

SHOPVISION MARKET INTELLIGENCE

Travel & Luggage Black Friday Benchmark:

How 18 leading brands
ran Holiday 2025

Insights to take into Q4 2026 planning



How would you plan Holiday 2026 differently if you knew exactly what your peers did in 2025?

Across 13 weeks of Q4 2025, we tracked every promotional move 18 of the most-watched travel and luggage brands made — when they launched, how deep they went, which products they discounted, and the non-price mechanics they used to pull the shopper in.

What we saw

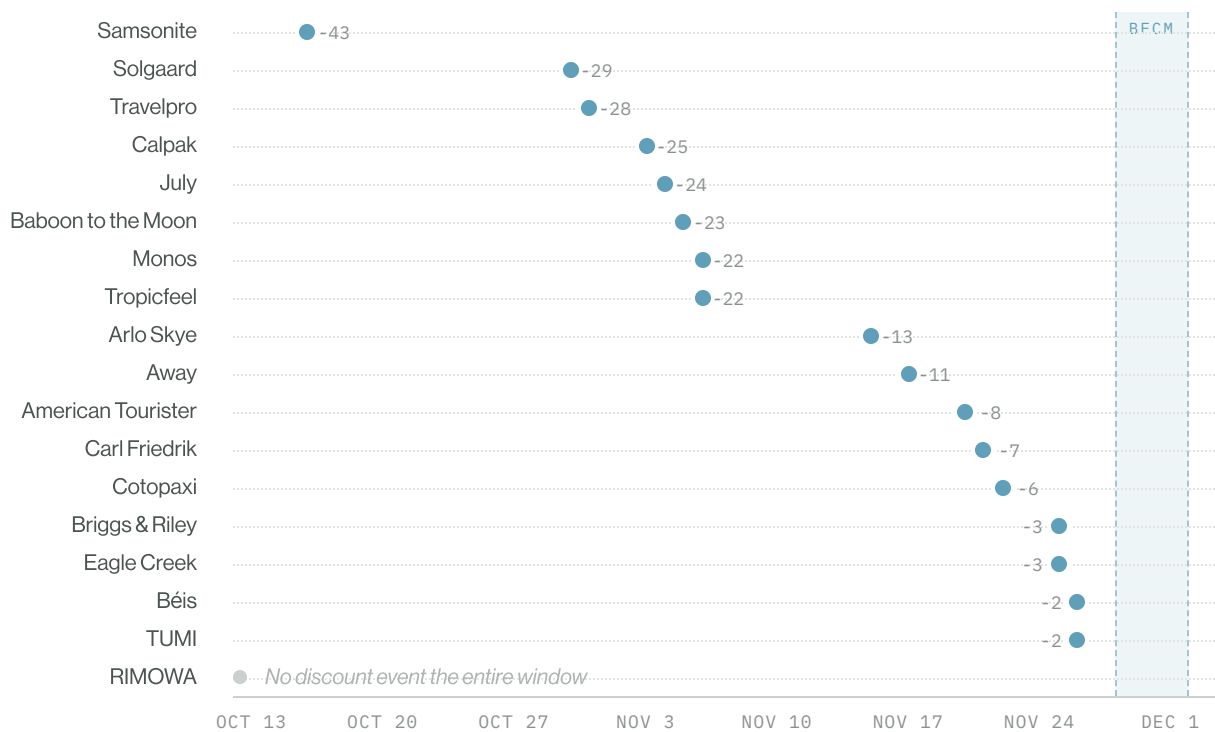
- **44% of brands were discounting before mid-November.** Samsonite opened a Cyber Week Preview on Oct 16; Solgaard, Travelpro, Calpak, and July were all live before Nov 5.
- **67% claimed a sitewide discount, but "sitewide" covered 3 different mechanics.** The same word covered deals with little in common, making it a weak read on the offer underneath.
- **Flat sitewide rates clustered at 20–30%.** The "up to 40–60%" headlines reached those depths only on select stock.
- **Bundle and set deals were travel's signature mechanic.** 39% ran one, and July built its entire Black Friday on tiered Bundle & Save.
- **28% stacked a discount on an already-marked price.** Samsonite and American Tourister, sister brands, ran an identical EXTRA10 / CYBER10 playbook.
- **RIMOWA ran no public discount at all.** Lifetime guarantee and worldwide-repair messaging carried its entire Q4, the clearest premium hold in the set.
- **50% of brands used flash sales.** These often ran below the headline rate — a real 50% off a bestseller, or a carry-on at a flat \$99.99.
- **The Black Friday inbox was packed: 156 sends across 18 brands.** Most were distinct creative — Béis, Monos, and Calpak led at 16 to 19 each — and re-sending the same email to non-openers was rare.
- **Only 33% of brands promoted after Christmas (Dec 26–31), and they used the week for opposite ends.** With two-thirds of the field done for the year, the open window split between inventory clearance at up to 40% off and new-year resets built to pull January demand forward.

18	13	3,000+	Q4 2025
TRAVEL & LUGGAGE BRANDS	WEEKS TRACKED	DATA POINTS ANALYZED	OBSERVATION WINDOW

When did travel & luggage brands kick off Black Friday?

Travel doesn't wait for Thanksgiving week. 44% of brands (8 of 18) had a holiday-framed discount live before mid-November, and 5 were running one before Nov 5 — a full 3 weeks ahead of Black Friday.

