



# HELMUT LANG

## **BRAND DNA**

**FOUNDER: HELMUT LANG (1986).**

**STYLE: 90S MINIMALISM & "ANTI-FASHION."**

**MATERIALS: INDUSTRIAL (NYLON/RUBBER) MEETS SHARP TAILORING.**

**1998: FIRST-EVER ONLINE FASHION SHOW**

## **OWNERSHIP & M&A**

**PRADA GROUP (1999-2004): INITIAL ACQUISITION.**

**FOUNDER EXIT (2005): LANG LEAVES FOR THE ART WORLD.**

**FAST RETAILING/LINK THEORY (2006): JAPANESE ACQUISITION.**

**"RUNWAY" TO CONTEMPORARY LUXURY.**

## **MODERN ERA & CHALLENGES**

**IDENTITY CRISIS: STRUGGLING TO DEFINE "HELMUT LANG" WITHOUT HELMUT.**

**PETER DO (2023-2024): BRIEF REVIVAL ATTEMPT;**

**CURRENT FOCUS: ARCHIVAL "RE-EDITIONS" AND MARKET SCALABILITY.**



# TARGET DESCRIPTION

GENDER FLUID, URBAN BASED IN GLOBAL CITIES (NYC, LONDON, TOKYO), 23 - 38YO, FASHION AWARE, CULTURALLY ENGAGED CONSUMERS, UPPER MIDDLE TO HIGH INCOME.

# THEIR NEEDS

TIMELESS, MINIMALISTIC CLOTHING WITH STRONG IDENTITY  
AUTHENTIC BRANDS WITH CULTURAL AND CREATIVE BACKGROUNDS  
QUALITY, FUNCTIONABILITY, AND UNDERSTATED LUXURY

# THEIR ENEMY

FAST FASHION, TREND SATURATION, LOGO-DRIVEN PIECES, LOW QUALITY

# INSIGHTS THAT TELL THEIR STORY

“I’M DRAWN TO BRANDS THAT HAVE A CULTURAL AND CREATIVE HISTORY BEHIND THEIR DESIGNS.”

“I WANT PIECES THAT ARE TIMELESS AND WON’T FADE AWAY WITH TRENDS.”

# WHAT DO THEY THINK NOW?

“I HOPE HELMUT LANG KEEPS TRYING TO MAINTAIN ITS MINIMALIST, ANDROGYNOUS, QUALITY-BASED ESSENCE.”



# HOW ARE THEY BUYING?

Researching fashion history and brand heritage  
Reading online reviews about product quality  
Influenced by editorial content and aligned content creators

## WHAT WE WANT THEM TO:

**See:** A minimalist brand with strong heritage and cultural credibility

**Think:** Helmut Lang is authentic, intelligent, and beyond fashion trends

**Feel:** Confident, understood, and culturally aligned

**Do:** Choose Helmut Lang as a long-term wardrobe investment

**Whisper:** *“Helmut Lang is a reference in minimalist, genderless, intelligent fashion.”*

# PROBLEMS FACED BY CUSTOMER

## FINANCIAL PAIN POINT

- PREMIUM PRICING REQUIRES STRONG JUSTIFICATION IN DESIGN AND DURABILITY.
- NOT GOOD QUALITY ( FINE FABRICS, HOLES, SEAMS COMING UNDONE)

## PROCESS PAIN POINT

- SUCCESSION OF ARTISTIC DIRECTORS
- INSTABILITY OF COLLECTIONS (CANCELLATION OF ENTIRE SEASONS SUCH AS SPRING 2025)
- DIFFICULTY FINDING MINIMALIST FASHION THAT STILL FEELS DISTINCTIVE AND AVANT-GARDE

