



## **PLUS SIZE FASHION: CHILDREN'S PLUS SIZE MARKET ANALYSIS IN BRAZIL**

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### **SUMMARY**

At a time of constant development in various sectors of the Brazilian consumer market, there is a growing demand in the clothing segment for plus size fashion in all genders and age groups. The sector is in full growth and generates 3.5% in retail sales per year, manufactures 45 million pieces and has a wholesale revenue of R \$ 1 billion and R \$ 2.5 billion in retail. With a population in which 52.5% are overweight and 15% are children, meeting the demand of obese child consumers is essential. This article aims to characterize, understand and present a synthesis of the children's plus size market in Brazil, a segment with high demand and with a target audience in need of product options. With the insufficiency and / or absence of this clothing, the child uses patterns and modeling for adults, which is not suitable for the obese child audience. Investing in this market niche fills a little-explored market gap, which can represent a competitive advantage, positive financial return, in addition to the possibility of becoming an important reference in the sector for the entrepreneur.

**Key words: Obesity, children, clothing, adultization, entrepreneurship.**

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## INTRODUCTION

The purpose of this article is to characterize the plus size clothing segment for children aged 2 to 12 years old, to understand the importance of making plus size children's fashion and to present an expanding segment with indications of profitability.

The main factor for this demand has been the increase in obesity, which according to the World Health Organization is one of the biggest public health problems in the world.

In Brazil, the need to supply the plus size clothing market is notorious and for SEBRAE (2016) the numbers prove that there is a potential audience to be conquered and, despite the negative health factor, it is essential to serve this population in all your needs, including the clothing sector.

The Brazilian population, according to data from Pnad (2013), has 201.5 million people, comprising 98 million men and 104 million women, with 59.7 million under 18 years of age and data from the Ministry of Health show that 52.5% of the population is overweight and 15% are children with obesity. (Abeso, 2017)

## THEORETICAL REFERENCE

To understand the behavior of the clothing market in relation to making children's plus size fashion, we conducted theoretical research on the performance of the textile industry in this segment and characterization of the target audience.

For Vilaça (2010 p.63, apud TACHIZAWA and MENDES, 2006) the theoretical research proposes to understand or indicate a space for discussion of a topic or an intriguing question of reality, without requiring data collection and / or field research.

In addition to using theoretical research, the article will be based on quantitative research, which according to Gerhardt and Silveira (2009, p.33 apud, FONSECA 2002, p. 20) clarifies:

Unlike qualitative research, the results of quantitative research can be quantified. As the samples are usually large and considered representative of the population, the results are taken as if they were a real picture of the entire target population of the research. Quantitative research focuses on objectivity. Influenced by positivism, it considers that reality can only be understood based on the analysis of raw data, collected with the help of standardized and neutral instruments. Quantitative research uses mathematical language to describe the causes of a phenomenon, the relationships between variables, etc.

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The information and data collected were acquired on websites, articles and proceedings directed at the obese population and for the plus size fashion segment.

## **BRIEF HISTORY OF FASHION**

The word Fashion comes from the Latin *modus*, which means mode. In Portuguese the word means:

**Fashion** SF 1. Way or style of acting or dressing. 2. System of collective uses or habits that characterize clothing, footwear, accessories, etc., at a given time. 3. Set of trends dictated by professionals in the fashion world. 4 Art and technique of the clothing industry or trade. 5 Own style or typical way of acting; way, way. 6. Excessive interest or fixation on something; mania. (MICHAELIS, 2017)

According to Stefani (2005, p.11 apud PALOMINO, 2002), fashion is much more than clothes, it is a system that integrates the simple use of everyday clothes into a larger, political, social, sociological context .

We understand that living in society demands from people the need for clothing since antiquity, which can identify a subject or a group of individuals, in addition to being a mechanism that regulates people's choices and preferences, indicating what they should consume, use or do. (CONCEPT.DE, 2013)

## **PLUS SIZE FASHION HISTORY**

There are reports that the emergence of Plus Size clothing started by the American seamstress and entrepreneur Lane Bryant in 1904.

