



LEMAIRE

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Lemaire brand analysis report: Tea culture themed brand pop-up store to prepare for entering the Chinese market

CONTENT

PART 1

External Overview

Brand information
PESTEL analysis
Positioning map
Marketing analysis
Brand strategies

PART 2

Internal Information

Target customer analysis
Marketing mix analysis
Brand Characteristics
SWOT analysis

PART 3

Campaign

Campaign overview
Objectives
Store design
Floor plan
Shopping experience
Space setting
KPIs
Promotion plan





Brand Information

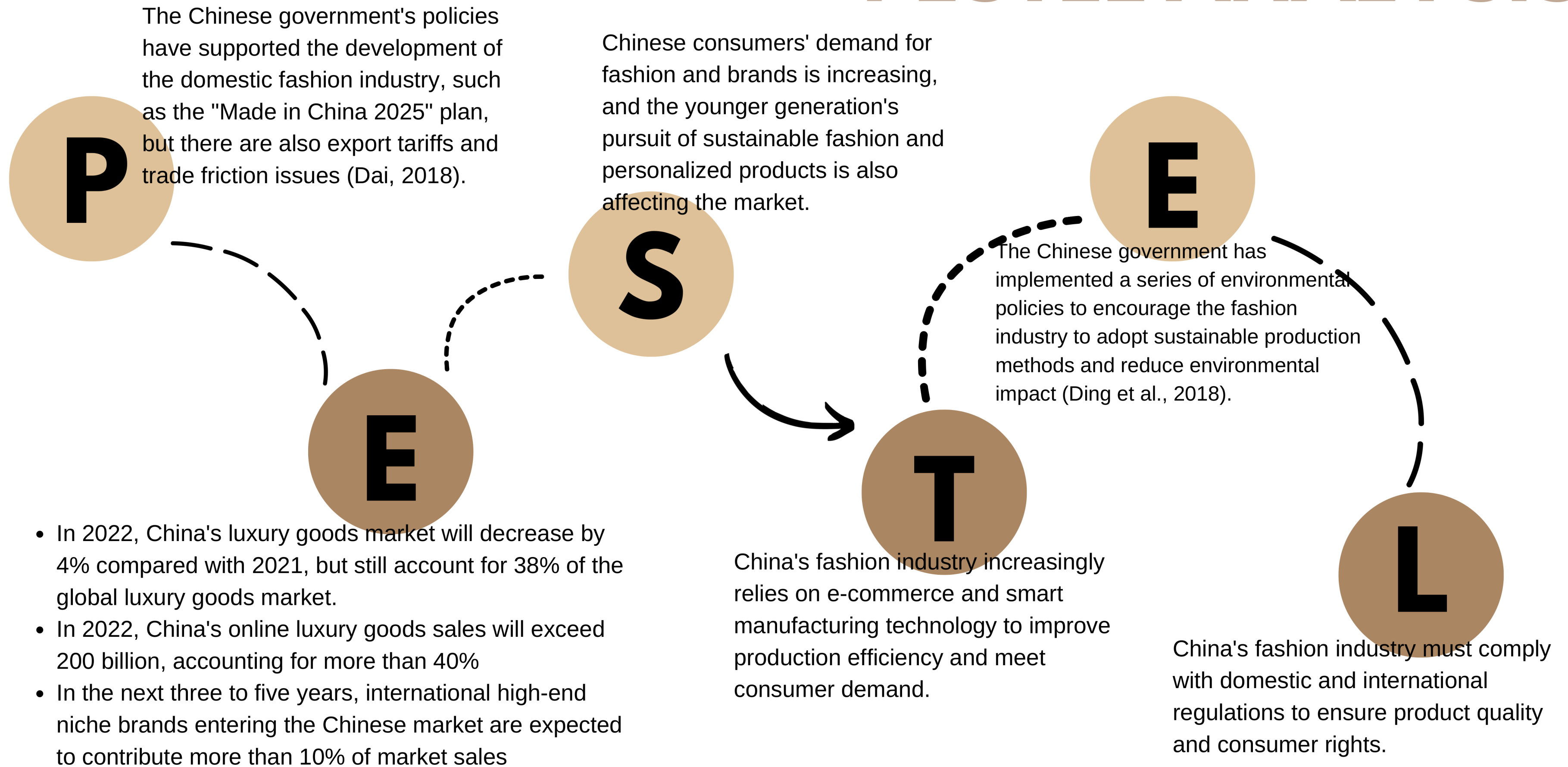
Lemaire is a French brand founded in 1991. After the establishment of the brand, designer Christophe Lemaire successively served as the artistic director of Lacoste and Hermès. In 2010, fellow designer Sarah-Linh Tran joined the brand with her fashion sensitivity and love of narrative methods. After founder Christophe returned from Hermès in 2014, the brand was officially renamed LEMAIRE.

The Croissant bag first appeared on the LEMAIRE show in 2018 and is still popular today.

In 2015, it received investment from Bpifrance. In 2018, Fast Retailing Co., Ltd acquired part of lamaire's shares for 4.5 million euros.

Craftsmanship, fabrics and quality have always been at the core of the LEMAIRE brand. Deeply engaged in minimalist design, focusing on purity and comfort in fashion design. Product categories include: men's clothing, women's clothing, bags and shoes, etc. Its target consumer group is the middle and high-income class with certain spending power and pursuit of comfort.

