



Of Size and Suitability!

Bindu Gopal Rao gives a lowdown on the plus size clothing market in India.

India's branded apparel market, which is projected to grow more than double to US\$ 18 billion by 2017, according to consultant Technopak Advisors, is a very strong market now. With an increase in obesity and life disorders, the demand for plus size clothing has increased and the market has found a place for itself. The World Health Organization predicts that about 31 per cent of adult men in India will be overweight by 2016. What this means is that the plus size clothing market will certainly be big business.

MARKET POTENTIAL

The plus size market in India is highly underfed. There seems to be, almost, a denial amongst the brands that consumers with larger sizes exist. "Further to this, the consumer continues to be

restricted as far as clothing options are concerned. By conventional logic, roughly 22 per cent of the apparel market belongs to plus sizes. The size of the Indian apparel market is US\$ 58 billion. This makes the plus size market for men and women to be roughly US\$ 12 billion, growing at an annual rate of nine per cent," opines Nischal Puri, Managing Director, Brandis India. The secondary requirement of plus size apparel becomes a natural requirement for people who are increasing in girth. According to IBIS world, the plus size woman's market is worth a whopping nine billion dollars. If we look at India, it is seen that on an average, every fifth woman is a plus size woman. The huge retail brands hardly touch down on this huge section of women. These women are ready to spend money on the clothing they would love to wear but often end up in a pickle

because they do not find the right size or the right fit.

APPAREL MATTERS

The market currently offers a plethora of options in plus size clothing. For men, loose t-shirts, lowers and cargos find a place along with sweatshirts. For women, long tops, full sleeves along with tights, stretchable trousers, knee-length dresses or maxi dresses are popular. Online retailer Zivame.com has started selling plus-size underwear. Last year, Marks & Spencer said that it saw India's plus size shoppers as a segment with strong potential. Currently, the apparel that is offered is not being designed as per the real need of the plus size consumers. Mere higher sizes of the current offerings have been the norm. On the contrary, the real need is to have clothes designed for the plus sizes which may or may not be required by the consumer with lower sizes. Plus size clothing, preferably, should have some design elements. "Firstly, for plus size, the colour tone should be darker. Plus size consumers will look better in darker colours as light colours end up accentuating the visual obesity. Secondly, plus size garments should have ruffles in the areas where the intention is to make the wearer look slimmer. The underwear should be high waist and not low waist and garments should not have horizontal stripes, instead, vertical stripes are better. There are lot of design inputs that should be considered while designing plus size clothing. While the current trend is only to create larger sizes in the designs that are created for the smaller sizes, this may or may not necessarily serve the specific purpose of the plus size consumer," explains Puri. Many leading brands have come up with on-trend pieces and collections exclusively for plus size women. "There are several brands like LastInch, StalkBuyLove, Lurap, Mustard, Larjiosa, and many more that create figure-friendly clothing. The apparel being offered are shirts, shirt dresses, jackets, palazzos, shift dresses, tunics, *kurtis*, peasant tops, culottes, skirts, maxi dresses, stylish cocktail dresses and so on, the list is endless," says Anna John, Creative Director, Blueliys.com. Brands like StalkBuyLove have a fabulous collection of the latest trends in a huge range of sizes; they have many varieties in tops, chic strapless numbers, statement evening ensembles, etc.

TREND CHECK

Marketers and apparel brands are becoming sensitive and are also increasingly becoming aware of specific needs in terms of colours, patterns and designing for the plus size consumers. In the recent past, the market that has suddenly



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gained traction is the shapewear market. "The shapewear market serves one aspect of the plus size consumer but is antithetical for the plus size apparel segment. However, the staggering shapewear market is being slated at roughly US\$ 1.5 billion and is growing at 20 per cent per annum. Retail has started allocating specified shelves for the plus size clothing. Though the trends are indicating movement in the direction of serving the underferd plus size clothing segment, the pace of this needs a higher impetus. There is definitely an opportunity for special clothes being designed for the plus sizes only. These are clothes with the right design excellence and perfection in patterns with sensible colour coding. Separate retail areas are dedicated only for the plus sizes," says Puri. "In 1985, the average woman in the US wore a size eight. Today, she wears a size 14—the number that usually marks the dividing line between standard and plus size fashion. In the United States alone, plus size clothing is now a US\$ 17.5 billion market. The same trends are now being seen in India with liberalisation and Indian plus size users coming out and choosing aspirational brands," says Yasharth Verma, Executive Director, Surpluss.in. The concept of plus size clothing is picking up fast in India, especially in Tier I cities like Delhi, Mumbai and Bengaluru. "In fact, wearing baggy clothes



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is becoming a style statement even for the slim consumers; therefore, it is no more a matter of size, it is a matter of fitting in your own skin, effortlessly. The trend for big size clothing is to design a special range for the plus size customer that flatters the fuller sizes rather than making bigger versions of the regular range. For example, horizontal stripes would make the customer look broader," says Sujatha R Nandan, Chief Brand Manager, Scullers, Indus League.



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THE CHALLENGE FACTORS

The main challenge is catering to the customised preferences of plus size customers. "From the consumers' angle, the key challenge is that the consumers are largely embarrassed to ask for plus size clothing and there needs to be a substantial change in the mindset of the consumer. The marketers have a substantial role to play in terms of stopping over eulogising the small size. The consumers have a fixation with small sizes. It is observed that more consumers end up buying one size smaller just to be in sync with the small size fixation. The other challenges are lower sensitivity of the brands for the need to include plus size clothing. The brands have to ensure better design inputs in sync with the needs of the consumers of plus size. And the other critical challenge is the allocation

of the retail space that caters to plus size clothing," says Puri. Although there are increasing options and brands in plus size clothing, the overall range of such clothes is less, as compared to regular size clothing. "In areas like wedding wear and occasion wear, we need to create more flexible options for plus size people. Plus size clothing brands can sometimes be a bit more expensive, which makes the options that much more limited. People are becoming more and more conscious about their shape rather than their size and so there need to be more clothing lines around this formula," says John. The biggest challenge faced by manufacturers/retail brands of plus size garments is forecasting the latent demand and ensuring that the supply matches the same. It also calls for effective communication that conveys the message loud and clear to the potential yet 'not so common' customer. "Men and women, who wear plus size clothes, have difficulties in finding clothes of their sizes in regular retail stores—clothes that define their fashion and style statement. For the manufacturer, the other challenge faced is finding the right model, to try the sizes. As a result, manufactures have to come up with varied business models like, standalone stores, multi-brand stores and online retail to cater to the bigger plus size market," opines Nandan. With these developments in mind, it is easy to conclude that the plus size market is definitely on the right track. ■