

GLOBAL SHOPPING BAG MARKET

Global Market Trend Analysis and Forecast To 2033

Date:- 26th December 2024



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1. MARKET SYNOPSIS



1.1. DEFINITION OF SHOPPING BAG

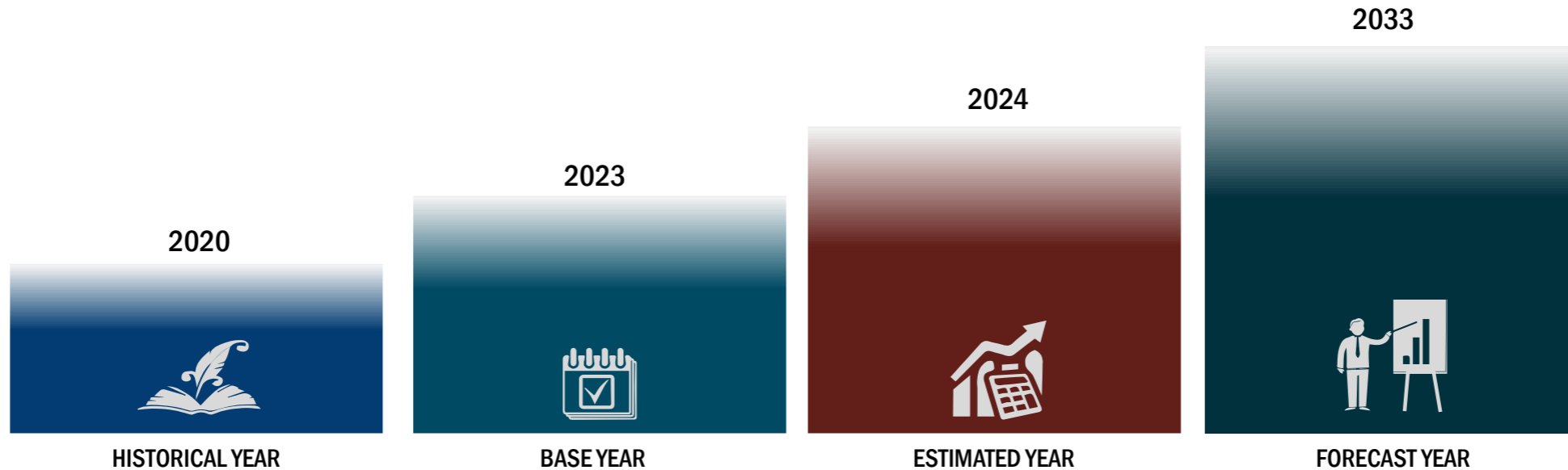
A shopping bag is a versatile and practical container designed for carrying items purchased from retail stores. Typically crafted from materials such as paper, plastic, or fabric, shopping bags vary in size, shape, and design to suit diverse consumer needs. They often feature handles or straps for ease of transport and can be either reusable or single-use, depending on their material. Shopping bags play a significant role in promoting sustainability by reducing reliance on disposable packaging. Additionally, they serve as a branding tool for retailers, offering opportunities for marketing through custom designs and logos while enhancing the overall shopping experience.

1.2. RESEARCH SCOPE & PREMISE

The report provides market value for base year 2023 and a yearly forecast from 2024 to 2033 in terms of Revenue (USD Billion). Market for each segment is present for North America, Europe, Asia Pacific, Latin America, Middle East & Africa region for the above-mentioned forecast period.

Key industry dynamics, regulatory scenario, and future markets of Shopping Bag market are analyzed to understand their impact on demand for the forecast period. Growth rates have been estimated using correlation, regression and time-series analysis.

FIGURE 1. YEARS CONSIDERED IN THE STUDY



1.3. RESEARCH METHODOLOGY

A research methodology is a systematic approach for assessing or conducting a market study. Researchers tend to draw on a variety of both qualitative and quantitative study methods, inclusive of investigations, survey, secondary data and market observation.

Such plans can focus on classifying the products offered by leading market players or simply use statistical models to interpret observations or test hypotheses. While some methods aim for a detailed description of the factors behind an observation, others present the context of the current market scenario.

1.3.1. SECONDARY RESEARCH MODEL

Extensive data is obtained and cumulated on a substantial basis during the inception phase of the research process. The data accumulated is consistently filtered through validation from the in-house database, paid sources as well reputable industry magazines.

A robust research study requires an understanding of the overall value chain. Annual reports and financials of industry players are referred thoroughly to have a comprehensive idea of the market taxonomy.

1.3.2. PRIMARY RESEARCH MODEL

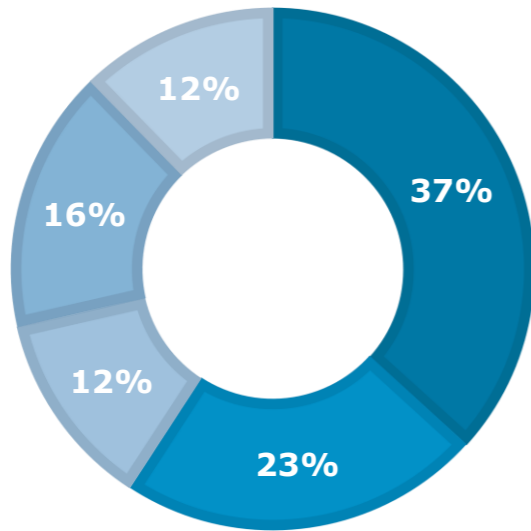
Post conglomeration of the data obtained through secondary research; a validation process is initiated to verify the numbers or figures. This process is usually performed by having a detailed discussion with the industry experts. Discussions with the subject matter experts were conducted to obtain quantitative and qualitative information and validate our market research findings.

However, we do not restrict our primary interviews only to the industry leaders. Our team covers the entire value chain while verifying the data. A significant number of suppliers, and stakeholders are interviewed to make our findings authentic. The current trends, which include the drivers, restraints, and opportunities, are also derived through the primary research process.

FIGURE 2. PRIMARY INTERVIEW BREAKDOWN: SHOPPING BAG MARKET

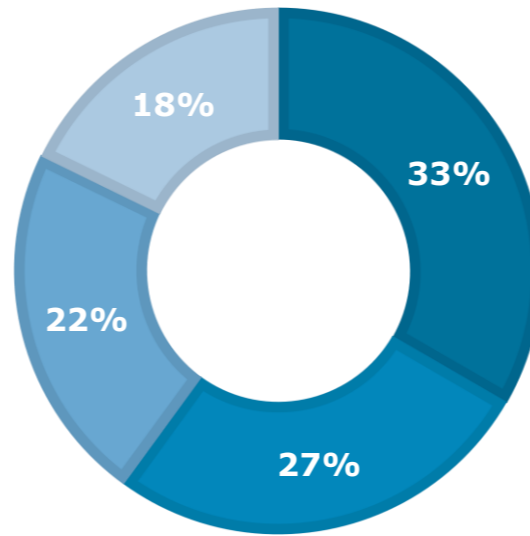
PRIMARY INTERVIEW BREAKDOWN: SHOPPING BAG MARKET

**Regional Respondents:
Shopping Bag Market**



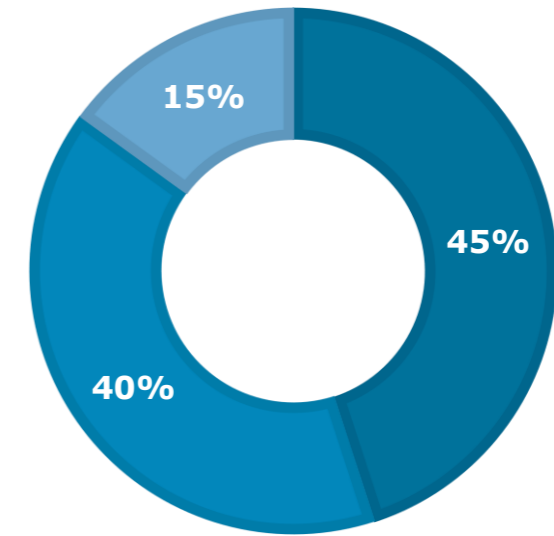
- Asia Pacific
- North America
- Europe
- Latin America
- Middle East & Africa

Respondents Category:



- Manager
- C Level Executive
- Director & VP
- Others

Stakeholders Domain



- COO/EVP/VP/Executives
- Manufacturer
- Industry Experts

1.4. MARKET ESTIMATION

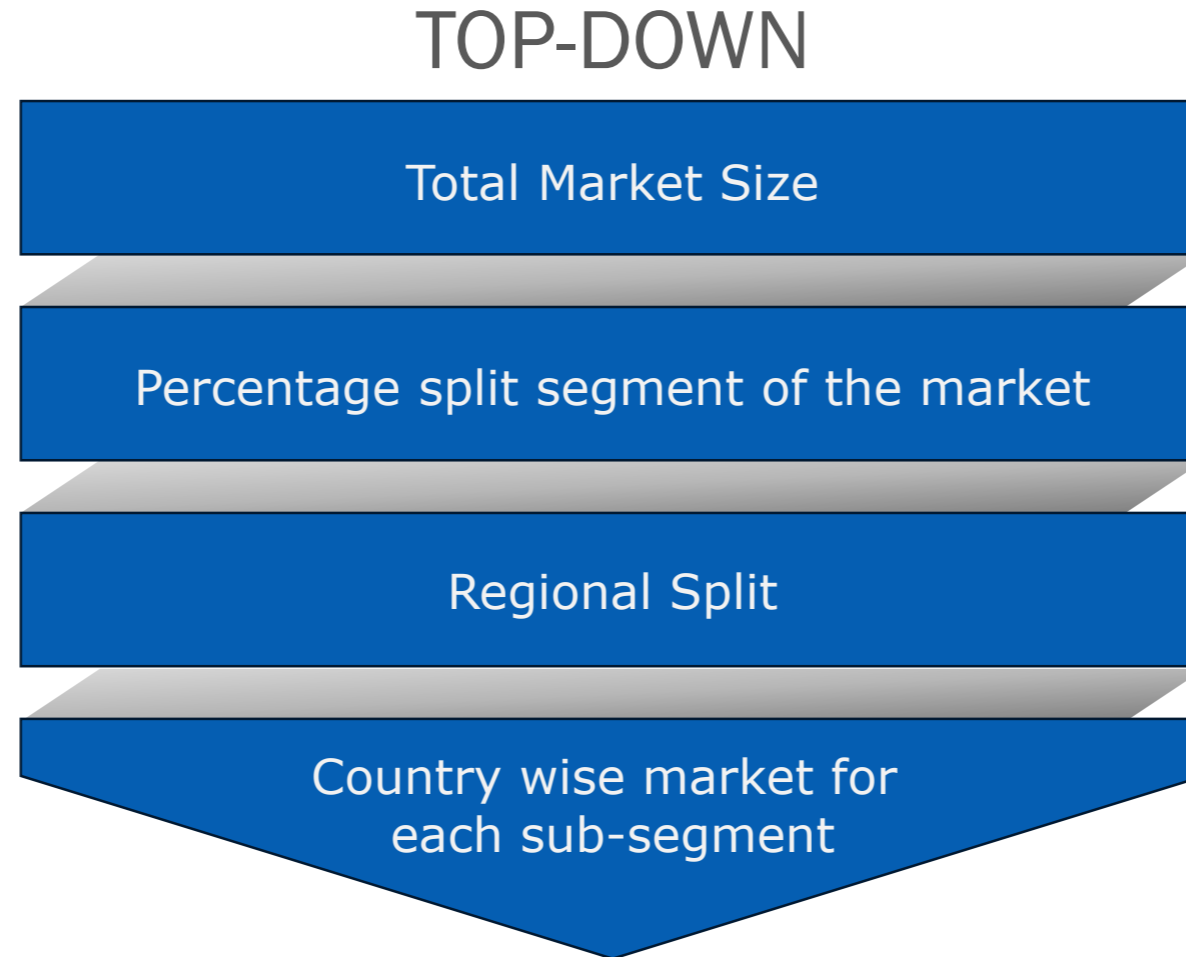
The market estimation is conducted by analyzing the data collected through both secondary and primary research. This process involves market breakdown, bottom-up and top-down approach.

Moreover, while forecasting the market a comprehensive statistical time series model is designed for each market. Macroeconomic indicators have been taken into consideration to understand the current trends of the market. The process of data triangulation method to arrive at the final market estimates verifies each data point.

Top-down, as well as the bottom-up approach, were used for the estimation and validation of the global market. These methods were applied extensively for the estimation of the market size of the sub-segments as well. Key stages for the market estimation included:

- Identification of the key players in the industry through extensive secondary research.
- Determination of the industry's supply chain and market size (in terms of value) through primary and secondary research processes.
- Determination of percentage shares, splits, and breakdowns of each sub segments using secondary sources and its validation through primary sources.

FIGURE 3. TOP DOWN APPROACH



1.4.1.MARKET SHARE BASED APPROACH

The global as well as key regional market players involved in the market were identified through extensive research. The market share of major players for the total product was estimated in a manner that approximately 80% of the products market was covered. The market revenue was then extrapolated to reach the global market value for the market.

Brand-wise regional market for each player was estimated based on the products offered by the companies present in each region/country. Along with products, the analyst also covered the regional as well as end-use market trends to determine the forecasts.

Thus, the regional/country-wise market was estimated for each product segment for each End-Use.

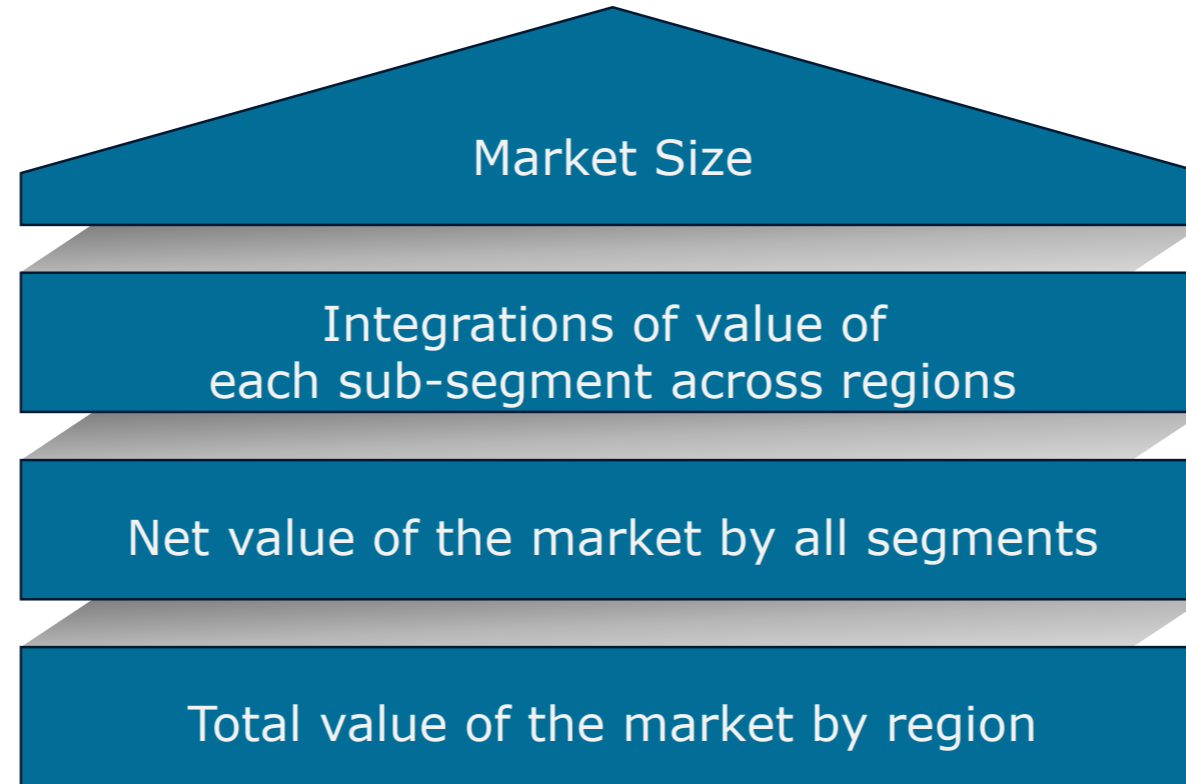
1.4.2.END-USE BASED APPROACH

Average selling price (ASP) of each product was determined. A comprehensive analysis was carried out to obtain average selling prices of all materials of products offered by market players operating in an individual region/country. The obtained data were used to calculate the average selling price for each product materials. Furthermore, Volume consumption for each product material was determined in each region/country.

Market revenue was estimated using average selling price and the volume consumption of products for each End-Use segment in every region/country.

The market values from both the approaches were triangulated to calculate the global market value.

