



Passport

Bags and Luggage in India

Euromonitor International

July 2021

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purposes only.

Some content and data have been changed.

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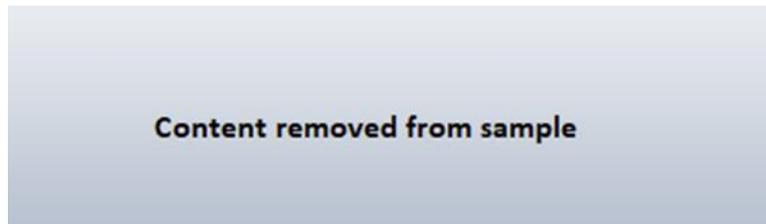
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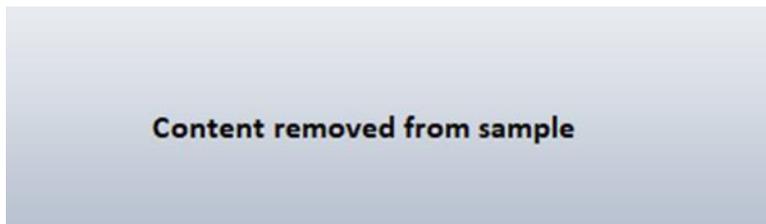
BAGS AND LUGGAGE IN INDIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

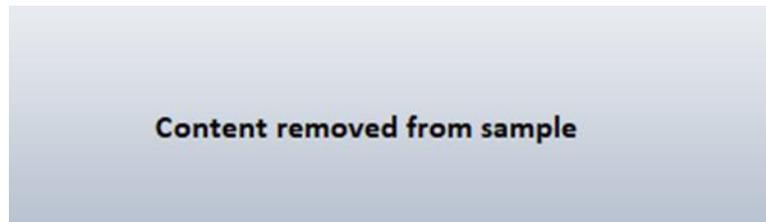


2021 DEVELOPMENTS

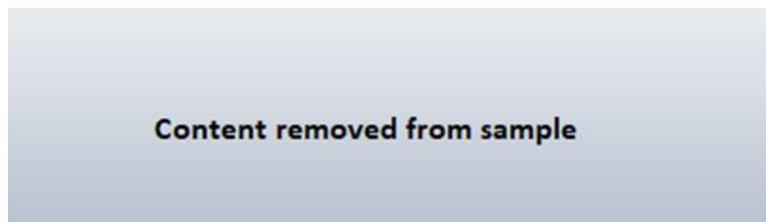
Second wave of COVID-19 results in fresh lockdowns across states impacting travel



Discounting as A pricing strategy prevails

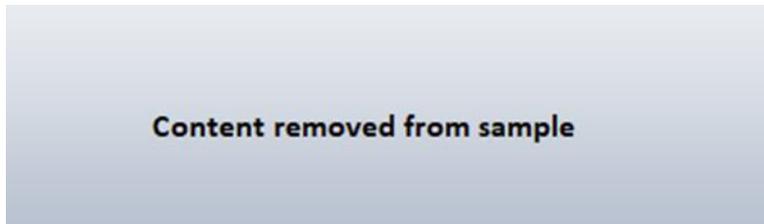


Small retailers get creative to reach consumers

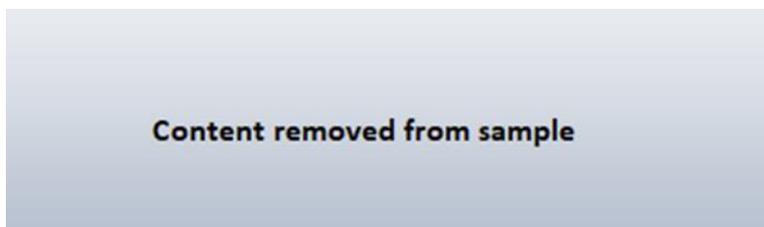


PROSPECTS AND OPPORTUNITIES

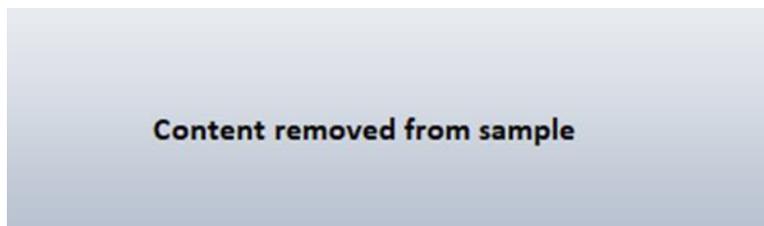
Domestic tourism to aid recovery of bags and luggage