PESTEL ANALYSIS



Positioning Map

$50\% * (\text{RED followers}) + 50\% * (\text{Deiwu followers})$

The record of the number of followers are as of June 2023

Unit for followers: Thousand

No.1 Maison Margiela $(64 * 0.5) + (35 * 0.5) = 35 + 32 = 67$

No.2 MaxMara $(13 * 0.5) + (63 * 0.5) = 6.5 + 31.5 = 38$

No.3 Marni $(17 * 0.5) + (52 * 0.5) = 8.5 + 26 = 34.5$

No.4 Toteme $(1 * 0.5) + (47 * 0.5) = 0.5 + 23.5 = 24$

No.5 Lemaire $(1 * 0.5) + (42 * 0.5) = 0.5 + 21 = 21.5$

No.6 Theory $(0.27 * 0.5) + (33 * 0.5) = 0.135 + 26.5 = 16.64$

No.7 The Row $(1 * 0.5) + (0 * 0.5) = 0.5 + 0 = 0.5$

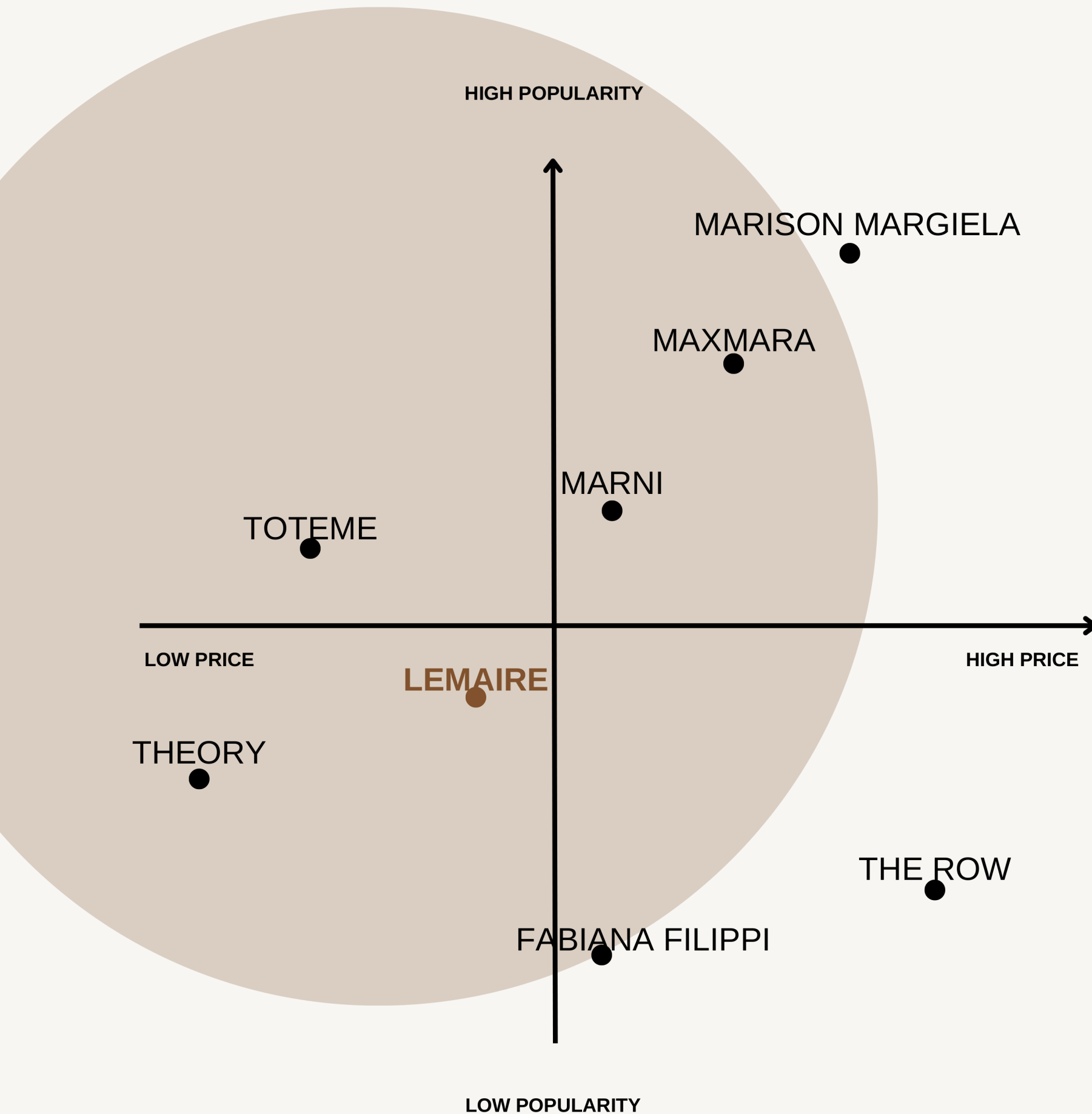
No.8 Faboana Filippi $(0 * 0.5) + (0.058 * 0.5) = 0 + 0.029 = 0.029$

Popularity

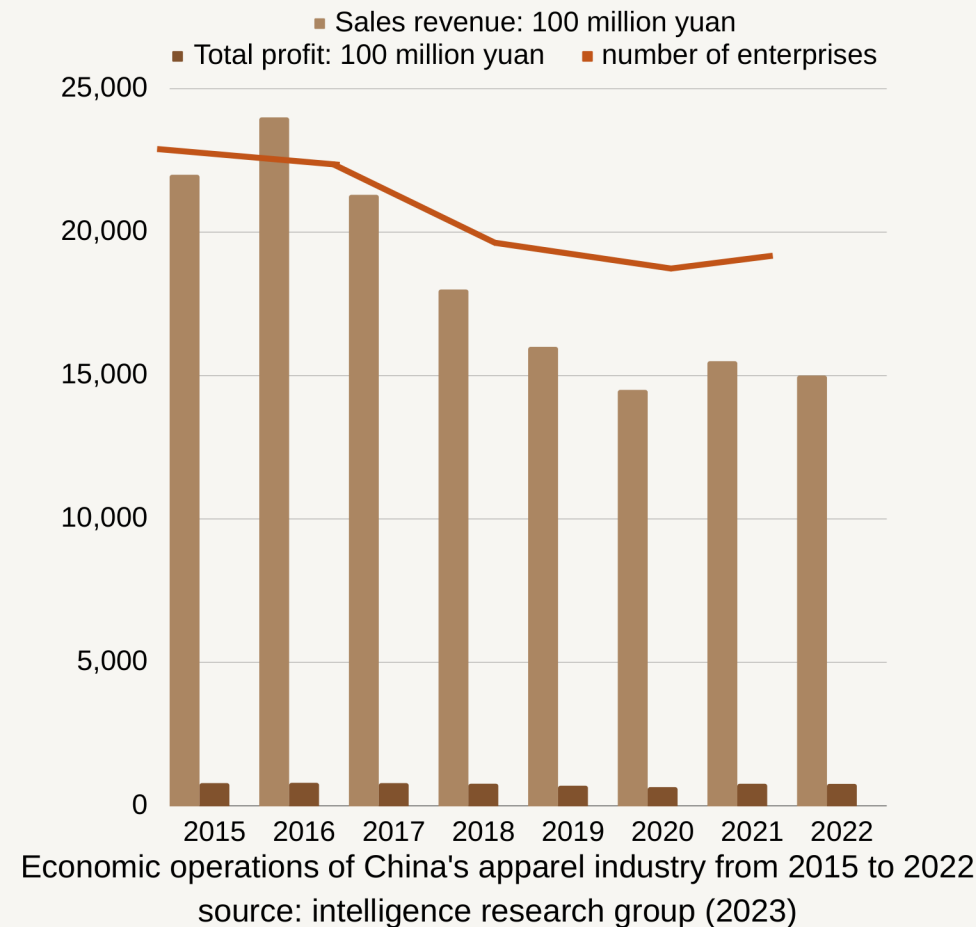
Among 8 designer brands with similar styles, lemaire ranks fifth in popularity in the Chinese market. The most popular brand is Maison Margiela.

Price

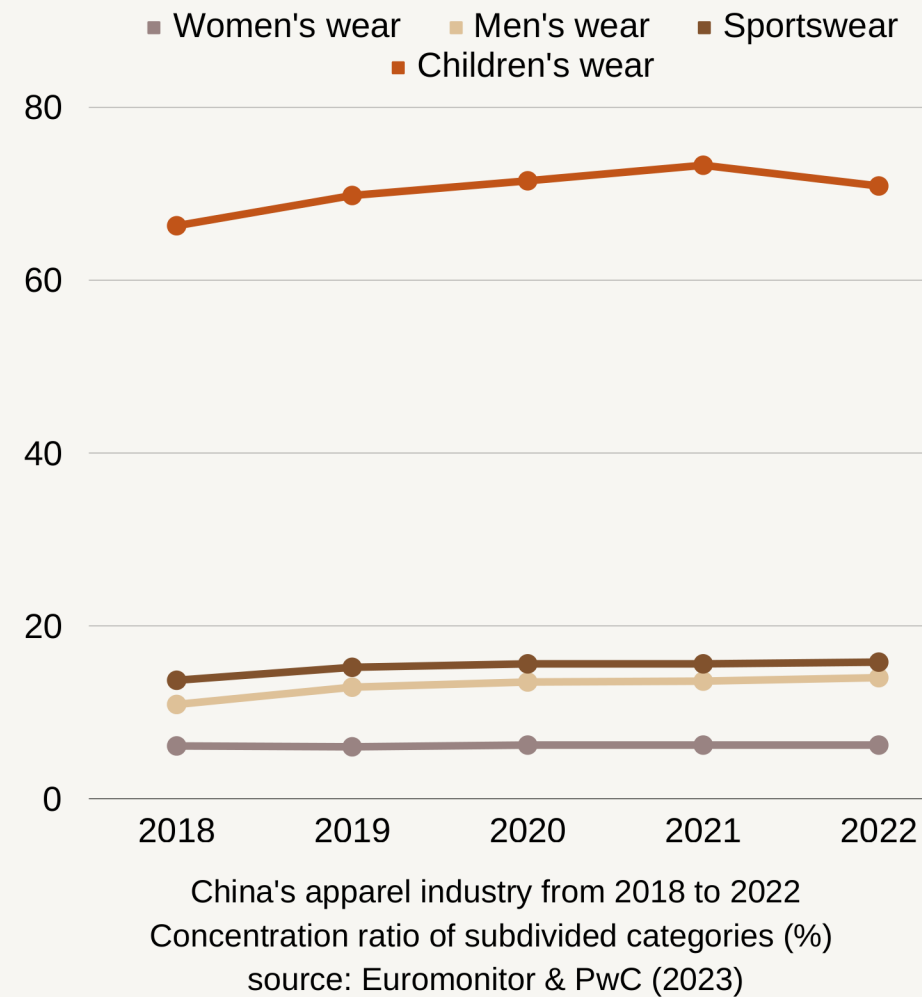
Refer to the official website of each brand for the average price of ready-to-wear.



