



Management consultant Harminder Sahni analyses the highs and lows of the fashion retail industry. Covering a spectrum of topics, each month he looks at the need of the hour for India.

Sizing India

Continuing from my last article wherein I had touched upon the simmering issue of sweatshop sourcing by domestic brands, I wish to cover another a little more technical aspect of the Indian apparel industry. Lack of standardisation of sizing in the apparel market is impacting its professional growth.

If you ask any Indian consumer what his shirt size is, chances are that he will say it's 40 regular or slim-fit of a particular brand. Isn't it odd that a consumer should qualify his size with a particular brand? This sounds like the old way of mentioning shoe size wherein everyone knew their Bata shoe size and asked the salesman at a shoe store to find the equivalent size in other brands. While Bata was and still is one of the dominant players in the Indian shoe market, there is no such player in the Indian apparel market and hence there is no standard size which any consumer has as a reference point. In the quest to become "Bata" of apparel market, it seems all brands have come

up with their own size sets and have left it to the consumers to struggle with it. Sometimes the size peculiarities are so high that some consumers complain of being a loyal customer of a particular brand because they believe that no other brand size will fit them.

But this issue isn't only limited to shirts, just check out the case of trousers which predictably should be much simpler as the main size element in that is the waist size. But surprise 36 inches of a brand doesn't mean 36 inches in another. What happened to the standard measurements that we all have been taught at school? I remember vaguely that our class teacher told us that a standard metre is equal to the distance between two lines on a standard bar (kept safely in France) composed of an alloy of 90 per cent platinum and 10 per cent iridium, measured at the melting point of ice. If that is the case then 36 inches should mean 36 inches independent of the brand or for that material or place. I do suspect that brands wish their consumers to believe that their waist is 36 inches while actually it might be 38 inches. Yes it does work and some consumers may be loyal to a brand that makes them believe that they are slimmer and fitter. International brands, more in case of womenswear, do this routinely and

as a part of thought-through strategy. However, I wonder whether this is the case in India or it's just plain lack of standardisation.

The issue becomes much graver when it comes to womenswear and kidswear, as the penetration level of readymade clothing as well as brands is still very low in these segments. On the positive side it actually provides a cleaner slate to create homogeneous and standard measurements and sizing. Menswear is going to be far tougher to standardise as numerous brands have established their own unique standards over years and may find it difficult to change the same.

This issue of sizing is not unique to India and the Western markets have faced similar issues probably few decades ago. They sorted out this matter through detailed and extensive





anthropometric studies and established the standard sizing systems to guide the industry. These standard sizes weren't rigid and gave flexibility to brands and designers to use it in the manner they felt appropriate. Actually, the anthropometric studies provide a sort of distribution table of the majority population's measurements and that are updated periodically to keep in line with the changing physical profile of the larger population. These measurements are thus the basis for brands and designers to create size sets for their own purpose. With markets getting segmented into various demographic profiles, these measurements become quite important and their role in the growth of business by making it easier for consumers to shop is quite well regarded now.

India is a developing nation and is called so for various reasons and I take it in the right spirit to reckon that we have the opportunity and responsibility to develop various aspects of our nation. India is amongst the few countries in the world that have an official and universally accepted symbol of its currency, and I wish that India may join the ranks of few nations that

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have their own scientific anthropometric database.

The scale of such an anthropometric study like everything else involving India's large population will be humongous. The resources and efforts required will be quite significant and thus it may only be taken up at a national level with the support and inputs of all stakeholders. Just to give you an idea of the resources and time required, the last anthropometric study in the U.K. was conducted at a cost of GBP 1.2 billion

(approximately ₹9,000 crore) and over a period of five years, for a population of 60 million people only. Similar studies in other developed markets are conducted routinely and results are made available to industry at large for the benefits of business as well as consumers.

I reckon that time may be right for the Indian apparel industry to strive to conduct a nationwide anthropometric study with the support of government agencies and technical institutions. The findings of such a study, their wider acceptance and usage could very well be a significant step towards professionalising various aspects of the fast-growing Indian domestic apparel market but more specifically the manufacturing end. The small and medium manufactures, who are the major suppliers for the domestic market, will be the biggest beneficiaries as they don't have the wherewithal to spend any resources on such matters. A collective effort involving brands, retailers, manufactures, institutions and government bodies will be necessary and also probably be the only way to tackle such an enormous and important task. **BoF**