8 of 18 travel & luggage brands were discounting before mid-November 2025



First date each brand's holiday-framed discount went live. Labels show days before Black Friday (Nov 28). RIMOWA ran no public discount. Source: ShopVision.

Who moved first

The earliest movers were legacy and DTC alike, and they ran real discounts rather than save-the-date banners. A live price three weeks early competes for the shopper's wallet, while a teaser only competes for attention.

- **Samsonite (Oct 16).** A 30%-off Cyber Week Preview 6 weeks before Cyber Monday, the earliest holiday-framed discount in the set.
- **Solgaard (Oct 30).** A sale titled "Black Friday begins now," 29 days before the day itself.
- **Travelpro (Oct 31).** A "Pre-Pre Black Friday" up-to-20% offer that ramped to up to 50% through the window.

- **Calpak (Nov 3).** The first DTC challenger into a formal early-access window, up to 60% off select plus 20% off sitewide.
- **July (Nov 4).** The one early mover to open with a bundle rather than a markdown — its BF/CM Bundle & Save went live the same week, with no sitewide rate behind it the whole season.

What it tells us

The center of gravity for this market sits well before Black Friday week. When a third of the peer set is live in October and early November, the cost of holding isn't just a few quiet days — it's 3 weeks of demand flowing to brands your shopper already sees on sale. RIMOWA is the counter-case. It ran no public discount at any point in Q4, leaning entirely on its lifetime guarantee and worldwide repairs. That's a deliberate premium position — not an absence of activity — and it recurs across the rest of this report.

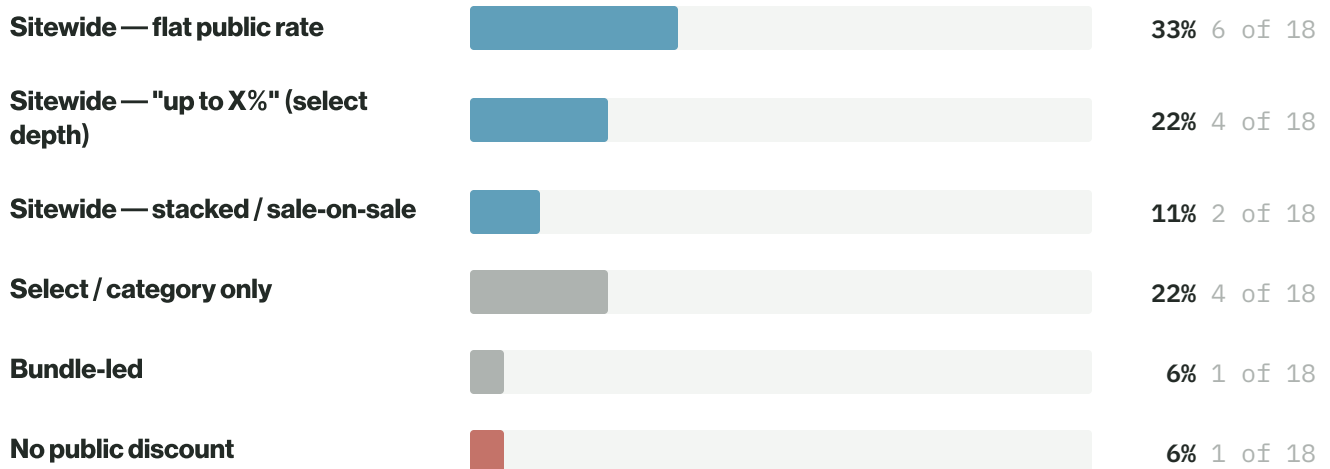
TAKE INTO 2026 PLANNING

- 1 **When do you flip the switch?** The pre-November window stayed wide open in 2025 — only 8 of 18 peers moved into it. The real question is whether owning that quiet air wins enough early demand to be worth it, or whether the season still concentrates tightly enough in Black Friday week to hold.
- 2 **Do you pre-promote the event, and for how long?** Several brands launched cold, so silence before launch is a posture, not a gap. And an early-season sale can do double duty — Solgaard and Samsonite relabeled late-October discounts as 'Black Friday begins now' and a 'Cyber Week Preview,' turning a fall sale into holiday anticipation with one line of copy.

How travel & luggage brands anchored their Black Friday discounts.

"Are we running sitewide this year?" is the Q4 question, and 12 of 18 answered yes. But the word covered 3 different shopper experiences, and 1 brand answered with no discount at all.

12 of 18 travel & luggage brands ran a sitewide Black Friday 2025 discount



Each brand's primary public-facing Black Friday mechanic. Source: ShopVision.

