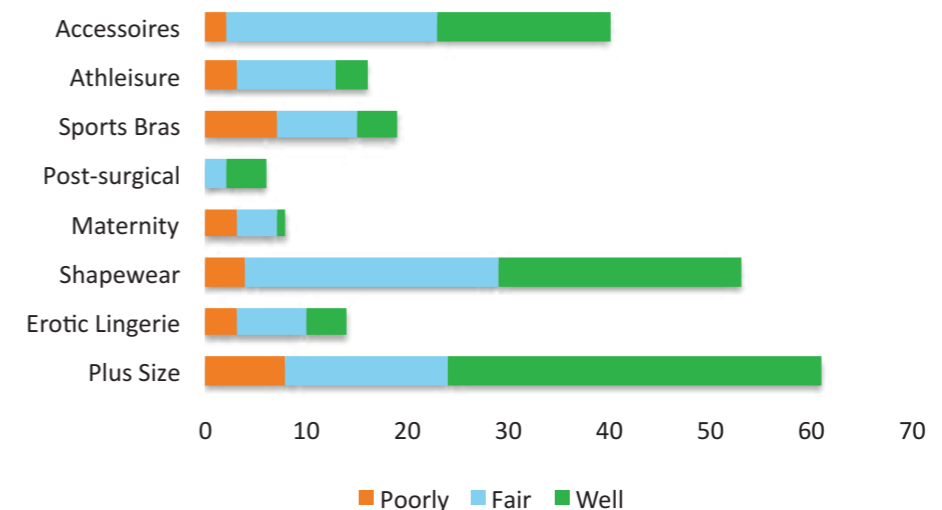


For the high-end range, **Hanro** is enjoying notable success. After a positive year in 2015, **MEN'S UNDERWEAR** sales are stable for 64% of stores where in-store visibility tended to influence overall performance. **Emporio Armani** is once again the top seller, joined by **Julipet** in second place and **Hanro**, **Polo Ralph Lauren** and legwear brand **Gallo** all in third place. Uniquely, **READY-TO-WEAR** is a successful complementary category for Italian lingerie stores, offered by

53%, who report that it is stable or growing. **Twin-Set**, **Ermanno Scervino**, and **Max Mara** are Italy's favorites, with **Pierre Mantoux**, **VDP** and **Oroblù** also doing well.

BEST PERFORMING SEGMENTS

Offered by most stores, **PLUS SIZE** is having an excellent season and is helping to boost lin-



ITALY BEST SELLERS

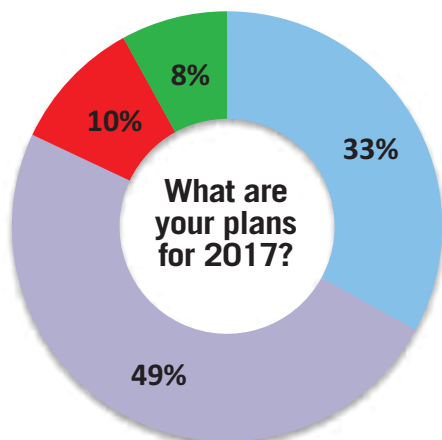
LINGERIE: Chantelle
 PLUS SIZE: Chantelle
 NIGHTWEAR: Paladini
 LOUNGEWEAR: Twin-Set
 LEGWEAR: Wolford
 DAYWEAR: Lisanza
 MEN'S UNDERWEAR: Emporio Armani
 SHAPEWEAR Wacoal
 MATERNITY: Anita
 SPORTS BRAS: Anita Active

