



Global Economy of the Luxury Industry

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Slides Part Two

Sources :
Bain & Company, BCG, Deloitte, JP Morgan, McKinsey, NPD, Beauty Inc,
BNP Exane, Bartley Intel., Comité Colbert, Forbes, FT, Altagamma, Statista, Gartner,
Bloomberg, Xerfi, and brands own financial reports (LVMH, Kering, Richemont, Lauder,
Loreal, etc.)

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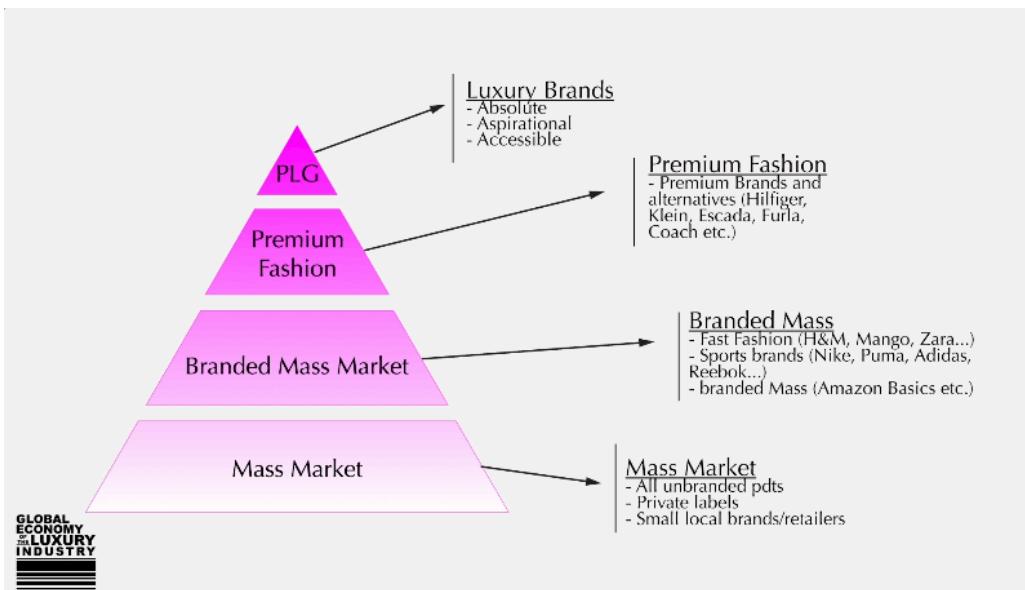
GLOBAL ECONOMY OF THE LUXURY INDUSTRY

Part 3 / The Fashion Industry



PLG Versus the Rest of the Consumer Market





The **Luxury Fashion Business** / BASICS

2 main Sub-Categories

>Ready-to-Wear (or RTW)

male segment
female segment
kids segment

>Haute Couture (or HC)

female segment (only)



The **Luxury Fashion Business** / Ready-to-Wear / Categories

For Men

- Polo & T-shirts
- Shirts (Dressed/casual/sport..)
- Jackets
- Suit Jackets & Tuxedos
- Pants & Shorts
- Outerwear (Coats & Jackets)
- Knitwear