The six anchoring positions

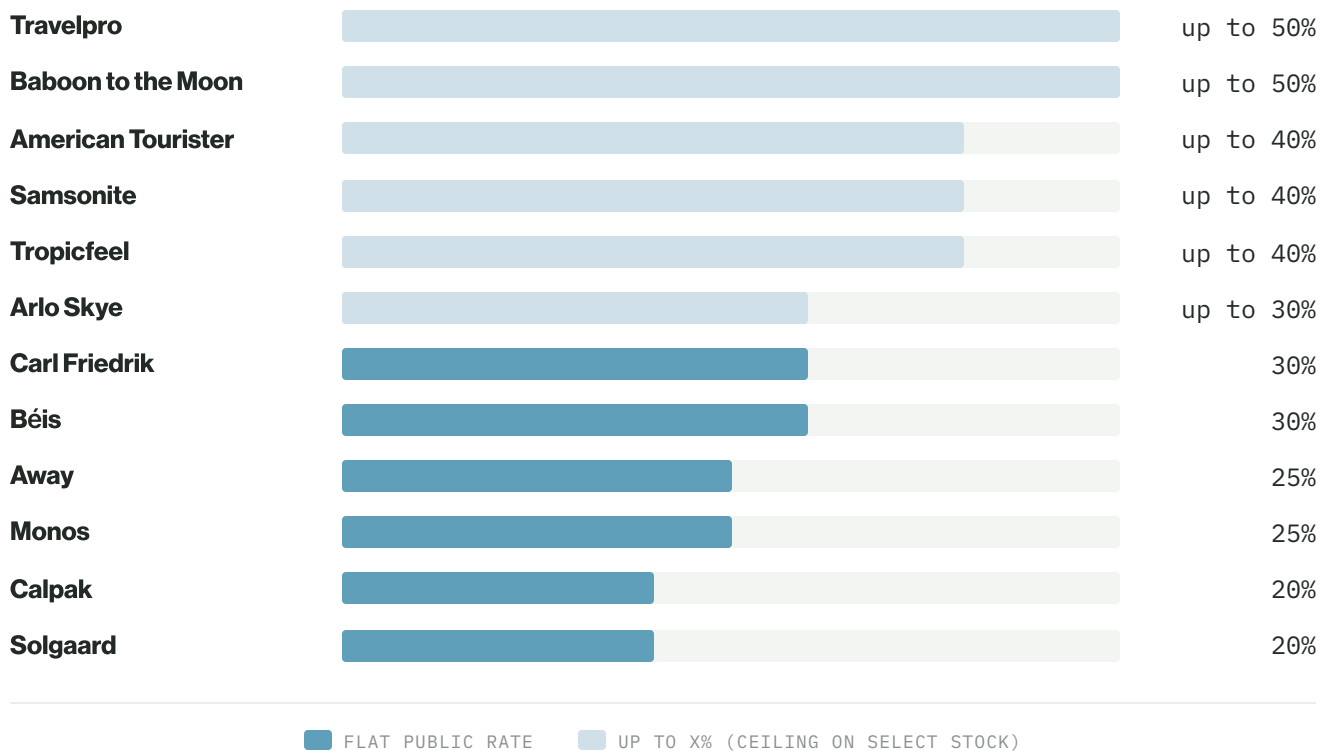
"Sitewide" looked like a single decision but split several ways. Of the 12 brands that ran it, only 6 offered a flat public rate — the rest delivered it as a high "up to" ceiling on select stock, or a base rate with an extra code stacked on already-marked prices. The label held across all 12; what sat behind it didn't.

Mechanic	Brands	What it looked like to a shopper
Sitewide, flat public rate	Away Béis Calpak Carl Friedrik Monos Solgaard	A flat rate across the offer scope, like "25% off everything."
Sitewide, "up to X%"	Arlo Skye Baboon to the Moon Travelpro Tropicfeel	A high ceiling advertised sitewide, with the deepest rate on select stock.
Sitewide, stacked / sale-on-sale	American Tourister Samsonite	A base rate plus an extra code stacked on already-marked prices.
Select / category only	Briggs & Riley Cotopaxi Eagle Creek TUMI	No sitewide event, a discount on select styles or a single category.
Bundle-led	July	No flat sitewide, the multi-item bundle carried the event.
No public discount	RIMOWA	No percentage off anywhere, warranty and repair as the message.

How deep did the sitewide cuts go?

Every flat rate landed in a tight 20–30% band. The "up to 50%" brands were quoting a ceiling on a slice of stock, not a floor across the catalog — so the real spread a shopper faced was roughly 10 points, not the 30 the banners implied.

Flat travel & luggage sitewide rates clustered at 20–30% for Black Friday 2025



Headline sitewide rate per brand. "Up to X%" brands advertise a ceiling that applies only to select stock. Source: ShopVision.

- **The flat-rate floor, 20–30%.** Solgaard and Calpak at 20%, Away and Monos at 25%, Carl Friedrik and Béis at 30%.
- **The "up to" ceilings.** Travelpro and Baboon advertised up to 50%, with American Tourister, Samsonite, and Tropicfeel at up to 40%, depth that landed on select stock.
- **Scope fine print mattered.** Béis ran 30% but excluded items already in sale; Baboon's "up to 50% sitewide" carved out 2 colorways. Sitewide rarely meant every SKU.

Sitewide didn't carry Black Friday alone.

Several brands went deeper than their sitewide offer with category and hero product discounts running alongside.

Brand	Category	Promo	Window
American Tourister	Carry-ons	Air Move collection, 50% off (vs 40% sitewide)	Nov 20
Calpak	Travel bags	Luka duffels, up to 60% off (vs 20% sitewide)	Nov 10–12, Nov 30
Calpak	Backpacks	Terra & Kaya, up to 60% off	Nov 10–12, Nov 30
Calpak	Luggage	All luggage, 25% off (vs 20% sitewide)	Nov 16
Monos	Carry-ons	Carry-On Plus / Pro Plus, 40% off (vs 25% sitewide)	Nov 28 – Dec 1
Monos	Accessories	Slim Wallet Pro, 40% off	Nov 30
Samsonite	Carry-ons	Carbon X line at \$99.99 (≈50% off, vs 40% sitewide)	Nov 2–3, Dec 10–15
Travelpro	Hardside	Platinum Elite, extra 12% stacked on the sitewide	Dec 2