FIGURE 4. BOTTOM-UP APPROACH

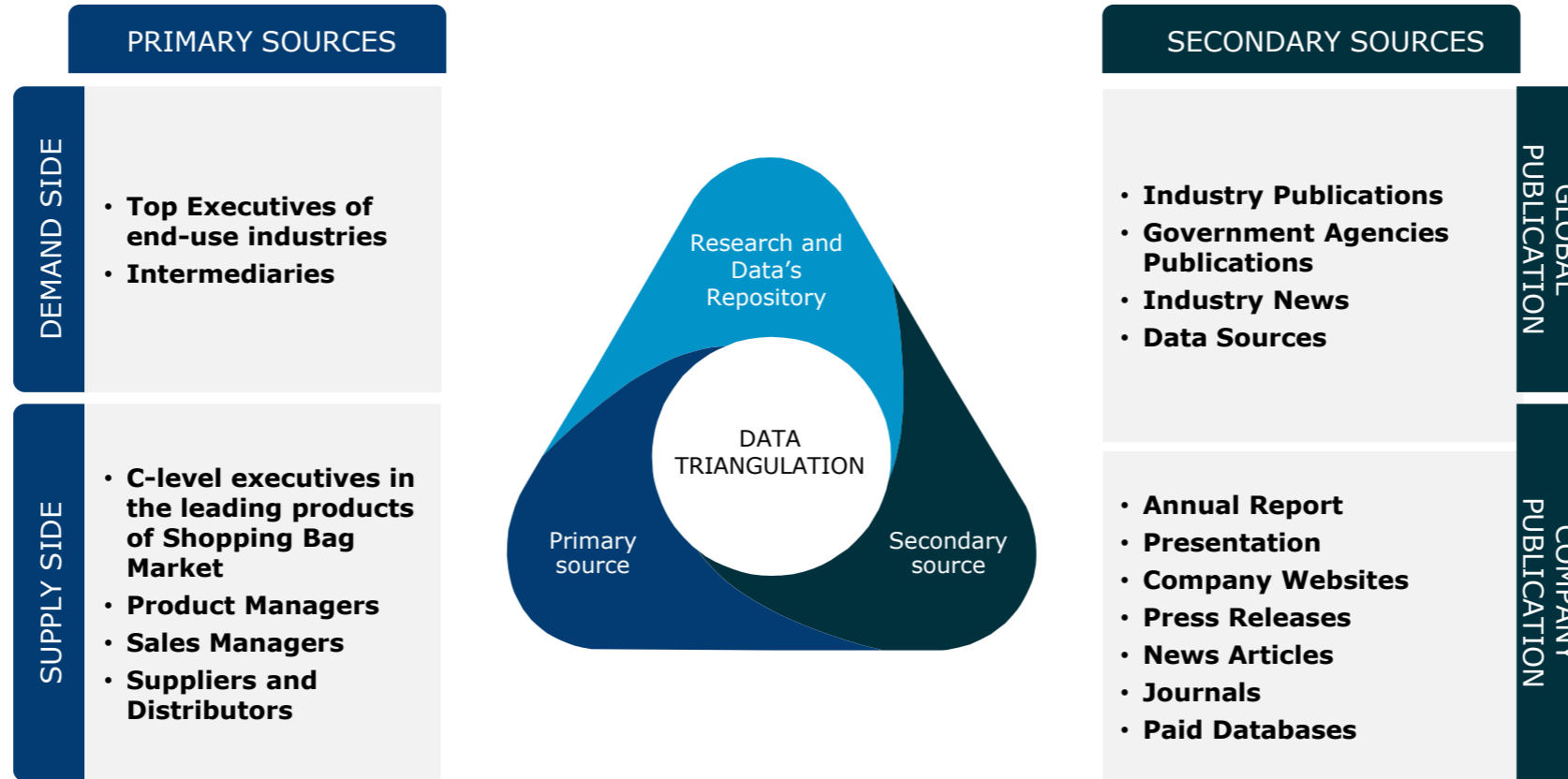


BOTTOM-UP

1.5. DATA TRIANGULATION

The process of data triangulation method was applied to arrive at the final market estimates verify each data points. Upon estimation of the global market size using the market size estimation approaches as explained above; the market was split into several segments and sub-segments. To complete the overall market estimation process and reach accurate statistics of the individual market segment and sub-segment, the data triangulation and market breakdown processes were applied, wherever applicable. The data was triangulated by studying various factors and trends from both the production side and consumption sides in the industry. Moreover, while forecasting the market a comprehensive statistical time series model was designed for the market. Macroeconomic indicators were taken into consideration to understand the current trends of the market.

FIGURE 5. DATA TRIANGULATION



Source: Journals & Articles, Press releases, Company websites, Investor presentations & Whitepapers, Annual Reports, Primary Interviews, and Reports and Data



2. SHOPPING BAG MARKET OVERVIEW



2.1. EXECUTIVE SUMMARY

The Global Shopping Bag market is expected to grow at a CAGR of 3.11% in terms of value to reach USD 22.898 Billion in 2033 from USD 16.890 Billion in 2023.

The global shopping bag market has witnessed significant growth in recent years, driven by factors such as increasing consumer awareness about environmental sustainability, stringent government regulations on plastic usage, and growing demand for reusable and eco-friendly alternatives. Shopping bags, which are commonly used for packaging goods purchased from retail outlets, are available in various materials including plastic, paper, fabric, and jute. A shift towards sustainable solutions, spurred by environmental concerns, is shaping the trajectory of the shopping bag market, which is expected to grow steadily over the coming years.

One of the primary drivers of the shopping bag market is the rising awareness of the environmental hazards posed by single-use plastics. Governments across the globe have enacted stringent regulations to limit the use of plastic bags, which has significantly contributed to the growth of the market for reusable shopping bags. For instance, the European Union has set ambitious targets to reduce plastic bag usage by 50% by 2025, encouraging the use of biodegradable or reusable alternatives. Similarly, countries like India have implemented nationwide bans on certain types of plastic bags, promoting the adoption of eco-friendly alternatives. According to a report from the United Nations, over 170 countries have introduced measures to reduce plastic waste, which has boosted the demand for alternative materials like paper, cloth, and biodegradable plastics in the shopping bag industry.

The increasing demand for sustainable products among environmentally conscious consumers is another key factor propelling the growth of the shopping bag market. Consumers are becoming more aware of the detrimental effects of plastic waste on ecosystems, leading to a shift towards reusable bags made from materials such as cotton, jute, and canvas. These reusable shopping bags are not

only durable but also provide a means for consumers to reduce their carbon footprint. The growing demand for such eco-friendly options has prompted retailers to offer a wider variety of sustainable shopping bags, further contributing to market expansion. According to the U.S. Environmental Protection Agency (EPA), recycling rates for paper and fabric shopping bags have been on the rise, underscoring the increasing preference for environmentally friendly alternatives in the retail sector.

Moreover, the increasing adoption of sustainable practices by major retail chains has fueled the demand for eco-friendly shopping bags. Leading retailers such as Walmart, Target, and Tesco have introduced initiatives to phase out single-use plastic bags and encourage customers to use reusable alternatives. This shift in retail practices has not only enhanced consumer acceptance of eco-friendly shopping bags but also paved the way for the introduction of innovative materials in bag production. For instance, the use of biodegradable materials, such as cornstarch and polylactic acid (PLA), has gained traction, offering a viable solution to reduce plastic waste in landfills.

In addition to environmental concerns, government incentives and policies promoting the use of sustainable materials have further accelerated the demand for reusable shopping bags. Many countries have implemented tax incentives or subsidies for businesses that adopt eco-friendly packaging solutions. For example, in the United Kingdom, businesses that use reusable shopping bags made from sustainable materials can benefit from reduced tax rates. This has encouraged more businesses to transition towards sustainable alternatives, thereby contributing to the expansion of the shopping bag market.

However, despite the promising growth outlook, the shopping bag market faces several challenges. One of the key challenges is the higher cost associated with the production of eco-friendly shopping bags compared to conventional plastic bags. Reusable bags made from materials like cotton or jute require more resources to manufacture, making them more expensive for both manufacturers and consumers. This cost disparity can hinder the widespread adoption of eco-friendly bags, particularly in price-sensitive markets.

Additionally, the production of biodegradable bags involves higher manufacturing costs, which may limit their affordability and accessibility.

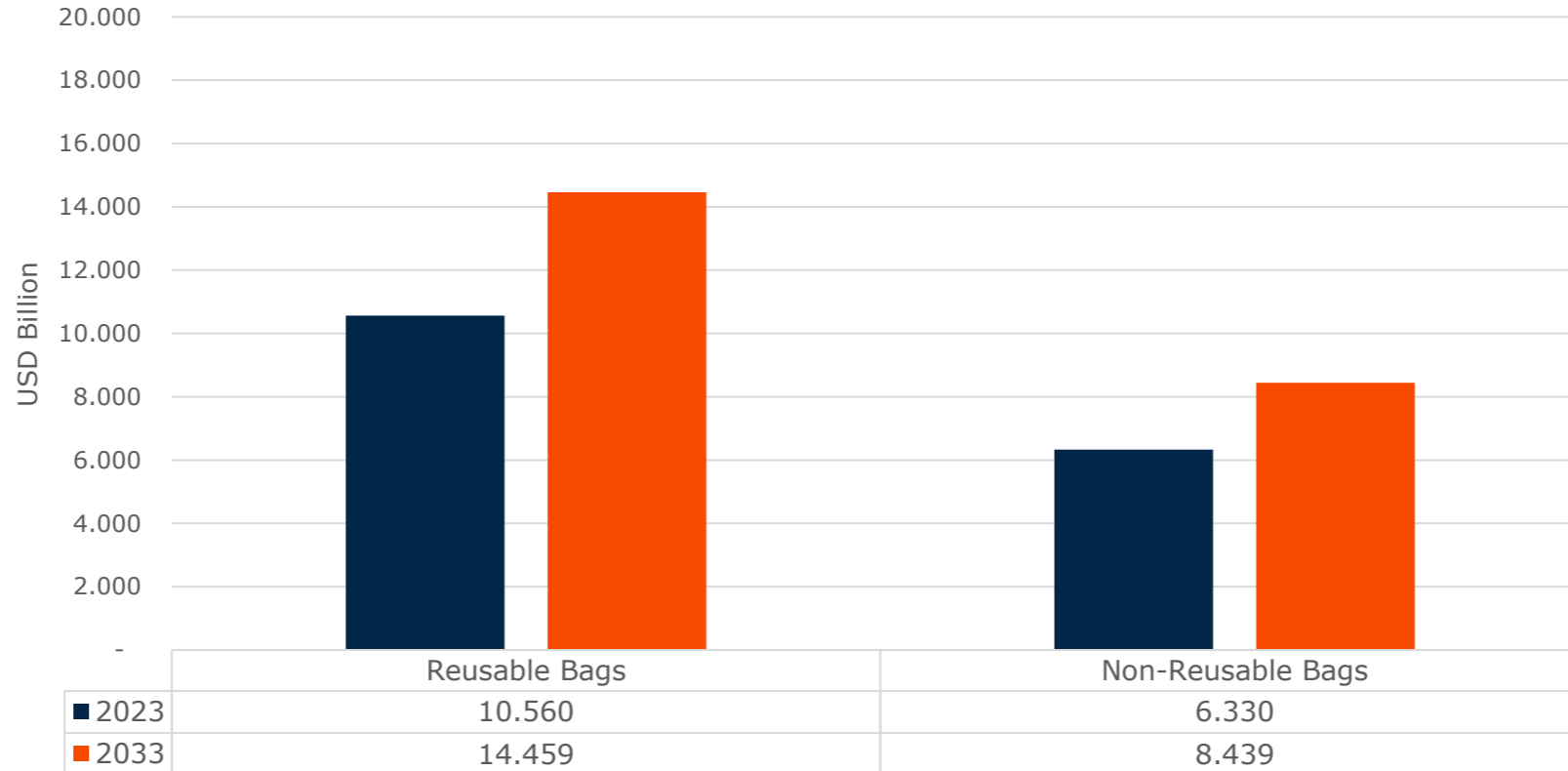
Another challenge confronting the shopping bag market is the limited infrastructure for recycling and disposal of biodegradable bags. While biodegradable materials offer an alternative to plastic, the effectiveness of these materials depends on proper disposal methods and recycling infrastructure. In many regions, the lack of adequate facilities for processing biodegradable materials can lead to improper disposal, thereby negating the environmental benefits of these bags. According to data from the European Environment Agency (EEA), only a small percentage of biodegradable plastics are properly composted or recycled, highlighting the need for improved waste management systems to support the growth of the eco-friendly shopping bag market.

Furthermore, the COVID-19 pandemic has posed temporary setbacks for the shopping bag market. During the pandemic, concerns over hygiene and safety led to an increased demand for single-use plastic bags in some regions, reversing the trend towards reusable alternatives. Retailers in certain areas reintroduced plastic bags to mitigate the risk of contamination, causing a short-term dip in the demand for eco-friendly shopping bags. However, as the world recovers from the pandemic, the shopping bag market is expected to regain momentum, with sustainability initiatives resuming and the focus shifting back to reducing plastic waste.

In terms of market trends, customization and branding have emerged as key drivers in the shopping bag market. Many businesses are using shopping bags as a branding tool, offering customized designs that feature their logos or promotional messages. This trend is particularly prevalent in the fashion and retail sectors, where personalized shopping bags serve as a marketing tool to enhance brand visibility and customer engagement. Additionally, the increasing demand for aesthetic and durable shopping bags has led to innovations

in bag design, with manufacturers incorporating features such as reinforced handles and waterproof linings to enhance the functionality of reusable bags.

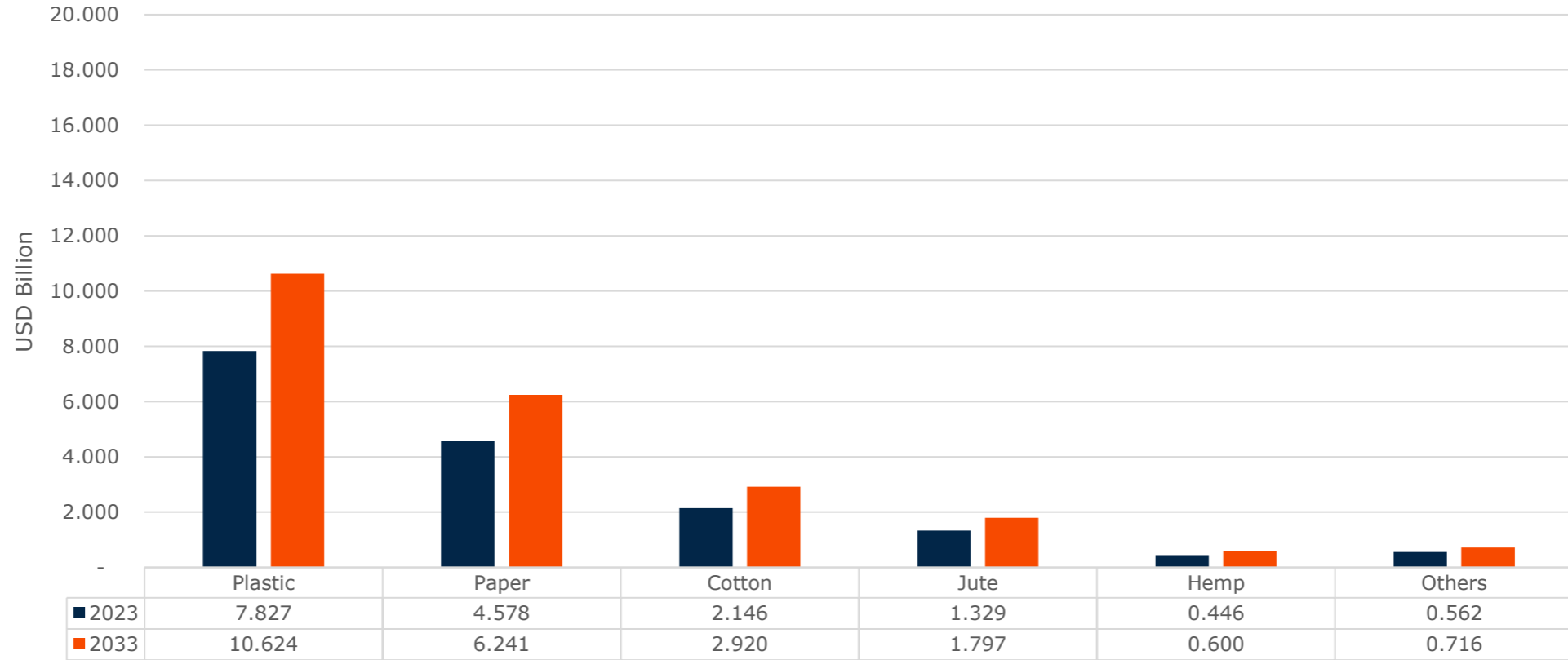
FIGURE 6. SHOPPING BAG MARKET: TYPE (IN USD BILLION)



Source: Environmental Protection Agency (EPA), Packaging Europe, Plastics Industry Association, International Council of Forest and Paper Associations, OECD Data, World Bank, United Nations Conference on Trade and Development, Journals & Articles, Press Releases, Company Websites, Investor Presentations and Whitepapers, Annual Reports, Primary Interviews, & Reports and Data

Based on type, reusable bags segment is expected to have a major share in the Global Shopping Bag Market with a CAGR of 3.22% in terms of value during the forecast period. The shift towards environmentally sustainable products, coupled with government regulations limiting the use of single-use plastics, is driving the demand for reusable shopping bags. Consumers are increasingly adopting these bags due to their durability, reusability, and cost-effectiveness in the long run. Furthermore, the growing awareness of plastic waste and its negative impact on the environment has encouraged both manufacturers and retailers to promote reusable bags. In several regions, policies banning or levying charges on plastic bags have further propelled the adoption of reusable bags. Retailers, including grocery stores and supermarkets, are offering incentives to consumers for using reusable shopping bags, boosting their popularity. The rise in eco-conscious consumers and the trend toward sustainable living are key factors contributing to the growth of this segment. Moreover, advancements in material technology have made reusable bags more durable, lightweight, and aesthetically appealing, catering to a broad consumer base. As concerns over plastic waste continue to grow, the reusable bags segment is expected to maintain its strong position in the market, reflecting the global push toward sustainability.