## PRODUCTIVITY PAIN POINT

- NEED FOR PIECES THAT AGE WELL OVER TIME
- RESTRICTED MORPHOLOGY

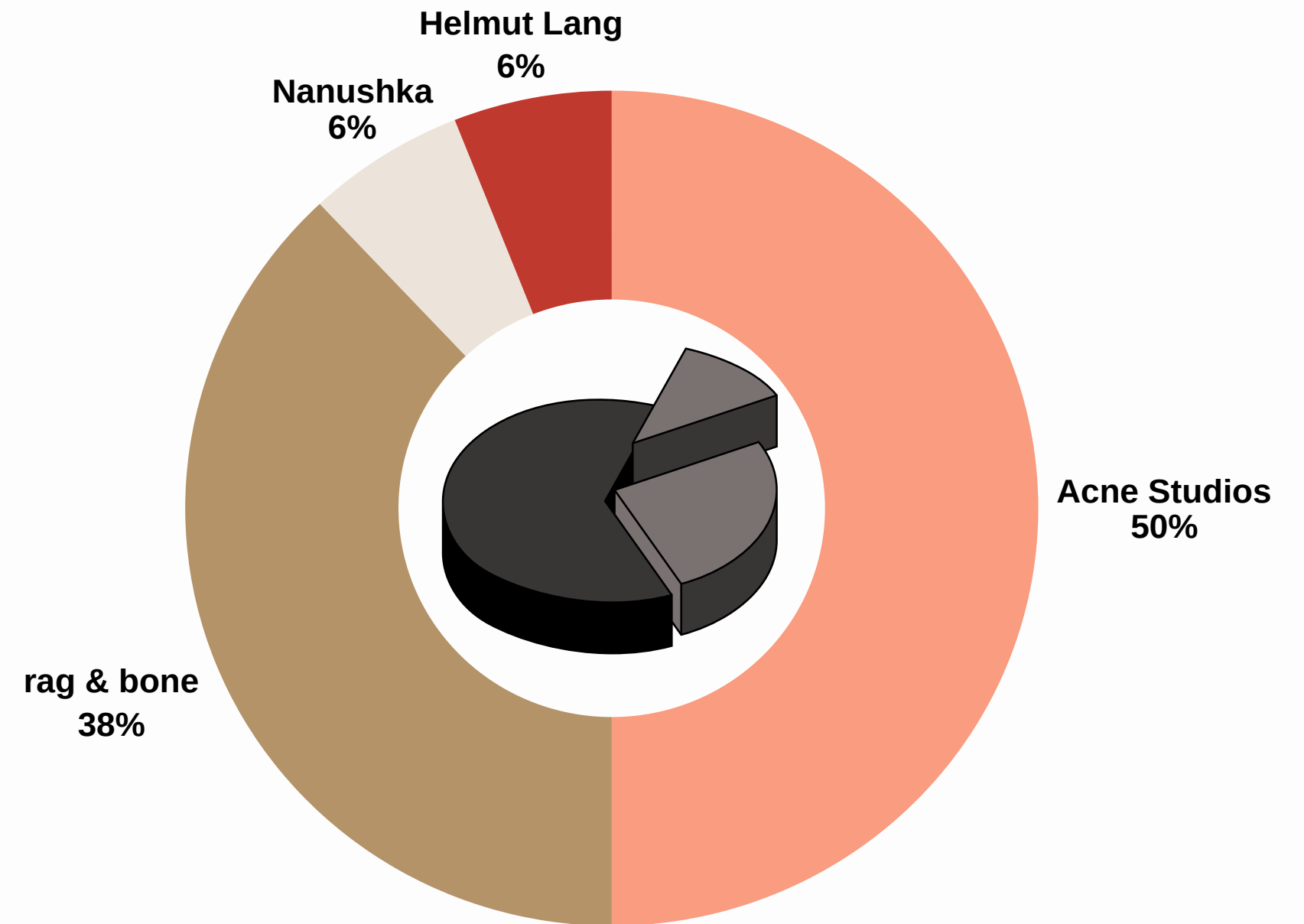
## SUPPORT PAIN POINT

- BAD CUSTOMER SUPPORT
- LATE DELIVERY
- CONSUMERS ARE SKEPTICAL OF BRANDS USING SUSTAINABILITY AS A MARKETING ARGUMENT WITHOUT SUBSTANCE

# MARKET SHARE ANALYSIS

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OUR MARKET SHARE IS ESTIMATED BASED ON ANNUAL BRAND REVENUE, USED AS A PROXY FOR MARKET INFLUENCE DUE TO LIMITED PUBLIC DATA ON UNITS SOLD OR EXACT MARKET PENETRATION.