Every brand's headline Black Friday offer

Brand	Anchor	Headline offer
Travelpro	Sitewide (up to)	Up to 50% off sitewide plus 20% off best sellers
Baboon to the Moon	Sitewide (up to)	Up to 50% off sitewide (excludes 2 colorways)
American Tourister	Sitewide (stacked)	Up to 40% off plus extra 10% (THANKS10); Cyber Monday up to 50%
Samsonite	Sitewide (stacked)	Up to 40% off plus extra 10% (CYBER10); sets from \$149.99
Tropicfeel	Sitewide (up to)	Up to 40% off the catalog (password pre-sale to public)
Arlo Skye	Sitewide	Up to 30% off everything (early access to Black Friday)
Carl Friedrik	Sitewide	30% off everything (code BLACKFRIDAY)
Béis	Sitewide	30% off sitewide (excludes sale) plus daily 50% flash drops
Away	Sitewide	25% off everything plus extra 10% off \$750+
Monos	Sitewide	25% off everything (EARLYBF) plus FLASHME 40% capped flash

Brand	Anchor	Headline offer
Calpak	Sitewide	20% off sitewide plus up to 60% off select plus extra 10% (EXTRA10)
Solgaard	Sitewide	20% off everything plus up to 40% off bundles
Briggs & Riley	Select	Up to 30% off select styles plus free sling bag on \$399+
Cotopaxi	Select	Up to 25% off select gear plus GWP; Funky Fuego 40% off
Eagle Creek	Select	Up to 25% off select (Pro orders excluded)
TUMI	Select (sale-on-sale)	Additional 15% off sale; Cyber Monday 40% off select, one day
July	Bundle	Bundle & Save, 15 / 20 / 25% off at \$400 / \$600 / \$1,000
RIMOWA	No discount	No public discount, lifetime guarantee and worldwide repairs only

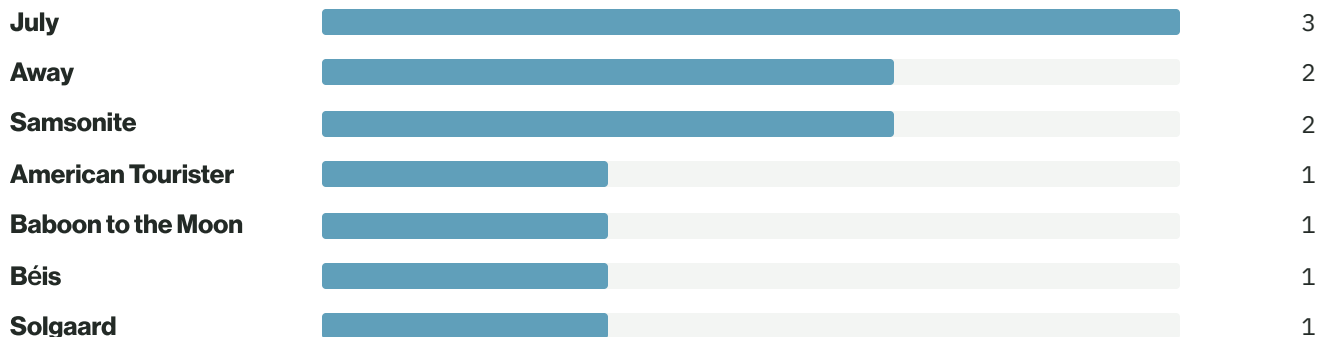
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- Bonus promotions carry the travel and luggage segment — but the timing is all over the calendar. If each brand replays these offers this season, where do you want to compete?

The bundle was travel's signature play.

39% of the peer set (7 of 18) ran a bundle or set deal in the holiday window. For July it was the entire event.

39% of travel & luggage brands ran a bundle or set deal in the Holiday 2025 window



Distinct bundle, set, or multi-item events per brand, Nov 1 – Dec 31 2025 (plus October events labeled early Black Friday); other October fall sales excluded. Source: ShopVision.

- **July.** Bundle & Save scaled 15 / 20 / 25% off to a \$400 / \$600 / \$1,000 basket.
- **Away.** Layered bundles on its sitewide — 20% off any order of 2+ that included luggage, then suitcase-plus-bag combos for late-season gifting.
- **Samsonite.** Fixed-price multi-piece sets, 3-piece from \$199.99, run as the early-access hook.
- **Baboon to the Moon.** A December bundle scaling 20 / 25 / 30% off to a 2 / 3 / 4+ item basket.
- **Solgaard.** Pushed curated bundles to 40%, well past its 20% sitewide.
- **American Tourister.** Stacked an extra 10% (EXTRA10) on its multi-piece sets after Cyber Monday.
- **Béis.** Holiday curated sets at up to 20% off.

Most people buy luggage once every few years, which makes Black Friday less a frequency play than a single shot at the basket — and that's what turns the bundle into a fork rather than a tactic. The brands that built on bundles weren't chasing more orders; they were spending that one shot on basket size, taking transaction value from a customer who won't be back for years. Solgaard ran the most deliberate version: a public anchor that holds the market's expectation, and a deeper, quieter reward for the high-intent buyer, enough to matter without resetting what everyone expects to pay next year.

TAKE INTO 2026 PLANNING

- 1 Is your bundle defending margin or just discounting more?** A set can lift what a single shopper spends in the one window they'll visit for years, or it can quietly hand away margin a flat cut would have protected. In a category bought this rarely, which is yours doing?
- 2 Does your offer structure fit how your catalog sells?** This field ran spend-scaled, item-count, and fixed-price sets, and each rewards a different basket. The question for your planning room is whether your structure follows your real average order value and range, or just mirrors last year's offer.