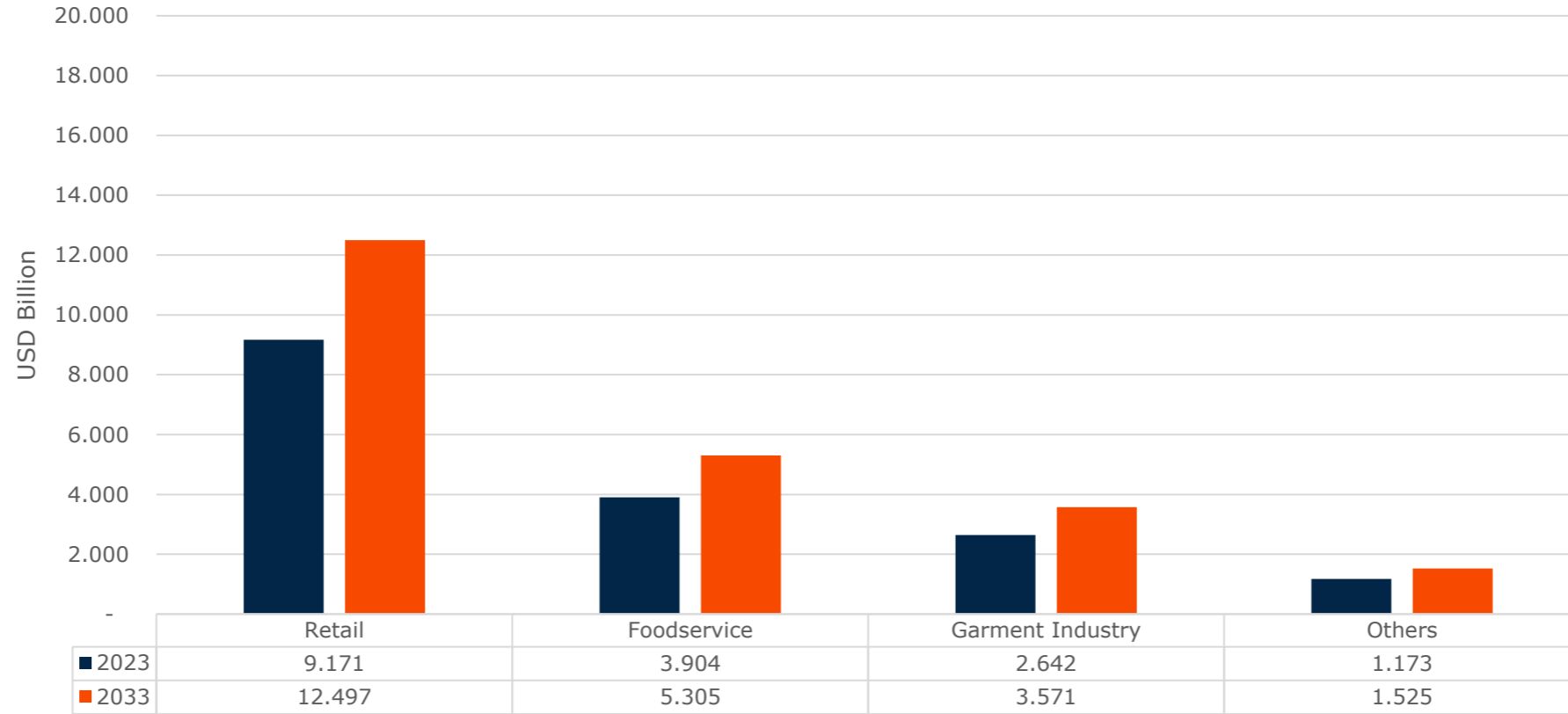
FIGURE 7. SHOPPING BAG MARKET: MATERIAL (IN USD BILLION)



Source: Environmental Protection Agency (EPA), Packaging Europe, Plastics Industry Association, International Council of Forest and Paper Associations, OECD Data, World Bank, United Nations Conference on Trade and Development, Journals & Articles, Press Releases, Company Websites, Investor Presentations and Whitepapers, Annual Reports, Primary Interviews, & Reports and Data

Based on Material, plastic segment is expected to have a major share in the Global Shopping Bag Market with a CAGR of 3.13% in terms of value during the forecast period. Despite the rising environmental concerns, plastic bags remain a popular choice due to their cost-effectiveness, versatility, and lightweight nature. Plastic shopping bags are widely used across various industries, including retail, supermarkets, and e-commerce, where affordability and convenience are key considerations. The continued demand for plastic shopping bags can be attributed to their strength, ability to carry heavy loads, and ease of production. Moreover, the development of biodegradable and recyclable plastic materials has helped mitigate some environmental concerns, allowing plastic shopping bags to maintain a significant market share. Innovations such as oxo-degradable and compostable plastic bags have gained traction, especially in regions with strict regulations on plastic waste. However, traditional plastic bags still dominate the market in developing countries where affordability and convenience are prioritized over environmental impact. The plastic segment, therefore, continues to play a vital role in the shopping bag industry. As manufacturers focus on sustainability, there is a growing trend toward offering plastic bags with eco-friendly properties, which is likely to further support the growth of this segment.

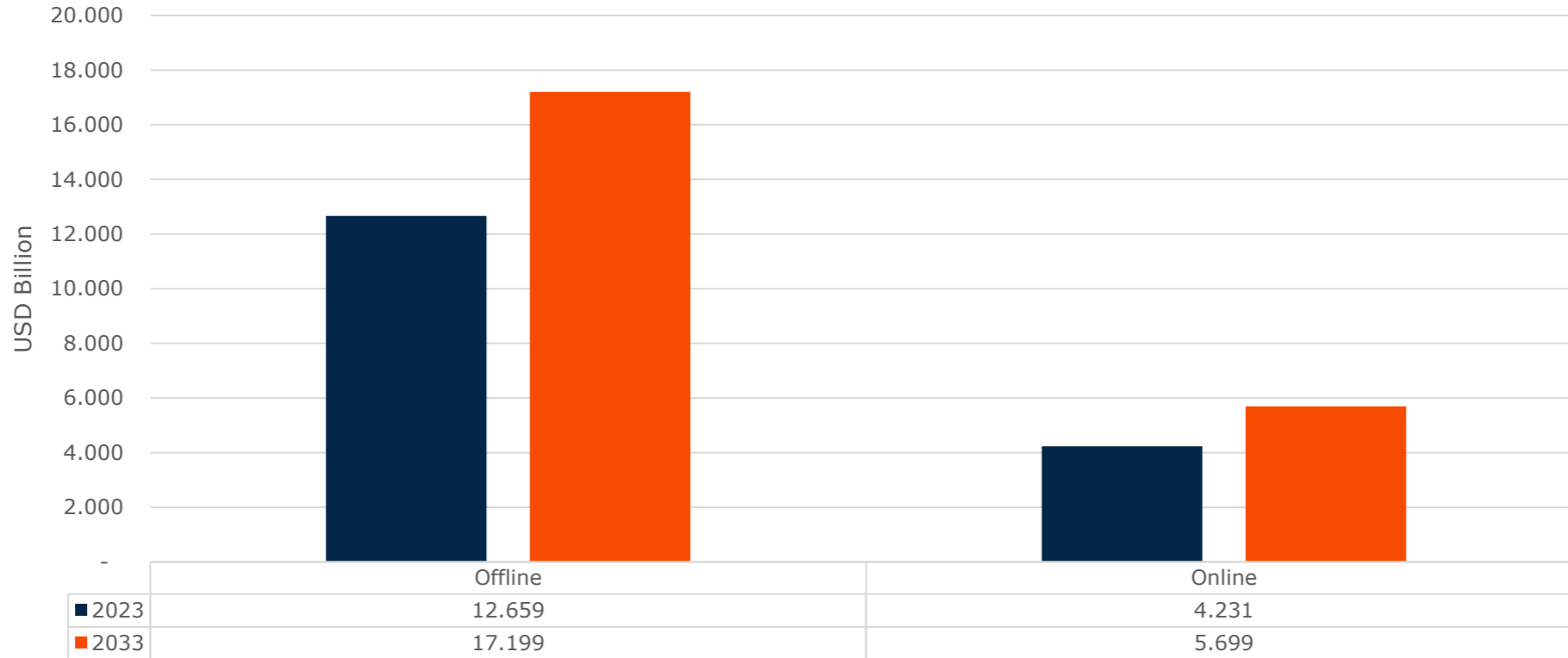
FIGURE 8. SHOPPING BAG MARKET: END USE (IN USD BILLION)



Source: Environmental Protection Agency (EPA), Packaging Europe, Plastics Industry Association, International Council of Forest and Paper Associations, OECD Data, World Bank, United Nations Conference on Trade and Development, Journals & Articles, Press Releases, Company Websites, Investor Presentations and Whitepapers, Annual Reports, Primary Interviews, & Reports and Data

Based on end use, retail segment is expected to have a major share in the Global Shopping Bag Market with a CAGR of 3.17% in terms of value during the forecast period. Retailers, including supermarkets, grocery stores, apparel outlets, and shopping malls, represent the largest end-users of shopping bags. The growth of this segment is driven by the continuous expansion of the retail sector, especially in developing economies where modern retail formats are gaining traction. Shopping bags, particularly those used in retail, serve as a convenient tool for customers to carry their purchases, making them an indispensable component of the shopping experience. As consumer demand for convenience grows, retailers are offering a wide variety of shopping bags to cater to different needs, ranging from lightweight plastic bags for grocery shopping to premium reusable bags for fashion and luxury items. Furthermore, the retail industry's focus on branding and customer loyalty has led to the increased use of custom-designed shopping bags, which also contribute to the segment's growth. With the rise of e-commerce, many retailers are offering personalized shopping bags as part of their packaging solutions, enhancing the shopping experience. As retail sales continue to increase globally, especially in emerging markets, the demand for shopping bags within the retail segment is expected to grow steadily.

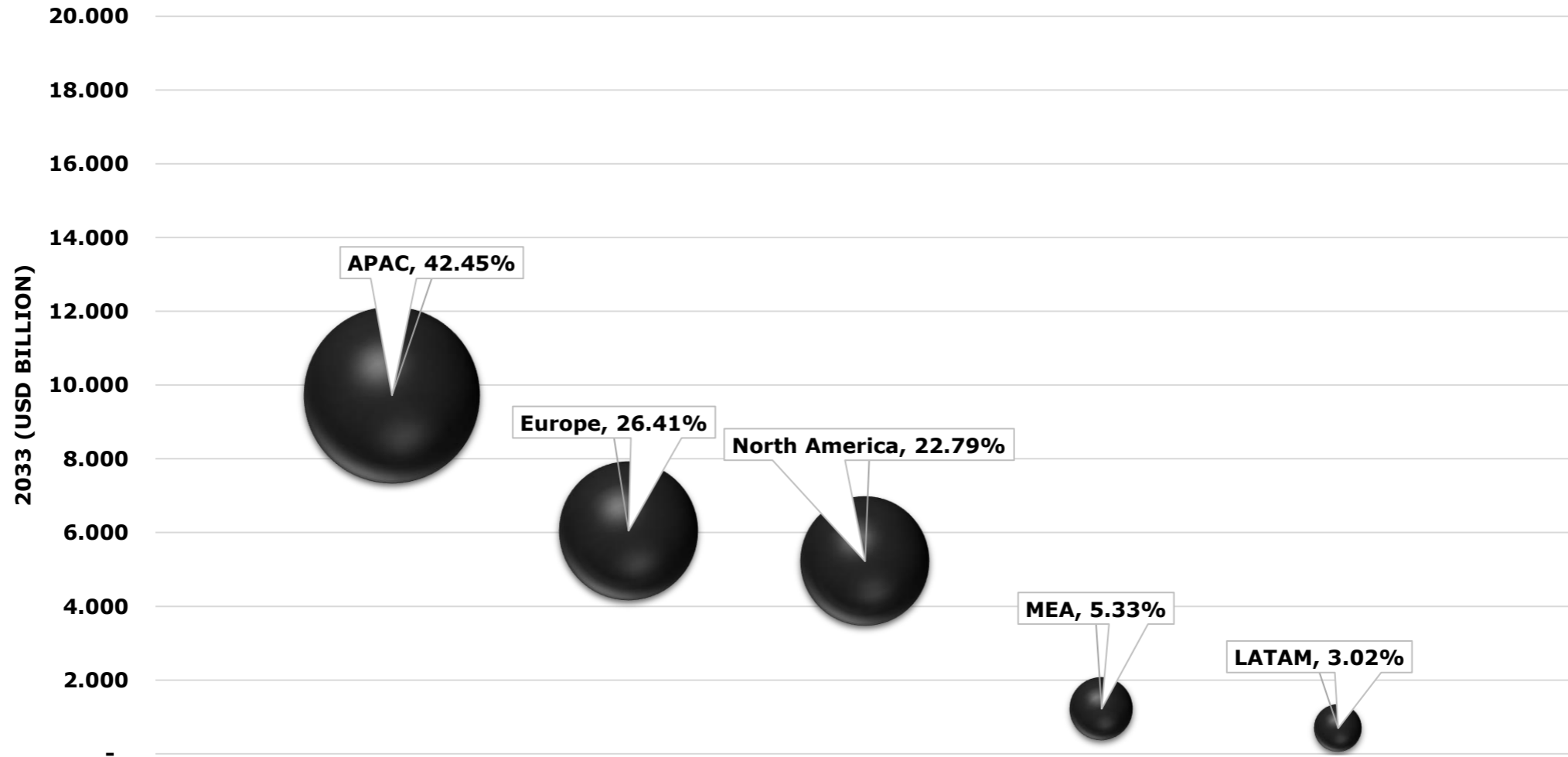
FIGURE 9. SHOPPING BAG MARKET: DISTRIBUTION CHANNEL (IN USD BILLION)



Source: Environmental Protection Agency (EPA), Packaging Europe, Plastics Industry Association, International Council of Forest and Paper Associations, OECD Data, World Bank, United Nations Conference on Trade and Development, Journals & Articles, Press Releases, Company Websites, Investor Presentations and Whitepapers, Annual Reports, Primary Interviews, & Reports and Data

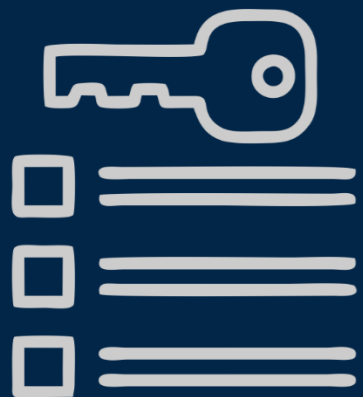
Based on distribution channel, the offline segment is projected to lead the global shopping bag market, registering a CAGR of 3.14% in terms of value during the forecast period. Despite the rapid growth of online shopping, the offline retail sector remains the primary distribution channel for shopping bags. Brick-and-mortar stores, including supermarkets, hypermarkets, department stores, and convenience stores, play a crucial role in distributing shopping bags, especially in regions where traditional retail dominates. Consumers in these settings often rely on the availability of shopping bags for carrying their purchases, and the offline distribution channel offers them immediate access to bags. Furthermore, many consumers still prefer in-store shopping for groceries, fashion, and daily essentials, driving the demand for shopping bags in physical retail outlets. Offline distribution also offers retailers the opportunity to showcase a variety of shopping bag options, including reusable and eco-friendly alternatives, which cater to the growing consumer preference for sustainable products. Additionally, offline retailers often provide shopping bags as part of their service, contributing to the convenience and satisfaction of their customers. As the offline retail sector continues to expand, particularly in emerging markets, the demand for shopping bags through this channel is expected to remain robust, supporting the segment's growth during the forecast period.

FIGURE 10. SHOPPING BAG MARKET: REGIONAL (IN USD BILLION)



Source: Environmental Protection Agency (EPA), Packaging Europe, Plastics Industry Association, International Council of Forest and Paper Associations, OECD Data, World Bank, United Nations Conference on Trade and Development, Journals & Articles, Press Releases, Company Websites, Investor Presentations and Whitepapers, Annual Reports, Primary Interviews, & Reports and Data

The Asia Pacific region is projected to lead the global shopping bag market, registering a CAGR of 3.16% in terms of value during the forecast period. The region's dominance can be attributed to its large population base, rapid urbanization, and expanding retail sector, particularly in emerging economies like China, India, and Southeast Asia. These countries are witnessing significant growth in consumer spending, driven by rising disposable incomes and changing lifestyles, which, in turn, is boosting the demand for shopping bags across various retail formats. Furthermore, the increasing penetration of modern retail outlets, supermarkets, and hypermarkets in both urban and rural areas is contributing to the heightened demand for shopping bags. With the shift toward sustainable living, many consumers in the region are opting for reusable and eco-friendly shopping bags, further driving market growth. Governments across Asia Pacific are also implementing regulations to reduce plastic waste, encouraging the use of biodegradable, compostable, and reusable shopping bags. For instance, China's ban on thin plastic bags and India's initiatives to phase out single-use plastics are pushing both consumers and retailers toward alternative materials like jute, cloth, and paper. The region's manufacturing strength also plays a pivotal role, with Asia Pacific being home to several large-scale shopping bag manufacturers. These companies are not only catering to domestic demand but are also exporting shopping bags to global markets, thereby reinforcing the region's leadership in the shopping bag market. As the retail sector continues to grow and environmental consciousness rises, the Asia Pacific shopping bag market is expected to maintain its leading position during the forecast period.



3. MARKET ANALYSIS

3.1. MARKET DRIVER

3.1.1. GROWING ENVIRONMENTAL AWARENESS DRIVING DEMAND FOR ECO-FRIENDLY BAGS

Growing environmental awareness is a significant driver for the increasing demand for eco-friendly bags in the global shopping bag market, with a particular focus on sustainable materials like cotton and jute. As the detrimental effects of plastic pollution become more widely recognized, consumers, governments, and corporations are seeking alternatives to single-use plastics. This shift has given rise to the popularity of reusable and biodegradable materials, with cotton and jute emerging as the preferred choices due to their environmental benefits, durability, and renewability.

One of the primary reasons for this shift is the heightened awareness of the environmental impact of plastic waste. According to the United Nations, approximately 8 million tons of plastic waste enters the oceans every year, posing a significant threat to marine life and ecosystems. As a result, many countries and regions have implemented policies to reduce or ban single-use plastics. For example, the European Union's Single-Use Plastics Directive aims to reduce the consumption of lightweight plastic carrier bags by 50% by 2025 and by 80% by 2030. These regulatory measures are creating a market shift towards reusable and sustainable shopping bags, with cotton and jute standing out as key materials in this transition.

Cotton and jute bags are particularly favored because of their eco-friendly properties. Jute, often referred to as the "golden fiber," is one of the most sustainable materials available. It is 100% biodegradable, renewable, and requires minimal resources such as water and pesticides for cultivation. Moreover, jute absorbs carbon dioxide and releases oxygen at a much faster rate than trees, contributing positively to carbon sequestration. The global production of jute is heavily concentrated in India and Bangladesh, with India accounting for over 60% of global production. The Indian government's focus on promoting jute through initiatives such as the Jute Packaging

Materials Act is further driving the growth of jute-based products, including shopping bags. These factors make jute an attractive option for manufacturers looking to align with environmental goals and meet the growing consumer demand for sustainable products.

Similarly, cotton is gaining traction as an eco-friendly alternative in the shopping bag market. Cotton is a natural fiber that is renewable and recyclable, offering a longer lifespan compared to plastic bags. In addition to being durable and easy to maintain, cotton bags can be produced organically, reducing the environmental impact associated with conventional cotton farming. According to the Organic Trade Association, the global organic cotton market grew by 31% in 2020, reflecting the increasing consumer demand for sustainable and ethically produced products. The growth of the organic cotton market is supported by government initiatives such as the Global Organic Textile Standard (GOTS), which certifies cotton products based on environmental and social criteria.

In response to this growing demand, retailers are also embracing the shift toward eco-friendly bags. Major global brands are increasingly offering cotton and jute bags as part of their sustainability initiatives. For example, large retailers like IKEA and Walmart have introduced reusable cotton and jute bags as alternatives to single-use plastics, contributing to the normalization of sustainable shopping practices. Furthermore, government initiatives and public awareness campaigns are playing a pivotal role in driving the adoption of eco-friendly bags. In India, the government has banned single-use plastics in several states, pushing both manufacturers and consumers toward alternatives like jute and cotton. The Ministry of Environment, Forest and Climate Change in India has been instrumental in promoting biodegradable alternatives to plastic, further encouraging the use of jute and cotton bags.

3.1.2. GOVERNMENT REGULATIONS ON PLASTIC BAGS BOOSTING ALTERNATIVE OPTIONS

Government regulations on plastic bags have significantly influenced the growth of alternative options in the global shopping bag market, particularly focusing on cotton and jute bags. Many countries have implemented stringent policies to curb plastic pollution, which has escalated the demand for eco-friendly alternatives. For instance, the European Union's directive (2015/720) on reducing the consumption of lightweight plastic carrier bags aims to reduce the number of plastic bags per person to 40 by 2025. Similarly, India, under the Plastic Waste Management Rules (2016), has prohibited the use of plastic bags under 50 microns, promoting the use of biodegradable materials like cotton and jute.