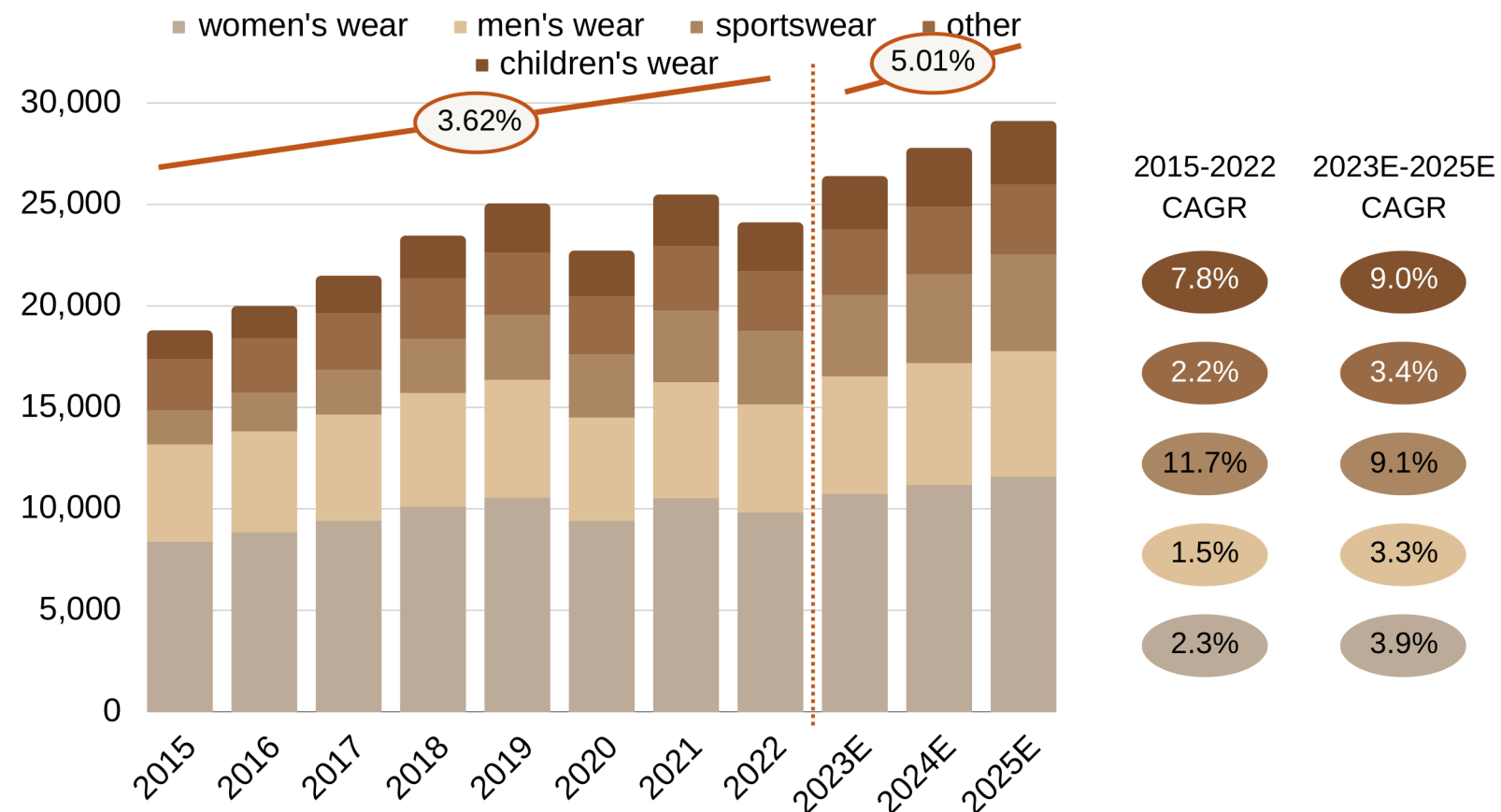
Marketing Analysis



In 2021, there were 12,653 enterprises above designated size in China's garment industry (annual main business income of 20 million yuan and above), achieving operating income of 1,482.336 billion yuan, a year-on-year increase of 6.51%, and the growth rate was approximately 17.85 percentage points higher than the same period last year; total profits 76.782 billion yuan, a year-on-year increase of 14.41%, and the growth rate was approximately 35.7 percentage points higher than the same period last year. From January to December 2022, there were 13,219 enterprises above designated size in China's garment industry, an increase of 566 compared with 2021; cumulative operating income was 1,453.9 billion yuan, a decrease of 28.44 billion yuan compared with 2021; total profits were 76.4 billion yuan, a decrease of 380 million yuan compared with 2021 Yuan.



As Chinese consumers' style preferences for clothing become more fashionable, more and more brands emerge. The overall industry concentration is low, the structure is fragmented, and competition is fierce. From the perspective of subdivided categories, women's clothing has the lowest overall concentration ratio, with CR5 (industry concentration ratio) remaining at around 6%, and there is no upward trend for the time being. The concentration of children's clothing and men's clothing is low, but both have obvious upward trends. Sportswear has functional attributes, requires deep technology accumulation, and continues to increase concentration. In the future, Chinese consumers will further diversify, and there is room for increased industry concentration. Companies that stand out in terms of brand power, product power, and channel power are expected to become industry leaders.



From 2015 to 2019, the Chinese clothing industry demonstrated a stable growth trend, with an average annual compound growth rate of 7.45%. However, after 2020, the clothing market experienced a contraction in demand due to the impact of the pandemic. In the first half of 2023, factors such as economic rebound and a lower base contributed to an improvement in the demand outlook for the clothing industry. It is anticipated that the market size of the Chinese clothing industry will maintain an upward trend in the coming three years.

In terms of segmented markets, the Chinese women's clothing market has been dominant, but in recent years, the growth rate of the women's clothing market has slowed down. The compound growth rate for women's clothing from 2015 to 2022 was 2.3%, which is lower than the overall clothing market. The children's clothing and sportswear segments exhibit significant growth potential, with a compound growth rate of 11.59% for the Chinese sportswear market from 2015 to 2023, surpassing the total compound growth rate of the clothing market.

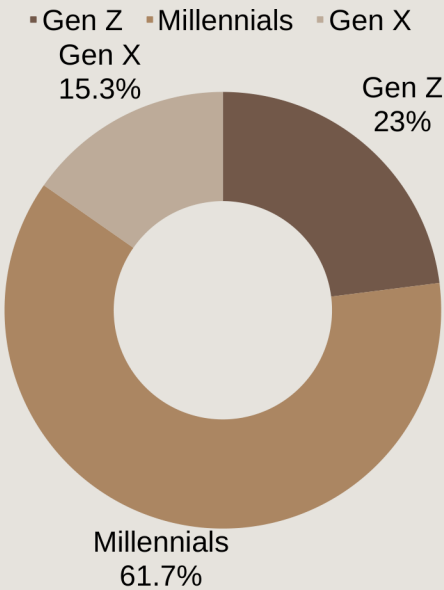
Marketing Analysis

Data from: data.iimedia.cn; report.iimedia.cn
sample size: N=1953; Time:2022

Online consumption pain points of Chinese apparel consumers in 2022

Population and income distribution of China's garments industry

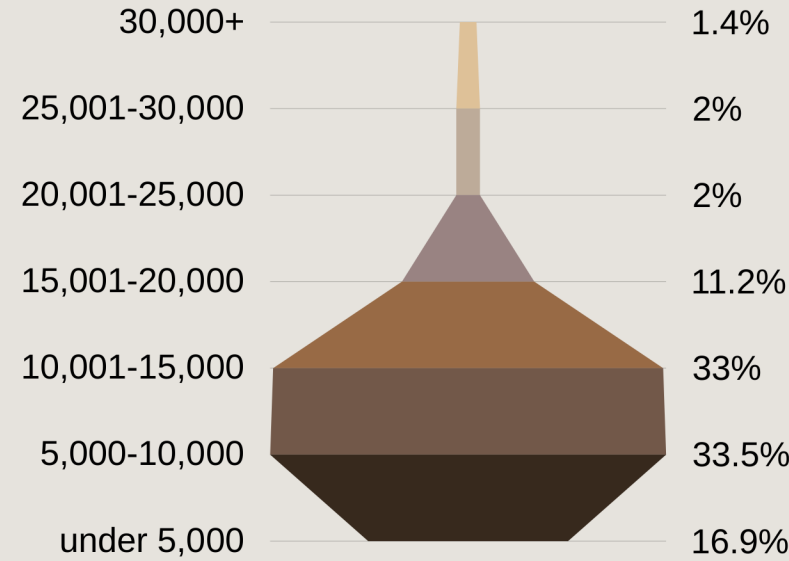
Distribution of Chinese apparel consumers in 2022



In China's clothing industry, there are the largest number of millennials, and consumers' spending power on clothing is generally between 5,000 and 15,000 yuan.

