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Shifting the Size and Fit Paradigm:

A Three-Pillar Framework to Reduce Returns and Future-Proof for Agentic Commerce

May 19, 2026

Executive Summary

Sizing and fit represent a foundational opportunity for the apparel industry to address implications for returns, inventory alignment and customer satisfaction. These implications often stem from inconsistent or poorly governed sizing systems, including fragmented fit standards and ineffective communication to consumers.

To address these gaps, brands must establish strong sizing intelligence as the foundation that connects data, standards and execution across the value chain. This same core sizing framework, when consistently applied from fit development through to its representation in PIM and PDP, enables clearer communication to consumers and creates better business opportunities. This consistency becomes especially vital as the industry moves toward more sophisticated capabilities: effective engagement with agentic commerce, predictive sizing tools and the emerging GLP-1 body landscape all depend on the strength of that underlying sizing intelligence.

Coresight Research Analysis

Section I: Market Forces Reshaping Expectations Around Apparel Sizing and Fit

- **Agentic Commerce**: AI agents rely on structured, machine-readable data to evaluate and recommend products, effectively penalizing brands with inconsistent or incomplete sizing information. As these agents increasingly mediate global commerce, retailers with poor data quality risk lost visibility and scaled decision errors.
- **Sizing Intelligence and Predictive Sizing Tools**: Retailers are increasingly turning to predictive sizing tools to improve size selection accuracy. These tools combine structured data, such as garment dimensions and fabric characteristics, with customer behavioral insights. Anchoring these tools in disciplined sizing standards allows for accurate recommendations even for new styles with no prior sales history.
- **GLP-1 Drugs**: The rapid adoption of GLP-1 medications is influencing apparel demand, with nearly three-quarters (72%) of surveyed US GLP-1 users have dropped at least one clothing size, according to a Coresight Research survey from November 2025. This trend highlights the growing need for clear fit communication and reliable size recommendations as shoppers navigate frequent body transitions and undertake wardrobe refreshes.

Section II: Core Pillars to Future-Proof Sizing and Fit

- **Size and Fit Discipline and Standards**: Establishing a solid foundation of consistent size and fit standards is crucial for retailers to reduce returns and improve customer confidence. Clear size definitions, grade rules and body measurements should be applied across product categories to ensure that sizing remains uniform across the brand's entire product line.
- **Product Information Management (PIM)**: Serving as the operational backbone, PIM transforms fit strategy into structured, usable data attributes like per-size measurements and fabric stretch. Effective PIM strategies also enable retailers to leverage data insights for continuous improvement, refining sizing recommendations, and enhancing the customer experience across various platforms.
- **Product Detail Page (PDP) Experience**: PDP is the final checkpoint before purchase and the primary source of information customers rely on to decide whether a garment will meet their expectation. Around 40% of US shoppers said they have abandoned their online apparel purchase "frequently" or "sometimes" because of missing or confusing PDP information, according to a Coresight Research survey. To be effective, PDPs must present sizing information in a way that is specific, clear and actionable.

What We Think

Sizing is not just a fit issue but a business intelligence issue. Accurate body and fit data inform design, assortment planning and merchandising decisions—reducing guesswork across the entire value chain. These insights help retailers optimize inventory, reduce waste and forecast demand with greater precision. Traditional one-size-fits-all assumptions are no longer effective. Today's consumers are diverse, dynamic and evolving. Brands that ground their sizing strategies in real customer body data are better positioned to meet expectations, build loyalty and secure a sustainable competitive advantage.

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Introduction

Sizing and fit remain a foundational opportunity for the apparel industry, with meaningful implications for returns, inventory alignment and customer satisfaction. These implications arise from inconsistent or poorly governed sizing systems, included fragmented and outdated fit standards, poorly designed PDPs and ineffective communication of size information to consumers.

Retailers must treat sizing as a comprehensive system—not a tool or feature—integrating body standards, brand guidelines and effective customer communication into a unified framework. This systematic approach ensures that the same logic flows seamlessly from body standards into patterns, size curves, PDP content and recommendations. This creates a stable foundation that can absorb market shocks like GLP-1-driven body transformations, support fit intelligence and sizing tools and adapt to the emerging paradigm of agentic commerce.

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Market Scale and Opportunity

The financial impact of returns on the apparel industry is staggering. Coresight Research estimates that the **average online apparel return rate** in the US was **23.4%** in 2025. With the US online apparel and footwear market reaching $201.1 billion in 2025, as estimated by Coresight Research, a 23.4% return rate would translate into approximately $47.1 billion in returned merchandise.

Returns represent more than just lost sales; they come with substantial operational and environmental costs. Each return incurs expenses in reverse logistics, such as shipping, restocking, repackaging and quality inspection, often exceeding the margin on the original sale. Many returned items cannot be resold at full price due to damage, wear or changing seasons, leading to markdowns or, in some cases, disposal in landfills, contributing to the apparel industry's already immense waste problem.