Bryant found that the fashion market ignored the most robust women, who resorted to private studios, out of this need, he took the initiative to produce and sell good quality clothes, according to the trends of the time, for women outside the standard measures. (FRANCIELE, 2017)

## **PUBLIC PLUS SIZE AND SIZE GG**

IEMI research (2016) distinguishes the consumer of large size fashion from the consumer of plus size fashion, helping to understand this market.

According to Martins, Hartmann, Alves and Iser (apud MEDEIROS and LIMA CRUZ 2007, p.02):

The greatest ignorance of businessmen centers on the ignorance of who their customers are. The problem of retailers who ignore who buys in their stores is common. Therefore, knowing what consumers want and how they make their

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decisions about purchasing and using products is essential for organizations to be successful in their market.

The manufacture of large size clothing has always existed in clothing and there are several products aimed at large or tall consumers, but who are not obese. (IEMI, 2016)

However, Plus Size fashion is characterized by the development and commercialization of a specific collection, designed and developed for women and men overweight. (IEMI, 2016)

The decision to produce and supply plus size fashion fills a gap in the clothing segment that grows more and more each day, making it an advantageous scenario for the sector's entrepreneur, in addition to satisfying the end consumer.

Pando and Pando (apud RICHERS, 1984) states that:

One of the hallmarks of this century is the high speed with which social, economic, political and technological changes take place. This scenario has forced companies to seek a competitive differential, to be more careful with quality and price in order to satisfy the needs and desires of consumers. (RICHERS, 1984)

According to Kotler (2000), in order to know and satisfy the needs of target customers, it is essential to understand consumer behavior and analyze how people, groups and organizations select, buy, use and reject the service.

A survey carried out by SEBRAE to find out the profile of plus size fashion consumers and their consumption habits, revealed that 71% of people who use GG find it difficult to find clothes in stores and 86% of them say they are dissatisfied with the clothing options for mannequins big ones. (PEGN, 2016).

**Table 1: Plus size and GG size data**

Target Audience	Plus size fashion		Size XL	
	Wholesale	Retail	Wholesale	Retail
Sales	-	3.5%	-	17.5%
Annual Production	45 million pieces		Nothing contained	
Recipes	R \$ 1 billion	R \$ 2.5 billion	Nothing contained	

Source: PEGN, 2016; IEMI, 2016. Prepared by the authors.

According to a SEBRAE survey, as shown in Table 1, 17.7% of fashion retail stores in Brazil sell oversize clothing and 3.5% are specialized in plus size fashion. (PEGN, 2016)

Information from IEMI (2016) Table 6, computes that the annual production was around 45 million pieces, with revenues exceeding R \$ 1 billion reais \* (net values, excluding taxes),

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proving to be a profitable market and, in the retail \*\* (including taxes, freight and the profit margin of tenants), revenues are close to R \$ 2.5 billion, in annual sales.

THE Brazilian Clothing Association (Abravest), notes that the production of fashion plus it grows 6% annually and moves around R \$ 5 billion, with around 300 physical stores and 60 virtual stores and with an expected growth of up to 10%. (SEBRAE, 2016).

In Brazil, according to information from IEMI (Market Intelligence, 2016), an institute that collects numerical and behavioral data from sectors of the Brazilian market, in the period from 2013 to 2015 it measured the production of Plus Size clothing in the country, identifying that 492 industries of clothing, 2.5% of the total establishments in activity in the sector, develop specific collections for the Plus Size segment.

The characteristics of the plus size segment have shown to be different due to the body measurements required from the consumer and obesity is the factor that imposes the need to produce clothes with larger models, for this we try to define what obesity is and its measures.

### **OBESITY AND ITS CHARACTERISTICS**

According to the Brazilian Society of Endocrinology and Metabology, obesity is characterized by the excessive accumulation of body fat in the individual and can be identified by calculating the body mass index (BMI), a calculation guided by the Ministry of Health through SISVAN (Sistema de Food and Nutrition Surveillance) as exemplified below:

$$\text{BMI} = \frac{\text{Weight in Kg}}{\text{Height}^2} = \text{Example: } \text{BMI} = \frac{80}{1.60 * 1.60} = \frac{80}{2.56} = \text{BMI} = \underline{\underline{31.25}}$$

Data from the World Health Organization, in 2025, it is likely that about 2.3 billion adults are overweight and 700 million obese, and the number of overweight and obese children may reach 75 million. (Abeso, 2016)

### **CHILD OBESITY**

The obese child consumer lives a different experience than a child with body measurements within the “recommended standard” and, in order to preserve the obese child from any constraint before society, it is essential to offer clothing that matches his body measurement.