gerie sales, with **Chantelle** leading the charge as number one top seller, followed by **Simone Pérèle** and **PrimaDonna** in second place. The **Lise Charmel** group have also proved to be very popular in Italy. A selection of **SHAPEWEAR** is available in many stores, **Wacoal** is Italy's brand of choice, followed by **Chantelle**, **Janira** and **Wolford**. **MATERNITY** and **POST-SURGICAL** remain products that are for the most part stocked in maternity and orthopedic stores. However, when the latter category is stocked, stores report that it performs well as it meets the needs of a specific client base. **Anita** is the queen of specialization and takes the top spot for both segments. **Anita** also does well in the world of **SPORTS BRAS**, followed by Chantelle which is finding new

success in this category. Like sports bras, **ATH-LEISURE** is more often found in sports stores than lingerie boutiques and the only brand mentioned was **Twin-Set Active**. **EROTIC LINGERIE** and **SEX TOYS** are also not widely stocked in Italian boutiques as they normally offer more seductive than sexy styles. On the other hand, original, own-brand fashion **ACCESSORIES** are selling well.

THE OUTLOOK FOR 2017

Following these results, Italian stores are not planning to take many risks in 2017 and many do not want to increase the number of brands that they carry. 33% of stores will keep their brand portfolio the same, however, 49% are planning to swap some of their brands. Stores aim to focus on the best performing categories such as swimwear, the leading product for Italian stores, and lingerie with an expanded offer of cup sizes in new fashionable styles. Some retailers, those who wish to expand their portfolio, are planning to offer complete looks in store by increasing their accessories range and including more outerwear. The minority of stores who want to reduce their offerings are planning to streamline their brand portfolios rather than discontinuing whole categories.



- Keep the same number of brands
- Keep the same number of brands but change suppliers
- Reduce the number of brands
- Increase the number of brands

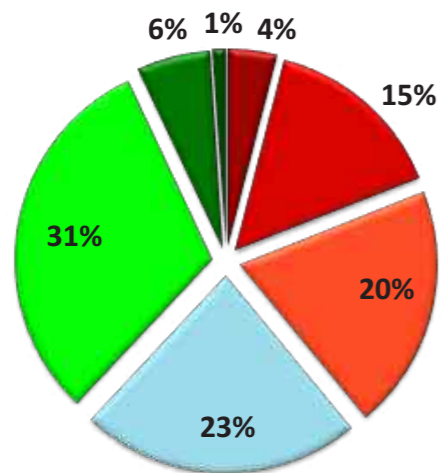


SPAIN

OUR PARTNER MAGAZINE CYL, WHO HAS BEEN PLAYING AN IMPORTANT ROLE IN SPAIN FOR A NUMBER OF YEARS, INTERVIEWED 70 INDEPENDENT, MULTI-BRAND STORES AMONG THE MOST REPRESENTATIVE OF THEIR MARKET.

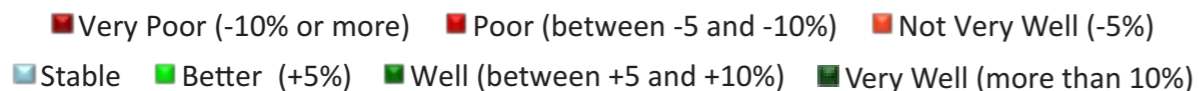
OVERVIEW

Slowly but surely, Spain is getting back on its feet with 38% of stores reporting a growth in their sales, among which, 7% confirmed that they were much better than 2015! As for the rest of the panel, 23% indicated stable sales, 20% still mentioned a slight decrease and only 19% stated that sales were worse than last year (by -10%). This is an encouraging sign for stores in Spain who can begin 2017 on an optimistic note.