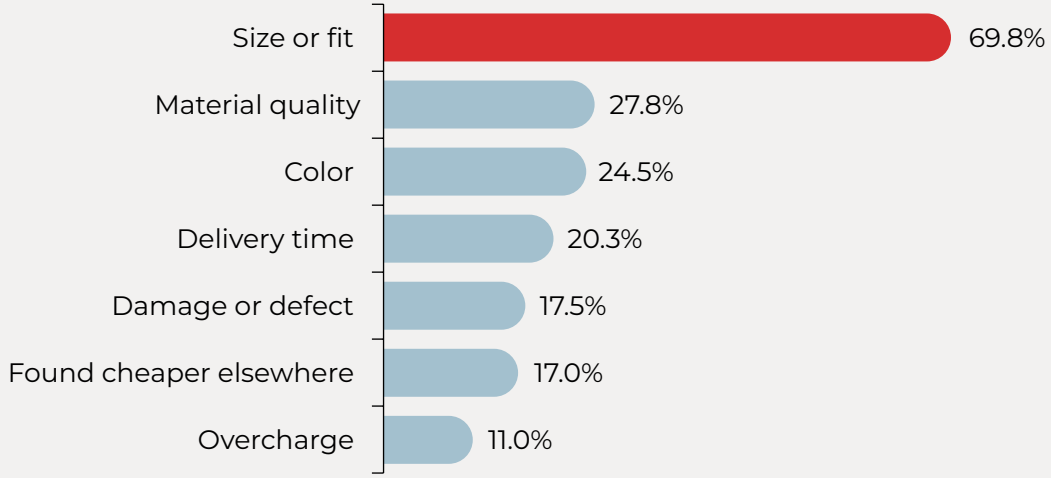
Sizing and fit issues are the top reason for online apparel returns. Around 70% of shoppers who returned apparel bought online in the last 12 months did so due to size or fit, according to a Coresight Research survey conducted on February-March, 2026. This highlights a strong opportunity for retailers to invest in sizing governance and intelligence to reduce returns and build shopper trust.

Figure 1.
US: Online Apparel Return Rate (%) and Total Online Apparel Returns (USD Bil.)

	2023	*2024*	*2025*
Online Apparel Return Rate	**24.4%**	**23.9%**	**23.4%**
Total Online Apparel Returns	**$41.7**	**$44.0**	**$47.1**

Source: Coresight Research

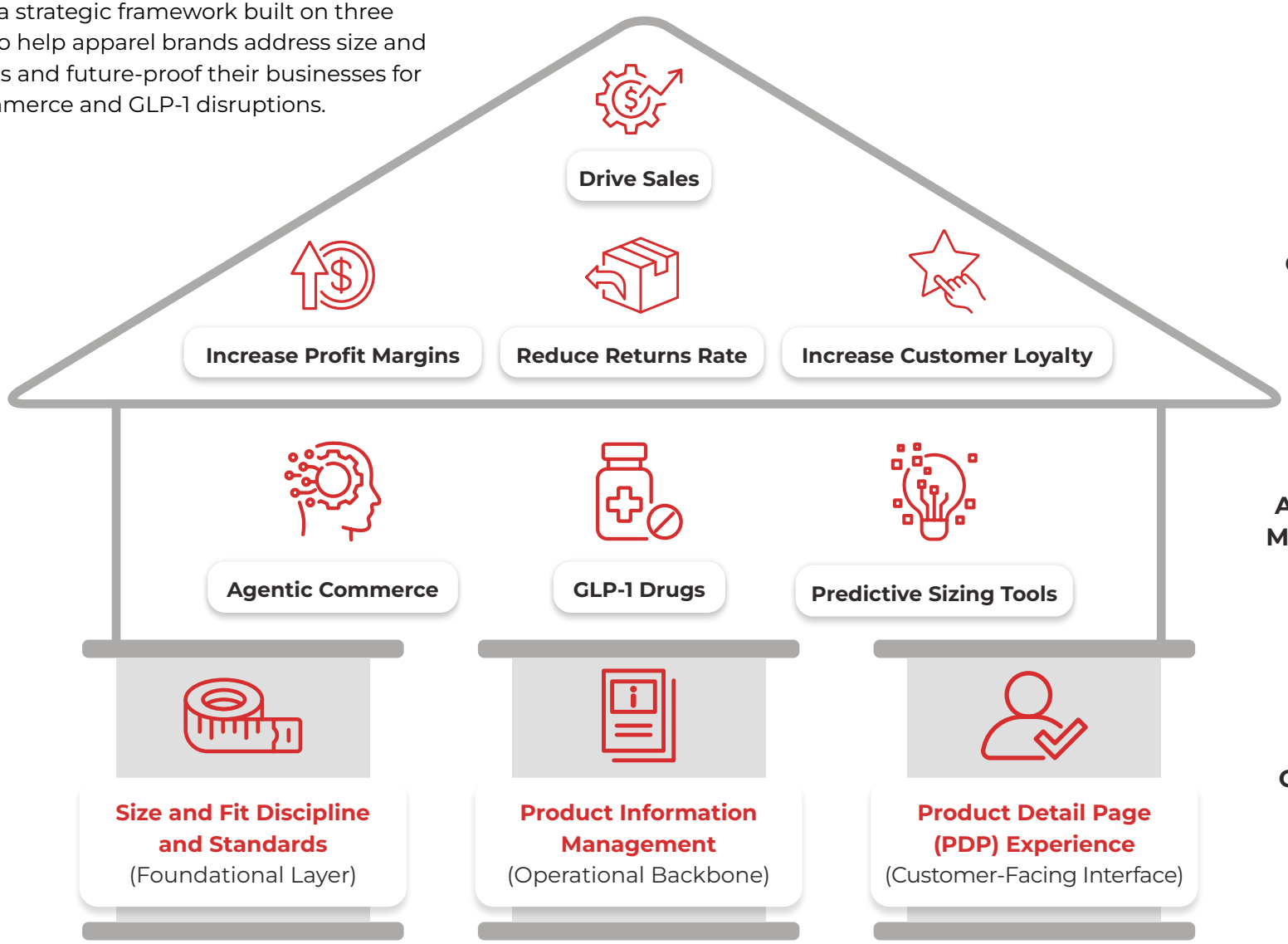
Figure 2.
US Shoppers: Main Reasons for Returning Apparel Items Purchased Online (% of Respondents)