Table 2 shows the weight x age considered normal for children aged 2 to 12 years according to the Ministry of Health and the Brazilian Society of Pediatrics and, in Table 3, it is possible

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to observe the values of the BMI indexes (Body Mass Index), which identifies the degree of risk and classifies the type of obesity.

**Table 2. Adequate children's weight as a function of height**

Age	Girls		Boys	
	Height	Weight	Height	Weight
2 years	86 cm	12,200 Kg	87 cm	13,000 Kg
3 years	95 cm	14,700 Kg	96 cm	14,800 Kg
4 years	102 cm	16,600 Kg	103 cm	16,800 Kg
5 years	108 cm	18,500 Kg	109 cm	18,700 Kg
6 years	113 cm	20,500 Kg	114 cm	21,000 Kg
7 years	119 cm	23,000 Kg	120 cm	23,600 Kg
8 years	125 cm	25,500 Kg	126 cm	26,000 Kg
nine years old	131 cm	27,700 Kg	131 cm	28,500 Kg
10 years	137 cm	32,000 Kg	136 cm	31,000 Kg
11 years	143 cm	35,300 Kg	141 cm	34,000 Kg
12 years	148 cm	40,000 Kg	146 cm	39,000 Kg

Source: <https://www.wikimulher.com/mamae-e-bebe/tabela-de-pesos-e-medidas-de-menino-e-menina-ate-os-12-anos/>.

**Table 3: Classification of Body Mass Index**

BMI	Classification
Under 18.5	Underweight
Between 18.5 and 24.9	Normal weight
Between 25.0 and 29.9	Overweight
Between 30.0 - 34.9	Class 1 Obesity
Between 35.0 - 39.9	Class 2 obesity
Greater than or equal to 40.0	Class 3 obesity

Source: <http://obesidadeemetalica.com.br/calculo-de-imc>

Table 4 shows the classification by age, the index that characterizes overweight children and obese children, according to ABESO (2016), which guides us to measure, estimate and predict the demand for clothing production.

**Table 4: BMI classification of male and female children**

AGE	ABOVE WEIGHT (BMI)		OBESE	
	Boys	Girls	Boys	Girls
2 years	18.4	18	20.1	20.1
4 years	17.6	17.3	19.3	19.1
6 years	17.6	17.3	19.8	19.7
8 years	18.4	18.3	21.6	21.6
10 years	19.8	19.9	24.0	24.1
12 years	21.2	21.7	26.0	26.7

Source: <http://obesidadeemetalica.com.br/calculo-de-imc>

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Following the evolution of the anthropometric pattern of the Brazilian population, the Commission for Measuring the Size of Made-up Articles (CE-17: 700.04) of ABNT / CB-17, launched ABNT NBR 15800: 2009 - Clothing - Reference for body measurements human - Wearability of clothes for babies and children, a standard defines a system for indicating the sizes of body measurements of children and young people in the expected clothing, so as to meet the needs of the textile and clothing sector. (ABNT, 2012)

## CHILD OBESITY MAP IN BRAZIL

In order to measure potential customers in the children's plus size market, we list the obese child population in the five regions of the Brazilian territory: the northern region, the northeast region, the central west region, the southeastern region and the southern region, according to data from the IBGE in 2008 and 2009.

### NORTH REGION

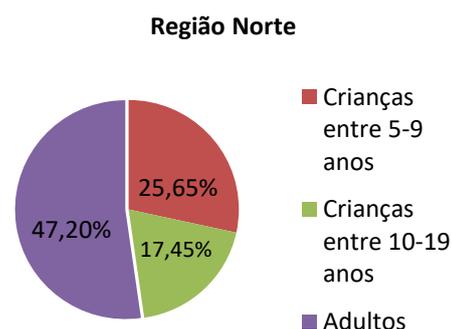
Table 5 shows that in the northern region (Amazonas, Pará, Acre, Amapá, Rondônia, Roraima and Tocantins) there are 17,707,783 inhabitants, assuming that there was no considerable change in the numbers above, in Graph 1 we find that among the most obese 47% they are adults, 25.65% are children between 5 and 9 years old and then children between 10 and 19 with 17.45%.