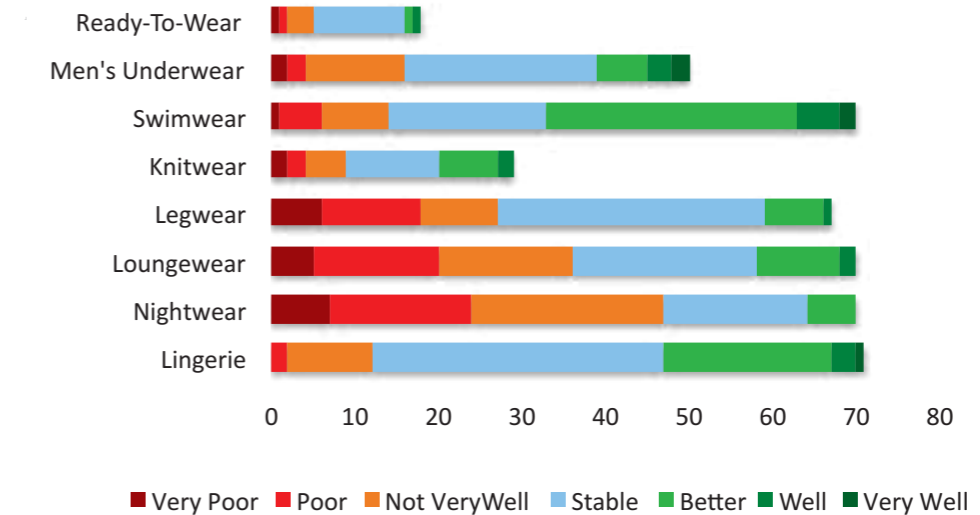
BEST SELLING CATEGORIES

LINGERIE remains the leading core product for Spanish stores, who offer at least five brands. 49% of stores report that their sales are stable and 33% indicate that sales are going well. Like in other European countries, specialist lingerie is allowing multi-brand stores to stand out from chain stores and boost their sales, as we can see by the best-selling brands, lead by **PrimaDonna**, followed closely by both **Chantelle** and **Anita**, then **Triumph**, **Selmark**, **Felina** and... **Simone Pérèle**! Still carried by 67% of the stores, **NIGHTWEAR** is in a completely different situation, with multi-brand independents having real difficulty competing with monobrand chains, despite the quality of the numerous collections available. Best performing brands are **Mitjans**, as the top seller, followed by brands such as **Teres**, **Marigall**, **Mansù**, and **Vania**. Things are slightly better for **LOUNGEWEAR** with **Barandi**, **Egatex**, **Señoretta** and **Vania** doing well. **LEGWEAR** is a stable category but is considered as a complementary product by most stores. Well known



brands sold the best, which is evident from the top-seller list where Spanish brand **Janira** is dominating the market, followed by **Filodoro** and **Philippe Matignon**. **DAYWEAR** is less popular and its success varies from store to store, with **Janira** in the lead, once again. On the other hand, **SWIMWEAR** is an

important category in Spain and had an excellent season for 53% of our panel, who tend to have more than five brands on offer. Things are also optimistic for **MEN'S UNDERWEAR**. 70% of stores carry this category and **Calvin Klein** is, by far the top seller, followed by **Punto Blanco** and **Impetus**. **READY-TO-**



WEAR is stable but is becoming less and less popular with Spanish retailers.

as it is offered by 93% of the panel. **PrimaDonna** is by far Spain's plus size brand of choice, followed by **Anita**, **Felina** and **Chantelle**. While **SHAPEWEAR** was offered by slightly less stores, it also sold well for 79% of them. **Janira** was once again the firm favorite for Spain. **NURSING BRAS**, **SPORTS BRAS** and **POST-SURGICAL LINGERIE** are

BEST PERFORMING SEGMENTS

PLUS SIZE is selling well and can be considered as a staple product for Spanish stores



SPAIN

BEST SELLERS

LINGERIE: PrimaDonna
 PLUS SIZE: PrimaDonna
 NIGHTWEAR: Mitjans
 LOUNGEWEAR: Barandi
 LEGWEAR: Janira
 DAYWEAR: Janira
 MEN'S UNDERWEAR: Calvin Klein
 SHAPEWEAR: Janira
 MATERNITY: Anita
 SPORTS BRAS: Anita Active