Base: 212 US respondents aged 18+ who have returned apparel items purchased online in the last 12 months, surveyed in February and March 2026
Source: Coresight Research

Coresight Research Analysis

We present a strategic framework built on three core pillars to help apparel brands address size and fit challenges and future-proof their businesses for agentic commerce and GLP-1 disruptions.



Market Forces Reshaping Expectations Around Apparel Sizing and Fit

In this section, we outline the market forces driving the need to optimize for size and fit. We define this capability as ***Sizing Intelligence***—the capture and activation of body shape and sizing data to inform decisions across the business.

Sizing Intelligence provides deeper insights into consumer fit preferences and behaviors, enabling applications such as predictive sizing, product development and inventory optimization. When effectively applied, it reduces returns and strengthens customer loyalty by improving fit accuracy. It spans the garment lifecycle, supporting more informed decisions across design, merchandising and e-commerce.

1 *Agentic Commerce*

Agentic commerce raises the stakes for size and fit discipline because AI agents rely on structured, machine-readable product data to evaluate, compare and recommend products. As agents increasingly research, shortlist and purchase on behalf of shoppers, retailers whose size and fit information is inconsistent, poorly structured or incomplete may become harder for agents to interpret with confidence.

Agentic commerce represents a fundamental shift in how consumers discover, evaluate and purchase products. The transition is well underway, with many consumers increasingly open to help from AI-based tools. Around 58% of US consumers who have heard of AI and specific AI platforms have used or intend to use GenAI to shop, according to a December 2025 Coresight Research survey. Additionally, 29% of consumers are more likely to shop on a website with an AI agent for improved customer service.

1 *Agentic Commerce*

For apparel retailers, inaccurate sizing systems become a far more costly liability under agentic commerce, creating three critical failure modes:

- **Data Gaps Limit Recommendation Confidence:** First, agents cannot confidently make recommendations when sizing data is missing, incomplete or inconsistent. If a retailer does not provide structured per-size measurements in machine-readable format, or if those measurements vary unpredictably across products or categories, agents lack the inputs required to determine size suitability. In these cases, agents do not attempt to infer or compensate; they simply route shoppers toward brands with clearer, more reliable sizing data. As a result, retailers can lose sales even when they carry the right product and inventory.
- **Inaccurate Inputs Drive Scaled Decision Errors:** Second, poor sizing data allows errors to scale rapidly. If a retailer trains or optimizes its agent on inaccurate size charts, incomplete measurements or inconsistent grade rules, it will automate bad decisions at scale. A single data error that might confuse a few human shoppers will now be replicated across hundreds or thousands of automated decisions, driving elevated return volumes as agents repeatedly recommend the wrong size to similar body profiles.
- **Performance Signals Shape Long-Term Visibility:** Third, agentic platforms learn from outcomes, such as repeated size-related returns at the user level, explicit fit feedback or review content. Over time, brands with poor sizing performance are deprioritized in recommendations, rankings and automated purchase decisions.

In this context, consistent standards, high-quality product data and well-structured PDPs become prerequisites for being "understood" by agents in a way that leads to better conversion and customer experience. Reliable size logic allows agents to interpret products correctly, compare them across brands and make confident recommendations that align with customer needs. Retailers that invest in this discipline are more likely to be surfaced, recommended and purchased in agent-driven shopping flows, while those that do not will find themselves increasingly sidelined in this wave of agentic commerce.

Industry Example

At the industry conference Shoptalk Fall 2025, Ranjeet Bhosale, Vice President of Digital Product Management at **Target**, said that "the future of SEO (search engine optimization) is becoming GEO (generative engine optimization)." Target is making sure its systems train agents to understand and represent its products effectively to customers. Preparing for GEO involves ensuring that core product data is accurate and accessible so that different types of agents can use it at scale.

Bhosale explained that Target now focuses on five key elements in search: price, product information, promotions, availability and policies. The company is updating its website to ensure this information is machine readable and ready for AI engines to access—whether internally (through Target's AI agents) or externally."

2 *Predictive Sizing Tools*

Retailers are increasingly deploying predictive sizing tools to help customers select the most appropriate size in digital environments. These systems draw on a range of inputs, including structured product data such as garment dimensions and fabric characteristics as well as behavioral signals, including historical purchase and return behavior, and qualitative customer reviews (for example, “runs large,” “tight in the shoulders”).

Some predictive models rely significantly on behavioral and crowd-sourced data, allowing them to identify fit patterns even when underlying size standards vary across brands or categories. By analyzing how similar customers have purchased, kept or returned items, these tools can dynamically adjust recommendations and compensate for inconsistencies in labeling.

However, this approach is inherently reactive — it requires several “bad” purchases before patterns can be identified, limiting predictive accuracy for new styles, new categories or low-volume products.