Stacked codes and sale-on-sale.

5 brands layered an extra discount on a price that was already marked down. It reads as a deeper deal without the brand ever publishing a deeper headline rate.

Brand	Stacked mechanic	What it looked like to a shopper
Samsonite	CYBER10 / EXTRA10	Up to 40% off sitewide, plus an extra 10% with code on the sale price.
American Tourister	THANKS10 / EXTRA10	Up to 40% off, plus an extra 10% code, the identical mechanic to its sister brand.
TUMI	Additional 15% off sale	An extra 15% layered on the already-marked Semi-Annual Sale, no sitewide event.
Travelpro	EXTRA10	Up to 20% off plus an extra 10% with code, stacked on existing prices.
Baboon to the Moon	Additional 15% off sale	A post-Christmas extra 15% on already-reduced sale items.

The signal under the stack

2 of these brands sit under one parent and ran the same stacked-code structure down to the naming convention. That isn't 2 independent reads on the same tactic — it's one promotional doctrine run across 2 storefronts, the kind of coordination you only catch watching the whole shelf at once. For anyone selling against either label, the read is that the group will likely move them together again next year, so the competitive unit here isn't the brand, it's the portfolio.

TAKE INTO 2026 PLANNING

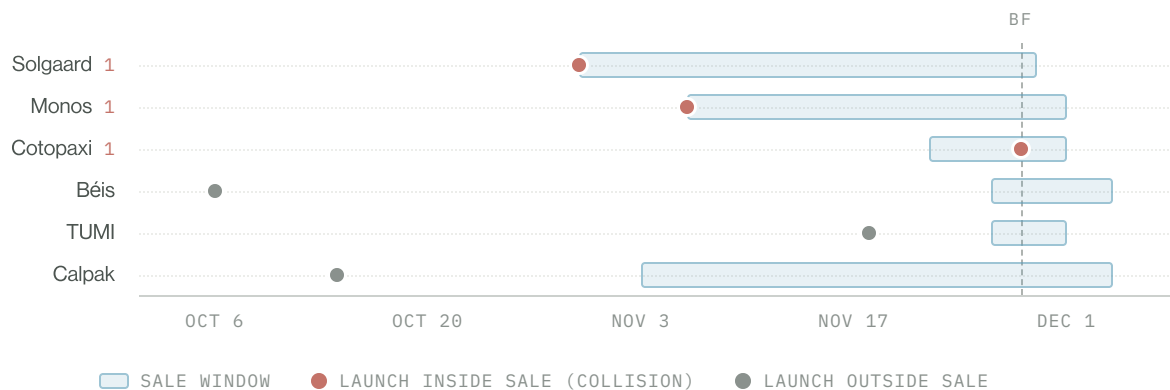
- **What does the code protect that a lower price wouldn't?** A stack lets the published rate stand while the customer still reaches a deeper number at checkout. The brands here that leaned on it had the most to lose from moving their reference price. Is yours guarding next year's full-price expectation, or teaching the customer that the real number only shows up with a code?

Holiday product drops vs the BFCM calendar.

New product was a deliberate lever in Holiday 2025, and brands split cleanly on whether they let new arrivals into the discount or walled them off from it.

Travel & luggage new-product drops split on entering the Black Friday 2025 discount

3 of 6 brands folded a new launch into the sale window; 3 launched ahead of it and held full price.



New collections and collabs vs. the BFCM sale event window. Source: ShopVision.

Folded new product into the discount

- **Monos.** Its new Gesso and Houndstooth collections were inside the 25% early-Black-Friday sitewide from day one.
- **Cotopaxi.** Launched the All-New Funky Fuego and discounted it 40% the same day, on Black Friday itself.
- **Solgaard.** Folded new arrivals and best sellers into its 20%-off-everything event.

Launched outside the discount, protected from it

- **Béis.** Launched the Air Collection in early October at full price — only curated sets later carried 15%, keeping the launch clear of the Black Friday markdown.
- **TUMI.** Its McLaren collaboration arrived as a gift-with-purchase, never a discount, new product as an acquisition hook.
- **Calpak.** Launched the Glazed Collection with a free-charm gift-with-purchase rather than a price cut.

What it tells us

Folding a drop into the sale is the safe call — it borrows the traffic of the loudest week and moves units while attention is everywhere. Walling it off is the confident one — it says the product can hold full price through the heaviest discounting of the year, and would rather be an acquisition moment than a markdown. Across this field the split was clean, and it tracked conviction more than company size, which is the part worth reading: protecting a launch is a forecast about 2026 demand, made in public.

TAKE INTO 2026 PLANNING

- 1 Which of your 2026 drops can survive the loudest week?** Some brands here let new product ride the Black Friday traffic; others bet it was strong enough to hold price through it. Both are public statements of confidence. Which of your launches earns the protected slot, and which one are you discounting because you're not sure it sells otherwise?
- 2 Is your launch calendar set against your discount calendar, or around it?** A drop inside the sale window trades full-price days for reach; a drop outside it asks the product to carry its own demand. The planning question is whether those 2 calendars are designed together, or whether your launches land wherever the product roadmap left them.

Flash sales concentrated after Cyber Monday.

9 brands ran a flash or quantity-capped event, short, urgent, and concentrated through Cyber week and the days after, when the main Black Friday headline had cooled and the calendar needed something new.