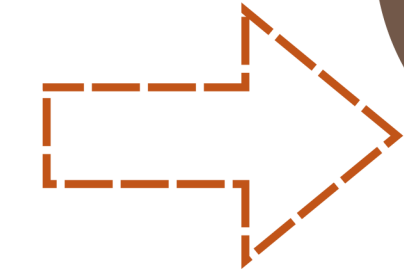
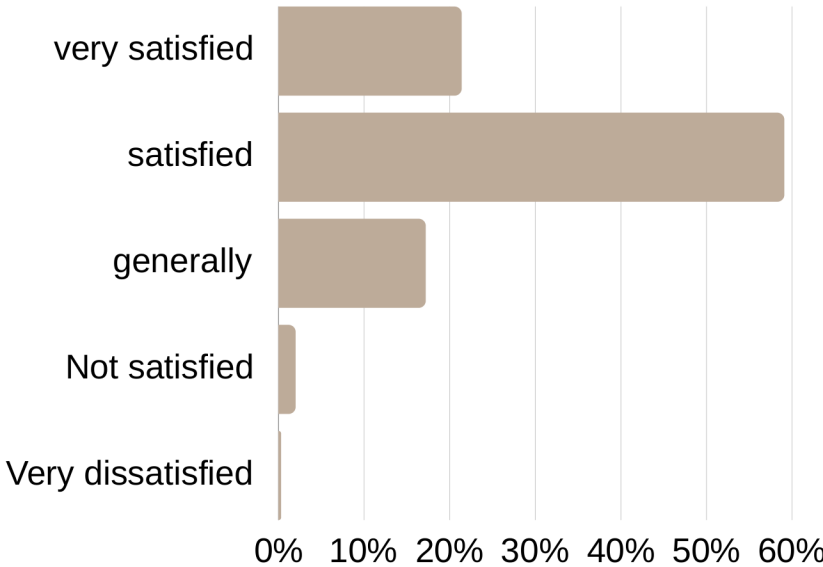
Income distribution of Chinese apparel consumers in 2022

Unit: China Yuan

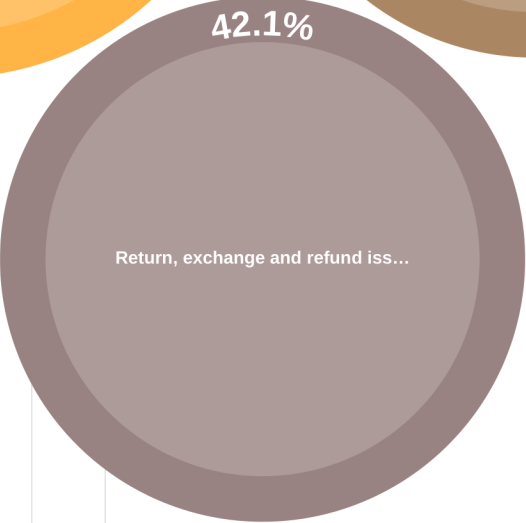
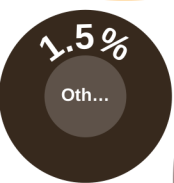
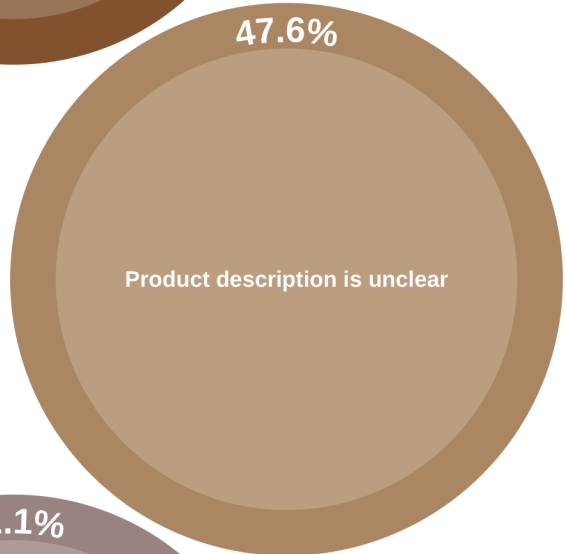
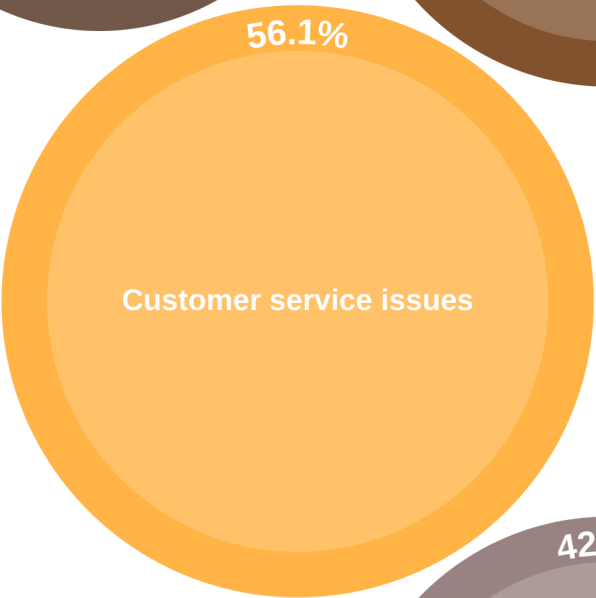
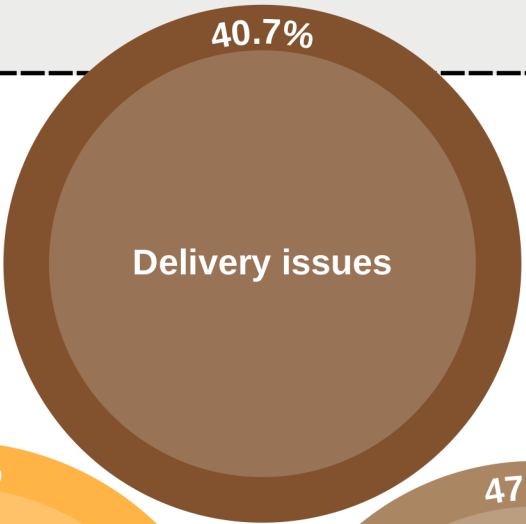
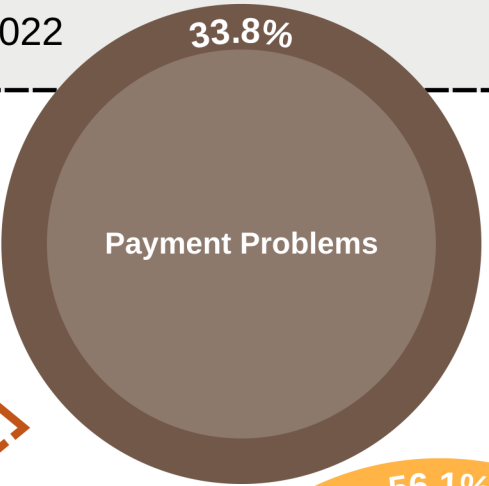