The **quality of recommendations** is therefore a **direct reflection of the sizing intelligence** from which they draw. When tools are grounded in disciplined size standards, accurate per-size garment measurements, and consistent grading across products and categories, they do not have to depend on noisy behavioral signals and can provide accurate recommendations for new styles before a single customer review is submitted.

For retailers, predictive sizing should therefore be viewed not as a replacement for sizing discipline, but as an extension of it. **Successful implementations typically combine:**

- Standardized size frameworks
- Clear measurement definitions
- Strong product information management

Return reasons and customer feedback are then incorporated to continuously refine recommendations and surface systemic sizing inconsistencies.

When anchored in high-quality product data and continuously enriched by behavioral insights, predictive sizing tools can reduce bracketing behavior, increase conversion rates, and improve post-purchase satisfaction.

3 *GLP-1 Drugs*

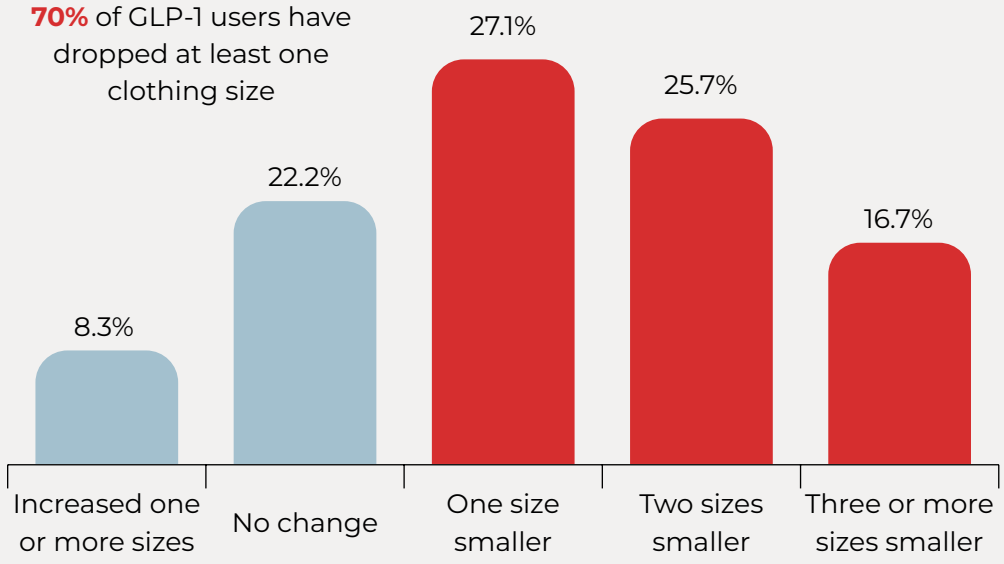
The rapid adoption of **GLP-1** weight-loss medications is reshaping consumer demand patterns for apparel. The US GLP-1 drugs market is set to expand rapidly over the next several years, rising from roughly $42.6 billion in 2024 to **$137 billion by 2030**, according to Coresight Research data (at manufacturers' prices).

Our proprietary consumer survey reveals that users' bodies—and thus their wardrobe needs—are changing since starting therapy: around 70% of surveyed US GLP-1 users have dropped at least one clothing size, and a combined **42% have sized down by two or more.**

As more consumers experience frequent changes in body size over shorter periods, they are increasingly undertaking partial or full wardrobe refreshes. This trend highlights the growing need for clear fit communication and reliable size recommendations, as shoppers seek reassurance when selecting sizes. From an inventory perspective, retailers must adapt by allocating more stock to sizes with higher demand, driven by shifting customer needs.

However, it is crucial that retailers **maintain stable sizing standards** and avoid adjusting them solely based on changes in consumer body sizes as doing so could confuse existing customers and create operational complexity across the supply chain. Instead, retailers should focus on expanding their size ranges and improving fit descriptions to help shoppers navigate existing size systems more effectively during periods of body transition.