# ANALYSIS

- ACNE STUDIOS HOLDS THE LARGEST SHARE (~50%) OF THIS PEER GROUP, WITH ESTIMATED REVENUE OF ~€300 MILLION IN 2024. THIS REFLECTS ITS STRONG GLOBAL RETAIL PRESENCE, EXPANDING E-COMMERCE, AND ESTABLISHED POSITION IN THE CONTEMPORARY LUXURY SEGMENT (VOGUE).
- RAG & BONE FOLLOWS WITH ~38% MARKET SHARE (~€230 MILLION IN 2023), DRIVEN BY ITS US MARKET DOMINANCE, WHOLESALE PARTNERSHIPS, AND INTERNATIONAL E-COMMERCE EXPANSION (ALCHEMPRO).
- NANUSHKA CAPTURES ~6% OF THIS MARKET (~€33 MILLION IN 2023), REFLECTING ITS SMALLER SCALE BUT FAST-GROWING GLOBAL PRESENCE AND INVESTMENT IN NICHE SUSTAINABLE LUXURY (GB & PARTNERS).
- HELMUT LANG, ALSO ~6% (~€35 MILLION), REMAINS A NICHE LABEL WITH SELECTIVE DISTRIBUTION AND A SMALLER GLOBAL FOOTPRINT, CONSISTENT WITH ITS BOUTIQUE LUXURY POSITIONING (GROWJO).

# INSIGHTS

- THE CHART HIGHLIGHTS A CLEAR DIVIDE IN REVENUE: ACNE STUDIOS AND RAG & BONE DOMINATE THE SEGMENT, WHILE NANUSHKA AND HELMUT LANG OCCUPY SMALLER NICHE POSITIONS.
- THIS DISTRIBUTION SHOWS SCALE AND MARKET PENETRATION DIFFERENCES, REFLECTING INVESTMENT LEVELS, RETAIL NETWORKS, AND BRAND RECOGNITION.

# Acne Studios



## STORY

Founded in Stockholm in 1997, Acne Studios is a multidisciplinary fashion house led by founder and Creative Director Jonny Johansson, whose background in art, photography, music and architecture shapes the brand's identity. Known for its sharp tailoring, experimental materials and custom-developed fabrics, the label spans men's and women's ready-to-wear, denim, accessories and footwear.

## TARGET

Acne Studios targets fashion-conscious, design-literate consumers aged roughly 25–45, with an urban, creative mindset. Their audience values individuality, cultural relevance and quality over overt logos or trend-driven fashion. Concentrated in major fashion markets across Europe, North America, and East Asia.

## DISTRIBUTION

Acne Studios operates a global network of directly owned flagship stores in major fashion capitals across Europe, North America, and Asia. The brand prioritises its official e-commerce platform for direct-to-consumer sales and brand storytelling. Distribution is reinforced through selective wholesale partnerships with premium department stores and luxury online retailers such as Farfetch, Net-a-Porter, Mytheresa, and Ssense..

## MERCHANDISING MIX

Acne Studios' merchandising mix centres on men's and women's ready-to-wear, with a strong focus on denim and tailored pieces as core products. This is complemented by footwear and accessories that reinforce the brand's minimalist yet experimental aesthetic. Limited seasonal drops, custom fabrics and occasional lifestyle items—such as books and furniture..

## COMMUNICATION

The brand favours editorial-style campaigns, minimalist visuals and collaborations with artists, photographers and creatives rather than traditional advertising. Social media and in-house publications are used to build a refined, intellectual brand narrative that values authenticity and creative expression.

## BEST PRACTICE

Acne Studios is best known for its distinctive blend of minimalist Scandinavian design with experimental, artistic touches, making it instantly recognisable in the fashion market. Signature elements include sharp tailoring, eclectic use of materials, and custom-developed fabrics, particularly in denim and ready-to-wear.