Consumer satisfaction in China's apparel industry

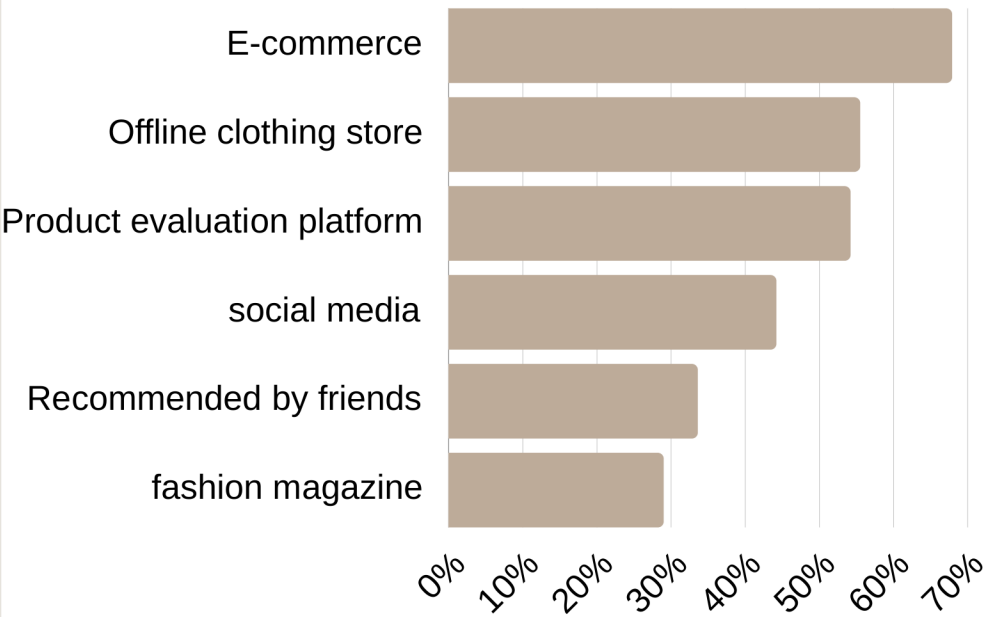
consumer satisfaction of chinese clothing in 2022



About 60% of consumers are satisfied with all the clothing they buy. Among them, the issue consumers are most concerned about is customer service.



Overview of purchasing channels in China's consumer garments industry



Reference channels for chinese apparel consumers to buy clothing in 2022



Channels for chinese apparel consumers to buy clothing in 2022

Consumers mainly refer to e-commerce channels to purchase clothes, with a high proportion of consumers purchasing through online channels.

LEMAIRE

Long-term Brand Strategies

E-commerce

- E-commerce is a key growth area for the brand in 2020, with 2019 e-commerce sales up 300 per cent on the previous year (Vogue business, 2020).
 - Lemaire launched a new e-commerce website in July 2020, adding more languages and currency forms, using more pictures and videos to upgrade the appearance of the web page, showing the clothing production process in the form of documentaries, and enriching the editorial content of the website.
 - lemaire has launched its flagship store on Tmall in China in September 2022. As early as April 2020, the brand had opened an official account on China's Xiaohongshu social media to warm up and pave the way for its expansion in the Chinese market. As of The account currently has 49,000 followers.
-
- Led by founder Christophe lemaire and co-designer Sarah-linh Tran, the brand is focusing on stronger storytelling in preparation for global expansion (Vogue business, 2020).
 - In the fiscal year ending in March 2020, Lemaire's sales were approximately 19 million euros, of which only 15% came from the French domestic market, 35% of revenue came from Asia, and 35% came from North America.
 - Lemaire plans to open two new stores in the Asian market, one of which has already settled in Tokyo, Japan in 2021, and the other will open in Seoul, South Korea in 2023.
-
- Lemaire also hopes to strengthen accessories and opened a store specializing in accessories downstairs of the Paris headquarters. As of 2020, the accessories category has accounted for 28% of the brand's total sales. Its soft croissant bags and stiff saddle bags appear frequently on social media and are loved by fashion bloggers (Ladymax, 2020).

Market Expansion

Product Expansion

Future challenge

- China's designer brand market is highly competitive and needs to deal with challenges from local and international competitors to ensure the brand's unique position in the minds of consumers.
- Operating successfully in the Chinese market requires consideration of cultural differences, including consumption habits, aesthetic trends, and localization of brand stories to win resonance with Chinese consumers
- In China's highly competitive e-commerce environment, maintaining the appeal of online channels and ensuring a seamless shopping experience is a challenge
- Management challenges brought about by global expansion, including marketing, logistics and other factors in different regions

Future opportunity

- The Chinese market continues to digitize, especially in the fashion sector. By continuing to optimize online channels and integrating advanced digital technologies, Lemaire can better meet the digital shopping experience needs of Chinese consumers.
- In China, social media has a huge influence on fashion and shopping. The brand has already achieved certain success on social media. By further strengthening its cooperation with fashion bloggers and influencers, it can increase the brand's exposure and influence in the Chinese market.
- Cooperation with local designers, artists and local brands can help Lemaire better integrate into the Chinese market and attract consumers with local creative and cultural elements.

Target customers

Geography

China Beijing Shanghai Guangzhou
Shenzhen...
First tier cities

Demographic

20-50 years old
Highly educated white-collar workers
Sufficient disposable income

Psychology

Casual and uninhibited
Full of self-awareness
Pursue a relaxed, lazy and high-end
feel

Behavior

Have online shopping habit
Pursue your own style
Literary temperament, likes watching
exhibitions and drinking tea



KK graduated from Shenzhen University and stayed in Shenzhen for 8 years after graduation. KK does not pursue trends. She pursues her own preferences and forms her own style.

Lifestyle

KK is a quiet, elegant and powerful woman. After work, she likes to drink tea, watch various exhibitions, and sometimes paint. In addition, KK also likes a kind of jade full of oriental charm: jade. She feels that jade and lemaire have similar temperaments. They are both elegant, calm and restrained, but they also contain their own unique and wonderful charm.

Marketing Mix - Products

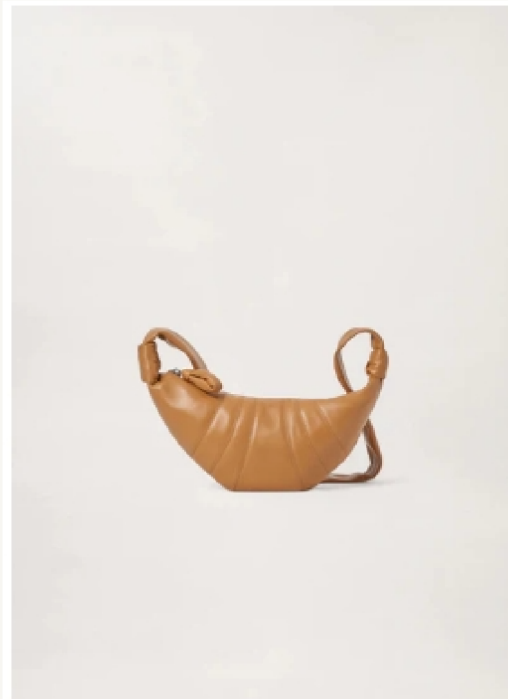


- LEMAIRE's product coverage is relatively wide, including bags, shoes, ready-to-wear, accessories, etc.
- LEMAIRE's product style is refined and casual. Soft silhouettes and colors allow LEMAIRE clothing to be given new styles over time.
- LEMAIRE's sense of relaxation not only comes from the soft and loose silhouette, but also is reflected in the use of traditional linen, cotton, wool, silk and other fabrics.
- In addition to clothes, LEMAIRE's bags are widely praised, especially the classic horn croissant bag and camera bag. They maintain style while also taking into account practicality, and are enthusiastically supported by consumers with literary and artistic styles.