Cotton and jute bags have gained substantial market share due to their durability, biodegradability, and reusability. Government-backed initiatives, especially in South Asia, have spurred the production and export of these alternatives. According to data from India's Ministry of Textiles, the jute industry has seen consistent growth, with India being the largest producer, accounting for over 60% of global jute production. Similarly, in Bangladesh, government policies encouraging the use of jute have driven production. In 2021, the Bangladesh Jute Mills Corporation reported a 15% increase in jute bag exports following the imposition of plastic bag bans across various regions.

In the United States, states such as California and New York have banned single-use plastic bags and imposed fees on alternatives, boosting the demand for reusable cotton and jute bags. A report by the New York State Department of Environmental Conservation highlights that since the implementation of the "Bag Waste Reduction Law" in 2020, there has been a 70% reduction in single-use plastic bags. These regulations are driving market growth for sustainable options, contributing to a rise in global demand for cotton and jute shopping bags.

Furthermore, cotton and jute bags provide economic benefits to rural communities in developing countries, as governments promote local production. According to the Indian Jute Mills Association, the Indian jute industry supports over 4 million families, providing livelihoods while contributing to sustainable environmental practices. This shift towards eco-friendly alternatives is set to grow as governments continue to impose stricter plastic regulations, positioning cotton and jute bags as key players in the global shopping bag market.

3.1.3. EXPANSION OF RETAIL AND E-COMMERCE SECTORS INCREASING SHOPPING BAG DEMAND

The global shopping bag market is witnessing significant growth, driven by the rapid expansion of the retail and e-commerce sectors. With consumers increasingly relying on online platforms and brick-and-mortar stores, the demand for sustainable and reusable shopping bags, particularly those made from cotton and jute, has surged. Retailers and e-commerce companies are progressively adopting eco-friendly practices, replacing plastic bags with environmentally sustainable options, including cotton and jute bags, to align with global sustainability trends. Cotton and jute bags have become popular choices due to their biodegradability, reusability, and lower environmental impact compared to plastic alternatives. As consumers become more eco-conscious, they seek alternatives that reduce their carbon footprint, a trend that has contributed to the growing adoption of these natural fiber bags. The rise in government regulations aimed at reducing single-use plastics has further bolstered demand for cotton and jute shopping bags. For instance, the Indian government has implemented policies encouraging the use of biodegradable and natural materials like jute, significantly boosting domestic production and consumption. In the e-commerce sector, companies are increasingly incorporating reusable cotton and jute bags as part of their packaging solutions to meet environmental regulations and cater to consumer preferences for eco-friendly packaging. This trend is expected to continue, with the global push toward sustainability and eco-friendly practices driving the shopping bag market further. In addition, statistics from the U.S. Census Bureau reveal that e-commerce sales in the U.S. alone increased by

14.2% in 2023, further contributing to the rising need for shopping bags to meet packaging demands. The global emphasis on reducing carbon footprints has made cotton and jute bags ideal options, especially as consumers shift towards sustainable, reusable alternatives. As the retail and e-commerce industries continue to grow, the demand for these natural fiber bags is expected to accelerate, creating a thriving market for eco-friendly shopping solutions globally.

3.1.4. CONSUMER PREFERENCE FOR CONVENIENCE AND LIGHTWEIGHT BAG OPTIONS

The growing consumer preference for convenience and lightweight bag options is significantly driving the global shopping bag market, particularly for cotton and jute bags. Consumers are increasingly opting for reusable and eco-friendly alternatives to traditional plastic bags due to heightened environmental concerns and the growing awareness of sustainability. Cotton and jute bags, known for their durability and lightweight properties, offer a convenient solution for everyday shopping needs. These materials are biodegradable and reusable, making them popular choices as governments worldwide implement stricter regulations on single-use plastics. For instance, the European Union's plastic bag directive has led to a reduction of over 70% in single-use plastic bags across member states, encouraging the adoption of sustainable alternatives like cotton and jute bags. In India, the Ministry of Environment, Forest, and Climate Change (MoEFCC) has also mandated restrictions on plastic bags, promoting jute bags, as the country is the largest global producer of jute. According to the National Jute Board, India produced around 1.2 million metric tons of jute during the 2023 fiscal year, illustrating the growing reliance on jute as a sustainable shopping bag option. Additionally, cotton bags are favored for their lightweight nature, ease of carrying, and ability to be washed and reused. According to a report by the United Nations Environment Programme (UNEP), reusable cotton bags are recommended as a more sustainable option compared to plastic, with a growing shift toward these bags, especially in urban markets. With an increasing number of retailers and brands offering cotton and jute shopping bags, this trend is poised to expand further, driven by government policies and changing consumer preferences.

3.2. EMERGING TRENDS

3.2.1. RISE IN SUSTAINABLE AND ECO-FRIENDLY BAGS

The rise in sustainable and eco-friendly bags marks a significant trend within the shopping bag market, driven by increasing consumer awareness regarding environmental issues and governmental regulations promoting sustainability. Sustainable Packaging Market is expected to grow at a 7.69% CAGR globally, and at a CAGR of 5.78% in Indian Market. With the escalating concerns surrounding plastic pollution, many consumers are actively seeking alternatives to conventional plastic bags. According to the U.S. Environmental Protection Agency (EPA), plastic bags contribute to a substantial portion of marine debris, which harms aquatic life and ecosystems. This growing awareness is further supported by research indicating that 72% of consumers prefer shopping bags made from sustainable materials, such as reusable cloth, paper, or bioplastics, as reported by a 2022 study from the National Retail Federation.

Governments worldwide are implementing policies to discourage the use of single-use plastics, significantly impacting the shopping bag market. For instance, a report by the European Commission indicated that around 8.5 billion plastic bags were eliminated across the EU due to regulations implemented in 2020. This shift has created a favorable environment for the adoption of eco-friendly alternatives, driven by increased awareness of the harmful effects of plastic pollution. This trend is particularly prominent in developed regions like Europe and North America, where consumers are more willing to pay a premium for sustainable products. In Europe, the European Union's ban on single-use plastics by 2021 has played a key role in driving demand for cotton and jute shopping bags, with local governments incentivizing the use of eco-friendly bags through subsidies and public awareness campaigns.

Retailers are also adapting to this trend by offering a range of sustainable bag options, including biodegradable bags, organic cotton bags, and jute sacks. Many major brands, including Target and Walmart, have committed to reducing plastic waste by offering discounts

to customers who bring their reusable bags. This initiative is evident in the findings of the 2021 National Grocery Association report, which highlighted that 42% of consumers now regularly use reusable bags when shopping.

Moreover, consumer behavior is evolving, with younger generations leading the charge towards sustainable practices. A survey conducted by Deloitte in 2021 revealed that 75% of Gen Z consumers are willing to pay more for sustainable products, including shopping bags. This has increased Corporate Pressure, 90% of CEOs are increasing their focus on sustainability as part of their corporate strategy. This demographic shift is crucial as it not only reflects changing preferences but also signifies a long-term commitment to sustainability within the shopping bag market.

3.2.2. BAN ON SINGLE-USE PLASTICS

The ban on single-use plastics is rapidly transforming the shopping bag market, with significant growth in the demand for eco-friendly alternatives such as cotton and jute bags. Governments worldwide have imposed restrictions or outright bans on single-use plastic bags due to their harmful environmental impact, particularly their contribution to pollution and marine debris. According to the United Nations, about 5 trillion plastic bags are used globally every year, and a significant portion of these end up as waste, with less than 10% being recycled. This usage exerts over 160,000 / Sec Shocking Usage Rate, and the Per Capita Usage Impacts to 700 / Year / Person. Over 60 countries have implemented bans and levies on plastic packaging and single-use waste. Also, usage of 12 minutes of plastic bag results in 1000 years of population. This alarming statistic has spurred global efforts to find sustainable alternatives, leading to a surge in the adoption of reusable shopping bags made from natural fibers like cotton and jute.

In India, a leading example of the anti-plastic movement, the government's "Plastic Waste Management Rules" of 2022 banned the use of single-use plastics, including shopping bags. This move has created substantial demand for cotton and jute bags, which are biodegradable and reusable. According to the Ministry of Textiles, India is the largest producer of jute globally, with an annual production of about 1.68 million metric tons, and a growing percentage of this production is being diverted to manufacturing eco-friendly shopping bags. The government's focus on promoting sustainable textiles is driving increased adoption of jute and cotton as preferred materials in the domestic and international markets. Similarly, the European Union has implemented directives to reduce single-use plastics, aiming for a 50% reduction in plastic bag usage by 2025. As a result, there has been a sharp rise in the demand for cotton and jute bags across Europe, with some countries offering subsidies to manufacturers of eco-friendly alternatives.

The trend is also gaining traction in North America, where countries like Canada are leading the way with federal regulations banning harmful single-use plastics by 2023. The transition to cotton and jute bags is not only driven by environmental concerns but also by changing consumer preferences. A 2021 survey conducted by the World Wildlife Fund (WWF) found that over 75% of consumers in developed countries are willing to pay a premium for environmentally sustainable products, including reusable shopping bags. Cotton and jute bags, known for their durability and recyclability, are becoming increasingly popular among consumers who seek sustainable choices. Technological innovations in the production of cotton and jute bags are also contributing to this shift. Manufacturers are developing lighter, stronger, and more aesthetically pleasing designs, which are driving their popularity. Additionally, the production of cotton and jute bags supports the livelihood of millions of farmers in developing nations, particularly in South Asia, adding a socio-economic dimension to the growing demand. The World Bank estimates that over 4 million people in India and Bangladesh are employed in the jute industry, highlighting the potential for economic growth tied to the ban on single-use plastics.

However, challenges remain, such as the higher production costs associated with cotton and jute bags compared to plastic alternatives. Governments are increasingly offering incentives to offset these costs, such as tax breaks and subsidies for eco-friendly manufacturing. In the long term, as production processes become more efficient and economies of scale are realized, the cost of cotton and jute bags is expected to decrease, further propelling their adoption.



4. SHOPPING BAG MARKET BY TYPE INSIGHTS & TREND

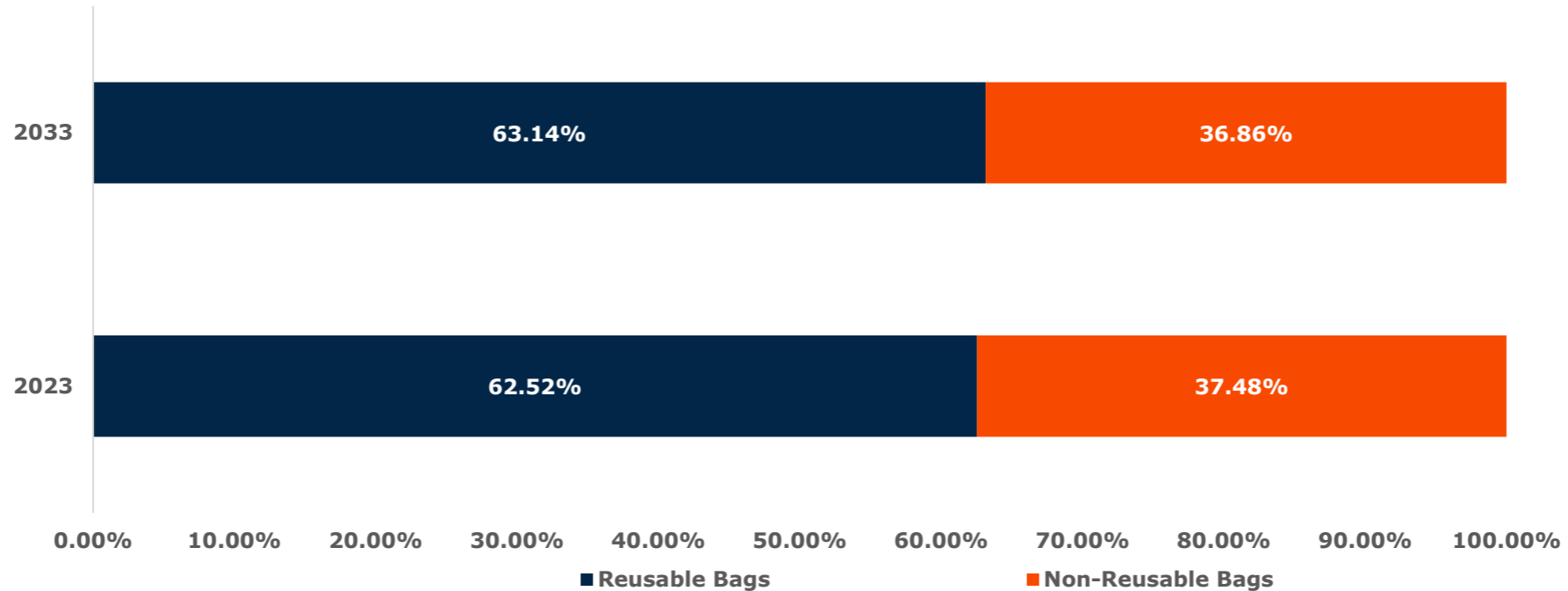


KEY TRENDS & HIGHLIGHTS

- The demand of reusable bags segment is expected to grow at a rate of 3.22% in the forecast period.

4.1. TYPE DYNAMICS & MARKET SHARE, 2023 & 2033

FIGURE 11. SHOPPING BAG MARKET: TYPE DYNAMICS (SHARE IN % USD BILLION)



Source: Environmental Protection Agency (EPA), Packaging Europe, Plastics Industry Association, International Council of Forest and Paper Associations, OECD Data, World Bank, United Nations Conference on Trade and Development, Journals & Articles, Press Releases, Company Annual Reports, Primary Interview, Reports and Data

4.2. REUSABLE BAGS

The **reusable bags segment** in the global shopping bag market has gained significant attention in recent years due to increasing environmental awareness and efforts to reduce single-use plastic waste. Reusable bags, made from materials like cotton, jute, non-woven polypropylene, and recycled plastic, are positioned as eco-friendly alternatives to disposable plastic bags. This shift is being driven by regulatory measures, consumer demand for sustainable products, and corporate responsibility initiatives.

Key Drivers:

- 1. Environmental Concerns and Regulatory Push:** One of the primary factors propelling the demand for reusable bags is the growing concern over environmental degradation caused by plastic waste. Many governments worldwide have introduced bans or taxes on single-use plastic bags, compelling both consumers and retailers to switch to reusable options. For example, the European Union has implemented directives that target a significant reduction in the consumption of lightweight plastic bags.
- 2. Sustainability and Corporate Initiatives:** Large retail chains and businesses are increasingly promoting the use of reusable bags to demonstrate their commitment to sustainability. Many companies have adopted reusable bags as part of their branding, offering incentives to customers who use them. These corporate initiatives are playing a vital role in popularizing reusable bags, especially in urban areas where eco-conscious consumers are more prevalent.
- 3. Changing Consumer Behavior:** Consumer preferences are evolving, with an increasing number of shoppers opting for reusable bags due to their durability, cost-effectiveness, and lower environmental impact. Reusable bags are not only seen as a responsible

choice but also a long-term investment, as they can be used multiple times, unlike single-use plastic bags. Awareness campaigns by environmental groups and retailers are further educating consumers about the benefits of reusable bags.

Material Trends:

The type of material used for reusable bags has become a critical factor in their adoption. **Cotton and jute bags** are popular for their biodegradability and sturdiness, making them a preferred choice for eco-conscious consumers. However, they are generally more expensive compared to other materials. **Non-woven polypropylene** bags are cost-effective and offer a balance between sustainability and affordability. Additionally, **recycled plastic** reusable bags are emerging as a trend, catering to consumers who want an eco-friendly option while promoting the use of recycled materials.

Market Challenges:

Despite the growing demand, the reusable bags segment faces several challenges. The **higher initial cost** of reusable bags compared to single-use plastic bags is a deterrent for some consumers, particularly in developing economies where price sensitivity is high. Moreover, **hygiene concerns** have arisen, especially in the wake of the COVID-19 pandemic, as reusable bags require cleaning and proper maintenance, which some consumers may find inconvenient.

Regional Insights:

- **North America and Europe** are leading the charge in the adoption of reusable bags, driven by stringent regulations and consumer awareness. In the United States, cities like San Francisco and states such as California have implemented bans on

single-use plastic bags, encouraging the use of reusable alternatives. Similarly, in Europe, countries like France, Germany, and the UK have adopted laws to reduce plastic bag usage, contributing to the growth of the reusable bag market.

- **Asia-Pacific** is also witnessing a significant rise in the use of reusable bags, especially in countries like India and China, where environmental concerns are being increasingly prioritized. However, the penetration of reusable bags is lower in developing regions compared to their developed counterparts due to cost factors and limited awareness.

Future Trends:

The future of the reusable bags segment is expected to see increased innovation in terms of **materials and design**. There is growing interest in the development of **biodegradable materials** and **recycled content**, which will further enhance the sustainability of reusable bags. Additionally, the integration of **technology**, such as smart tags or QR codes for loyalty programs, is being explored to increase consumer engagement and convenience. The increasing availability of customizable and branded reusable bags is also expected to drive consumer adoption.

4.2.1. REUSABLE BAGS MARKET ESTIMATES AND FORECASTS, 2020-2033, (USD BILLION)

TABLE 1. REUSABLE BAGS MARKET ESTIMATES AND FORECASTS, 2020-2033, (USD BILLION)

Market Size	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	CAGR (2024-33)
Revenue (USD BILLION)	9.325	9.729	10.133	10.560	10.873	11.200	11.546	11.907	12.284	12.677	13.088	13.523	13.979	14.459	3.22%

Source: Environmental Protection Agency (EPA), Packaging Europe, Plastics Industry Association, International Council of Forest and Paper Associations, OECD Data, World Bank, United Nations Conference on Trade and Development, Journals & Articles, Press Releases, Company Annual report, Primary Interviews, and Reports and Data

4.2.2. REUSABLE BAGS MARKET ESTIMATES AND FORECASTS, BY REGION, 2020-2033, (USD BILLION)

TABLE 2. REUSABLE BAGS MARKET ESTIMATES AND FORECASTS, BY REGION, 2020-2033, (USD BILLION)

Region	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	CAGR (2024-33)
North America	3.915	4.087	4.259	4.441	4.575	4.715	4.863	5.017	5.178	5.346	5.523	5.709	5.904	6.110	3.27%
Europe	2.477	2.585	2.693	2.807	2.891	2.979	3.071	3.168	3.269	3.374	3.484	3.601	3.723	3.852	3.24%
Asia Pacific	2.067	2.157	2.247	2.342	2.411	2.484	2.561	2.641	2.724	2.812	2.903	3.000	3.101	3.208	3.22%
Latin America	0.502	0.522	0.542	0.563	0.578	0.594	0.611	0.628	0.647	0.666	0.686	0.707	0.728	0.751	2.96%
MEA	0.365	0.379	0.393	0.407	0.418	0.429	0.441	0.453	0.466	0.479	0.492	0.507	0.522	0.538	2.84%

Total	9.325	9.729	10.133	10.560	10.873	11.200	11.546	11.907	12.284	12.677	13.088	13.523	13.979	14.459	3.22%
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Source: Environmental Protection Agency (EPA), Packaging Europe, Plastics Industry Association, International Council of Forest and Paper Associations, OECD Data, World Bank, United Nations Conference on Trade and Development, Journals & Articles, Press Releases, Company Annual report, Primary Interviews, and Reports and Data

4.3. NON-REUSABLE BAGS

The **non-reusable bags segment** in the **global shopping bag market** represents a significant portion of the market, catering to various retail industries and consumer needs. These bags are typically made from materials like plastic (polyethylene, polypropylene), paper, or biodegradable compounds. Despite increasing environmental concerns and regulatory pressures, non-reusable bags continue to be widely used due to their low cost, lightweight design, and widespread availability.