**Table 5: Geographic characteristics Northern Brazilian region.**

Geographic Features Northern Brazil	
Area (2010)	3 853 676,984 km <sup>2</sup>
Population (2016)	17 707 783 hab.
Density	4.6 inhab./km <sup>2</sup>
Indicators	
Average HDI (2010)	0.683 / average
GDP (2014)	R \$ 308.077 billion
GDP per capita (2012)	R \$ 17,879.20

Source: IBGE, 2017.

**Graphic 1: IBGE obesity map, North Region between 2008/2009**



Source: Abeso, 2017.

### NORTHEAST REGION

The northeastern states (Alagoas, Bahia, Maranhão, Paraíba, Pernambuco, Rio Grande do Norte and Sergipe, Piauí and Ceará) have a large population in relation to the northern region. Obesity is mostly with adults with 44.4%, children between 5 and 9 years old with 28.5% and

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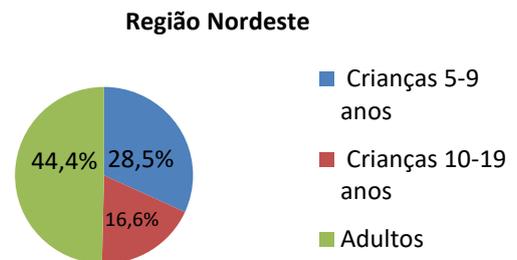
in a smaller number with children between 10 and 19 years old, according to Table 6 and Graph 2.

**Table 6: Geographic characteristics Northeast Brazilian region.**

Geographic Features Brazilian Northeast	
Area (2013)	1 554 29.744 km <sup>2</sup>
Population (2015)	56 560 081 inhab.
Density	39.39 inhab./km <sup>2</sup>
Indicators	
Average HDI (2010)	0.659 / average
GDP	R \$ 722.890.000 thousand
GDPPIB per capita (2012)	R \$ 11,044.59

Source: IBGE, 2017.

**Graph 2: IBGE obesity map, North Region between 2008/2009**



Source: Abeso, 2017.

## MIDWEST REGION

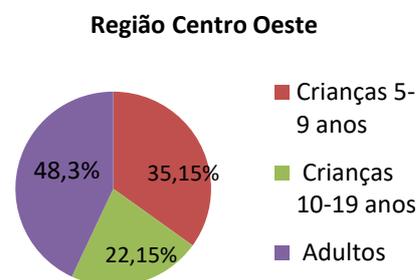
The central west region (Goiás, Mato Grosso, Mato Grosso do Sul) is the second largest region in Brazil with a high per capita income according to Table 7 and obesity among children aged 5 to 9 years are high with 35.15% compared to children aged 10 to 19 years with 22.15%, however the percentage of adults obese is high with 48.3% according to Graph 3.

**Table 7: Geographic characteristics Brazilian Midwest Region.**

Geographic Features Brazilian Midwest	
Area (2013)	1 606 403.506 km <sup>2</sup>
Population (2015)	15 660 988 inhab.
Density	9.75 inhab./km <sup>2</sup>
Indicators	
Average HDI (2010)	0.753 / high
GDP	R \$ 542.632 billion
GDP per capita (2012)	R \$ 35,653.48

Source: IBGE, 2017.

**Graph 3: IBGE obesity map, North Region between 2008/2009**



Source: Abeso, 2017.

## SOUTHEAST REGION

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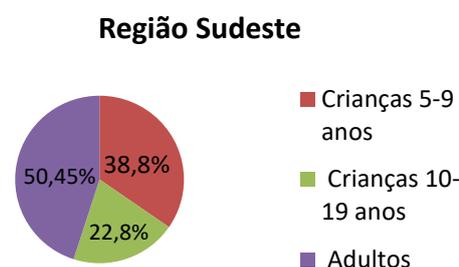
The southeast region is the second smallest region in the country and the first with the highest percentage of obese children between 5 and 9 years old with 38.8%, and the second among children between 10 and 19 years old with 22, 8%, according to Table 8 and Graph 4.