Marketing Mix - Price



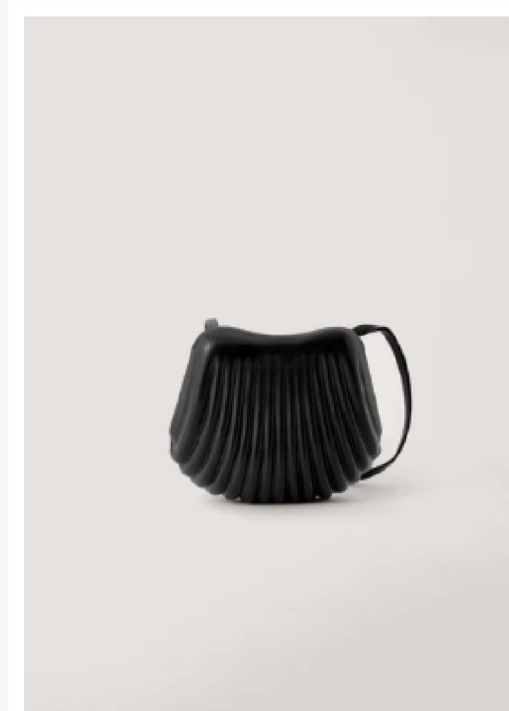
HOODED DOUBLE BREASTED PARKA
POLYAMIDE LINEN COTTON
1,090€



SMALL CROISSANT BAG
SOFT NAPPA LEATHER
940€



CAP SLEEVE DRESS
PIGMENT DYE JERSEY
96€ 160€



CARLOS BAG
VEGETAL TANNED LEATHER
3,500€



FLAT PIPED SLIPPERS
SHINY NAPPA LEATHER
470€

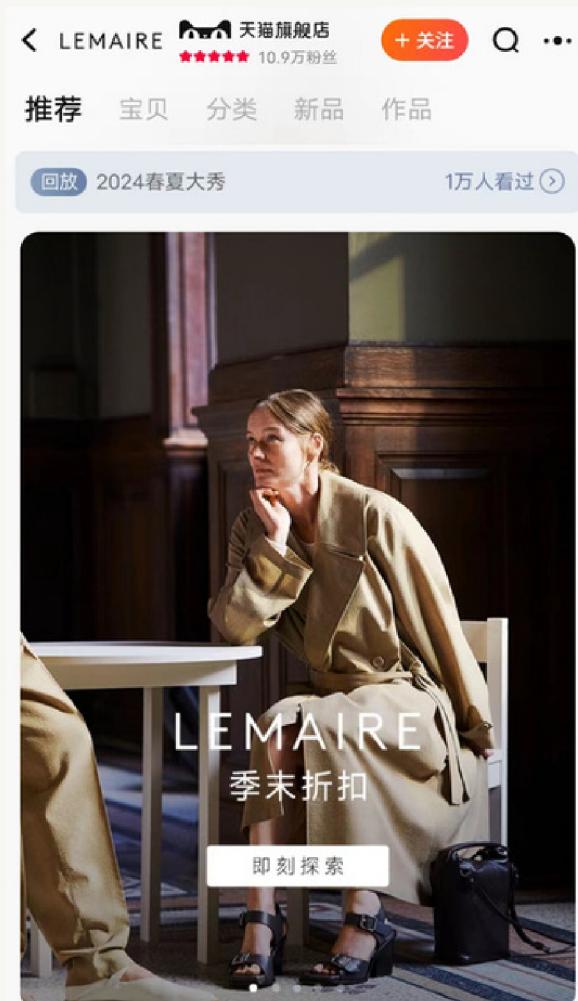


ANGKASAPURA SHIRT DRESS
ANGKASAPURA PRINTED COTTON
1,250€

Regarding the pricing of LEMAIRE, it is determined by the type of product, the difference in materials, the design and the complexity of the production process. The price of LEMAIRE's clothing ranges from more than one hundred pounds to more than one thousand pounds. Ordinary ready-made clothes are several hundred pounds, while ready-made clothes signed by artists or with complex craft materials are around one thousand pounds. Bags cost around 1,000 to 5,000 pounds, and shoes also cost several hundred pounds. Various accessories such as jewelry, fragrances, home furnishings, etc., also cost several hundred pounds. Generally speaking, the price of LEMAIRE is not high among this brand type, and its design details improve the cost-effectiveness of LEMAIRE's clothing.

Bags 7,900-31,400 rmb
Dress 1,400-10,900 rmb
Tops 900-13,700 rmb
Trousers 2,100-7,800 rmb
Jacket 3,720-9,600 rmb
Shoes 3,500-7,280 rmb
Accessories 1,900-3,900 rmb

Marketing Mix Place



Tmall online flagship store in China

ONLINE

OFFLINE

Buyer shop
LABELHOOD



Buyer shop
DONGLIANG



Buyer shop
SND



- Currently, LEMAIRE has three official direct stores in Paris and no official offline stores in China.
- In addition to pop-up stores, LEMAIRE is helped to carry out offline sales in China, and more are buyer stores, such as LABELHOOD, SND, Dongliang, etc. in Shanghai.
- In addition, the most important way of purchasing LEMAIRE is online. Currently, in addition to LEMAIRE's official website, it has opened a Tmall flagship store in China.

Artist collaboration



lemaire and Chinese artist Lin Yan jointly launched an art installation called "Beijing Doorway" in July 2021. Lin Yan's research and creation of rice paper are consistent with lemaire's thinking about clothing. In lemaire's view, clothing is through Multiple layers of fabric are stacked to form a simple and relaxing home.

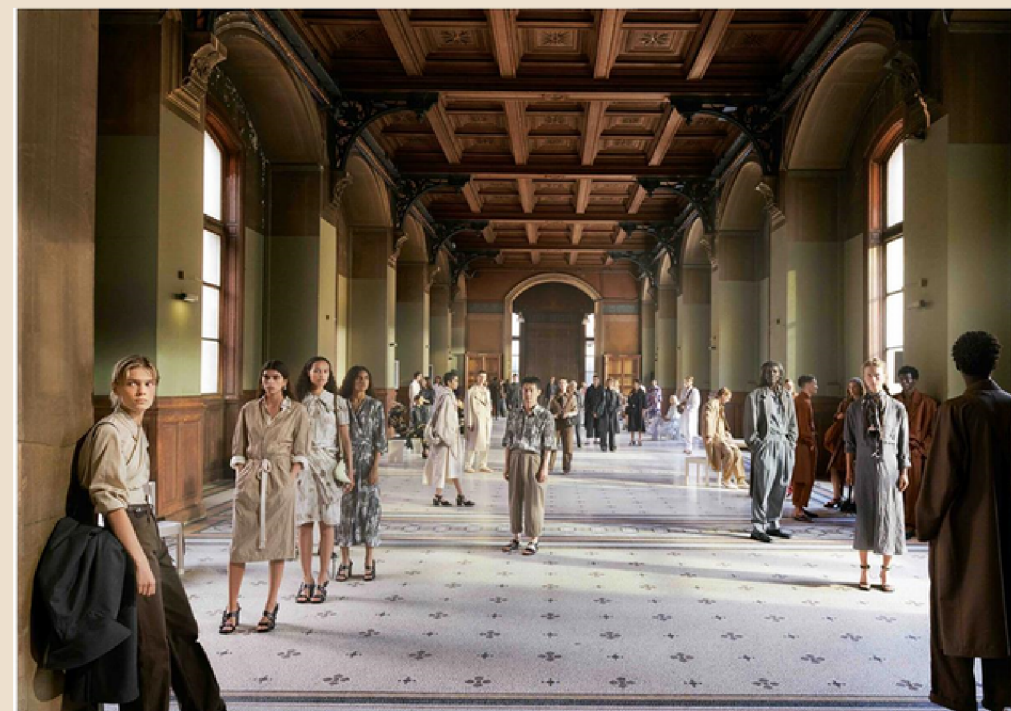
"Beijing Doorway" has received positive feedback from netizens. The texture and simple colors of the installation are highly integrated with lemaire's brand genes and complement each other.

Marketing Mix - Promotion

Starting from the 2019 spring and summer series, Lemaire's way of expressing the narrative of the brand and design has undergone very obvious changes. First of all, it is reflected in the choice of models. They no longer choose professional models too much, regardless of gender, height, skin color, nationality, age, occupation, etc. Their bodies, looks, skin colors, and ages span a wide range. Different groups of people slowly build up a group portrait of this ideal society for us. There are all kinds of "people" on the Lemaire show, with different human emotions, and the brand has a three-dimensional sense and storytelling.