Materials and Types

Non-reusable bags can be categorized based on the materials used in their production. Common types include:

- **Plastic Bags:** The most widely used, made primarily from low-density polyethylene (LDPE) or high-density polyethylene (HDPE). These bags are lightweight, strong, and cheap to produce, making them the default option for many retail outlets. However, their environmental impact due to long degradation times and the risk of marine pollution has led to increasing restrictions.
- **Paper Bags:** Although more environmentally friendly, paper bags are still non-reusable in many instances, especially when they are not coated or laminated for strength. They are often used by grocery stores and retailers as an alternative to plastic, but their higher cost and limited durability compared to plastic have restricted their use.

- **Biodegradable Bags:** An emerging segment, biodegradable plastic bags are designed to break down faster than conventional plastic bags. These are often made from plant-based materials or treated plastics that degrade over time. Although they address some environmental concerns, they still face criticism for not decomposing as rapidly as advertised in non-ideal conditions.

Drivers of Demand

1. **Cost Efficiency:** Non-reusable bags, especially plastic ones, are extremely cheap to produce, which makes them a favored choice for retailers globally, especially in developing markets where cost considerations are paramount.
2. **Convenience:** These bags are highly convenient for consumers due to their portability, lightweight design, and capacity to carry a wide range of items. Their disposability is an added benefit in many retail environments where consumers seek quick and easy solutions.
3. **Retail Industry Growth:** The expansion of supermarkets, convenience stores, and other retail formats has fueled the demand for non-reusable shopping bags. Retailers provide them as part of the shopping experience, especially in markets where eco-friendly alternatives are either unavailable or costly.

Challenges and Regulations

The non-reusable bags segment faces growing scrutiny and regulation, particularly in regions aiming to reduce plastic waste. Several governments and municipalities have introduced bans or taxes on plastic bags, leading to a decrease in their use in some parts of the world. For example, the European Union has set stringent targets for reducing the use of lightweight plastic bags, encouraging member states to adopt measures such as pricing or outright bans.

In contrast, some developing markets have been slower to implement such regulations due to economic constraints and the lack of affordable alternatives. However, there is increasing awareness and consumer preference for eco-friendly options, prompting retailers to explore alternatives.

Key Trends

- 1. Transition to Biodegradable Options:** Although non-reusable bags continue to dominate, there is a gradual shift toward biodegradable and compostable options, particularly in regions with stringent environmental regulations.
- 2. Decline in Developed Markets:** In many developed countries, the use of non-reusable plastic bags has significantly declined due to government policies and consumer awareness. Retailers have begun to charge for plastic bags, pushing consumers to opt for reusable alternatives.
- 3. Emergence of Alternative Materials:** Companies are exploring innovative materials for non-reusable bags, such as those made from cassava, corn, and sugarcane. These materials offer the convenience of plastic with a smaller environmental footprint, although they are yet to gain widespread adoption due to higher production costs.

Future Outlook

The non-reusable bags segment will likely continue to face regulatory pressures, particularly in developed markets, where environmental sustainability is a top priority. While plastic and paper bags will remain in circulation, their market share is expected to decline in favor of biodegradable and reusable alternatives. However, in developing economies, cost-effective and convenient non-reusable bags will persist, especially as manufacturers and consumers adapt to regulatory changes at a slower pace.

Technological advancements in biodegradable materials and growing consumer awareness will shape the future of this segment. Government policies will also play a critical role in determining the trajectory of non-reusable bags, particularly in regions where plastic waste is a significant concern.

4.3.1. NON-REUSABLE BAGS MARKET ESTIMATES AND FORECASTS, 2020-2033, (USD BILLION)

TABLE 3. NON-REUSABLE BAGS MARKET ESTIMATES AND FORECASTS, 2020-2033, (USD BILLION)

Market Size	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	CAGR (2024-33)
Revenue (USD BILLION)	5.648	5.871	6.095	6.330	6.502	6.680	6.869	7.065	7.270	7.482	7.704	7.938	8.183	8.439	2.94%

Source: Environmental Protection Agency (EPA), Packaging Europe, Plastics Industry Association, International Council of Forest and Paper Associations, OECD Data, World Bank, United Nations Conference on Trade and Development, Journals & Articles, Press Releases, Company Annual report, Primary Interviews, and Reports and Data

4.3.2. NON-REUSABLE BAGS MARKET ESTIMATES AND FORECASTS, BY REGION, 2020-2033, (USD BILLION)

TABLE 4. NON-REUSABLE BAGS MARKET ESTIMATES AND FORECASTS, BY REGION, 2020-2033, (USD BILLION)

Region	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	CAGR (2024-33)
North America	2.704	2.812	2.920	3.034	3.117	3.204	3.296	3.391	3.490	3.594	3.702	3.815	3.934	4.059	2.98%
Europe	1.432	1.489	1.546	1.606	1.650	1.695	1.743	1.793	1.845	1.899	1.956	2.015	2.078	2.143	2.95%
Asia Pacific	0.717	0.745	0.773	0.802	0.824	0.846	0.870	0.895	0.920	0.947	0.975	1.004	1.035	1.067	2.91%
Latin America	0.445	0.462	0.479	0.497	0.510	0.524	0.538	0.553	0.569	0.585	0.602	0.619	0.638	0.657	2.85%
MEA	0.350	0.363	0.377	0.390	0.400	0.411	0.422	0.433	0.445	0.458	0.471	0.484	0.498	0.513	2.80%
Total	5.648	5.871	6.095	6.330	6.502	6.680	6.869	7.065	7.270	7.482	7.704	7.938	8.183	8.439	2.94%

Source: Environmental Protection Agency (EPA), Packaging Europe, Plastics Industry Association, International Council of Forest and Paper Associations, OECD Data, World Bank, United Nations Conference on Trade and Development, Journals & Articles, Press Releases, Company Annual report, Primary Interviews, and Reports and Data



5. SHOPPING BAG MARKET BY MATERIAL INSIGHTS & TREND

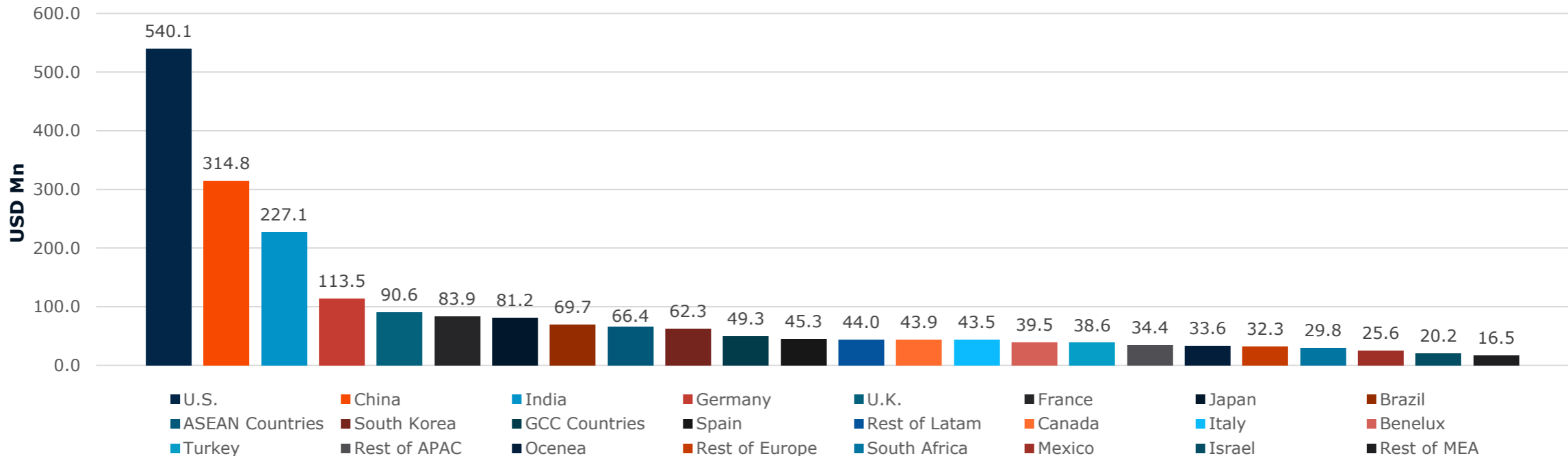


KEY TRENDS & HIGHLIGHTS

- The demand for cotton bags segment is expected to grow at 53.80% in the forecast period.

5.1. MARKET DYNAMICS, BY COUNTRY 2023

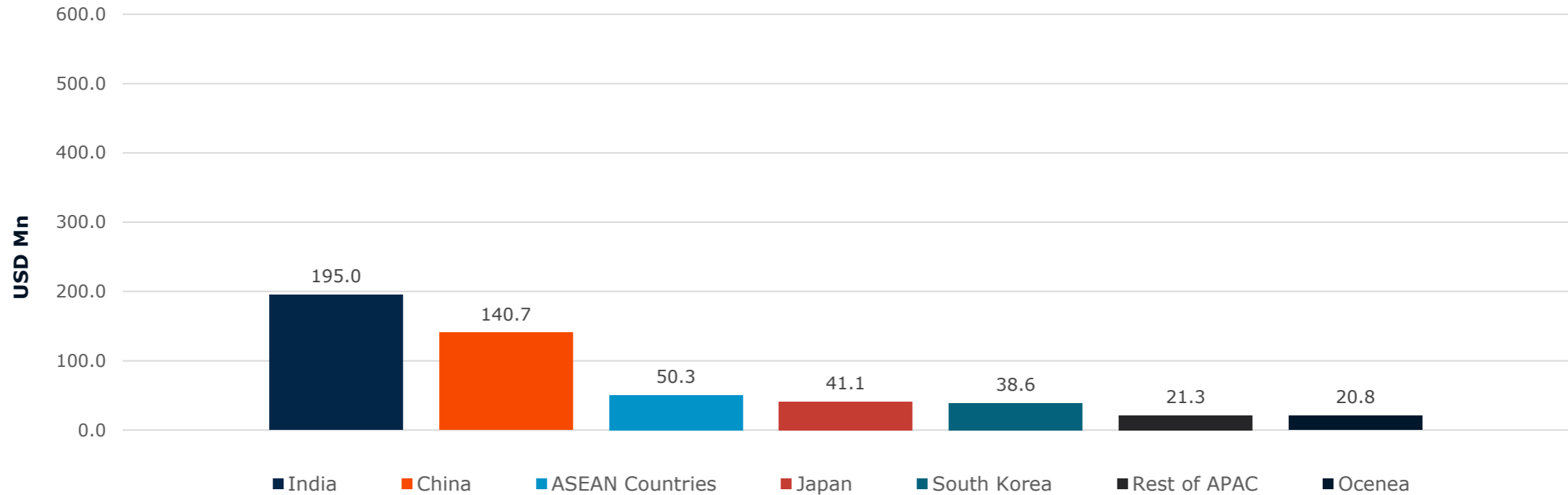
FIGURE 12. COTTON BAG MARKET- COUNTRY, BY 2023 REVENUE



Source: Environmental Protection Agency (EPA), Packaging Europe, Plastics Industry Association, International Council of Forest and Paper Associations, OECD Data, World Bank, United Nations Conference on Trade and Development, Journals & Articles, Press Releases, Company Annual report, Primary Interviews, and Reports and Data

The chart shows the **Cotton Bag Market revenue by country in 2023 (USD Million). The **U.S.** leads with **540.1 USD Mn**, followed by **China (314.8 USD Mn)** and **India (227.1 USD Mn)**. **ASEAN Countries** and **Germany** also have notable revenues. Smaller contributors include **Italy (32.3 USD Mn)** and **Rest of MEA (16.5 USD Mn)**. Developed markets dominate, with growing demand in emerging regions. Data is sourced from reliable organizations like **EPA** and **OECD**.

FIGURE 13. JUTE BAG MARKET - COUNTRY, BY 2023 REVENUE



Source: Environmental Protection Agency (EPA), Packaging Europe, Plastics Industry Association, International Council of Forest and Paper Associations, OECD Data, World Bank, United Nations Conference on Trade and Development, Journals & Articles, Press Releases, Company Annual report, Primary Interviews, and Reports and Data

The chart shows the **Jute Bag Market revenue by country in 2023 (USD Million). **India** leads with **195.0 USD Mn**, followed by **China (140.7 USD Mn)** and **ASEAN Countries (50.3 USD Mn)**. Other contributors include **Japan (41.1 USD Mn)**, **South Korea (38.6 USD Mn)**, and **Rest of APAC (21.3 USD Mn)**. Smaller contributions come from **Oceania (20.8 USD Mn)**. Data is sourced from reputable organizations like **EPA** and **OECD**.

5.1.1. KEY EXPORTERS OF COTTON BAG IN INDIA, AS OF LAST 5 YEARS

Companies	Headquarters
Ecoline Exim Limited	Kolkata, West Bengal, India
Om Textiles	Karur, Tamil Nadu, India
Sree Baba Fabrics	Tirupur, Tamil Nadu, India
Shri Pranav Textile Creations Private Limited	Karur, Tamil Nadu, India
Kush Export	Kolkata, West Bengal, India
Richie Bags	Kolkata, West Bengal, India
EcoSacks	Ahmedabad, Gujarat, India
Ronak Industries	Jaipur, Rajasthan, India
Paramount Corporation	Ahmedabad, Gujarat, India
Ramesh Exports	Karur, Tamil Nadu, India

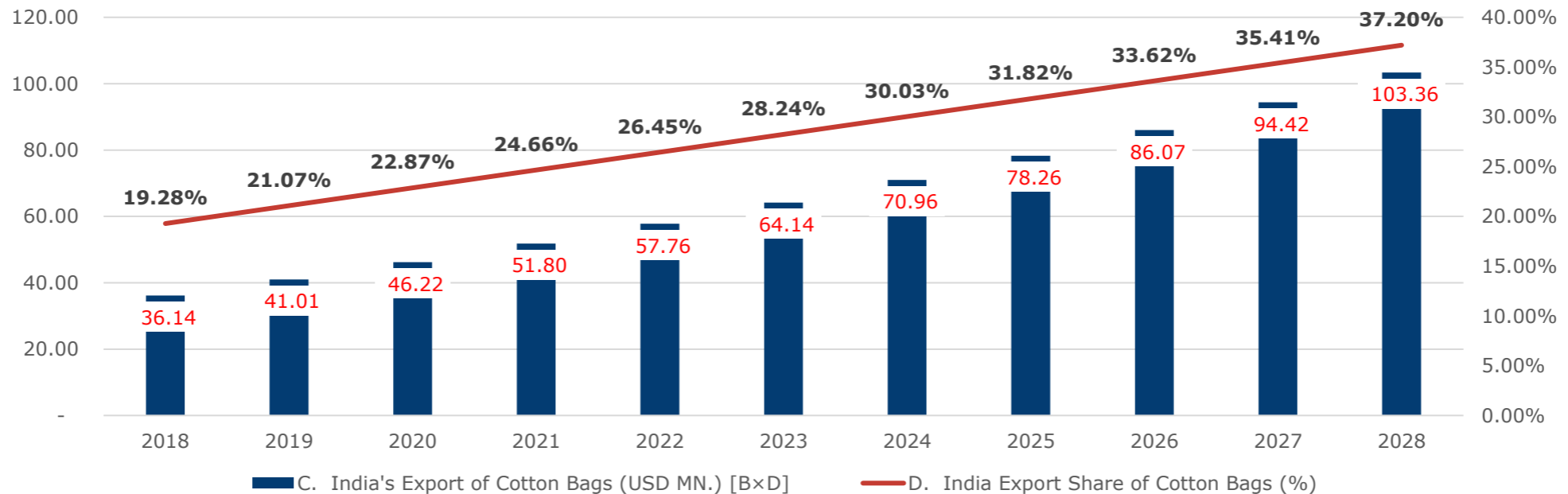
Source: Environmental Protection Agency (EPA), Packaging Europe, Plastics Industry Association, International Council of Forest and Paper Associations, OECD Data, World Bank, United Nations Conference on Trade and Development, Journals & Articles, Press Releases, Company Annual report, Primary Interviews, and Reports and Data

5.1.1. INDIA EXPORT OF COTTON BAG, 2018-2028

Particulars	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
India's Export of Cotton Bags (USD MN.)	36.14	41.01	46.22	51.80	57.76	64.14	70.96	78.26	86.07	94.42	103.36
India Export Share of Cotton Bags (%)	19.28%	21.07%	22.87%	24.66%	26.45%	28.24%	30.03%	31.82%	33.62%	35.41%	37.20%

Source: Environmental Protection Agency (EPA), Packaging Europe, Plastics Industry Association, International Council of Forest and Paper Associations, OECD Data, World Bank, United Nations Conference on Trade and Development, Journals & Articles, Press Releases, Company Annual report, Primary Interviews, and Reports and Data

FIGURE 14. COTTON EXPORT TREND (INDIA), 2018-2028



Source: Environmental Protection Agency (EPA), Packaging Europe, Plastics Industry Association, International Council of Forest and Paper Associations, OECD Data, World Bank, United Nations Conference on Trade and Development, Journals & Articles, Press Releases, Company Annual report, Primary Interviews, and Reports and Data

***The chart depicts the growth of India's Contribution in global export for cotton bags from 2018 to a projected 2028, presented in **USD Million** and as a percentage of global market share. India's cotton bag export value has grown substantially, rising from **USD 36.14 million** in 2018 to **USD 64.14 million** in 2023, with projections reaching **USD 103.36 million** by 2028. Concurrently, India's global market share has increased from **19.28%** in 2018 to **28.24%** in 2023, with a projected share of **37.20%** by 2028. This upward trend suggests increasing international demand for Indian cotton bags, potentially driven by factors such as rising environmental awareness, competitive pricing, quality and production capacity improvements, and supportive government initiatives. The data, sourced from reputable organizations including the **EPA, OECD, World Bank, and UN Conference on Trade and Development**, indicates consistent year-on-year growth in both export value and market share. It's important to note that figures from 2024 to 2028 are projections and may vary from actual results.*

5.2. MATERIAL DYNAMICS & MARKET FOR 2018-2028

5.2.1. COTTON BAGS

Cotton shopping bags have gained significant popularity in recent years as a sustainable alternative to plastic bags. Made from natural fibers derived from the cotton plant, these bags are biodegradable, eco-friendly, and reusable, making them a favorite choice for environmentally conscious consumers. The primary appeal of cotton shopping bags lies in their durability and versatility. Unlike single-use plastic bags, cotton bags can withstand heavy loads and are resistant to tearing, making them ideal for carrying groceries, books, or personal items. They come in various sizes, colors, and designs, allowing users to choose a bag that suits their needs and style preferences. Another notable benefit is their low environmental impact. Cotton is a renewable resource, and the bags decompose naturally, reducing landfill waste. Moreover, many cotton bags are produced using organic or sustainably grown cotton, minimizing the environmental footprint further. They can also be washed and reused multiple times, which extends their lifespan and adds to their cost-effectiveness. However, the production of cotton shopping bags does have some drawbacks. Cotton cultivation requires significant water and land resources, and conventional farming methods may involve the use of pesticides. Nonetheless, advancements in sustainable farming practices and the increasing availability of organic cotton are addressing these concerns. Cotton shopping bags are a practical and stylish option for reducing plastic pollution and promoting eco-friendly habits. By adopting these bags, individuals can contribute to a cleaner, greener planet while enjoying a durable and aesthetically pleasing product.