Working from home and studying from home will slow the recovery of bags



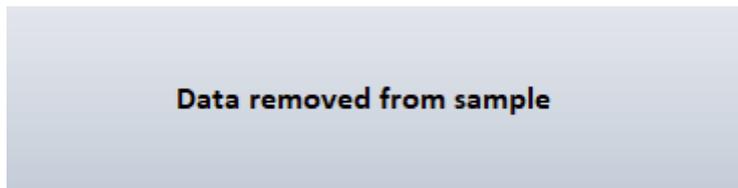
Fewer international trips will benefit domestic sales of luxury handbags



CATEGORY DATA

Table 1 Sales of Bags and Luggage by Category: Volume 2016-2021

'000 units	2016	2017	2018	2019	2020	2021
Bags						
- Backpacks						
- Business Bags						
- Crossbody Bags						
- Duffel Bags						
- Handbags						
-- Non-Luxury Handbags						
-- Luxury Handbags						



- Wallet and Coin Pouches
 - Other Small Bags
 Luggage
 Bags and Luggage

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Bags and Luggage by Category: Value 2016-2021

INR million

2016 2017 2018 2019 2020 2021

Bags
 - Backpacks
 - Business Bags
 - Crossbody Bags
 - Duffel Bags
 - Handbags
 -- Non-Luxury Handbags
 -- Luxury Handbags
 - Wallet and Coin Pouches
 - Other Small Bags
 Luggage
 Bags and Luggage

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Bags and Luggage by Category: % Volume Growth 2016-2021

% volume growth

2020/21 2016-21 CAGR 2016/21 Total

Bags
 - Backpacks
 - Business Bags
 - Crossbody Bags
 - Duffel Bags
 - Handbags
 -- Non-Luxury Handbags
 -- Luxury Handbags
 - Wallet and Coin Pouches
 - Other Small Bags
 Luggage
 Bags and Luggage

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Bags and Luggage by Category: % Value Growth 2016-2021

% current value growth

2020/21 2016-21 CAGR 2016/21 Total

Bags
 - Backpacks
 - Business Bags

Data removed from sample

- Crossbody Bags
- Duffel Bags
- Handbags
- Non-Luxury Handbags
- Luxury Handbags
- Wallet and Coin Pouches
- Other Small Bags
- Luggage
- Bags and Luggage

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Sales of Luggage by Type: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Hard Case	Data removed from sample					
Soft Case						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 NBO Company Shares of Bags and Luggage: % Value 2016-2020

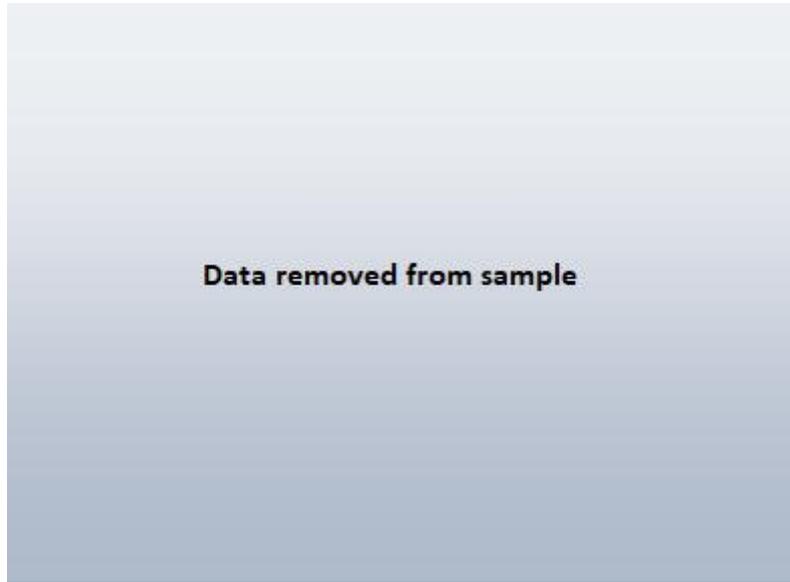
% retail value rsp Company	2016	2017	2018	2019	2020
Others	Data removed from sample				
Total					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 LBN Brand Shares of Bags and Luggage: % Value 2017-2020