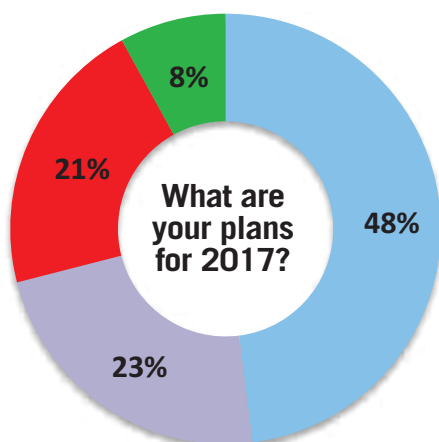
widely available in Spain and all three categories are dominated by **Anita**, with their dedicated lines. Additionally, **Variance** and **Triumph** are also mentioned often. As for **ATHLEISURE**, only a very limited number of Spanish stores are presently stocking it. **SEX TOYS** are also not a popular segment for Spanish stores. For **EROTIC LINGERIE**, **Lise Charmel** was the most popular brand, even if it is not the most daring choice. **ACCESSORIES** were offered by just under half of the

stores and beachwear is by far Spain's accessory of choice, with **Antica Sartoria**, the **Maryan Beachwear** group and **Selmark** being the brands of choice.

THE OUTLOOK FOR 2017

Spanish retailers feel that they have found a winning formula and 48% of them want to keep their portfolio unchanged in 2017, as they feel that these brands are familiar to their customers. Nevertheless, 23% of the panel is considering substituting some brands with others in order to de-

velop certain categories in their stores, notably plus size lingerie and swimwear. Amongst the 21% of those, who on the other hand, want to reduce the number of brands on offer, many are thinking of stocking less nightwear. However, retailers were unanimous on one thing: the success of multi-brand stores depends on their ability to provide specialist lingerie as it is a category with high added value due to its improved fit.



- Keep the same number of brands
- Keep the same number of brands but change suppliers
- Reduce the number of brands
- Increase the number of brands

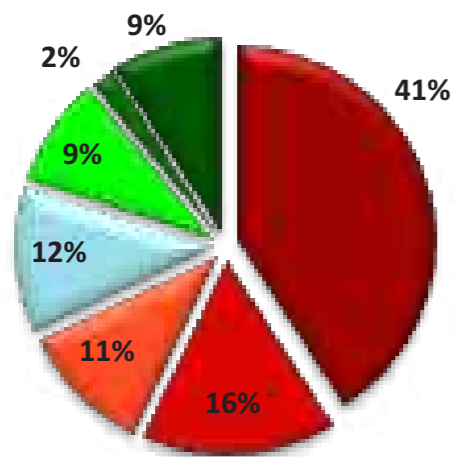
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RUSSIA, UKRAINE and CIS

THIS YEAR INTIMODA SPOKE TO 60 MULTIBRAND, INDEPENDENT LINGERIE BOUTIQUES IN RUSSIA, UKRAINE, KAZAKHSTAN AND BELARUS, ALL SELECTED FROM THE PRESTIGIOUS "WORLDWIDE BOUTIQUES PROGRAM".

OVERVIEW

Even though the market remains unpredictable, we are finally beginning to see signs of recovery as in 2015. 12% of stores reported stable sales compared to just 4% in 2015 and the number of stores with falling sales has decreased from 54% to 41%.