5.2.1.1. COTTON BAGS MARKET ESTIMATES AND FORECASTS, 2018-2028, (USD MILLION)**TABLE 5. COTTON BAGS MARKET ESTIMATES AND FORECASTS, 2018-2028, (USD MILLION)**

Market Size (USD MILLION)	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (2024-28)
Global	1,861.10	1,913.22	1,967.68	2,024.61	2,084.13	2,146.38	2,211.49	2,279.60	2,350.88	2,425.48	2,503.58	3.15%
INDIA	187.41	194.61	202.16	210.08	218.39	227.12	236.28	245.91	256.02	266.66	277.84	4.13%

Source: Environmental Protection Agency (EPA), Packaging Europe, Plastics Industry Association, International Council of Forest and Paper Associations, OECD Data, World Bank, United Nations Conference on Trade and Development, Journals & Articles, Press Releases, Company Annual report, Primary Interviews, and Reports and Data

5.2.1.2. COTTON BAGS MARKET ESTIMATES AND FORECASTS, BY REGION, 2018-2028, (USD MILLION)

TABLE 6. COTTON BAGS MARKET ESTIMATES AND FORECASTS, BY REGION, 2018-2028, (USD MILLION)

Region	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (2024-28)
North America	517.39	534.17	551.74	570.13	589.39	609.57	630.72	652.88	676.11	700.48	726.04	3.58%
Europe	396.42	405.98	415.97	426.38	437.25	448.59	460.43	472.79	485.69	499.16	513.23	2.75%
Asia Pacific	707.22	727.79	749.29	771.78	795.31	819.92	845.67	872.63	900.86	930.41	961.37	3.26%
Latin America	102.36	104.46	106.65	108.92	111.29	113.76	116.32	119.00	121.78	124.67	127.68	2.36%
MEA	137.72	140.81	144.03	147.39	150.89	154.54	158.34	162.31	166.44	170.75	175.25	2.57%
Total	1861.10	1913.22	1967.68	2024.61	2084.13	2146.38	2211.49	2279.60	2350.88	2425.48	2503.58	3.15%

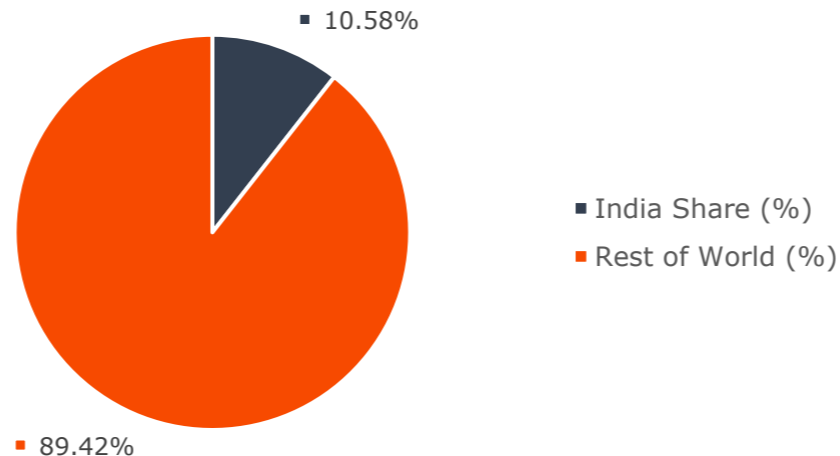
Source: Environmental Protection Agency (EPA), Packaging Europe, Plastics Industry Association, International Council of Forest and Paper Associations, OECD Data, World Bank, United Nations Conference on Trade and Development, Journals & Articles, Press Releases, Company Annual report, Primary Interviews, and Reports and Data

5.2.1.3. COTTON BAGS MARKET SIZE AND SHARE %, 2018-2028, (USD MILLION)

GLOBAL COTTON BAG MARKET, MARKET SIZE (USD MILLION)											
Year	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
India's Cotton Bags Market Size	187.41	194.61	202.16	210.08	218.39	227.12	236.28	245.91	256.02	266.66	277.84
India Share (%)	10.07%	10.17%	10.27%	10.38%	10.48%	10.58%	10.68%	10.79%	10.89%	10.99%	11.10%
Rest of the World (Global- India's Market Size)	1,673.69	1,718.61	1,765.52	1,814.53	1,865.74	1,919.26	1,975.21	2,033.69	2,094.85	2,158.82	2,225.74
Rest of World (%)	89.93%	89.83%	89.73%	89.62%	89.52%	89.42%	89.32%	89.21%	89.11%	89.01%	88.90%

Source: Environmental Protection Agency (EPA), Packaging Europe, Plastics Industry Association, International Council of Forest and Paper Associations, OECD Data, World Bank, United Nations Conference on Trade and Development, Journals & Articles, Press Releases, Company Annual report, Primary Interviews, and Reports and Data

FIGURE 15. COTTON BAG SHARE ANALYSIS: 2023 (EXCLUDING EXPORT)



Source: Environmental Protection Agency (EPA), Packaging Europe, Plastics Industry Association, International Council of Forest and Paper Associations, OECD Data, World Bank, United Nations Conference on Trade and Development, Journals & Articles, Press Releases, Company Annual report, Primary Interviews, and Reports and Data

The data illustrates the Cotton Bags Market size and share from 2018 to a projected 2028, presented in USD Million. India's Cotton Bags Market Size has steadily increased, from **USD 187.41 million in 2018 to **USD 227.12 million** in 2023, with projections reaching **USD 277.84 million** by 2028. Consequently, India's market share has also seen a gradual rise, from **10.07%** in 2018 to **10.58%** in 2023, with a projected share of **11.10%** by 2028. The remaining global market, represented as "Rest of the World," holds the majority share, decreasing slightly from **89.93%** in 2018 to **89.42%** in 2023, with projections indicating **88.90%** by 2028. This suggests a consistent, albeit small, growth in India's domestic market share within the larger global context. The data is sourced from reputable organizations including the **EPA, Packaging Europe, Plastics Industry Association, International Council of Forest and Paper Associations, OECD Data, World Bank, and UN Conference on Trade and Development**. Figure 15 specifically highlights the 2023 market share distribution, showing India holding **10.58%** and the Rest of the World holding **89.42%**.

5.2.2. JUTE BAGS

Jute shopping bags are an eco-friendly and practical solution to the growing problem of plastic pollution. Derived from the fibers of the jute plant, these bags are both biodegradable and sustainable, making them a popular choice for environmentally aware consumers. Jute bags are renowned for their strength and durability, capable of carrying heavy items without tearing. They are also breathable, which helps prevent spoilage of fresh produce, making them an excellent choice for grocery shopping. Available in various sizes and styles, jute bags are often designed with vibrant patterns or branding, adding an element of style to their functionality. One of the most significant advantages of jute shopping bags is their minimal environmental impact. Jute is a fast-growing crop that requires little water or pesticides, making it an eco-friendly alternative to cotton in some cases. Additionally, the production of jute bags provides livelihoods to many artisans and workers in rural areas, supporting local economies. While jute bags are highly sustainable, they are less flexible and soft compared to cotton bags. Their coarser texture may not suit all applications, and they require proper care to maintain their durability. Prolonged exposure to moisture can lead to mold or mildew, so it is essential to store them in a dry environment. Jute shopping bags symbolize a step towards a sustainable lifestyle by reducing reliance on single-use plastics. Their blend of functionality, durability, and eco-friendliness makes them an excellent choice for individuals and businesses looking to adopt sustainable practices while promoting environmental consciousness.

5.2.2.1. JUTE BAGS MARKET ESTIMATES AND FORECASTS, 2018-2028, (USD MILLION)**TABLE 7. JUTE BAGS MARKET ESTIMATES AND FORECASTS, 2018-2028, (USD MILLION)**

Market Size (USD MILLION)	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (2024-28)
Global	1,153.67	1,185.97	1,219.63	1,254.70	1,291.25	1,329.36	1,369.09	1,410.53	1,453.76	1,498.86	1,545.92	3.08%
INDIA	160.94	167.13	173.62	180.41	187.54	195.00	202.83	211.03	219.64	228.68	238.16	4.10%

Source: Environmental Protection Agency (EPA), Packaging Europe, Plastics Industry Association, International Council of Forest and Paper Associations, OECD Data, World Bank, United Nations Conference on Trade and Development, Journals & Articles, Press Releases, Company Annual report, Primary Interviews, and Reports and Data

5.2.2.2. JUTE BAGS MARKET ESTIMATES AND FORECASTS, BY REGION, 2018-2028, (USD MILLION)**TABLE 8. JUTE BAGS MARKET ESTIMATES AND FORECASTS, BY REGION, 2018-2028, (USD MILLION)**

Region	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (2024-28)
North America	326.49	335.87	345.64	355.83	366.46	377.54	389.10	401.16	413.74	426.87	440.59	3.16%
Europe	250.35	255.46	260.76	266.25	271.94	277.84	283.95	290.29	296.86	303.67	310.73	2.28%
Asia Pacific	429.17	443.55	458.58	474.28	490.68	507.82	525.73	544.47	564.06	584.55	606.00	3.62%
Latin America	65.76	66.65	67.57	68.51	69.47	70.46	71.47	72.50	73.56	74.64	75.75	1.47%
MEA	81.91	84.44	87.08	89.84	92.71	95.71	98.85	102.12	105.54	109.12	112.85	3.37%
Total	1153.67	1185.97	1219.63	1254.70	1291.25	1329.36	1369.09	1410.53	1453.76	1498.86	1545.92	3.08%

Source: Environmental Protection Agency (EPA), Packaging Europe, Plastics Industry Association, International Council of Forest and Paper Associations, OECD Data, World Bank, United Nations Conference on Trade and Development, Journals & Articles, Press Releases, Company Annual report, Primary Interviews, and Reports and Data



6. COMPETITIVE LANDSCAPE



6.1. GLOBAL COTTON BAG MARKET: COMPANY MARKET SHARE ANALYSIS

The competitive landscape of the **cotton shopping bag market** is shaped by a growing demand for sustainable and eco-friendly packaging solutions driven by increased environmental awareness, stringent government regulations, and shifting consumer preferences. Cotton shopping bags, as reusable alternatives to plastic bags, have become a symbol of sustainability, attracting a broad spectrum of manufacturers and market players ranging from global conglomerates to local artisans.

Key Market Players and Competitive Dynamics

- 1. Global Manufacturers:** Major global players have established strong brand identities, built extensive distribution networks, and focus on product differentiation through innovation, quality, and design. They often cater to retail chains, fashion brands, and supermarkets, providing customized solutions with brand logos or specific designs, which creates long-term partnerships.
- 2. Local and Regional Players:** The market also has a significant presence of local and regional players, especially in **developing markets** like India, China, and Bangladesh. Many local players focus on cost-efficient production and serve domestic markets. Due to lower labor costs and raw material availability, these manufacturers can offer competitive pricing, attracting small and medium-sized enterprises (SMEs) and local businesses looking to adopt eco-friendly packaging options. These regional players are particularly competitive in price-sensitive markets.
- 3. Artisan and Small-scale Producers:** In addition to large-scale industrial production, small-scale manufacturers and artisans play a role in this market, particularly in regions where handloom and artisanal craftsmanship are prevalent. Companies like **Cotton Bag Co.**, **Zesttex**, and **Smart Zero Waste** emphasize handmade, ethically sourced, and fair-trade cotton shopping bags,

appealing to environmentally conscious consumers. These players often sell directly to consumers via online platforms such as Etsy or through small boutiques.

4. **Retail and E-commerce Giants:** Large retail chains like **Walmart**, **Target**, and **Amazon** have also entered the cotton shopping bag market, either through partnerships with manufacturers or by offering their own branded eco-friendly bags. These companies have significant bargaining power, which allows them to negotiate lower prices from manufacturers and offer competitive pricing to consumers. Retail giants dominate the mass market by producing and distributing cotton bags in bulk.

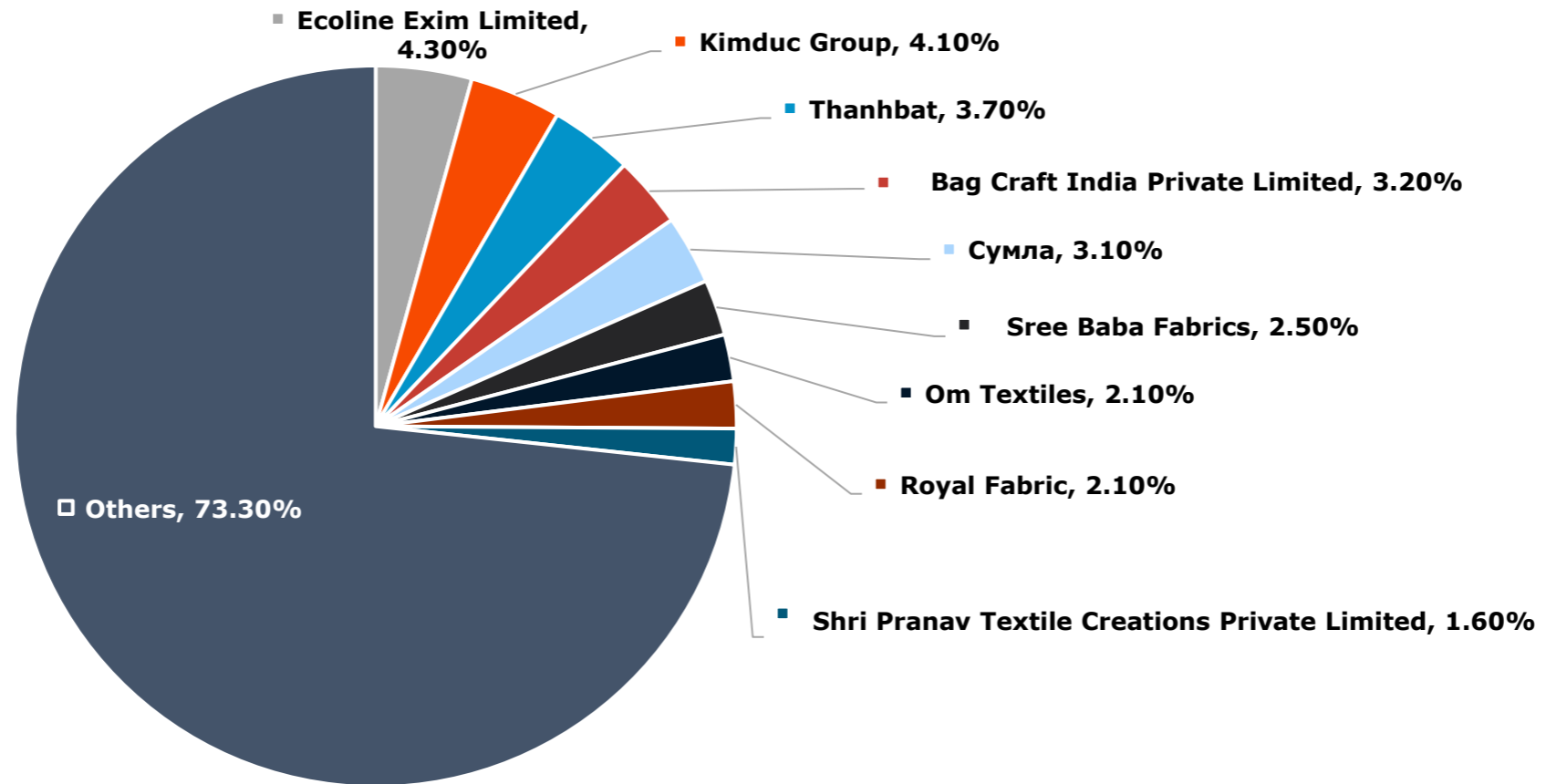
Strategic Initiatives and Market Trends

1. **Product Innovation:** Companies are increasingly focusing on innovation to gain a competitive edge. Innovations in cotton shopping bags include improved durability, water resistance, anti-microbial coatings, and enhanced aesthetics. Many companies are also experimenting with organic cotton, recycled cotton, and blended materials (e.g., cotton and jute) to appeal to an eco-conscious consumer base. Customization options like personalized prints, multi-color designs, and corporate branding have also become popular, particularly for corporate giveaways and event merchandising.
2. **Sustainability Practices:** The sustainability of cotton shopping bags is a key differentiator in the market. Leading players are adopting eco-friendly production processes, including **organic farming** of cotton, **low-impact dyes**, and water-conservation techniques. Certifications such as **Global Organic Textile Standard (GOTS)**, **Fair Trade**, and **OEKO-TEX** have become selling points, as consumers increasingly seek transparency about the environmental and social impact of the products they purchase. Companies that adopt sustainable sourcing and fair labor practices can position themselves favorably in the market.