LEMAIRE's show layouts often use daily life scenes to create an immersive movie feel, and the models display in the most realistic and realistic way. From the early morning seaside performed by 2022 FW to the waiting hall where 2023 SS interacts with the audience, the 2023 FW show is on the campus of Paris VI University. LEMAIRE created a wonderful moment of body, contrast, personality, difference, gender and age. Everything is flowing freely.

Brand characteristics



- Lemaire enjoys a high reputation internationally, which can help build trust and attract consumers in the Chinese market.
- Lemaire's minimalist and classic design may align with the preferences of Chinese consumers for high-quality fashion.
- Products made with high-quality materials and exquisite craftsmanship may stand out in the Chinese market.

- Lemaire is positioned as a higher-end brand, which may limit mass consumption in the Chinese market.
- Compared to some local or more well-known international brands, Lemaire's awareness in the Chinese market may be relatively low.

SWOT ANALYSIS

- China's fashion market is continually expanding, and Lemaire has the opportunity to gain a share in this growing sector.
- Collaborating with local Chinese brands or celebrities for promotional activities could potentially boost the brand's recognition in China.
- Leveraging the rapidly growing e-commerce market in China, Lemaire can expand its market share through online sales channels.

- The Chinese market is saturated with local fashion brands that may have a better understanding of local consumer needs, posing competitive pressure.
- Global and domestic economic fluctuations could impact the luxury goods market, including Lemaire.
- Fashion brands need to adapt to local culture and aesthetics; otherwise, they may struggle to attract and retain Chinese consumers.

Campaign Overview

"Chinese Tea Culture" Themed Pop-Up Store

A pop-up store that seamlessly integrates the poetic, casual, and vibrant characteristics of lemaire brand culture with elements from traditional Chinese tea culture. We are planning to incorporate installation art to create a visually distinctive pop-up store, selecting products that resonate with the preferences of Chinese consumers for sale within the temporary retail space.

Objective **1** Broaden brand awareness and prepare for entering the Chinese market

Objective **2** Based on actual sales data, gain an in-depth understanding of local market needs and trends

Objective **3** Communicate and share brand culture and establish a unique brand image by displaying cultural resonance points



LEMAIRE SS 2023



Chinese traditional tea culture visual reference from:
<https://bestceramics.cn>



Chinese traditional tea culture visual reference from: <https://bestceramics.cn>



LEMAIRE Runway SS 2023

Store Design



Shanghai West Bund Art Center



why choose Shanghai?

Shanghai is China's economic and cultural center, rich in popular culture, and the proportion of fashionable people ranks first in the country. Lemaire has many target customers in Shanghai, and Shanghai, as the country's trend center, has a great influence on the country. Choosing to open a pop-up store in Shanghai will attract the attention of consumers across China.



Floor Plan



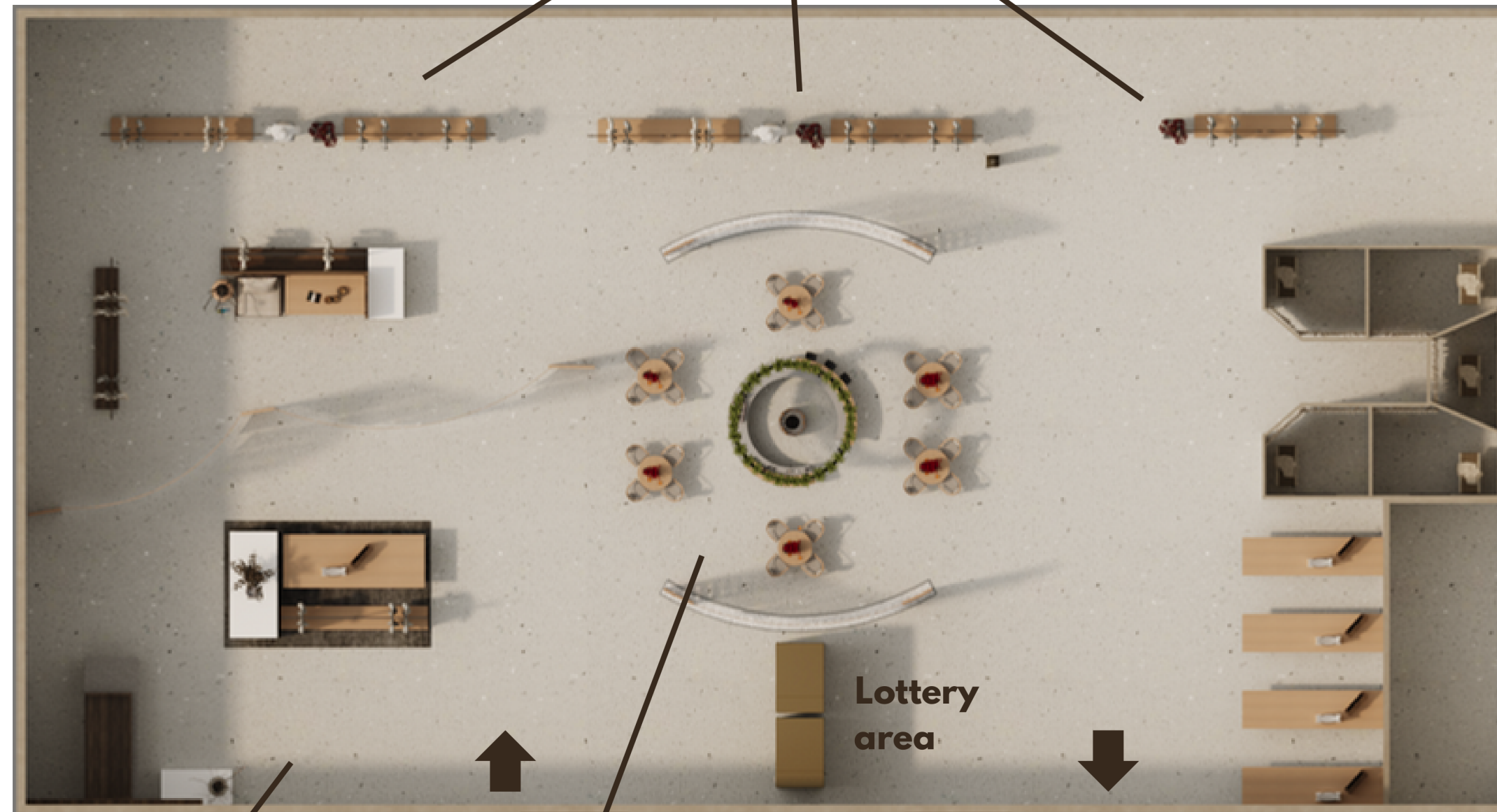
Product display area



Decoration style
Roof: Fabric/Irregular



Decoration style
Walls: Fabric/Soft/Natural



Fitting room



Tea area

Reception
Brand story

Pickup area



Shopping experience

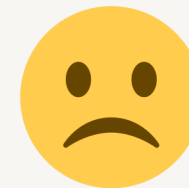


Consumers discover
items they like



Ask sales at any time, leave your name and
email address, and register an account

The salesperson will help you add the clothes
you like to the shopping basket on iPad and
send them to the fitting room. You only need
to wait. When the clothes are ready, the
salesperson will call your name. There is no
need to queue up to try on the clothes.



If you are not satisfied, just leave the
clothes in the fitting room

If you are satisfied, you only need to tell the
salesperson and check out at any time via
iPad. You can wait in the rest area without
queuing. After the products are packaged,
you can pick up the products.



Delivered to
your home



Pick up area

Space Setting

Highlights



Brand story display:
Introduce the Lemaire brand story, deeply communicate the brand value and culture, and leave a deep impression on the audience

Brand identity combined with artistic style attracts consumers to take photos and share



The combination of product display, tea drinking experience and shopping experience not only exports brand culture but also stimulates consumption.



Tea area: for guests to rest, provide tea drinks, export tea culture, and select lemaire related patterns for packaging



Raw material and process display: Display of Lemaire raw materials and production process



KPIs:



Rewards program

Posting related content about the #LEMAIRE X TEA topic on the Red platform will earn you a chance to enter a lucky draw.

