

Adjustable Beds & Mattress Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product (Adjustable Beds, Adjustable Mattress), By End User (Residential, Commercial), By Sales Channel (Direct Sales, Online, Supermarkets/Hypermarkets, Home Decor Shop, Others), By Region & Competition, 2021-2031F

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Abstracts

The Global Adjustable Beds & Mattress Market is projected to expand from USD 8.02 billion in 2025 to USD 12.92 billion by 2031, reflecting a compound annual growth rate of 8.27%. This market consists of articulated bed frames paired with compatible mattresses, such as memory foam or hybrid options, engineered to offer customizable elevation for ergonomic support. Key growth drivers include a globally aging population in need of mobility assistance and an increasing number of consumers using their bedrooms for both work and relaxation. Additionally, growing awareness regarding the medical advantages of inclined sleeping, such as improved circulation and respiratory relief, continues to drive demand for these functional sleep systems.

However, economic volatility poses a significant barrier to market growth, as inflation limits consumer discretionary spending on expensive durable goods. This challenge is highlighted by recent industry metrics; for instance, the International Sleep Products Association projected a 4.5% decline in the wholesale value of mattress shipments in 2024 due to these financial pressures. Consequently, manufacturers are forced to navigate a price-sensitive landscape while simultaneously managing the substantial logistical costs associated with distributing heavy, motorized bed bases.

Market Driver

The incorporation of IoT capabilities and smart home connectivity is fundamentally transforming the market, elevating adjustable bases from simple mechanical furniture to advanced wellness technologies. Modern systems increasingly employ biometric sensors to monitor heart rate, respiration, and sleep cycles, allowing the bed to autonomously adjust elevation for pressure relief or snoring reduction without user input. This technological advancement enables manufacturers to position their products within the wider smart home ecosystem, justifying higher price points through data-driven personalization and enhanced utility. The commercial success of this strategy is evident; Sleep Number Corporation reported net sales of USD 1.89 billion in their full-year 2023 results, released in February 2024, a performance largely driven by the continued adoption of their proprietary smart bed platforms.

Simultaneously, the rising incidence of chronic pain and sleep disorders is pushing consumers toward ergonomic solutions that offer clinical benefits in a home setting. Individuals dealing with sleep apnea, acid reflux, or lumbar discomfort are increasingly prioritizing adjustable bases for their targeted support and zero-gravity positioning features. Furthermore, partner compatibility issues are influencing product configurations, specifically driving the need for split-king setups. A July 2024 survey by the American Academy of Sleep Medicine revealed that over one-third of respondents sleep in separate rooms to address partner needs, a trend that directly boosts demand for independent dual-adjustment bases. This health-focused demand supports revenue resilience even during economic stress, as seen in Tempur Sealy International's third-quarter 2024 results, where the company posted USD 1.3 billion in net sales, reflecting enduring consumer investment in high-quality sleep systems.

Market Challenge

Economic instability serves as a primary impediment to the growth of the Global Adjustable Beds & Mattress Market by eroding consumer purchasing power and dampening demand for non-essential durable items. High inflation rates compel households to reallocate budgets toward daily necessities, resulting in the postponement of high-ticket investments such as motorized bed frames and premium hybrid mattresses. This shift in spending behavior creates a highly price-sensitive environment, making it difficult for advanced ergonomic sleep solutions to gain mass-market traction.

The severity of this demand contraction is reflected in recent volume metrics that highlight a shrinking customer base. According to the International Sleep Products

Association, unit shipments for the total mattress market were forecast to decline by 7.5% in 2024. This significant drop in physical volume, distinct from monetary value fluctuations, demonstrates that fewer consumers are entering the market entirely. Consequently, the industry struggles with a reduced scale of adoption, as financial uncertainty deters the demographic expansion necessary to sustain growth in the premium adjustable bedding sector.

Market Trends

The rise of Direct-to-Consumer and Bed-in-a-Box e-commerce models is reshaping the distribution landscape by allowing manufacturers to bypass traditional retail limitations and capture higher profit margins. This shift enables companies to offer specialized adjustable bases and compressed mattresses directly to end-users, facilitating rapid delivery and trial periods that traditional showrooms often cannot match. The dominance of this channel is evident in the revenue mix of leading industry innovators, who increasingly rely on digital storefronts to sustain liquidity during periods of wholesale contraction. For instance, Purple Innovation's third-quarter 2024 results revealed Direct-to-Consumer net revenues of USD 70.8 million, significantly eclipsing their wholesale revenue of USD 47.8 million, underscoring the critical role of online sales channels in maintaining market presence.

Concurrently, the market is witnessing a decisive shift toward sustainable and eco-friendly manufacturing materials, driven by regulatory pressure and growing consumer eco-consciousness. Manufacturers are progressively replacing petroleum-based foams and non-recyclable components with organic latex, ethically sourced wool, and circular waste reduction protocols to minimize environmental impact. This transition extends beyond mere material substitution to encompass the entire production lifecycle, including waste diversion certifications that validate corporate environmental claims. The tangible impact of these green initiatives is quantifiable; according to Avocado Green Mattress, the company achieved an 85% landfill diversion rate at its production facility in January 2024, setting a new benchmark for waste minimization in the premium bedding and adjustable furniture sector.

Key Market Players

Tempur Sealy International, Inc.

The Sleepwell Company

Leggett & Platt, Inc.

Sleep Number Corp.

Easy Rest Adjustable Sleep Systems

Simmons Bedding Company, LLC.

Serta, Inc.

Ascion, LLC.

Southerland Sleep

Sealy Technology LLC

Report Scope

In this report, the Global Adjustable Beds & Mattress Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Adjustable Beds & Mattress Market, By Product

Adjustable Beds

Adjustable Mattress

Adjustable Beds & Mattress Market, By End User

Residential

Commercial

Adjustable Beds & Mattress Market, By Sales Channel

Direct Sales

Online

Supermarkets/Hypermarkets

Home Decor Shop

Others

Adjustable Beds & Mattress Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Adjustable Beds & Mattress Market.

Available Customizations:

Global Adjustable Beds & Mattress Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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