# rag & bone

## STORY

Rag & Bone is an American fashion brand founded in New York in 2002 by Marcus Wainwright and Nathan Bogle, known for combining British tailoring with American workwear. It offers ready-to-wear, footwear, and accessories sold globally through owned stores, wholesale partners, and online. Since 2024, it is owned by Guess? and WHP Global, pushing broader category expansion.

## TARGET

Rag & Bone targets affluent, style-minded consumers seeking contemporary fashion with a modern, urban aesthetic. Its core audience spans both men and women with disposable income interested in quality design and trend-forward clothing. The brand's reach now includes global markets via retail and e-commerce.

## COMMUNICATION

Communication combines digital channels (email, text, social) with storytelling about product quality and brand heritage. Personalized triggered email and text campaigns are used to improve customer engagement and conversion. Rag & Bone also uses editorial content and seasonal campaigns to reinforce its creative identity.

## MERCHANDISING MIX

The product mix includes men's and women's apparel, denim, footwear, and accessories with seasonal collections. Pricing varies by category, with basics at lower tiers and tailored or leather pieces at higher street-luxury price points. Additional lifestyle categories like handbags and eyewear are being expanded through partnerships.

## DISTRIBUTION

Distribution channels include owned monobrand stores, e-commerce sites servicing multiple regions, and wholesale into premium department stores. The brand is increasing direct-to-consumer (DTC) infrastructure with regional online sites (e.g., Europe, Australia) and expanded physical footprints. .

## BEST PRACTICE

Rag & Bone focuses on omnichannel customer experience, improving its e-commerce platform and CRM for personalized engagement. It leverages data-driven remarketing and D2C strategies to enhance conversion and retention. Strategic retail expansion supports global brand growth alongside strong digital and CRM operations



## STORY

Nanushka was founded in Budapest in 2005 by Sandra Sándor after graduating from the London College of Fashion, with a focus on functional womenswear and later menswear and accessories. The brand brings Central European design to global markets and is led by Sándor (Creative Director) and Peter Baldaszti (CEO). It has expanded from a niche local label to an international fashion house showing collections in major fashion capitals.

## TARGET

The brand targets metropolitan consumers interested in functional fashion with conscious production practices. Its audience spans globally, especially in markets such as the United States, United Kingdom, France, China, and the Middle East. Nanushka appeals to buyers who value considered design and responsible material choices.

## COMMUNICATION

The brand uses digital and social media storytelling to convey transparency about materials, product provenance, and circularity. Nanushka adds digital IDs to garments to provide detailed product history and care information via QR codes. Collaborations and pop-up events in major cities support brand visibility.

## MERCHANDISING MIX

Nanushka's product range includes womenswear, menswear, handbags, accessories and increasingly footwear and expanded bags. Materials often include low-impact and recycled content with services like repair and rental tied to sustainability efforts. The brand balances seasonal ready-to-wear collections with ongoing lifestyle pieces.

## DISTRIBUTION

Nanushka operates flagships in Budapest, New York and London and plans further global retail expansion. Its products are sold through over 140 wholesale points including key luxury department stores and online platforms such as Farfetch, MyTheresa, MatchesFashion and Net-a-Porter. Wholesale currently represents a significant portion of revenue alongside direct retail and e-commerce.

## BEST PRACTICE

Nanushka embeds sustainability into product lifecycle through circular material use, repair and resale partnerships and digital traceability tools. It strategically balances retail and wholesale channels while planning physical retail that integrates experiential spaces beyond traditional stores. Annual sustainability reporting and partnerships reflect measurable progress in sustainable operations.

# Nanushka



rag & bone

Nanushka

Acne Studios

## STRENGTHS

- Strong global contemporary fashion brand.
- Clear brand identity and positioning.
- Omnichannel distribution.
- Strong digital and CRM strategy.

- Strong international brand with clear design identity.
- Founded by a recognised designer (LCF background).
- Sustainability and circularity as key brand pillars.
- Global presence across retail and luxury wholesale.