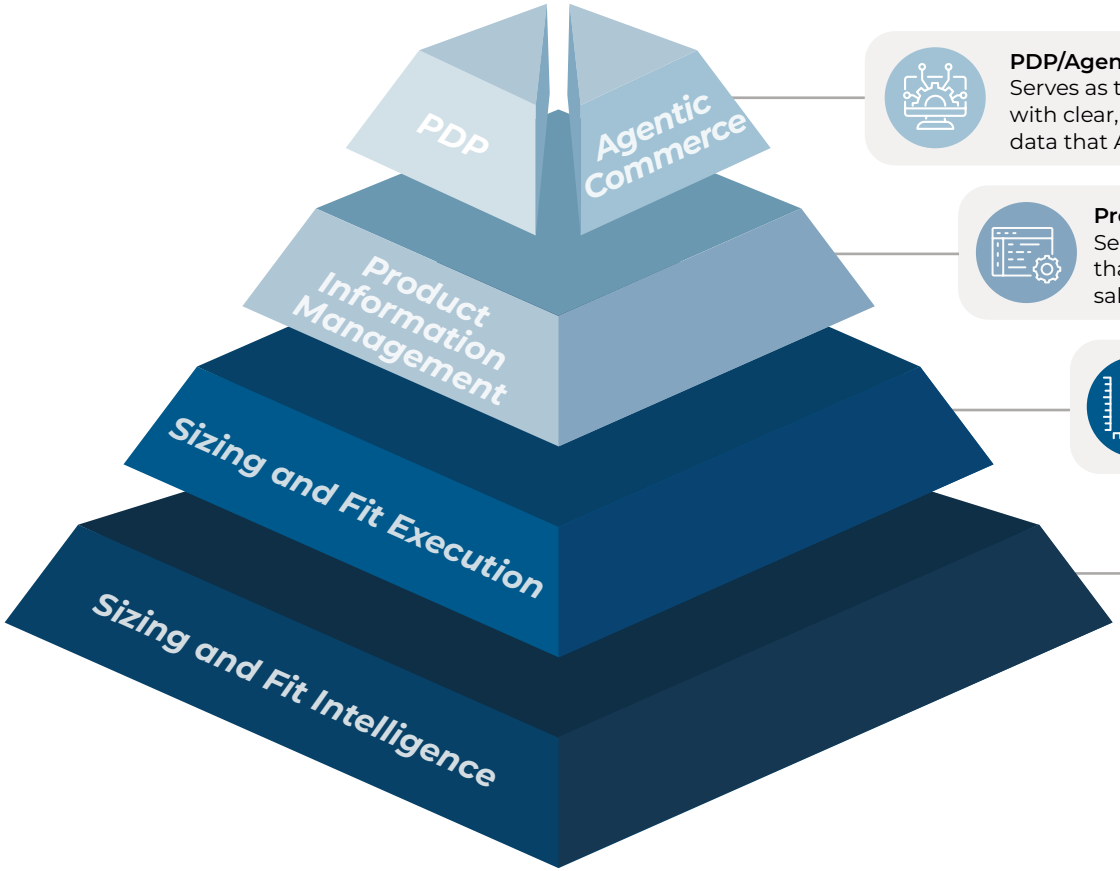
Figure 3.
Change in Clothing Size Among US GLP-1 Users Since Starting Therapy (% of Respondents)



Base: 144 US respondents aged 18+ who are taking GLP-1 drugs, surveyed in November 2025 and March 2026
Source: Coresight Research

Core Pillars To Future-Proof Sizing and Fit

We have identified the following core, interconnected pillars to turn these market shifts into a competitive advantage.



PDP/Agentic Commerce
Serves as the customer-facing layer, providing shoppers with clear, specific sizing information and structured fit data that AI agents can read and interpret.

Product Information Management
Serves as the single source of truth for fit data, ensuring that information flows accurately across every team and sales channel.

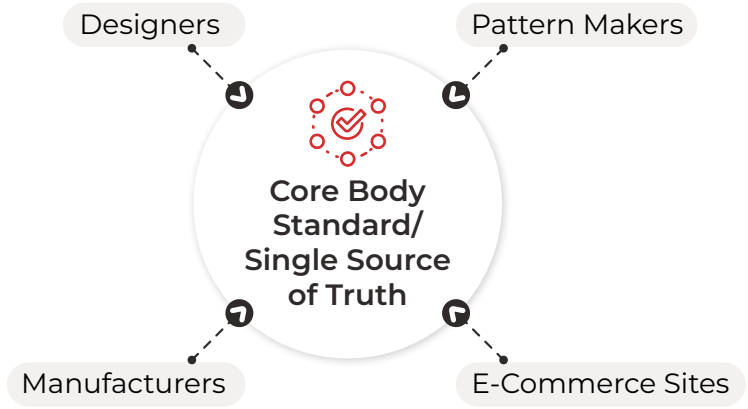
Sizing and Fit Execution
Applies consistent grade rules, body measurements and fit intent across every garment, category and supplier, as established in the foundational layer.

Sizing and Fit Intelligence
Establishes the foundational layer of real body-shape and sizing data to inform decision-making across teams, including design, merchandising and e-commerce.

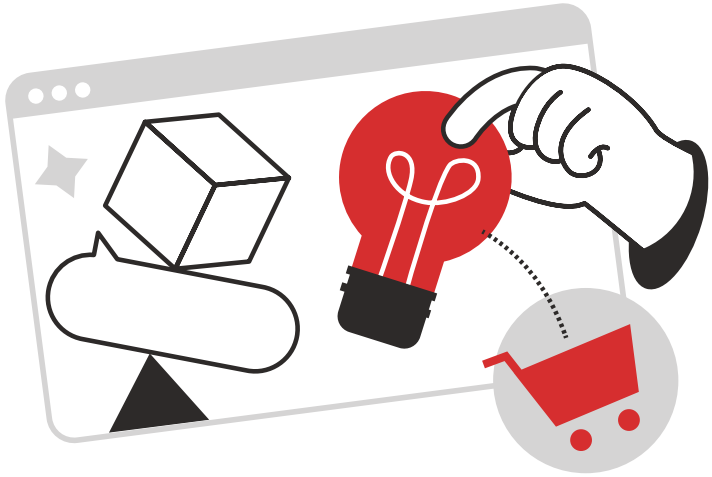
1 *Size and Fit Discipline and Standards*

A disciplined approach to **size and fit standards forms the foundation of any effort to improve customer confidence and reduce returns.** At its core, this requires establishing a clear, data-driven sizing framework that defines target body measurements, base sizes and grade rules across both core and extended size ranges. These standards must be applied consistently across garment types and categories to ensure that a given size carries the same meaning throughout the assortment.