Prizes include small gifts, shopping vouchers, or discounts on tea beverages.



Revenue

- Generate a total sales revenue of ¥300,000 during the pop-up store duration.
- Achieve a minimum conversion rate of 15%, indicating effective product selection and pricing.
- Have 20% of customers express interest in future events or make repeat purchases.



Feedback

- Attain positive feedback from at least 70% of visitors regarding the installation art.
- Achieve an average customer satisfaction rating of 4.5 out of 5 based on feedback surveys.



Social media

- Garner a 30% increase in social media mentions and engagement through partnerships.
- Secure coverage in at least three major media outlets and generate buzz on at least five influential online platforms.
- Reach a minimum of 100,000 impressions on social media platforms through pop-up store-related content.

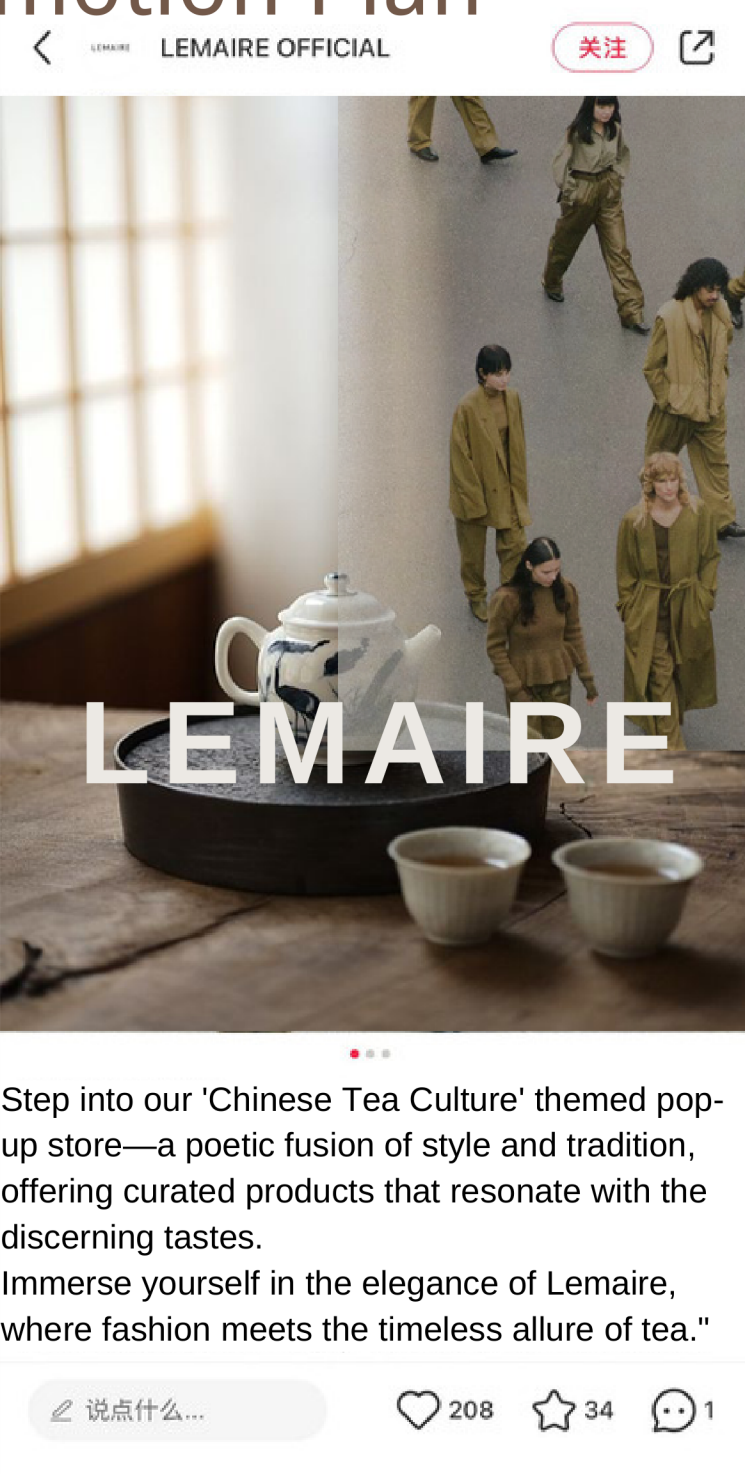


Engagement

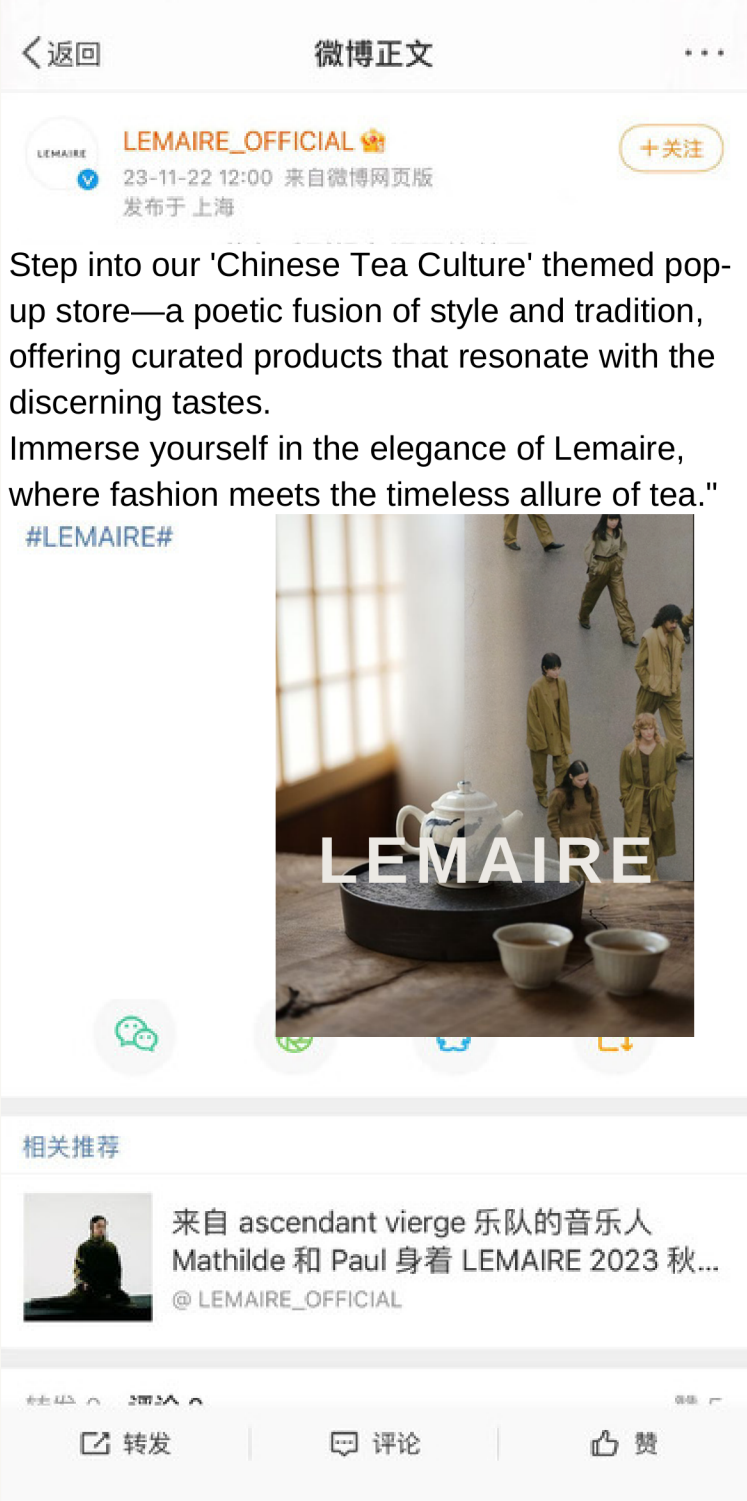
- Achieve a minimum daily foot traffic of 300 visitors.
- Maintain an average interaction rate of at least 60% with customers through staff engagement and activities.

Owned Media

Promotion Plan



RED



Sina Weibo



WeChat Mini Program



WeChat public account

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