- Strong and recognisable brand identity.
- Distinctive Scandinavian minimalist + artistic aesthetic.
- Core strength in denim and tailoring.
- Global flagship retail and strong DTC focus.

## WEAKNESS

- High prices limit wider market.
- Highly competitive segment.
- Relies on affluent consumers.

- Premium pricing limits mass market.
- Heavy reliance on wholesale partners.
- Sustainability positioning may appeal to a niche audience.

- Premium pricing limits wider audience.
- Niche, intellectual positioning may not appeal to mass market.
- High competition in contemporary luxury.

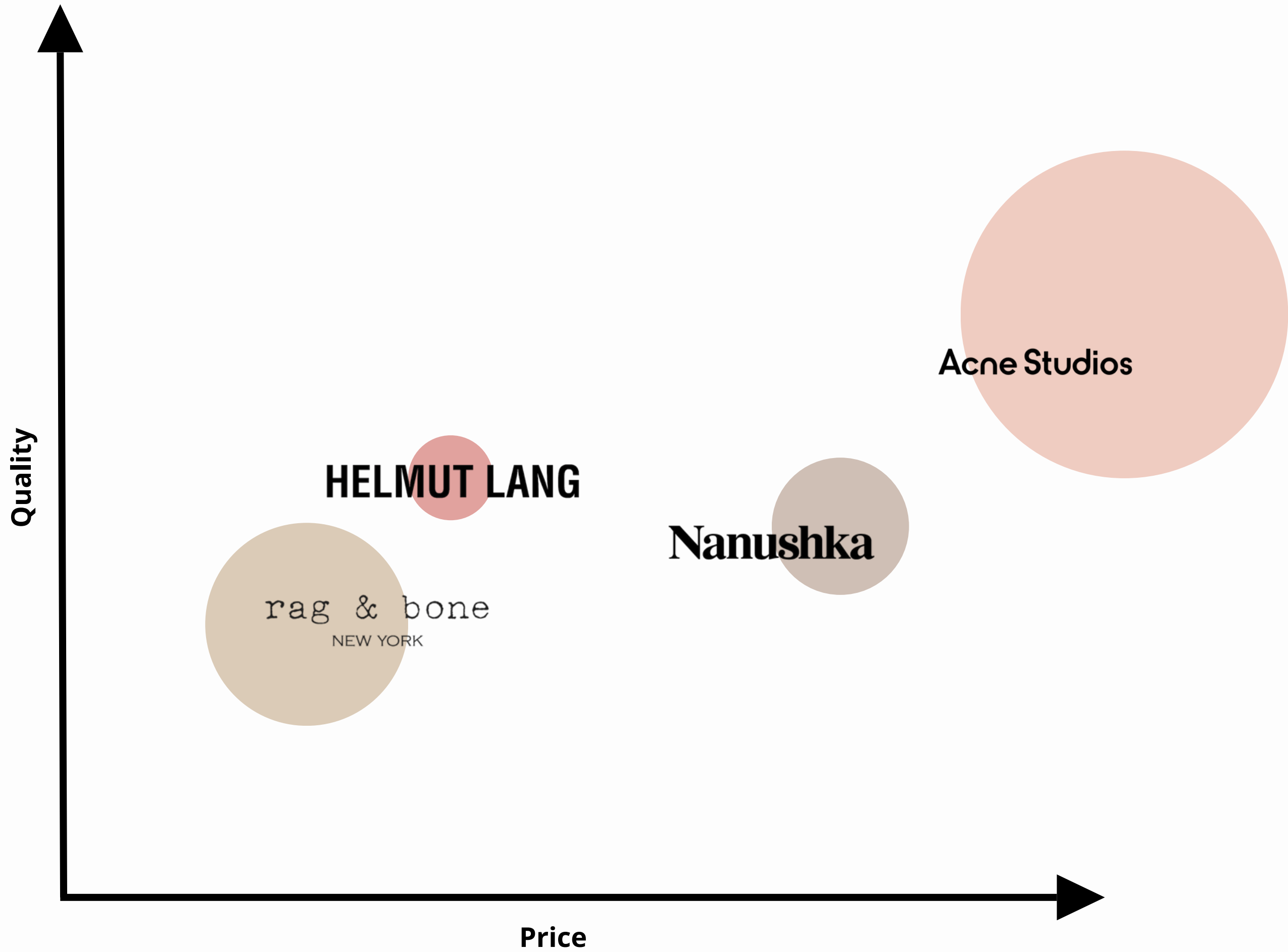
## MARKET BREAKDOWN

- Budget: Premium / street-luxury pricing.
- B2B: Wholesale with premium department stores.
- Retail: DTC via own stores and e-commerce.
- Products: Apparel, denim, footwear, accessories.
- Local: Global presence (US, Europe, Australia)

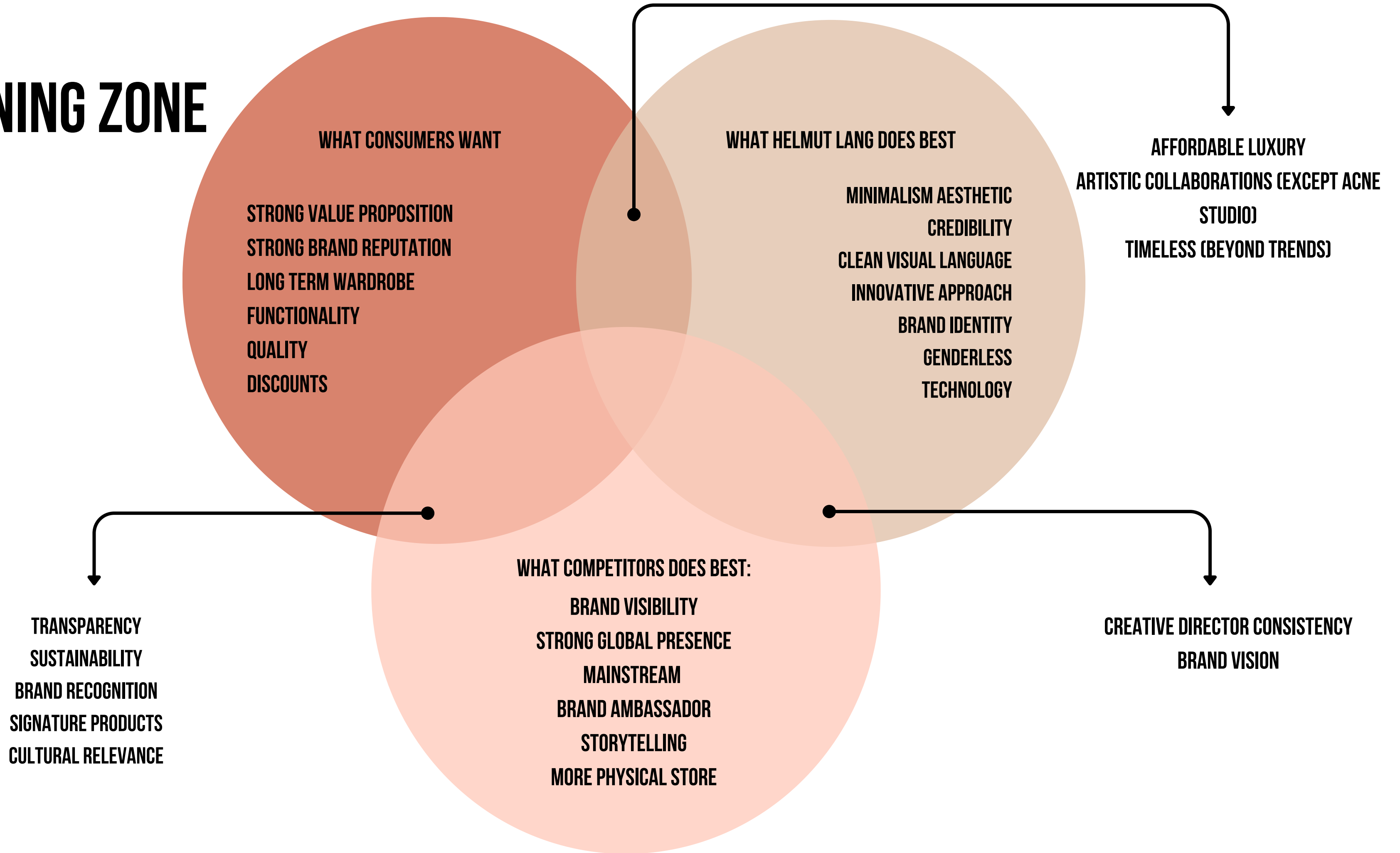
- Budget: Premium / contemporary luxury.
- B2B: Wholesale with luxury department stores and platforms.
- Retail: DTC via flagships and e-commerce.
- Products: Womenswear, menswear, bags, footwear, accessories.
- Local: Global (US, UK, Europe, China, Middle East).