3. **Government Regulations:** Governments worldwide have implemented regulations to reduce the use of plastic bags, which has accelerated the adoption of cotton shopping bags. Many countries, particularly in **Europe** and parts of **Asia-Pacific**, have banned or taxed single-use plastic bags, creating opportunities for manufacturers to supply cotton shopping bags. For instance, countries like **France** and **Germany** have been leaders in this shift, while in **India**, the growing emphasis on reducing plastic waste has propelled demand for locally produced cotton bags.
4. **Pricing Competition:** While cotton shopping bags are often perceived as a premium product, there is considerable pricing competition. As the market matures, manufacturers in regions with lower production costs, like **India** and **Bangladesh**, can offer highly competitive prices, often at the expense of larger, established players in Western markets. However, the trade-off between low cost and quality is a key consideration for consumers, with some preferring more durable or ethically sourced options even if they are more expensive.
5. **Technological Integration:** Incorporating technology in the production and marketing of cotton shopping bags offers opportunities for growth. For instance, companies are exploring the use of **blockchain technology** for better supply chain transparency and certification of eco-friendly materials. Additionally, **QR codes** or **smart tags** embedded in bags can be used to provide consumers with information about the product's sustainability features, enhancing consumer trust

6. **E-commerce Expansion:** The rise of e-commerce platforms has significantly expanded the reach of smaller manufacturers and artisans, allowing them to compete on a global scale. Online platforms like **Amazon, Alibaba, Etsy**, and others have provided smaller players with an opportunity to reach international consumers who are seeking eco-friendly shopping solutions. The increasing popularity of direct-to-consumer (D2C) sales models via online platforms has reduced the market entry barriers, making it easier for new entrants to establish themselves.
7. **Branding and Marketing:** Branding and effective marketing play crucial roles in differentiating products in the cotton shopping bag market. Companies with strong brand identities focused on sustainability, such as **Bags of Ethics** and **Eco-Bags Products**, use messaging around eco-friendliness, social responsibility, and ethical production to capture a loyal consumer base. Social media platforms and influencer marketing campaigns are widely utilized by companies to appeal to younger, environmentally conscious consumers.
8. **Collaborations and Partnerships:** Strategic collaborations with retail brands, NGOs, and environmental groups have become a key competitive strategy. Many brands collaborate with environmental non-profits or partner with supermarkets and retail chains to offer cotton shopping bags as part of a broader sustainability initiative. These partnerships often serve to enhance the brand image of both parties while driving consumer adoption of reusable shopping bags.

FIGURE 16. GLOBAL COTTON BAG MARKET: COMPANY MARKET SHARE ANALYSIS, 2023



Source: Journals And Articles, Press Releases, Company Websites, Investor Presentations And Whitepapers, Annual Reports, Primary Interviews, And Reports And Data
**Market share has been calculated based on consumption-production pattern

TABLE 9. MARKET SHARE ANALYSIS OF GLOBAL COTTON BAG MARKET LEADERS, 2023

	Company	Headquarters	Market Share (%)
1	Ecoline Exim Limited	Kolkata, West Bengal, India	4.30%
2	Kimduc Group	Ho Chi Minh City, Vietnam	4.10%
3	Thanhbat	Ho Chi Minh City, Vietnam	3.70%
4	Bag Craft India Private Limited	New Delhi, India	3.20%
5	Сумла	Istanbul, Turkey	3.10%
6	Sree Baba Fabrics	Tirupur, Tamil Nadu, India	2.50%
7	Om Textiles	Karur, Tamil Nadu, India	2.10%
8	Royal Fabric	Asarva, Ahmedabad, Gujarat, India	2.10%
9	Shri Pranav Textile Creations Private Limited	Karur, Tamil Nadu, India	1.60%
10	Others	Various Locations	73.30%

Source: Journals And Articles, Press Releases, Company Websites, Investor Presentations And Whitepapers, Annual Reports, Primary Interviews, And Reports And Data

6.2. INDIA COTTON BAG MARKET: COMPANY MARKET SHARE ANALYSIS

The cotton bag market in India is characterized by a growing focus on sustainability, eco-friendly products, and government regulations aimed at reducing plastic use.

1. Market Overview:

- The Indian cotton bag market is expanding due to rising environmental awareness and the demand for biodegradable and reusable alternatives to plastic bags.
- Government initiatives, such as the ban on single-use plastics, have accelerated the shift towards cotton bags, driving the market's growth.
- Key end-use sectors include retail (supermarkets and fashion brands), corporate giveaways, and promotional merchandise.

2. Other prominent Players:

- **Earthware India:** Specializes in eco-friendly and sustainable cotton bags for retail and promotional use. They focus on exports and have a strong presence in the international market.
- **CarryGreen:** A well-known brand offering customized cotton bags with a wide range of designs and sizes. They cater to both the domestic and international markets, emphasizing premium quality.
- **EcoRight:** Offers a variety of eco-friendly cotton bags, including tote bags and grocery bags. Their focus is on providing stylish and reusable alternatives, often with custom printing options for corporate clients.
- **BAGittoday:** This company is known for providing bulk quantities of cotton bags for retail chains and promotional events. They focus on affordability while maintaining quality.

3. Market Share and Positioning:

- **Earthware India** and **CarryGreen** dominate the export market due to their established international clientele and large production capacities.
- **EcoRight** focuses on premium quality and design, giving it a competitive edge among urban and corporate clients looking for fashionable and sustainable options.
- Smaller, local manufacturers also hold significant market share by catering to local retail chains, small businesses, and event companies needing cost-effective bulk orders.

4. Competitive Landscape:

- The competition is largely driven by product quality, pricing, and the ability to cater to custom orders, especially for corporate clients and international exports.
- Companies are also investing in sustainable and ethical sourcing practices, which have become important differentiators in this market.
- Many companies, especially those targeting urban consumers, are leveraging e-commerce platforms to expand their reach and offer personalized cotton bags directly to end-users.

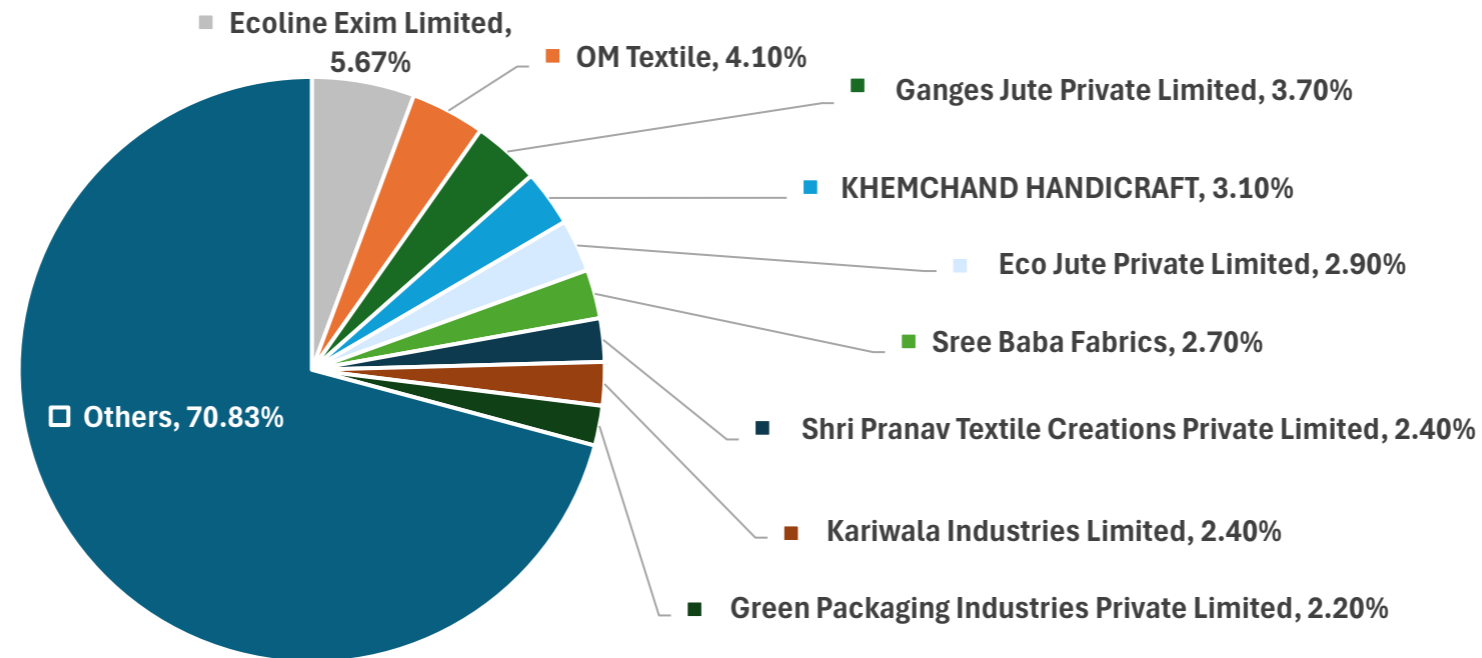
5. Future Trends:

- Increasing consumer preference for sustainable and biodegradable products will continue to drive the market.
- Companies that innovate in terms of bag design, durability, and customization will gain a competitive advantage.

- The export market for Indian cotton bags is expected to grow as global demand for eco-friendly products rises. Companies focusing on international quality standards will benefit from this trend.

Overall, the Indian cotton bag market presents opportunities for growth, especially for companies that prioritize sustainability, quality, and customization.

FIGURE 17. INDIA COTTON BAG MARKET: COMPANY MARKET SHARE ANALYSIS, 2023



Source: Journals And Articles, Press Releases, Company Websites, Investor Presentations And Whitepapers, Annual Reports, Primary Interviews, And Reports And Data
**Market share has been calculated based on consumption-production pattern

TABLE 10. MARKET SHARE ANALYSIS OF INDIAN COTTON BAG MARKET LEADERS, 2023

	Company	Headquarters	Market Share (%)
1	Ecoline Exim Limited	Kolkata, West Bengal, India	5.67%
2	OM Textile	Karur, Tamil Nadu, India	4.10%
3	Ganges Jute Private Limited	Kolkata, West Bengal, India	3.70%
4	KHEMCHAND HANDICRAFT	Jodhpur, Rajasthan, India	3.10%
5	Eco Jute Private Limited	Kolkata, West Bengal, India	2.90%
6	Sree Baba Fabrics	Tirupur, Tamil Nadu, India	2.70%
7	Shri Pranav Textile Creations Private Limited	Karur, Tamil Nadu, India	2.40%
8	Kariwala Industries Limited	Kolkata, West Bengal, India	2.40%
9	Green Packaging Industries Private Limited	Kolkata, West Bengal, India	2.20%
10	Others	Various Locations	70.83%

Source: Journals And Articles, Press Releases, Company Websites, Investor Presentations And Whitepapers, Annual Reports, Primary Interviews, And Reports And Data

6.3. GLOBAL JUTE BAG MARKET: COMPANY MARKET SHARE ANALYSIS

Competitive Landscape in the Jute Shopping Bag Market

The **jute shopping bag market** has been experiencing robust growth, driven by the increasing awareness of environmental sustainability and the rising demand for eco-friendly products. Jute, being a biodegradable and renewable material, has gained prominence as an alternative to plastic bags. With growing concerns over plastic pollution, governments across various regions have imposed regulations and bans on single-use plastics, creating significant opportunities for the jute shopping bag market. Consequently, the competitive landscape of this market is becoming increasingly dynamic, with a diverse range of players vying for market share, from established manufacturers to emerging entrants.

Key Market Players

The jute shopping bag market consists of several key players, including both **large-scale manufacturers** and **small-to-medium enterprises (SMEs)**, primarily from **India** and **Bangladesh**, which are the two largest producers of jute globally.

These companies have a significant presence in international markets and cater to the growing demand for jute bags in regions such as North America, Europe, and the Asia-Pacific. The promotional jute bag segment is highly competitive, as companies across various industries, particularly in retail, fashion, and corporate sectors, use these bags as part of their branding and marketing strategies. Customized jute bags, offering flexibility in terms of design, size, and printing options, are in high demand among brands looking to create a sustainable image.

Market Dynamics and Differentiation Strategies

- 1. Product Innovation and Customization:** Companies in the jute shopping bag market are focusing on product innovation and customization to differentiate themselves from competitors. **Design and quality** are critical factors for market differentiation, with manufacturers increasingly offering **personalized** and **aesthetically appealing** jute bags tailored to the preferences of individual consumers or brands. Features like **durability**, **reusability**, and **biodegradability** remain key selling points, while the incorporation of **modern designs** and **multi-functional uses** enhances appeal among eco-conscious consumers.
- 2. Sustainability and Ethical Practices:** Many players emphasize their commitment to **ethical sourcing**, **fair trade practices**, and **sustainable production processes**. This has become a significant marketing strategy, particularly for companies catering to **Western markets**, where consumer awareness around sustainability is high. Companies that can demonstrate strong sustainability credentials, including **zero waste production**, **natural dyeing**, and **environmentally friendly packaging**, gain a competitive advantage.
- 3. Geographic Expansion and Export Focus:** Companies from **India** and **Bangladesh** dominate the global supply of jute bags due to their competitive advantage in jute production. They are increasingly focusing on expanding their market presence in **Europe**, **North America**, and **Asia-Pacific** through strategic partnerships and distribution networks. Export-oriented strategies have allowed these manufacturers to capitalize on rising international demand for sustainable products, supported by favorable government policies that encourage jute production and exports.
- 4. Government Support and Initiatives:** The governments of India and Bangladesh have introduced various initiatives to promote jute cultivation and the use of jute products. For example, the **Jute Packaging Materials Act** in India mandates the use of jute

for packaging certain goods. These policies provide a competitive edge to jute bag manufacturers based in these countries, ensuring a steady supply of raw materials at competitive prices, while also facilitating investment in **technology** and **innovation**.

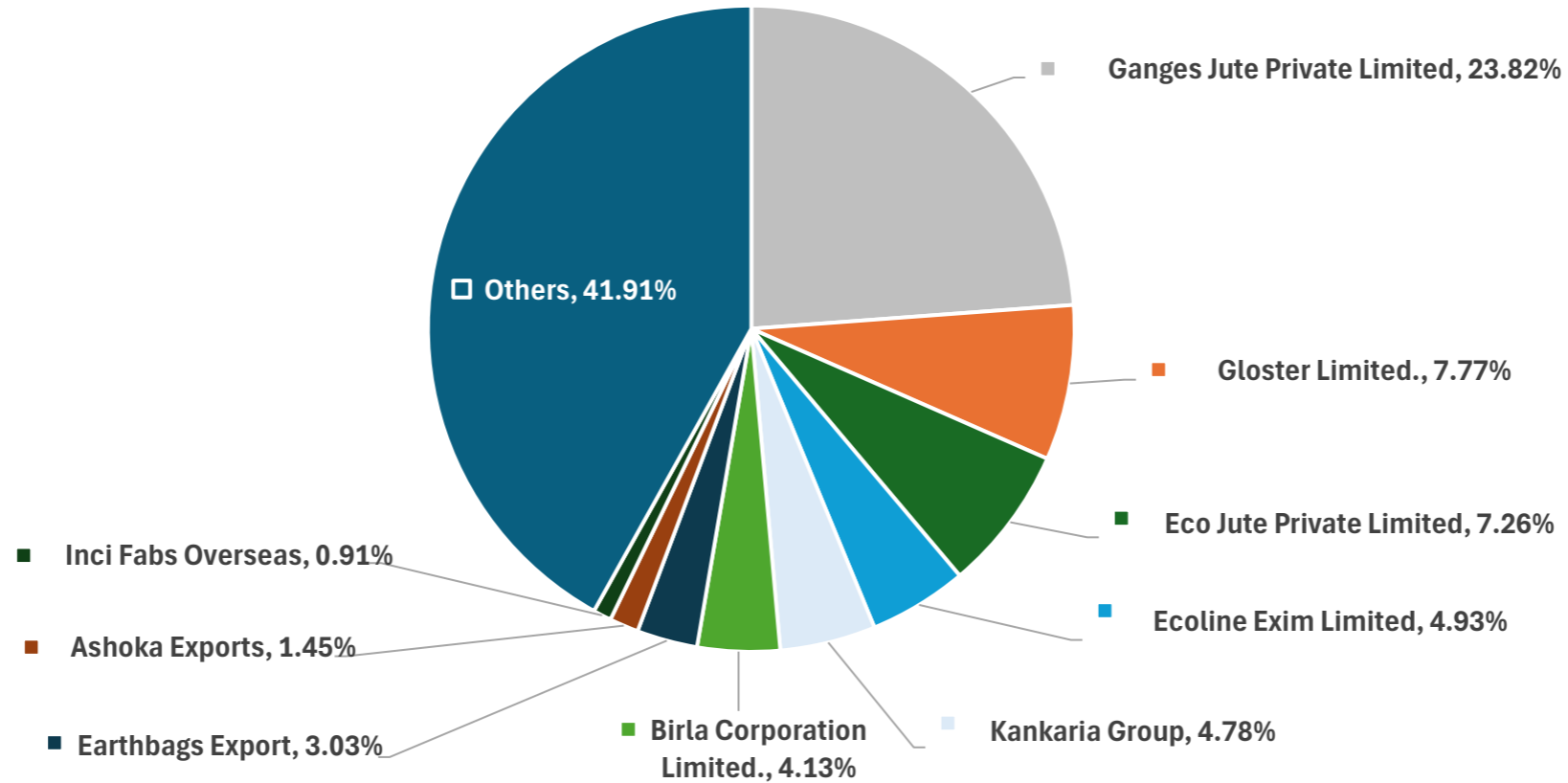
5. **Pricing Strategies and Cost Competitiveness:** Price remains a critical factor in the competitive landscape. While **jute bags** are generally perceived as more expensive than plastic bags, manufacturers are striving to maintain cost competitiveness through **economies of scale, automation, and efficient production processes**. Companies that can balance affordability with quality, sustainability, and design innovation are better positioned to capture a larger market share, particularly in **price-sensitive markets** like Asia-Pacific and Latin America.

Regional Competition

The **Asia-Pacific** region, led by India and Bangladesh, is a dominant force in the production and export of jute shopping bags. However, competition is intensifying in other regions as well:

- **Europe:** The demand for sustainable alternatives has made Europe a lucrative market for jute shopping bags. Manufacturers are focusing on expanding distribution networks and partnerships with retailers and brands that emphasize sustainability.
- **North America:** The growing consumer shift towards eco-friendly products has led to an increasing demand for jute bags, especially in urban areas. Companies targeting this market focus on premium product offerings with superior design and durability.