Historically, collaboration and standardization across the apparel supply chain have been limited. Designers, pattern makers, manufacturers and retailers have worked in disconnected silos, each with their own interpretation of size and fit. This lack of a common language has been a primary driver of inconsistency seen across the industry. Establishing a core body standard gives every function a single source of truth and creates a consistent foundation for each stage of product development. Built on robust demographic data, this standard ensures that whether a garment is being designed in a 3D program, cut in a factory or displayed on an e-commerce site, all partners are working from the same playbook.



For example, Bershka, a sister brand of **Zara**, recently undertook a major refresh that included an overhaul of its sizing strategy and standards. In partnership with **Alvanon**, a data-driven sizing technology provider, Bershka identified the size range of its core customers, then used digital avatars and physical mannequin 'twins' to align its entire product range consistently across all its internal teams and suppliers—resulting in a 10% reduction in returns.



These standards should remain stable with periodic refreshes every 5-7 years, allowing customers to develop reliable expectations about how a brand's sizing fits their body.

Finally, effective sizing discipline requires clear ownership and governance. Many organizations establish a fit council or designate technical design leadership to oversee standards, approve changes and manage exceptions. Formal change-control processes help prevent gradual "fit drift" and ensure that any adjustments are intentional, documented and communicated across functions. Without this governance layer, even well-defined standards can erode over time.

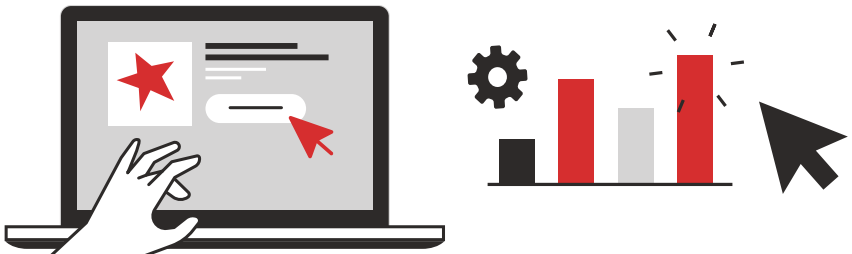
2 *Product Information Management*

Product Information Management (PIM) serves as the operational backbone that connects fit strategy to execution across the apparel value chain. Once size and fit standards are defined, their impact depends entirely on how effectively they are translated into structured, usable product data.

The strategic importance of PIM is recognized at the executive level. According to a 2022 survey by Coresight Research of 166 US-based brands and retailers, “reducing product returns from customers” is the third most important PIM benefit, with 45% of respondents citing it as “extremely important.”

An effective PIM implementation for apparel should:

- Capture the right fit-critical fields: per-size garment measurements, fit intent (e.g., relaxed vs tailored), fabric composition and stretch characteristics, regional size variants and any size exceptions.
- Enforce consistent structure and terminology so that size and fit attributes mean the same thing across brands, categories and channels.
- Establish clear ownership and governance (who creates, who validates, who updates) for each data field across design, technical design, merchandising and e-commerce teams.
- Integrate with downstream systems so that PDPs, marketplaces and internal tools all draw from the same source.



The value of a robust PIM backbone extends beyond product creation and content syndication. When integrated with broader performance signals, PIM becomes a feedback engine for continuous improvement.

Key inputs include:

- Returns data
- Demand signals
- Customer feedback and review

This integration enables a closed-loop view of sizing performance, allowing teams to identify patterns such as systematic over- or under-sizing in specific categories, fabrics or silhouettes.

These insights can then feed back into:

- Product development
- Assortment planning
- Inventory allocation decisions, improving outcomes over time.

As commerce becomes increasingly automated, the ability to expose clean, structured fit data through application programming interfaces (APIs) and integrations becomes increasingly important. Internal tools—such as predictive sizing engines, merchandising analytics and planning systems—depend on reliable inputs to function effectively. External platforms, marketplaces, and emerging agentic commerce systems similarly require standardized data to interpret products accurately. Retailers that treat PIM as a strategic

3 *PDP Experience*

The PDP is the point where sizing discipline is ultimately validated by the customer. It is the final checkpoint before purchase and the primary source of information customers rely on to decide whether a garment will meet their expectations. Even with strong internal standards and clean product data, poor PDP execution can reintroduce uncertainty and negate upstream efforts.