Brand	Window	Flash mechanic
Samsonite	Oct 30 – Nov 3	Carbon X carry-on or large at a fixed \$99.99, 72-hour window (extended twice).
Monos	Nov 28 – Dec 1	FLASHME codes, 40% off, capped at the first 500 customers per day.
Béis	Nov 26 – Dec 4	Daily 50%-off bestseller drops in 1,000-unit batches, plus a 40% app-only Appy Hour.
Cotopaxi	Nov 28	The All-New Funky Fuego at 40% off, "today only," doubling as a launch.
TUMI	Dec 1	Cyber Monday 40% off select styles, online only, 1 day.
July	Dec 1	Cyber Monday up to 25% off select items, stacked on the bundle, 1 day.
Away	Dec 4	A single bestselling style at 50% off each day, extremely limited quantities.
Travelpro	Dec 3	An additional 12% off Platinum Elite hardsides for 24 hours.
Calpak	Dec 7	25% off the Terra Collection, "ends tonight."

What it tells us

The flash calendar barely existed before Cyber Monday and then filled the days after, once the headline sale had cooled and the inbox had thinned — the field effectively agreed on when to go dark and left that window open. Only 2 brands went further and put a hard cap behind the clock, a limit on units or customers; everyone else relied on the countdown alone. So the post-Cyber stretch is the least contested part of the calendar, and the sharpest urgency lever available there is the one almost no one reached for.

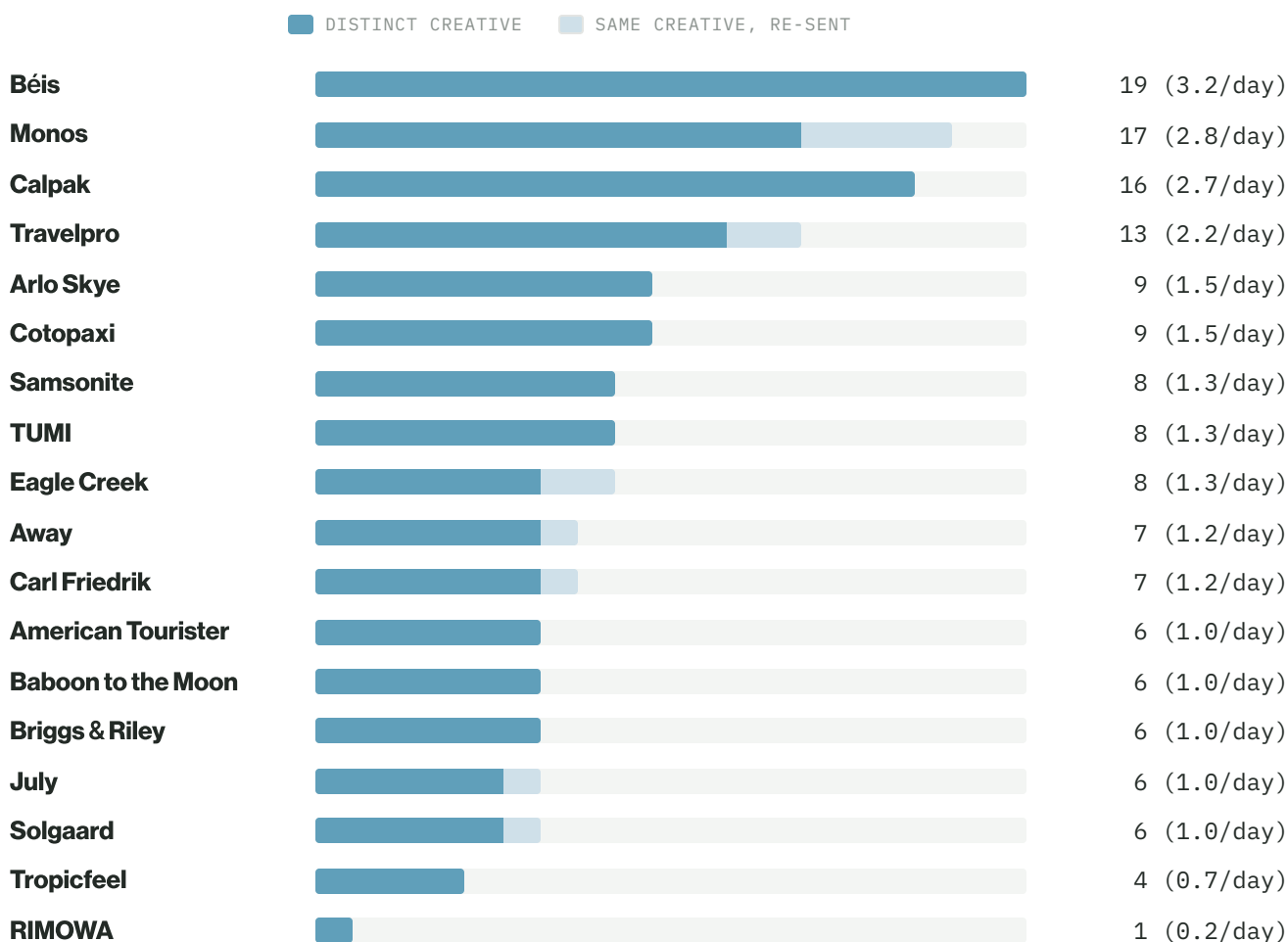
TAKE INTO 2026 PLANNING

- 1 Whose attention is still available after Cyber Monday?** This market concentrated its loudest moves into the same few days and then thinned out together, leaving the back half of the window quiet. If your December tends to go dark too, are you avoiding a tired shopper — or ceding the one stretch where the inbox isn't crowded?
- 2 Is your urgency real, or just a countdown?** A clock resets; a hard cap on units or customers doesn't, and only a couple of brands here used one. Does your flash give a reason to buy now that survives the next identical email, or is the timer the only thing between this sale and the next?