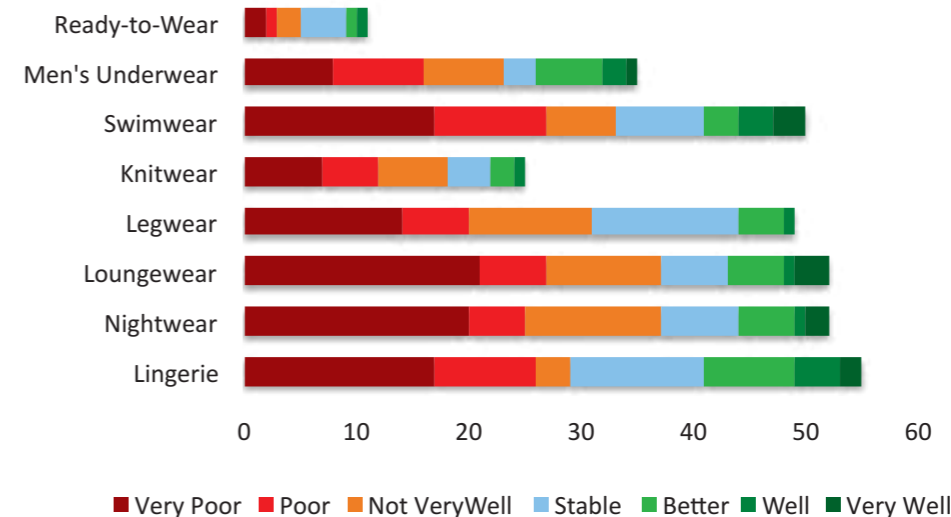


BEST SELLING CATEGORIES

LINGERIE is still the foundation for Russian retailers which is a good thing as this category is showing signs of recovery, and in fact, 26% of stores (compared to only 14% in 2015) report that their sales are growing. For the first time, **Dimanche Lingerie** has taken the top spot, followed by **Felina**, staying in second place for the second year in a row, highly popular due to its wide offer and quality-price ratio. French brands **Empreinte** and **Simone Pérèle** return to the top selling list, indicating that sales for high-end lingerie are recovering. **NIGHTWEAR** and **LOUNGEWEAR** haven't been performing well for several years now and some Russian retailers have reduced their offerings. **Mia-mia** knocked Russian brand **Laete** off the top spot for both categories, with **Triumph** following at a distance for nightwear and **Mey** for loungewear. **LEGWEAR** is offered by 88% of stores, however, it remains a complementary category rather than a key product offer and is not selling well. That being said, **Char-**

mante was reported to be the best-selling brand, followed by the **Golden Lady** group with their range of brands with varying prices such as **Omsa**, **Philippe Matignon** and **Sisi**. **DAYWEAR** is rapidly falling out of favor, now only stocked by 45% of stores, compared to 58% in 2015. German brands **Mey** and **Triumph** are among the few that are still selling

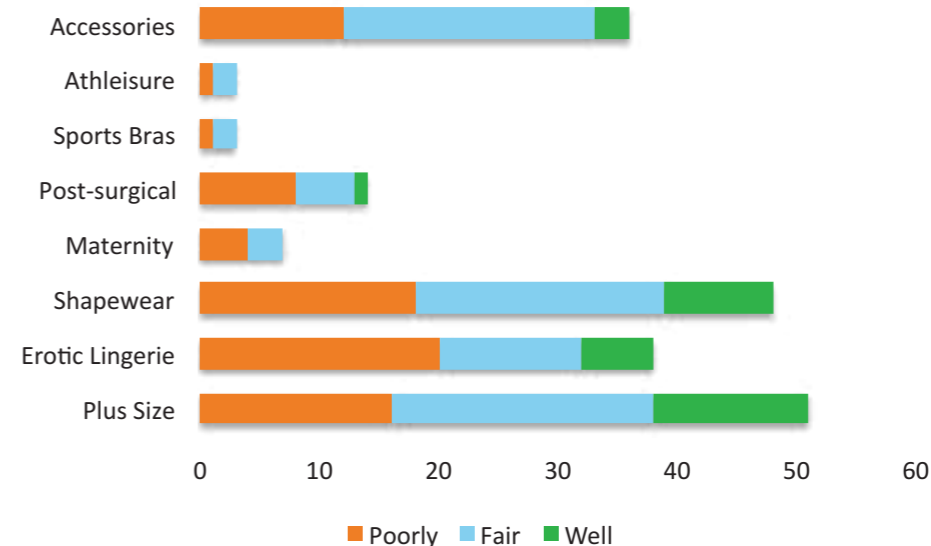
well. Despite the optimism at the beginning of the season, **SWIMWEAR**, while stocked by 89% of retailers, is underperforming. Unfortunately, so is **MEN'S UNDERWEAR**, stocked by 63% of stores, followed by **Emporio Armani** are the two strongest brands in this struggling category, followed once again by German brands **Mey** and **Triumph**.