**Table 8: Geographic characteristics Southeast Brazilian region.**

Geographic Features Southeast Brazil	
Area (2013)	1 606 403.506 km <sup>2</sup>
Population (2015)	15 660 988 inhab.
Density	9.75 inhab./km <sup>2</sup>
Indicators	
Average HDI (2010)	0.753 / high
GDP	R \$ 2 088 221 trillion
GDP per capita (2012)	R \$ 21,182.68

Source: IBGE, 2017.

**Graph 4: IBGE obesity map, North Region between 2008/2009**



Source: Abeso, 2017.

## SOUTH REGION

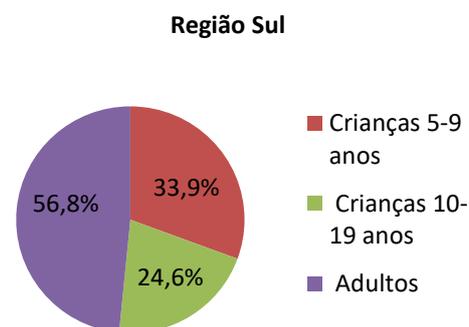
Obesity among children in the southern region among children aged 10 to 19 years is the highest of the five regions with 24.6% and among children aged 5 to 9 years the second placed with 33.9%, see Table 9 and Graph 5 .

**Table 9: Geographic characteristics Southern Brazil.**

Geographic Features Southern Brazil	
Area (2010)	576 774.31 km <sup>2</sup>
Population (2014)	29 016 114 hab.
Density	50.31hab./ km <sup>2</sup>
Indicators	
Average HDI (2010)	0.756 / high
GDP (2011)	R \$ 672 049 billion
GDP per capita (2011)	R \$ 24,382

Source: IBGE, 2017.

**Graph 5: IBGE obesity map, South Region between 2008/2009**



Source: Abeso, 2017.

## CHILDREN'S FASHION MARKET

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Despite the economic and political crisis in Brazil, the children's fashion market projects a 7.8% growth, moving R \$ 24 billion the second Marcelo Prado (IEMI, 2017) there is no crisis for children, the growth makes them have a constant consumption of these products.

According to (IEMI, 2017), clothing, as it is a necessary product, has a growth forecast for being items linked to the need to buy.

Also according to Marcelo Prado, children's fashion retailers need to innovate in the segment to stand out in this still complicated scenario and should read about what the consumer is looking for.

### **PUBLIC PLUS SIZE CHILDREN**

Attentive to this market and the growth of childhood obesity, the objective of the article is to identify and present data from the national market for the plus size children's clothing segment between the age of 02 to 12 years.

Second (BARROS; BARROS; GOUVEIA, 2013, p.13), offering adult modeling clothing to a child creates a situation of "adultization" of the child, preventing a dissociation between the adult world and the child world, preventing that the child behaves in a relaxed, naive and informal manner typical of his age.

Also according to ECA / 1990, art.3:

Children and adolescents enjoy all the fundamental rights inherent to the human person, without prejudice to the full protection provided for in this Law, assuring them, by law or by other means, of all opportunities and facilities, in order to provide them with physical, mental, moral, spiritual and social development, under conditions of freedom and dignity. (ECA / 1990)

Dias (2011) when verifying the market deficiency and the need of the infant consumer, proposed a fashion design associated with technology to fill this gap in consumers of plus size clothing.

Also according to (DIAS, 2011 p.4):

The clothing worn by obese children, in general, is clothing that sometimes corresponds to the size of an adult or more than their age, within the younger sizes. In addition, the ergonomics and anatomy of the modeling do not correspond to reality, there are maladjustments in specific areas of the body where the manufacture has not paid attention to this type of details.



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Source: <http://www.ipcbr.com/ipc-maps.html>. Prepared by the

Consumption according to the state is shown in Table 13, which shows that the state of São Paulo has the highest consumption (R \$ 1,064.60 billion) and the state of Roraima has the lowest consumption power (R \$ 7.62 million) .