The Black Friday inbox: many brands ran multiple creatives.

Between Thanksgiving and Cyber "Tuesday," travel & luggage brands packed inboxes with 156 emails across 18 brands.

Travel & luggage email volume, BFCM 2025



Unique emails per brand over the Black Friday–Cyber Monday core. Source: ShopVision.

Of the brands, Monos, Travelpro and Eagle Creek were the heaviest re-senders to non-openers. Monos re-sent 4 messages, pushing its daily flash deal as "reminder," "last chance," and "final call"; Travelpro and Eagle Creek followed at 2 each, typically a last-day reminder.

Where the sending heat landed

The inbox stayed dense for the whole window and peaked on the days themselves — 34 sends on Black Friday, 29 on Cyber Monday — with the leaders stacking 5 and 6 in a single day, and Béis and Calpak each producing 16 to 19 distinct emails in under a week.

Travel & luggage email sends by day, BFCM 2025

	27	BF 28	29	30	CM 1	2	TOT
Béis	2	2	4	3	4	4	19
Monos		6	4	4	2	1	17
Calpak	2	5	2	1	3	3	16
Travelpro	1	3	2	3	1	3	13
Arlo Skye	1	2	2	1	2	1	9
Cotopaxi	1	2	2	1	2	1	9
Samsonite	1	1	2	1	1	2	8
TUMI	1	1	1	1	2	2	8
Eagle Creek	1	1	1	1	2	2	8
Away		2	2		2	1	7
Carl Friedrik	2	1	1	2	1		7
American Tourister	1	1	1	1	1	1	6
Baboon to the Moon	1	1			1	3	6
Briggs & Riley	1	2		1	1	1	6
July		1	1	2	2		6
Solgaard	1	1	2	1	1		6
Tropicfeel	1	1		1	1		4
RIMOWA		1					1
INBOX TOTAL	17	34	27	24	29	25	156

1 2 3 4 5 EMAILS / DAY

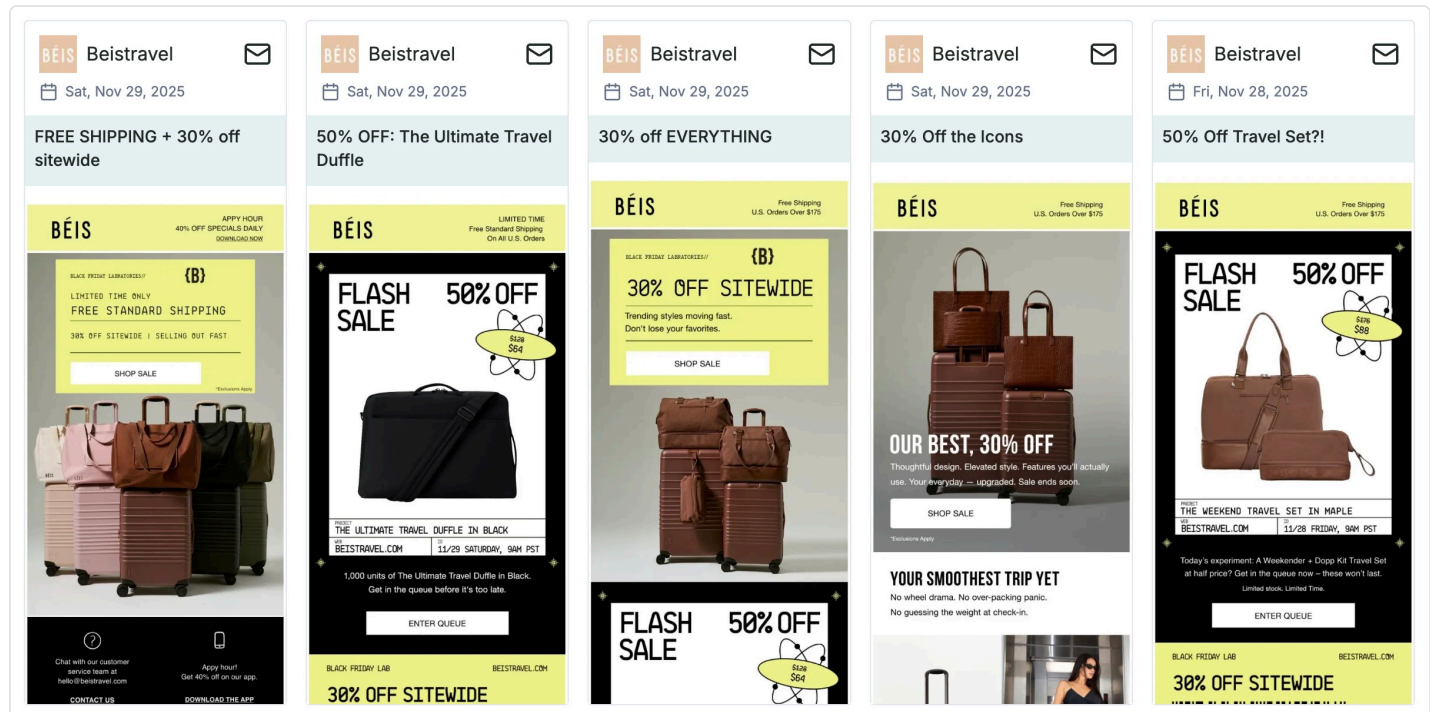
Emails sent per brand per day over the Black Friday–Cyber Monday core. Source: ShopVision.