- Budget: Premium / contemporary luxury.
- B2B: Selective wholesale with premium retailers.
- Retail: DTC via flagship stores and e-commerce.
- Products: Ready-to-wear, denim, footwear, accessories.
- Local: Global (Europe, North America, East Asia).

# BRAND POSITIONING CHART



# WINNING ZONE



# SOLUTION OFFERED BY BRAND

- *Seasonal extensions*
- *Facilitating trade*
- *Digital inclusion*
- *Direct support*
- *Versatility*
  - *Develops modular pieces adaptable to professional, social, and cultural settings.*
  - *Encourages personal styling rather than dictated looks.*
- *Team transparency*
- *Moves toward more conscious material sourcing and reduced overproduction.*
- *Promotes “less but better” consumption.*
- *Justifies premium pricing through design intelligence and durability.*
- *Offers meaningful fashion with emotional and cultural value.*
- *Logistics Improvements*



# BENEFITS (FUNCTIONAL VS. EMOTIONAL)



BENEFIT TYPE	DESCRIPTION
FUNCTIONAL	<ul style="list-style-type: none"><li>• <b>Versatility and Utility:</b> Clothes with functional details (adjustable straps, reversible pieces) that adapt to the body and work for different moments and occasions.</li><li>• <b>Good Fit and Clean Tailoring:</b> Refined silhouette without sacrificing comfort.</li><li>• <b>Timeless design:</b> Simple pieces that do not go out of style.</li><li>• <b>Neutral colors:</b> Easy to combine and style in different ways.</li></ul>
EMOTIONAL	<ul style="list-style-type: none"><li>• <b>Intellectual Confidence:</b> Wearing Helmut Lang makes the person feel confident, smart, and sure of their style.</li><li>• <b>Cool Factor:</b> You feel like an "insider." It's a brand for people who know about fashion but don't need to show off with big logos.</li><li>• <b>Independence from Trends:</b> Feeling different without following fashion trends or logos.</li><li>• <b>Security:</b> The clothes give a feeling of comfort and calm in everyday life.</li><li>• <b>Effortless:</b> It removes the stress of getting dressed. You feel "right" for any occasion. Pieces are wardrobe staples.</li></ul>



# REASONS TO BELIEVE

## Process

- Focus on design, construction and form rather than trends
- Minimalist design approach with attention to detail
- Emphasis on quality over quantity

## Product

- Strong tailoring, minimal silhouettes and clean cuts
- Consistent minimalist street-wear style across collections
- Use of premium materials and fabrics (durable and well-constructed pieces)

## Third Person

- Recognized as a pioneer of within the minimalist and street-wear space
- Strong reputation with a cultural and artistic relevance in fashion history
- Worn and respected by creatives and fashion insiders

## Behavioral

- The brand has a long-term consistency to its identity
- Avoids trend-chasing and excessive branding, does not follow fast fashion trends
- Communicates in a clean and simple way