**Table 13: Consumption power according to the state, IPC Maps, 2016.**

IPC MAPS 2016			IPC 2016	Posição no	Potencial de Consumo	IPC 2015	Posição no
COD	ESTADO	UF	(Share de Consumo)	Ranking - 2016	2016 - R\$ bi	(Share de Consumo)	Ranking - 2015
35	SAO PAULO	SP	27,38736	1	1.064,60	26,98358	1
31	MINAS GERAIS	MG	10,41602	2	404,90	10,20857	2
33	RIO DE JANEIRO	RJ	9,18045	3	356,86	9,69680	3
43	RIO GRANDE DO SUL	RS	6,70332	4	260,57	6,75043	4
41	PARANA	PR	6,33758	5	246,36	6,41450	5
29	BAHIA	BA	5,38811	6	209,45	5,39237	6
42	SANTA CATARINA	SC	4,53476	7	176,28	4,56075	7
26	PERNAMBUCO	PE	3,41105	8	132,60	3,35404	8
52	GOIAS	GO	3,38149	9	131,45	3,31179	9
23	CEARA	CE	2,87577	10	111,79	2,86141	10
15	PARA	PA	2,50075	11	97,21	2,50571	11
32	ESPIRITO SANTO	ES	2,05417	12	79,85	2,11904	13
53	DISTRITO FEDERAL	DF	1,95497	13	75,99	2,15933	12
21	MARANHAO	MA	1,75065	14	68,05	1,81278	14
51	MATO GROSSO	MT	1,63194	15	63,44	1,61521	15
25	PARAIBA	PB	1,42111	16	55,24	1,46331	16
13	AMAZONAS	AM	1,42018	17	55,21	1,23585	19
50	MATO GROSSO DO SUL	MS	1,39237	18	54,12	1,30594	18
24	RIO GRANDE DO NORTE	RN	1,27960	19	49,74	1,32005	17
27	ALAGOAS	AL	1,10266	20	42,86	1,01139	20
22	PIAUÍ	PI	0,98413	21	38,26	0,98514	21
28	SERGIPE	SE	0,81791	22	31,79	0,82061	22
11	RONDONIA	RO	0,73114	23	28,42	0,72725	23
17	TOCANTINS	TO	0,59562	24	23,15	0,57843	24
16	AMAPA	AP	0,28027	25	10,89	0,30939	25
12	ACRE	AC	0,27041	26	10,51	0,28534	26
14	RORAIMA	RR	0,19607	27	7,62	0,21099	27

Source: <http://www.ipcbr.com/ipc-maps.html>

Table 14 shows the consumption potential of Brazilians according to the IPCA 2016 among the social classes in the category of made-up clothing and social class B had the highest consumption value, with R \$ 48,743,834,429, followed by the CR \$ 42,565 class. 373,635.

**Table 14: Consumption potential of Brazilians according to social classes 2016.**

IPC Maps 2016 Consumption Potential by Category - R \$					
Category	THE	B	Ç	IN	Total
Made-up clothing	12,278,387,670	48,743,834,429	42,565,373,635	13,383,159,786	116,970,755,520

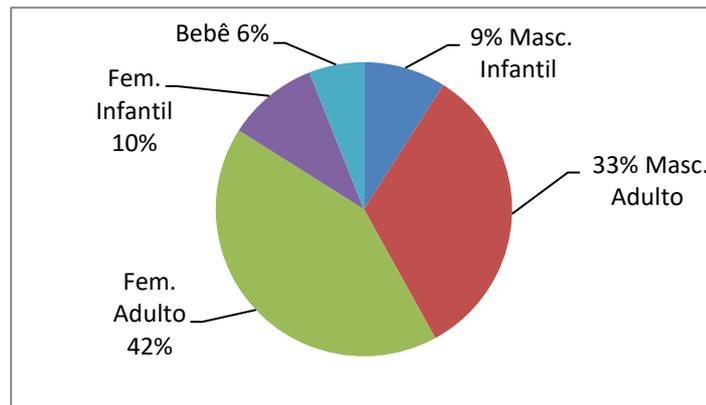
Source: <http://www.ipcbr.com/ipc-maps.html>. Prepared by the authors.