Three brands drove the heaviest volume — Béis at 19 sends, Monos at 17, and Calpak at 16 — and most of it was distinct creative.

- **Béis.** Each send was its own event: a running "Black Friday Lab" theme with a different hero product and a different offer in nearly every email, stacking three and four in a single day.
- **Calpak.** A steady rotation of featured products and gift-with-purchase hooks across all 16 of its sends.
- **Monos.** The most aggressive flash-deal cadence of the three — daily code-driven drops.

RIMOWA stands out as the quietest brand in the pack, sending one email on Black Friday only — "Iconic companions, holiday ready" — featuring full-priced product.

Béis sends unique email creatives multiple times per day during BFCM weekend. Source: ShopVision Email Explorer.



TAKE INTO 2026 PLANNING

- 1 If your discount looks like everyone else's, what is doing the differentiating?** The offers in this field were nearly interchangeable, so the inbox carried the brand. When a shopper sees your Black Friday email beside three competitors at the same percentage off, what makes yours unmistakably yours — the voice, the point of view, the reason to care beyond the number?
- 2 Is your peak-week ceiling set by your offer, or by your creative pipeline?** The brands that owned this inbox produced original creative nearly every day for a week — an operations capability, not a media buy. Before you set a 2026 send calendar, ask whether your team is built to fill it with new work.

After Christmas, the field split.

The week between Dec 26 and Dec 31 isn't a tail — it's the runway into a new-year activation moment. 6 brands moved on it deliberately, and they split between clearing inventory and resetting toward January.

Posture	Brands	Signature move
Clearance	Away	"Goodbye 2025" sale, up to 40% off luggage and bags.
Clearance	Monos	Boxing Week 15% off, excluding the Aluminum line and a collab.
Clearance	Briggs & Riley	End-of-year, up to 30% off select styles.
Clearance	Cotopaxi	Post-holiday tiered spend, \$10 / \$25 / \$40 off at \$100 / \$200 / \$300.
Reset	Solgaard	A "New Year" 20%-off sitewide code (NEWYEAR20), a clean reset.
Reset	Baboon to the Moon	An additional 15% off sale items, a sale-on-sale close to the year.

What it tells us

The striking thing about the week after Christmas is how empty it was. Most of this field simply stopped, which left the brands that kept moving to collect whatever demand was still in the market without competing for it. The ones who showed up split into 2 intents — clear what the season over-bought, or set the brand's first impression for January before anyone else does. The opening here isn't the mechanic, it's the quiet around it.

TAKE INTO 2026 PLANNING

- 1 Is the empty week a gap in your plan, or a gift?** Most of this market treated the days after Christmas as the end of the season and went dark, which left the few who moved with the field to themselves. If you go quiet then too, is that a considered read on a tired shopper — or the calendar running out before your planning did?
- 2 What is the first thing a shopper should see from you in January?** The brands that used the week split between clearing inventory and setting a clean new-year tone, and those are very different opening statements for 2026. Have you decided which one your Dec 26 self is making, or will it be decided by whatever stock is left on the shelf?

Want to drill deeper into this data?

ShopVision holds the deepest competitive intelligence dataset in digital commerce. The report you just read is one slice of one peer set across one quarter, every promotional event verified at the source from the brand's own public copy.

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How this report was built.

Peer set. 18 travel and luggage brands, a deliberate spread across legacy hardside leaders (TUMI, Samsonite, RIMOWA, Briggs & Riley, Travelpro, American Tourister), digitally-native challengers (Away, Monos, Béis, July, Calpak, Arlo Skye, Solgaard, Carl Friedrik, Baboon to the Moon), and adjacent travel-gear players (Cotopaxi, Eagle Creek, Tropicfeel).

Window. October 1 – December 31, 2025 (92 days, 13 weeks). BFCM event window: Nov 19 – Dec 2. Black Friday fell on Nov 28, Cyber Monday on Dec 1.

Classification. Every promotional event was tagged against a travel-and-luggage mechanic taxonomy built for this analysis: sitewide, category or collection, bundle or set, spend threshold, select-products-only, dollar-off, flash, gift-with-purchase, and member or loyalty. Each event was also tagged for scope (everything, excludes new drops, excludes existing sale, or sale-on-sale), holiday positioning (early Black Friday, Black Friday, Cyber, or a regular fall event), and whether new product was included in or held out of the discount. Classification was read from each brand's own public offer copy.

American Tourister	shop.americantraveler.com	Arlo Skye	arloskye.com
Away	awaytravel.com	Baboon to the Moon	baboontothemoon.com
Béis	beistravel.com	Briggs & Riley	briggs-riley.com
Calpak	calpaktravel.com	Carl Friedrik	carlfriedrik.com
Cotopaxi	cotopaxi.com	Eagle Creek	eaglecreek.com
July	july.com	Monos	monos.com
RIMOWA	rimowa.com	Samsonite	shop.samsonite.com
Solgaard	solgaard.co	Travelpro	travelpro.com
Tropicfeel	tropicfeel.com	TUMI	tumi.com