% retail value rsp

Brand (GBO) Company (NBO) 2017 2018 2019 2020



Others
Total

Others
Total

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Distribution of Bags and Luggage by Format: % Value 2016-2021

% retail value rsp 2016 2017 2018 2019 2020 2021

- Store-Based Retailing
- Grocery Retailers
- Modern Grocery Retailers
- Hypermarkets
- Non-Grocery Specialists
- Apparel and Footwear Specialist Retailers
- Leisure and Personal Goods Specialist Retailers
- Bags and Luggage Specialist Retailers
- Stationers/Office Supply Stores
- Other Non-Grocery Specialists
- Mixed Retailers
- Non-Store Retailing
- Homeshopping
- E-Commerce
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Forecast Sales of Bags and Luggage by Category: Volume 2021-2026

'000 units	2021	2022	2023	2024	2025	2026
Bags	Data removed from sample					
- Backpacks						
- Business Bags						
- Crossbody Bags						
- Duffel Bags						
- Handbags						
-- Non-Luxury Handbags						
-- Luxury Handbags						
- Wallet and Coin Pouches						
- Other Small Bags						
Luggage						
Bags and Luggage						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 10 Forecast Sales of Bags and Luggage by Category: Value 2021-2026

INR million	2021	2022	2023	2024	2025	2026
Bags	Data removed from sample					
- Backpacks						
- Business Bags						
- Crossbody Bags						
- Duffel Bags						
- Handbags						
-- Non-Luxury Handbags						
-- Luxury Handbags						
- Wallet and Coin Pouches						
- Other Small Bags						
Luggage						
Bags and Luggage						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 11 Forecast Sales of Bags and Luggage by Category: % Volume Growth 2021-2026

% volume growth	2021/22	2021-26 CAGR	2021/26 Total
Bags	Data removed from sample		
- Backpacks			
- Business Bags			
- Crossbody Bags			
- Duffel Bags			
- Handbags			
-- Non-Luxury Handbags			
-- Luxury Handbags			

- Wallet and Coin Pouches
 - Other Small Bags
- Luggage
Bags and Luggage

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 12 Forecast Sales of Bags and Luggage by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
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- Bags
- Backpacks
 - Business Bags
 - Crossbody Bags
 - Duffel Bags
 - Handbags
 - Non-Luxury Handbags
 - Luxury Handbags
 - Wallet and Coin Pouches
 - Other Small Bags
- Luggage
Bags and Luggage

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

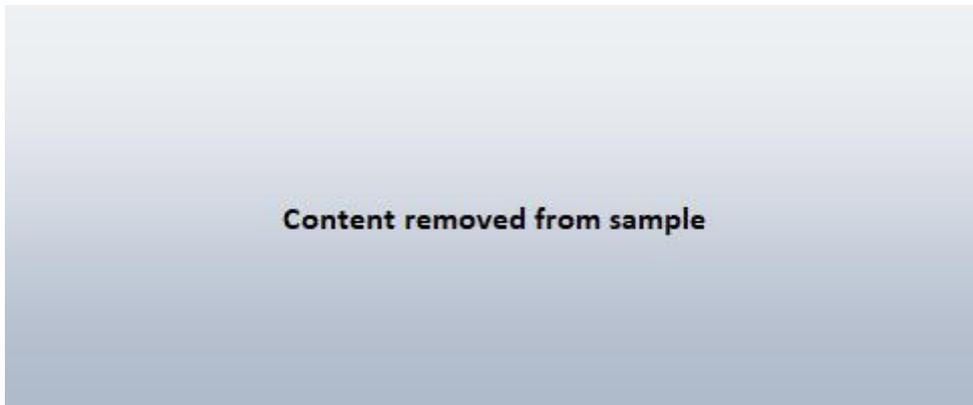
PERSONAL ACCESSORIES IN INDIA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Personal accessories in 2021: The big picture



Key trends in 2021



Competitive landscape



Retailing developments



What next for personal accessories?



