

The Luggage Industry After Covid: Recovery, Rewired

An industry pulse from Travel Sentry

GENEVA, SWITZERLAND, July 14, 2026 /EINPresswire.com/ -- Five years on from the shutdowns that grounded global travel, the luggage industry has not so much bounced back as rebuilt itself around a different set of rules. [Travel Sentry](#) surveyed a range of professionals including owners, executives, sales, product and sourcing leaders in English, Chinese, Japanese, German, Italian, Spanish and French to understand what changed and where the category is heading. The picture that emerges is less "return to normal" and more about quiet ways to reinvent.

Recovery has been uneven

There is no single recovery story. Compared with 2019, respondents split almost evenly three ways: 39% report higher sales today, 39% report lower and 22% are roughly flat. Workforces track the same pattern, with slight-growth and slight-decline businesses in near-equal measure. The pandemic didn't lift or sink the industry as a whole: it widened the gap between the brands that adapted and those that didn't.

What's squeezing everyone is competition and cost. Fielded against a list of recovery challenges, competition (57%) and rising material costs (52%) top the list by a clear margin, ahead of supply-chain disruption (34%) and changing consumer demand (31%). More than one respondent described a market pushed toward commoditisation "travel bags are almost disposable items after the first few uses," as one owner put it, with the strategic response being to escape price competition through quality and design rather than chase it.

The channel map has been redrawn

The most decisive shift is where product is being sold. Growth is now concentrated in direct and digital channels: B2B / corporate (33%), direct-to-consumer own-website (31%) and online marketplaces such as Amazon (28%). Traditional travel retail and duty-free is a growth driver for just 9% of respondents. The write-in answers reinforce it bluntly: "reduce dependency on traditional retailers," "rely on your own distribution, not third-party resellers," "D2C marketplaces have outgrown all other sales channels."

Investment has followed. The two areas businesses have put the most into since 2019 are product development (66%) and e-commerce / digital sales (59%), with marketing third (46%). The category is spending on what it makes and how it sells online, not on physical retail

operations (12%).

TSA locks: rising adoption, gated by price

Security hardware is quietly gaining ground. Over the past five years, 56% of respondents increased the share of their assortment featuring TSA-recognized locks and only 5% decreased it. The barrier to going further is almost entirely commercial: 55% cite cost or price point, far ahead of differentiation concerns (20%) or a perceived lack of consumer demand (13%). Adoption isn't blocked by doubt about the value of locks: the blocker is margin pressure at the entry level.

Sustainability is now the baseline, not the differentiator

Sustainability has crossed a threshold. Six in ten respondents (61%) say it matters more in their product development than it did in 2019; only 11% say less. On materials, the exploration is broad and evenly balanced: lighter-weight composites, recycled content and sustainable materials each land at 47%, with more durable fabrics (30%) close behind. Lighter, tougher and greener no longer constitutes a premium positioning, it's the table stakes.

Gen Z moves up the target list

Leisure travellers and business travellers remain the core audiences, as you'd expect, with leisure travellers a fraction ahead of business travellers in the survey result. The notable mover is Gen Z / younger travellers at 45% now ahead of luxury (25%) and budget-conscious buyers (16%) as an actively targeted segment. The industry is designing for the next generation of travellers, not just the returning one.

Where the category is heading

Asked what will shape the next two to three years, respondents point to personalization and customization (47%), smart / connected features (44%), sustainability demands (40%) and the durable rise of "bleisure" which is blended business and leisure travel (34%). The demand outlook is cautiously optimistic: 60% expect travel demand to grow, 23% expect it to hold steady, and only 17% foresee decline.

The one-word lesson: agility

Asked for the single biggest change their business has made since the pandemic, respondents converged on one idea, phrased a dozen ways: agility. "Change is the only constant." "Don't put all the eggs in one basket." "Stay flexible." "No innovation, no future." "Quality over quantity." The businesses coming out of this period strongest describe themselves as diversified, digital-first, and unwilling to win on price alone.

Five years on, the industry looks different than it did in 2019. Sales go direct now, budgets have moved online, materials are lighter and greener and the traveller everyone's chasing is younger and more concerned about security. No huge surprises there. The companies who identified those signals early and acted on them fast are the ones pulling ahead now.

Based on a Travel Sentry industry survey across seven languages. Figures represent the share of

respondents selecting each option and are intended as a qualitative read of industry sentiment rather than a statistically representative sample.

About Travel Sentry

Travel Sentry is the global standard for travel security, best known for creating the TSA-accepted lock system used by millions of travellers worldwide. We work with luggage manufacturers, travel accessory brands and security agencies across the globe to promote safe, smart travel. Spanning 800 airports, 80 countries and 600+ luggage brands, Travel Sentry sits at the centre of that network, which is a position that gives us a rare, ecosystem-wide view of where the industry is really headed.

Molly Gibson

Travel Sentry

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