FIGURE 18. GLOBAL JUTE BAG MARKET: COMPANY MARKET SHARE ANALYSIS, 2023



Source: Journals And Articles, Press Releases, Company Websites, Investor Presentations And Whitepapers, Annual Reports, Primary Interviews, And Reports And Data
**Market share has been calculated based on consumption-production pattern

TABLE 11. MARKET SHARE ANALYSIS OF GLOBAL JUTE BAG MARKET LEADERS, 2023

	Company	Headquarters	Market Share (%)
1	Ganges Jute Private Limited	Kolkata, West Bengal, India	23.82%
2	Gloster Limited	Kolkata, West Bengal, India	7.77%
3	Eco Jute Private Limited	Kolkata, West Bengal, India	7.26%
4	Ecoline Exim Limited	Kolkata, West Bengal, India	4.93%
5	Kankaria Group	Kolkata, West Bengal, India	4.78%
6	Birla Corporation Limited	Kolkata, West Bengal, India	4.13%
7	Earthbags Export	Kolkata, West Bengal, India	3.03%
8	Ashoka Exports	Kolkata, West Bengal, India	1.45%
9	Inci Fabs Overseas	Kolkata, West Bengal, India	0.91%
10	Others	Various Location	41.91%

Source: Journals And Articles, Press Releases, Company Websites, Investor Presentations And Whitepapers, Annual Reports, Primary Interviews, And Reports And Data

6.4. INDIA JUTE BAG MARKET: COMPANY MARKET SHARE ANALYSIS

The **India jute bag market** has seen substantial growth in recent years, driven by the increasing emphasis on sustainable and eco-friendly alternatives to plastic bags. Rising awareness of environmental concerns, government initiatives such as bans on single-use plastics, and a shift toward biodegradable packaging materials have positioned jute bags as a preferred option in multiple sectors, including retail, food, agriculture, and fashion.

Key Players and Market Share Distribution: Gloster Limited: A well-established private player, Gloster Limited specializes in high-quality jute bags for diverse applications. Their significant market share stems from their ability to meet domestic and international quality standards, especially in the food and beverage industry. The company's focus on value-added products like laminated and decorative jute bags has widened its market reach. **Eco Jute Pvt. Ltd.:** A rising star in the industry, Eco Jute focuses on sustainability and bespoke designs. The company has quickly captured a significant portion of the urban market by collaborating with retail giants and promoting eco-conscious branding.

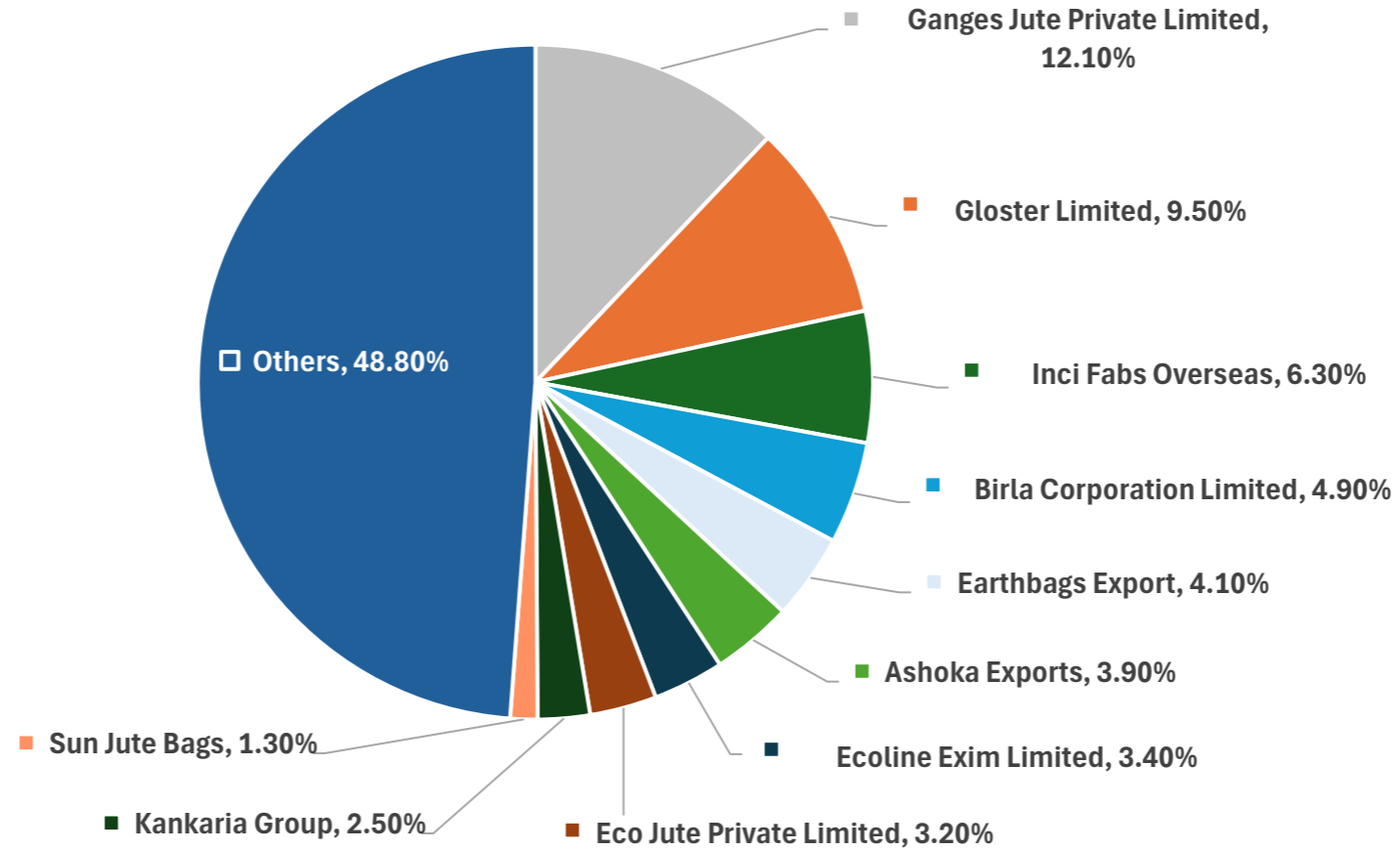
Fragmented Market Structure

While the above players dominate a portion of the market, the **jute bag market in India is highly fragmented**, with numerous small and medium enterprises (SMEs) contributing significantly to overall production. These SMEs often cater to local demand and export markets, supported by initiatives like the **National Jute Policy** and government subsidies for small jute businesses.

Market Dynamics Influencing Market Shares

1. **Government Policies:** Incentives for jute manufacturers and mandates for jute packaging in agricultural and sugar industries have stabilized market shares for larger companies.
2. **Export Opportunities:** Global demand for biodegradable products has enabled major companies to expand their presence internationally, influencing their market share in India.
3. **Technology Adoption:** Companies investing in automated weaving and stitching processes have gained a competitive edge, particularly in maintaining consistent quality and meeting high-volume orders.

FIGURE 19. INDIA JUTE BAG MARKET: COMPANY MARKET SHARE ANALYSIS, 2023



Source: Journals And Articles, Press Releases, Company Websites, Investor Presentations And Whitepapers, Annual Reports, Primary Interviews, And Reports And Data
**Market share has been calculated based on consumption-production pattern

TABLE 12. MARKET SHARE ANALYSIS OF INDIA JUTE BAG MARKET LEADERS, 2023

	Company	Headquarters	Market Share (%)
1	Ganges Jute Private Limited	Kolkata, West Bengal, India	12.10%
2	Gloster Limited	Kolkata, West Bengal, India	9.50%
3	Inci Fabs Overseas	Kolkata, West Bengal, India	6.30%
4	Birla Corporation Limited	Kolkata, West Bengal, India	4.90%
5	Earthbags Export	Kolkata, West Bengal, India	4.10%
6	Ashoka Exports	Kolkata, West Bengal, India	3.90%
7	Ecoline Exim Limited	Kolkata, West Bengal, India	3.40%
8	Eco Jute Private Limited	Kolkata, West Bengal, India	3.20%
9	Kankaria Group	Kolkata, West Bengal, India	2.50%
10	Sun Jute Bags	Gannavaram, Andhra Pradesh, India	1.30%
11	Others	Various Location	48.80%

Source: Journals And Articles, Press Releases, Company Websites, Investor Presentations And Whitepapers, Annual Reports, Primary Interviews, And Reports And Data



7. ECOLINE EXIM LIMITED- COMPANY PROFILE



7.1. ECOLINE EXIM LIMITED

Ecoline Exim Limited

Type: Public

Industry: Packaging

Founded: 2008

Headquarters : West Bengal, India

7.1.1. COMPANY SUMMARY

Founded in 2008, Ecoline Exim Limited has established itself as a leading manufacturer and exporter of eco-friendly packaging solutions, emphasizing sustainability and ethical practices. The company specializes in the production of reusable cotton and jute bags, with a strong focus on addressing global challenges posed by single-use plastic bags.

KEY HIGHLIGHTS:

- **Experience and Capacity:** With over 15 years of expertise, Ecoline produces **60 million bags annually** across three socially compliant factories in West Bengal and Gujarat, India.
- **Global Reach:** Ecoline Exim Limited serves over **30 countries** and holds the top position globally in the cotton bag market, with a **4.30%** market share.

- **Sustainability Commitment:** The company aligns with UN Sustainable Development Goals (SDGs) and incorporates certifications like ISO 9001:2015, GOTS, and OEKO-TEX. Ecoline's operations aim to achieve carbon positivity through initiatives such as backward integration and solar power.

MILESTONES AND ACHIEVEMENTS:

Early Success and Expansion: The journey began with a significant milestone in **2015-16**, achieving an annual turnover of **₹50 crores**. This success was followed by recognition in **2016-17** with the prestigious **21st Handicrafts Exports Award**, highlighting excellence in the handicrafts sector. In **2017-18**, the company received the **Eastern Export Excellence Award** from **FIEO** and further expanded its production capabilities by establishing the **Madhyamgram Unit 1 factory**.

Accelerated Growth and Recognition: The years **2018-19** marked a phase of accelerated growth, with the company surpassing an annual turnover of **₹100 crores** and earning the **22nd Handicrafts Exports Award** for outstanding export performance. During this period, it set up a **state-of-the-art manufacturing facility in Ahmedabad** and gained the **Authorized Economic Operator – T1 Certification**, enhancing its credibility in global trade.

Strategic Expansion and Certifications: In **2021-22**, the launch of the **Madhyamgram Unit 2 factory** enabled the company to scale operations to meet increasing market demand. The following year, **2022-23**, marked further achievements with the attainment of **ISO 14001:2015 Certification**, underscoring a commitment to sustainable practices, and receiving the **23rd Handicrafts Exports Award**, reinforcing its leadership in the industry. By **2022-23**, the company achieved another landmark by exceeding **₹250 crores** in annual turnover.

Global Recognition: In **2023-24**, the company reached a new pinnacle by being awarded the prestigious **3-Star Export House Certification** by the **Government of India**, underscoring its excellence in exports and international trade.

FUTURE GROWTH:

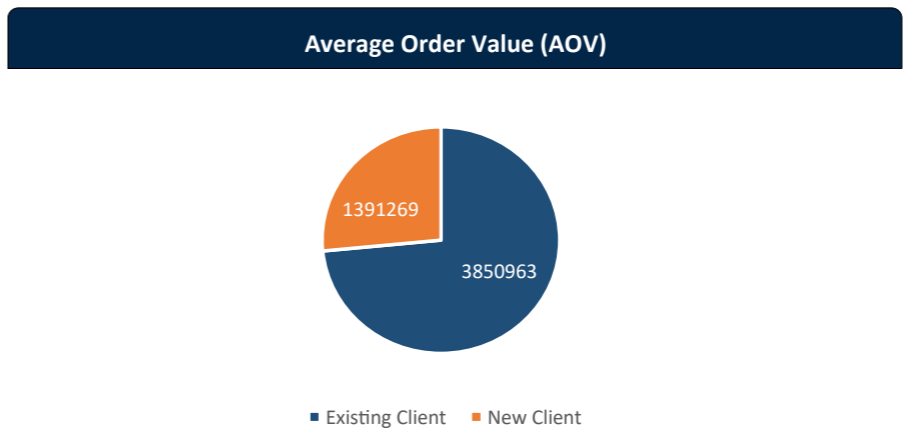
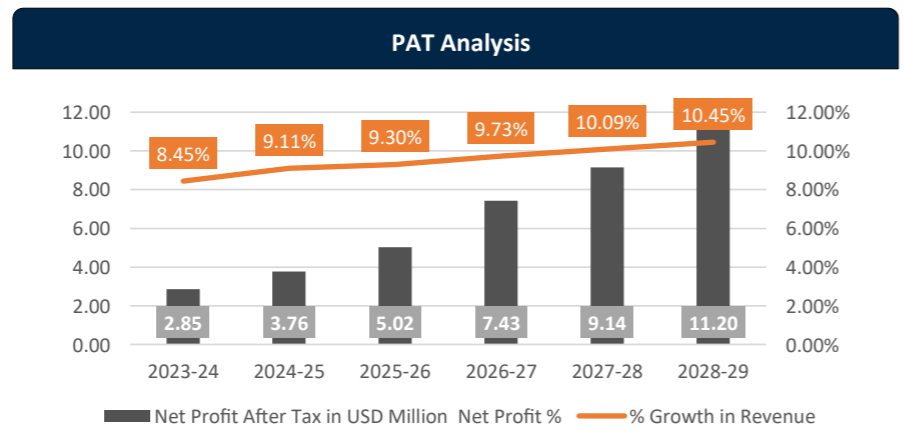
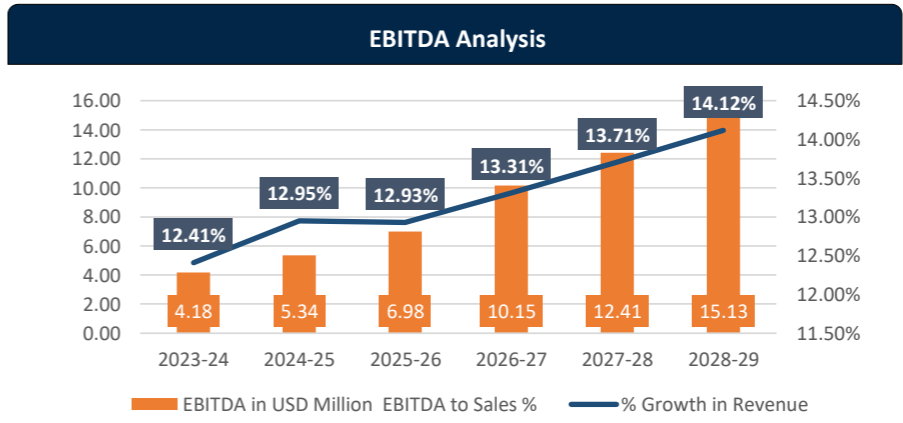
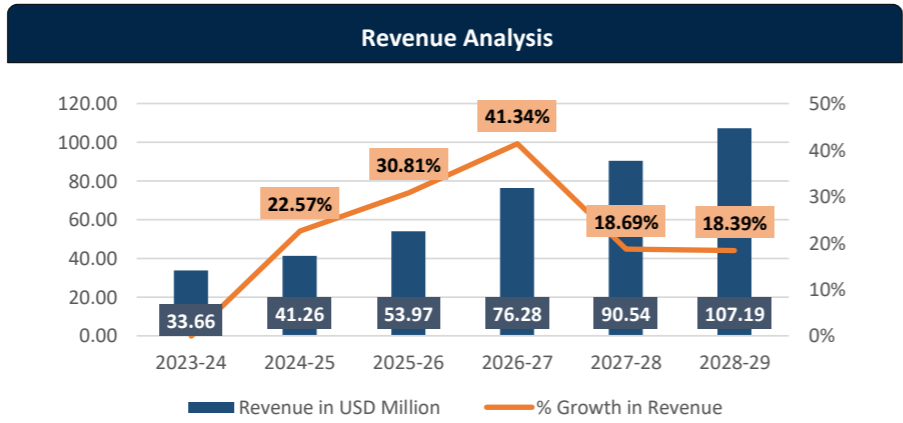
Ecoline aims to expand its capacity by **60-65%**, integrate in-house weaving, and launch a domestic brand to tap into the local market. The company also plans to diversify into backpacks and other sustainable products.

SOCIAL IMPACT:

Through CSR initiatives, Ecoline contributes to healthcare by donating medical equipment to hospitals, showcasing its commitment to community welfare. Ecoline Exim Limited continues to lead the transition toward eco-friendly packaging solutions, combining innovative practices with a robust commitment to sustainability and social responsibility.

7.1.2. FINANCIAL INSIGHTS

With 15+ year of experience, company has 3 socially compliant factories with world-class infrastructure. Ecoline Exim Limited’s production capacity is 60 million bags/year and serve 30+ countries with their Wide Range of Eco-Friendly Shopping Bags.



Source: Company Website, Annual Report, News & Press Release

Exchange rate assumption: 1 INR = 0.012 USD.

7.1.3. PRODUCT INSIGHTS

Product Type	Description	Key Features	Impact
Fairtrade Bags	Bags certified by FLOCERT to ensure fair wages and ethical practices throughout the supply chain.	- Ethically sourced materials	Promotes economic fairness and labor rights
		- Ensures workers' well-being	
Organic Bags	Made using GOTS-certified cotton that minimizes chemical usage and supports sustainable farming.	- Minimal chemical usage	Encourages environmentally friendly farming
		- Supports organic agriculture	
Recycled Bags	Crafted from pre- and post-consumer waste, repurposing discarded textiles into new products.	-Made from recycled materials	Reduces waste and supports recycling
		- Promotes circular economy	
Conventional Cotton Bags	Strong, durable bags designed for everyday use, made from standard cotton.	- Affordable and versatile	Reduces reliance on single-use plastics
Conventional Jute Bags	Durable, best-selling products crafted from standard jute materials.	- Biodegradable and robust	Encourages the use of natural fibers

Source: Annual Reports, Primary Interviews, and Reports and Data

7.1.4. SWOT ANALYSIS

 S STRENGTHS	 W WEAKNESS	 O OPPORTUNITIES	 T THREATS
<ul style="list-style-type: none"> ▪ The company offers a wide range of eco-friendly sustainable products which are mainly produced from cotton and jute. ▪ The company is mainly involved in the export of the cotton as well as jute bags to more than 30 countries. ▪ It has a production capacity of 60 million/bags per annum, which makes it one the prominent leader in the market. 	<ul style="list-style-type: none"> ▪ The company is too much dependent on raw materials such as jute and cotton. Any fluctuations in sourcing these raw materials might hamper the company’s production. ▪ Limited brand recognition compared to larger competitors. ▪ Vulnerability to supply chain disruptions 	<ul style="list-style-type: none"> ▪ Growing demand for eco-friendly and sustainable products. ▪ Expansion into new markets and industries ▪ Partnership and collaboration opportunities with other export and import organizations. 	<ul style="list-style-type: none"> ▪ Intense competition from established and emerging companies in the shopping bag category. ▪ Economic downturns and fluctuations in commodity prices

Source: Company Website, Annual Report, News & Press Releases

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