MARKET DATA

Table 13 Sales of Personal Accessories by Category: Volume 2016-2021

'000 units	2016	2017	2018	2019	2020	2021
Bags and Luggage	Data removed from sample					
Jewellery						
Watches						
Writing Instruments						
Personal Accessories						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Sales of Personal Accessories by Category: Value 2016-2021

INR million	2016	2017	2018	2019	2020	2021
Bags and Luggage	Data removed from sample					
Jewellery						
Watches						
Writing Instruments						
Personal Accessories						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 Sales of Personal Accessories by Category: % Volume Growth 2016-2021

% volume growth	2020/21	2016-21 CAGR	2016/21 Total
Bags and Luggage	Data removed from sample		
Jewellery			
Watches			
Writing Instruments			
Personal Accessories			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 16 Sales of Personal Accessories by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Bags and Luggage	Data removed from sample		
Jewellery			
Watches			
Writing Instruments			
Personal Accessories			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 NBO Company Shares of Personal Accessories: % Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
	Data removed from sample				

Others
Total

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 18 LBN Brand Shares of Personal Accessories: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Others
Total

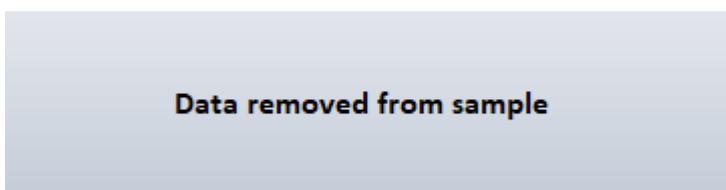
Others
Total

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Distribution of Personal Accessories by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
--------------------	------	------	------	------	------	------

Store-Based Retailing
 - Grocery Retailers
 -- Modern Grocery Retailers
 --- Supermarkets
 --- Hypermarkets
 - Non-Grocery Specialists



- Apparel and Footwear Specialist Retailers
- Leisure and Personal Goods Specialist Retailers
- Bags and Luggage Specialist Retailers
- Stationers/Office Supply Stores
- Jewellery and Watch Specialist Retailers
- Other Non-Grocery Specialists
- Mixed Retailers
- Department Stores
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 20 Forecast Sales of Personal Accessories by Category: Volume 2021-2026

'000 units	2021	2022	2023	2024	2025	2026
Bags and Luggage	Data removed from sample					
Jewellery						
Watches						
Writing Instruments						
Personal Accessories						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 21 Forecast Sales of Personal Accessories by Category: Value 2021-2026

INR million	2021	2022	2023	2024	2025	2026
Bags and Luggage	Data removed from sample					
Jewellery						
Watches						
Writing Instruments						
Personal Accessories						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 22 Forecast Sales of Personal Accessories by Category: % Volume Growth 2021-2026

% volume growth

2021/22 2021-26 CAGR 2021/26 Total

Bags and Luggage
Jewellery
Watches
Writing Instruments
Personal Accessories

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 23 Forecast Sales of Personal Accessories by Category: % Value Growth 2021-2026

% constant value growth

2021/2022 2021-26 CAGR 2021/26 Total

Bags and Luggage
Jewellery
Watches
Writing Instruments
Personal Accessories

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

DISCLAIMER

Forecast and scenario closing date: 21 June 2021

Report closing date: 22 July 2021

Analysis and data in this report give full consideration to consumer behaviour and market performance in 2021 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on www.euromonitor.com and via the Passport system, where new content is being added on a systematic basis.

SOURCES

Sources used during the research include the following:

Summary 1 Research Sources

Official Sources

Trade Associations

Trade Press

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