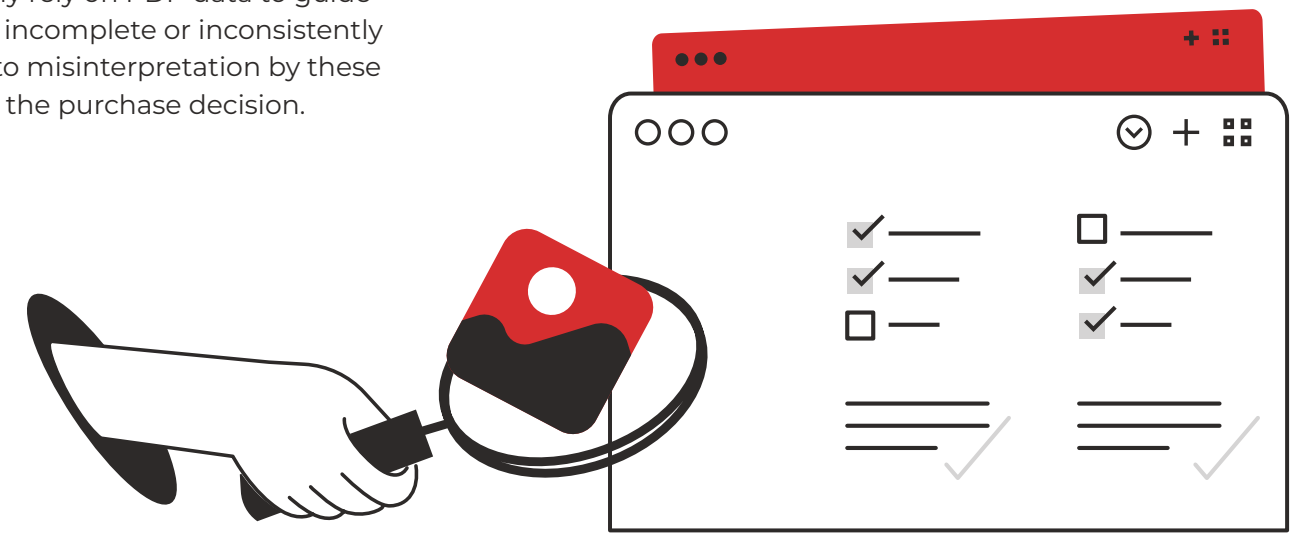
Increasingly, **PDP information** must also be **structured and precise** enough to be interpreted by AI agents that consumers are beginning to use in their shopping journey . PDP data must be therefore both human-and machine-readable so that these agents can accurately understand sizing, fit and garment attributes.

If PDPs do not provide the information shoppers need, they may choose not to make a purchase. **Around 40% of US shoppers** said they have **abandoned their online apparel purchase** “frequently” or “sometimes” because of missing or confusing PDP information, according to a Coresight Research survey from February 2026. As AI-assisted shopping tools increasingly rely on PDP data to guide recommendations and comparisons, incomplete or inconsistently presented information can also lead to misinterpretation by these systems, further increasing friction in the purchase decision.

To be effective, PDPs must present sizing information in a way that is specific, clear and actionable. Customers need garment-level detail, including:

- Measurements by size
- A clear explanation of intended fit (e.g., relaxed, tailored, oversized)
- Fabric characteristics (for example, stretch vs non-stretch) which impact how garment fits and moves
- Contextual cues that translate measurement into real-world expectations

When this information is precise and consistent, customers are less likely to guess, reducing uncertainty and return risk.



3 *PDP Experience*

Visual content plays a critical role in translating sizing data into an intuitive understanding. High-quality imagery and, where appropriate, video should show garments in real-world use, including movement, drape, and how fabric behaves on the body. Showing products on different body types or sizes adds further context, helping customers understand how proportions change across the size range and how the garment might look on them.

PDPs should also provide interpretive guidance where appropriate, including:

- Comparative statements (e.g., runs small, true to size) grounded in actual measurements
- Model details such as height, size worn and relevant body proportions
- Verified reviews tied to size selection
- Feedback from customers with similar body characteristics
- These signals reinforce trust and reduce hesitation.

Crucially, the PDP must reflect the same sizing assumptions used throughout the organization. When PDPs accurately surface sizing data and present it in a clear, interpretable way, they function as a practical decision-support tool—enabling customers and AI shopping agents alike to evaluate products reliably, choose the right size with confidence and reduce the likelihood of bracketing, returns and purchase abandonment.

What We Think

Sizing and fit have long been persistent challenges in the apparel industry, but they are now being amplified by emerging market forces, such as agentic commerce and GLP-1 adoption, making inaction increasingly costly. By focusing on three key pillars: size and fit discipline and standards, PIM strategy and PDP experience, brands and retailers can reduce returns, streamline the supply chain and position themselves to succeed in this evolving retail landscape.

Implications for Brands and Retailers

- Sizing is not just a fit issue but a business intelligence issue. Accurate body and fit data inform design, assortment planning and merchandising decisions—reducing guesswork across the entire value chain. These insights help retailers optimize inventory, reduce waste and forecast demand with greater precision.
- Traditional one-size-fits-all assumptions are no longer effective. Today's consumers are diverse, dynamic and evolving. Brands that ground their sizing strategies in real customer body data are better positioned to meet expectations, build loyalty and secure a sustainable competitive advantage.
- Treat returns as a source of insight rather than purely as a cost. Retailers should systematically capture size and fit-related return reasons, link them to root causes, and use this data to adjust sizing grades, refine PDPs and train predictive sizing models.

Brands or Retailers That Risk Losing Advantage

- Vertically integrated retailers that control their manufacturing or maintain close technical partnerships with factories are better positioned to implement and maintain consistent size standards. They can enforce spec compliance, iterate quickly on fit refinements and ensure that standards translate accurately to finished garments.
- Premium and luxury brands have long invested in sizing expertise and consistency, giving them a strong foundation to build on. By adding AI-based systems, they can further strengthen and extend this existing advantage.
- Direct-to-consumer (D2C) brands, without the burden of legacy systems, are uniquely positioned to make sizing a core part of their value proposition. With direct access to rich customer data and full control over the e-commerce experience, they can rapidly test new size curves, deploy AI-driven fit tools, personalize recommendations and continuously feed learnings back into design and production.