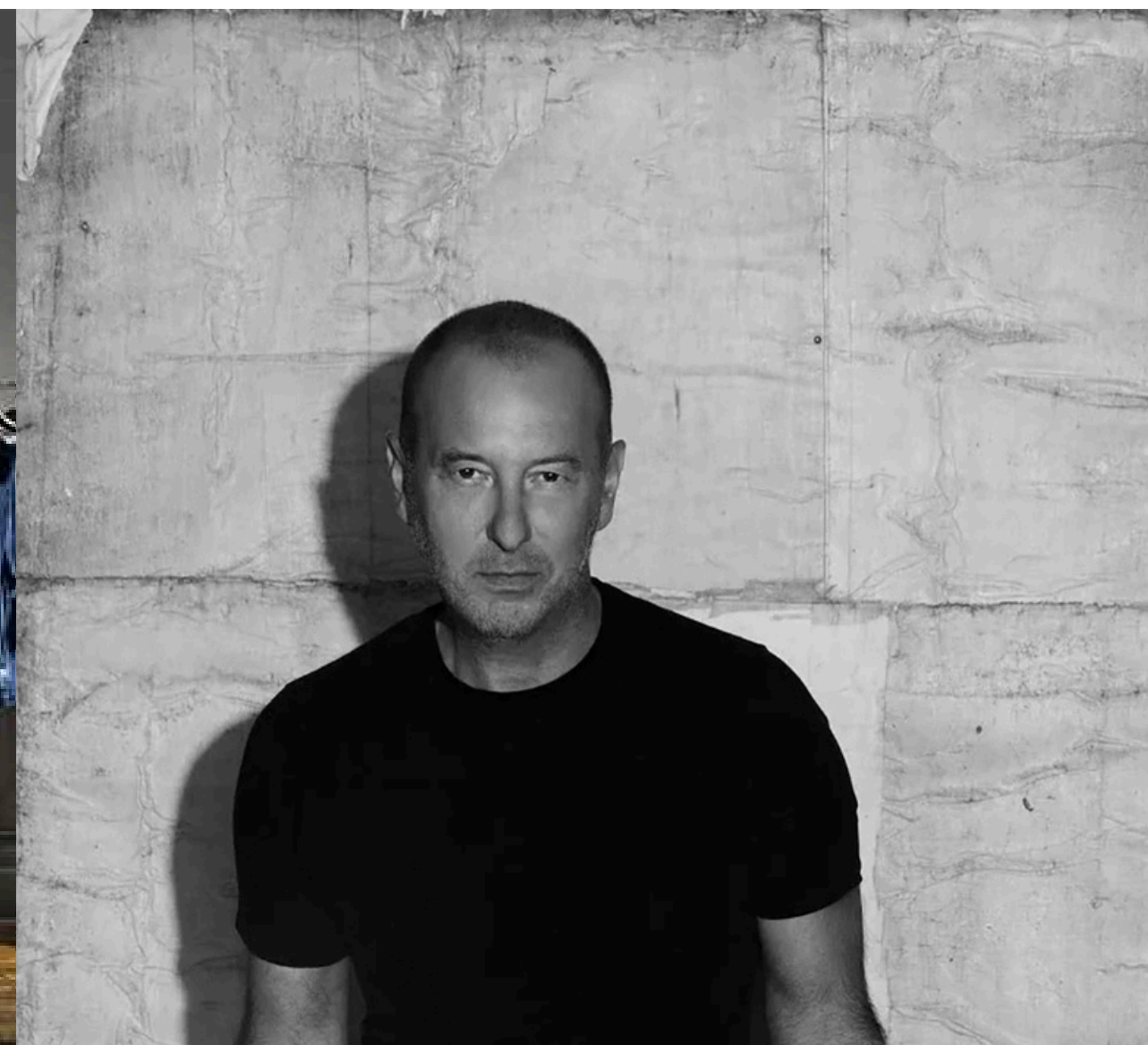


# **BIG IDEA**

**HELMUT LANG REDEFINES MODERN FASHION BY BLENDING A MINIMALIST CONTEMPORARY AESTHETIC THAT INFLUENCES STREETWEAR AND HIGH FASHION TODAY CEMENTING ITSELF WITHIN ITS NICHE AS A BIG PLAYER IN THE INDUSTRY.**



**HELMUT LANG**





**HELMUT LANG**