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According to the Brazilian Textile and Clothing Industry Association (Abit), the children's clothing market grows an average of 6% per year and data from IEMI show that, in 2012, children's fashion retail generated R \$ 27.5 billion, representing 7.5% increase over 2011.

In Graph 6 we can see the percentage of the segmentation of the clothing sector by target audience, where the female segment represents 52% of the production "Adult + Children" and the child segment (including baby) totaling 25%.

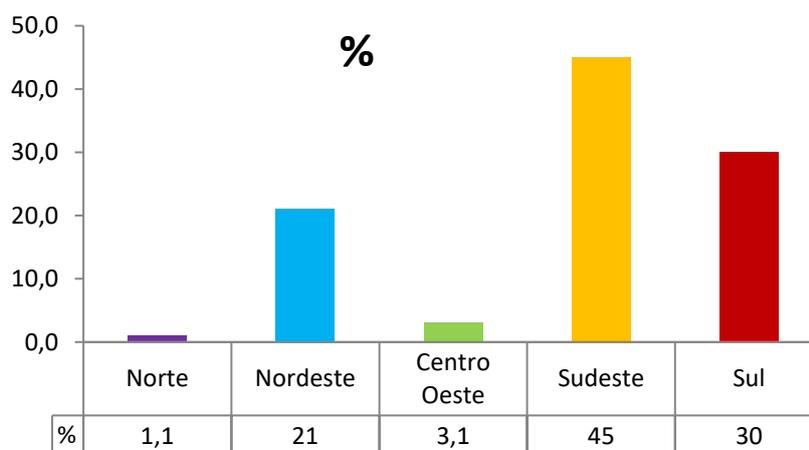
**Graph 6: Segmentation by target audience, 2012.**



Source: IEMI. Prepared by the authors.

According to research by IEMI (2016), in the panorama of the potential Brazilian textile industry that it can undertake in the children's plus size segment, it can be seen in the infographic below, which measures the regional distribution of textile production in Brazil, where the largest production is found in the Southeast (45%) and the lowest in the North (1.1%).

**Table 15: Regional distribution of textile production in Brazil, 2012.**



IEMI font. Prepared by the authors.

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The segment needs to supply the children's plus size market, being an important opportunity to do excellent business and requires understanding the public, their needs, desires, perceptions and behaviors.

The figures related to childhood obesity prove that there is a potential audience to be conquered, providing profitability to investors in the plus size fashion trade, in addition to satisfying the need and desire of the final consumer.

### **FINAL CONSIDERATION**

For the clothing segment, it is extremely important to know and meet the needs of plus size consumers in all age groups, especially children.

According to the Child and Adolescent Statute (ECA / 1990) art. 1 °, a child is considered to be a person up to twelve years of age incomplete, and adolescent to be a person between twelve and eighteen years of age.

It is a fact, that the offer of plus size clothing is often directed at the adult audience and the absence of a greater plus size offer for the child, obliges parents or people related to it, to purchase modeling and adult size clothes.

According to Richers (apud Medeiros and Lima Cruz 2007, p.04), consumer behavior is characterized by mental and emotional activities carried out in the selection, purchase and use of products / services to satisfy needs and desires.

Thus, we can affirm that, by producing and / or providing clothing with the appropriate profile and measure to the obese child audience, we are supplying a shortage not only in the market with a forecast of high profitability, but emotionally, making the purchase of clothing an important, pleasant and satisfaction. By facilitating the purchase of the product, art.4 of ECA / 1990 states that:

It is the duty of the family, the community, society in general and the government to ensure, with absolute priority, the realization of the rights relating to life, health, food, education, sport, leisure, professionalization, culture , dignity, respect, freedom and family and community coexistence. (ECA / 1990)

The relevance in producing and offering children's plus size clothes means prioritizing the child's needs, so that they have a lifestyle with options to choose from, tranquility in finding a quality product, without discrimination of their physique.

## Plus Size Fashion: Analysis of the Plus Size Children's Market in Brazil

And the entrepreneur who invests in this underexplored market niche, will be filling a positive financial return market gap, could be an important reference in the children's clothing sector, which makes a differential or competitive advantage for the investor.

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