"Newer" Categories

- Denim
- Loungewear
- Jersey
- Swimwear



For Women

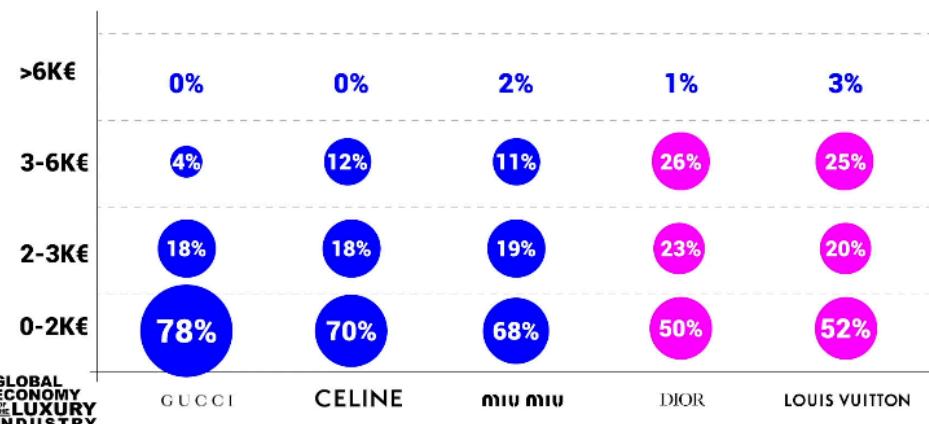
- Tops (blouses, shirts, t-shirts...)
- Dresses & Skirts
- Pants & Shorts
- Knitwear
- Outerwear (Coats & Jackets)
- Swimwear

"Newer" Categories

- Denim
- Lingerie
- Leather
- Activewear

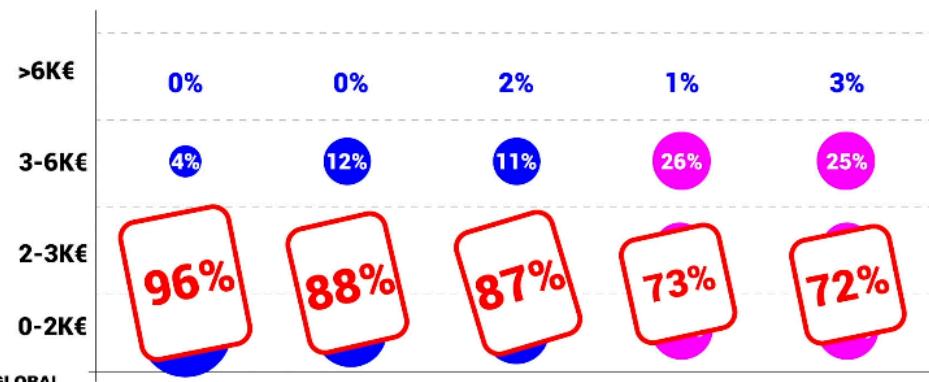
RTW STRATEGY
PRICING STRATEGY - H1 2024

The Assortment by Price by each brands is clearer
The war on the 800€-3K€ Segment is raging



Sources : Bartley / Design : Bartley
Retail Prices in Paris as of September 1st, 2024, VAT included, excluding limited editions, capsules and collabs

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The RTW Business / Style **Trends**

6 main Trends in 2023

- > Quiet Luxury
- > Lingerie
- > Denim
- > Normcore
- > Red
- > Wide Shoulders

6 main Trends for FW/2024

- > Quiet Luxury
- > Red
- > Wide Shoulders
- > Tartan
- > Tailoring
- >Lady Like



The RTW Business / Style **Trends**

Several Fashion Trends from TikTok in 2024

- > Quiet Luxury
- > MobWives
- > Coquette

.....



What is Haute Couture ?



Haute Couture / Key Facts

>Exclusive to France

>Created by a Decree in 1945

- . Part of the Fédération de la Haute Couture et de la mode
- . Placed under the authority of the Ministry of Industry
- . Members are elected by a Committee

>"Haute Couture" is a protected label

- . A brand registered worldwide

>A set of strict rules

- . Members must follow strict production constraints



15 Members

Adeline André
Alexandre Vauthier
Alexis Mabille
Atelier Gustavolins
Bouchra Jarrar
Chanel
Dior
Rabih Kayrouz
Franck Sorbier
Giambattista Valli
Jean Paul Gaultier
Julien Fournié
Maurizio Galante
Stéphane Rolland
Maison Martin Margiela
Schiaparelli
Givenchy

9 Corresponding Members

Alaïa
Armani Privé
Fendi Couture
Elie Saab
Iris Van Herpen
Valentino Couture
Ateliers Versace
Viktor & Rolf