BEST PERFORMING SEGMENTS

In Russia, specialist segments are performing well and are bringing life to the larger categories. For example, while bras are remaining rather static, **PLUS SIZE** lingerie is indispensable for Russian stores, offered by 91% of the

retailers we spoke to. Plus size represents one of the best selling segments overall as 61% of boutiques happily report that it is stable or growing! **Felina** is the top selling brand overall, while **Empreinte** and **Simone Pérèle** share second place, followed by **Chantelle** and Polish brand **Corin**. Polish brands are selling well, as **Obsessive** takes home **EROTIC LINGERIE'S** gold



Very Poor (-10% or more) Poor (between -5 and -10%) Not Very Well (-5%) Stable Better (+5%) Well (between +5 and +10%) Very Well (more than 10%)

Poorly Fair Well

RUSSIA, UKRAINE AND CIS BEST SELLERS

LINGERIE: **Dimanche Lingerie**

PLUS SIZE: **Felina**

NIGHTWEAR\ LOUNGEWEAR: **Mia-mia**

LEGWEAR: **Charmante**

MEN'S UNDERWEAR: **Jolidon**

SHAPEWEAR: **Janira**

SPORTS BRAS: **Triumph**

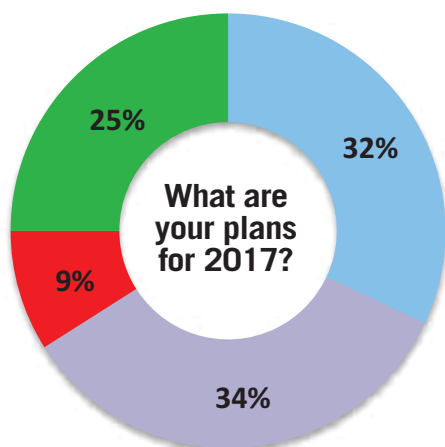
medal, followed at a distance by **Maison Close** and **Dita von Teese**, and fellow Polish brand, **Casmir**. Offered by 86% of stores, **SHAPEWEAR** is fast becoming a staple product in Russian stores, with Spanish brand **Janira** proving to be 2016's brand of choice. American brand **Maidenform** takes the silver medal for shapewear and Spanish **Ysabel Mora** and Latvian brand **Orhideja** share the bronze. While **NURSING BRAS** and **POST-SURGICAL LINGERIE** remain categories only to be found in specialist stores, **SPORTS BRAS** are beginning to crossover into the mainstream. Now stocked by a quarter of stores,

2016, 33% guessed that they would keep their portfolio exactly the same, another 34% thought they might switch out brands that aren't selling well. In the last few years retailers have reduced their product offers, but now stores are considering introducing new brands into their main categories, especially ones with lower costs, or expanding their specialist segments by stocking more sports bras for example. For those who really need to budget well, the most popular approach seems to be towards eliminating categories that are not selling well rather than specific brands.

43% of which report that this segment is stable or growing. Stores report that **Triumph**, **Anita** and **Emporio Armani** are the three best-selling champions. On the other hand, **ATH-LEISURE** remains a niche.

THE OUTLOOK FOR 2017

Confronting further economic uncertainty, the majority of Russian retailers haven't decided on their strategy for 2017 yet. At the end of



- Keep the same number of brands
- Keep the same number of brands but change suppliers
- Reduce the number of brands
- Increase the number of brands