Brands or Retailers Poised to Gain Advantage

- Retailers that primarily optimize for speed-to-market, such as fast-fashion brands, often sacrifice size consistency in favor of rapid trend response. Their already high return rates will be further amplified as AI agents penalize unreliable sizing.
- Retailers that aggregate third-party brands without enforcing data standards face significant disadvantages. If they cannot guarantee structured, accurate fit data across their assortment, AI agents will route customers to platforms that can.
- Traditional retailers operating on legacy technology stacks with product data scattered across incompatible systems will face the highest implementation challenges. Without the ability to centralize and govern fit data, they cannot support modern fit intelligence tools or expose data to AI agents.

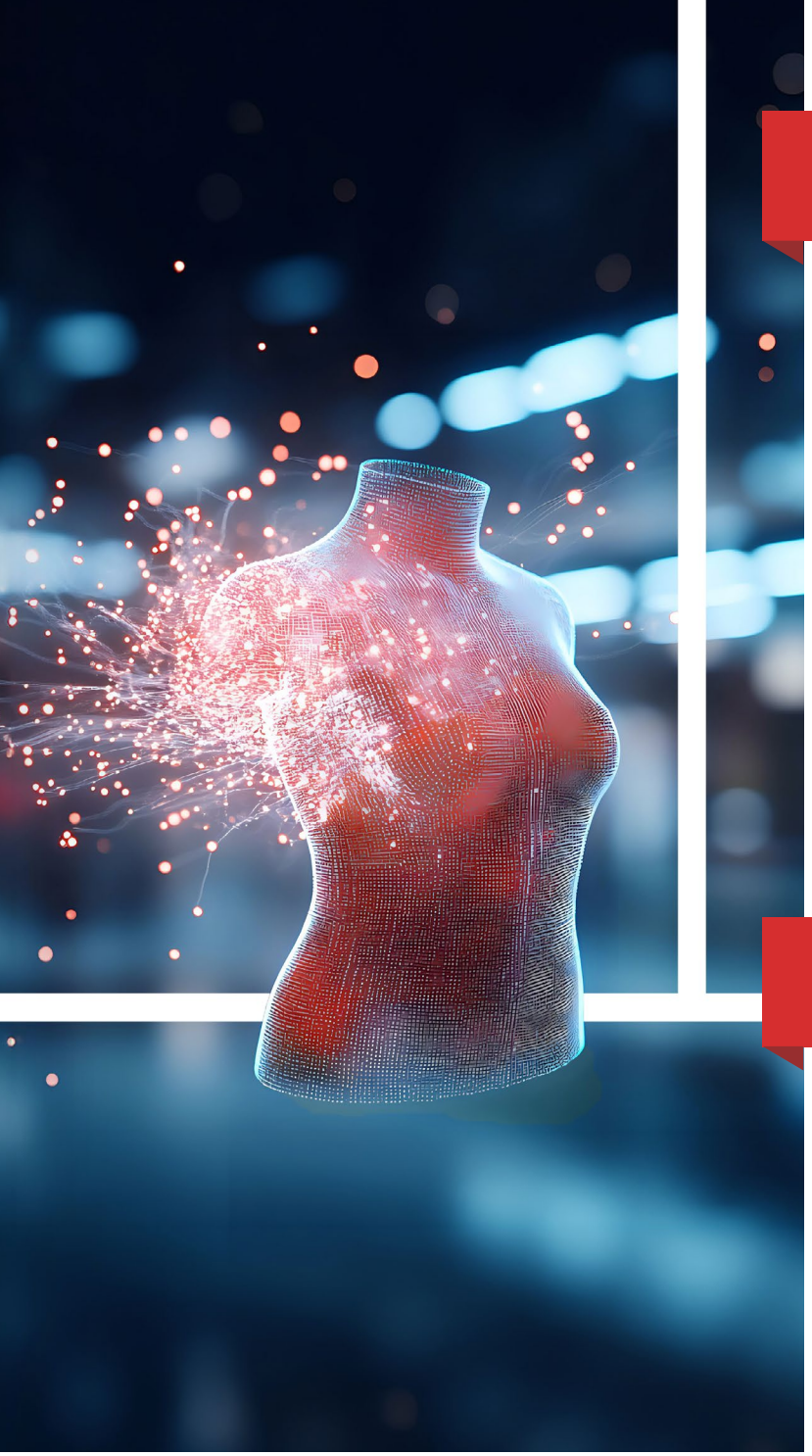
Implications for Technology Vendors

- Predictive sizing and fit recommendation tools must move beyond pure machine learning pattern matching to incorporate actual garment measurements, fit intent and brand-specific grading systems. This requires deep integration with retailers' PIM systems, tech packs and historical sizing data. Likewise, vendors building agent platforms, comparison engines or autonomous shopping tools must create integrations that pull clean sizing information from retailers' PIM and product data systems.

Notes and Methodology

Data and conclusions in this report are as of February 23, 2026.

Companies mentioned in this report are: Alvanon, Bershka and Zara.



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Alvanon is a fashion technology company driven by a mission to create consistent, perfectly sized apparel for every body. It combines advanced technology, data insights, and decades of industry expertise to power its sizing intelligence ecosystem for 1000+ global clients across multiple sectors including fashion, sports & leisure, performance & workwear, swimwear and lingerie. Using global body data Alvanon streamlines product development, reduces returns, and ensures consistent sizing for brands, manufacturers, and consumers alike.

For more information, visit https://alvanon.com/