New 2021 (but not in 2023)
ULYANA SERGEENKO
MIU MIU

Around 15 invited members per seasons

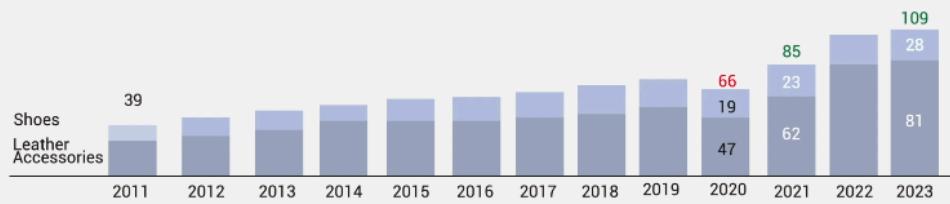
Balenciaga
De Vilbordin
Balenciaga
Ashi Studio
Imane Ayissi
Julie de Libran
Vêtements
Guo Pei
Ralph & Russo
Gaurav Gupta
Yuima Nakazato
Georges Hobeika
Juan Martin
Thom Brown
Aelis
Rahul Mishra
Zuhair Murad
Van der Kemp
...../.....



Part 4 / The Accessories Business



The Leather Accessories Business / **Revenues**





€ 2,650 - 2,800

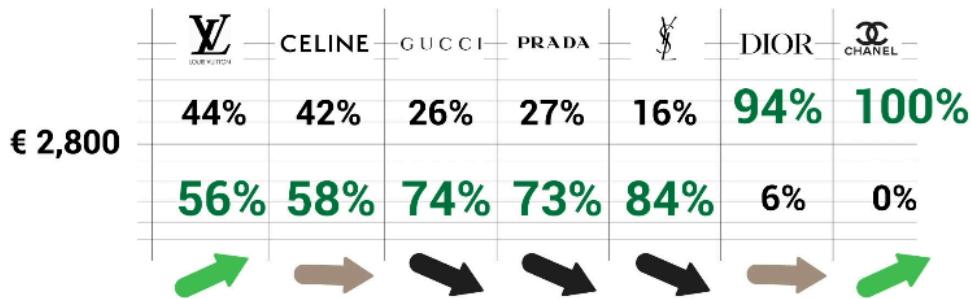


€ 900 - 1,000



Source : Bartley, Retail Prices as of September 1st, 2024 in Paris, full VAT, excluding limited editions, collabs and made-to-orders
 Design : Bartley

BRAND STRATEGIES
Brand Positioning Strategy on Bags
 Assortment breakdown for Fall 2024



Source : Bartley, Retail Prices as of September 1st, 2024 in Paris, full VAT, excluding limited editions, collabs and made-to-orders
 Design : Bartley

The **Luxury Handbag Business** / Review

3 business Trends in 2022

- > The Micro bags
- > The Straps
- > The New Men Bag

4 business trends in 2023

- > The Maxi & Mini Bags
- > The Baskets
- > The Bumbags



Part 4 / The Accessories Business
/ The Shoe Business



SHOE BUSINESS / WOMEN's MARKET
THE SNEAKER INFLATION- 2024 - EU MARKET
Sneakers Prices Continue to Rise
But the ceiling may have been reached in 24'

HEC

CHANEL
€ 1,288

LV

LOUIS VUITTON

€ 1,001

+1.2%

DIOR

€ 936

+2.5%

HERMÈS

€ 882

+0.5%

BALENCIAGA

€ 942

+11.5%

GUCCI

€ 908

+17%

PRADA

€ 853

+4%

Source : Bartley Market Intel, 24



Sources : Bartley / Euro Market / Average Retail Prices on Sneaker Category / Increase vs 2023
Design : Bartley

The Luxury Shoes'Business / Review

3 business Trends in 2022

- > The Sneakers line extensions
- > The New Mules
- > The Raffles

2 business Trends in 2023

- > The Worn-out Shoes
- > The Web 3.0 link

