

Memory Foam Mattress Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product Type (Conventional Memory Foam, Gel Memory Foam, Others), By Distribution Channel (Offline, Online), By Region & Competition, 2021-2031F

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Abstracts

The Global Memory Foam Mattress Market is projected to expand significantly, rising from USD 6.94 Billion in 2025 to USD 12.92 Billion by 2031, reflecting a compound annual growth rate of 10.91%. These sleep surfaces, engineered from viscoelastic polyurethane foam, contour to the user's body by reacting to heat and pressure, thereby delivering customized support and minimizing motion transfer. Key factors driving this trajectory include the growing incidence of orthopedic conditions like chronic back pain, which fuels the need for ergonomic sleeping aids, alongside a heightened consumer focus on the health advantages of restorative sleep. Additionally, the rapid pace of urbanization and the broadening hospitality industry are sustaining global demand for high-quality bedding solutions.

However, the market confronts substantial obstacles due to the fluctuating costs of essential raw materials, specifically petrochemical derivatives such as polyols and isocyanates required for foam manufacturing. This price instability hampers cost predictability, pressurizing manufacturer margins and complicating the implementation of competitive pricing structures. Offering a quantitative outlook on the sector's recovery, the International Sleep Products Association forecasted a 3% increase in the wholesale value of mattress shipments in 2025, suggesting a rebounding environment that is poised to support the continued growth of the memory foam category.

Market Driver

Technological advancements in cooling gels and breathable foam structures are significantly altering consumer adoption patterns by resolving the historical challenge of heat retention in viscoelastic materials. By incorporating phase-change materials and open-cell designs that manage temperature, manufacturers are successfully repositioning memory foam as a high-performance, premium solution rather than a basic commodity. This evolution towards sophisticated materials enhances sleep quality and bolsters profitability by enabling the sale of higher-value product lines. For example, according to Purple Innovation, Inc.'s 'Third Quarter 2025 Earnings Call Transcript' from November 2025, the company achieved a gross margin expansion to 42.8%, a success attributed largely to the strong sales performance of its premium Rejuvenate 2.0 mattress.

Simultaneously, the rising demand for plant-based and eco-friendly foam options is driving the industry to decrease its dependence on conventional petrochemical derivatives. As sustainability becomes a primary purchasing factor, brands are reformulating their offerings with circular designs and bio-based polyols to attract environmentally aware consumers concerned with product lifecycles. According to the National Bed Federation's 'Consumer Bed Buying Survey' from July 2025, 73% of participants indicated a willingness to pay a premium for mattresses designed to avoid landfill waste. This shift toward sustainable, high-value products underpins market optimism, a sentiment reflected in the International Sleep Products Association's 2025 forecast, which projects a 6% increase in the wholesale value of mattress shipments for 2026.

Market Challenge

The erratic pricing of raw materials, particularly petrochemical derivatives such as isocyanates and polyols, serves as a major hindrance to the growth of the Global Memory Foam Mattress Market. Since these components are essential for foam production, their volatile cost structures subject manufacturers to abrupt financial instability. Producers are often forced to adjust prices to safeguard their margins, a reaction that complicates long-term strategic planning and frequently results in increased costs passed down to retailers and end-users. This pricing volatility creates friction within the sales process and diminishes the affordability of premium bedding, ultimately suppressing broader market demand.

As a result, the industry faces difficulties in sustaining consistent volume growth during

times of inflated input costs. The impact of these economic strains is evident in recent market performance data which highlights the contraction driven by such pressures. According to the International Sleep Products Association, the wholesale value of mattress shipments was forecast to decline by 4.5% in 2024. This decrease emphasizes how the sector's inability to stabilize production costs directly leads to dampened market activity, thereby preventing the industry from achieving its maximum growth potential.

Market Trends

The widespread adoption of hybrid designs that merge foam with coil systems is reshaping the market as manufacturers aim to overcome the structural drawbacks of standard viscoelastic foams. By combining the pressure-relieving benefits of memory foam with the airflow and robust support of pocketed springs, these composite mattresses deliver improved responsiveness and edge support, making them attractive to consumers moving away from traditional innerspring models. This structural evolution allows brands to secure greater retail presence by providing products that balance durability with contouring comfort. For instance, according to Tempur Sealy International, Inc.'s '2023 Annual Report' from February 2024, the hybrid-centric Stearns & Foster brand realized a 20% increase in slot placements at third-party retailers, highlighting the growing floor space allocated to these configurations.

In parallel, the incorporation of smart adjustability and AI-driven sleep tracking is transforming the sector from a provider of passive furniture to a hub of active health technology. Biometric monitoring innovations allow mattresses to adjust temperature and firmness in real-time based on movement and heart rate data, fostering deeper connections with health-focused consumers. This technological tier enhances sleep effectiveness while driving superior unit economics through the monetization of subscription services and proprietary digital ecosystems. Demonstrating the financial strength of this strategy, Sleep Number Corporation reported in its 'Q3 2024 Earnings Call Transcript' from October 2024 that it achieved a gross margin rate of 60.8%, a 340 basis point year-over-year increase driven largely by the pricing power and operational efficiencies of its smart bed portfolio.

Key Market Players

Serta, Inc.

Sleep Number Corporation

Tempur Sealy International, Inc.

Casper Sleep Inc.

DeRUCCI International Holdings Limited

Kingsdown, Inc.

Simmons Bedding Company

Spring Air International.

Dorel Industries Inc.

Restonic Mattress Corporation

Report Scope

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

Memory Foam Mattress Market, By Product Type

Conventional Memory Foam

Gel Memory Foam

Others

Memory Foam Mattress Market, By Distribution Channel

Offline

Online

Memory Foam 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 Memory Foam Mattress Market.

Available Customizations:

Global Memory Foam 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).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. GLOBAL MEMORY FOAM MATTRESS MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Product Type (Conventional Memory Foam, Gel Memory Foam, Others)
 - 5.2.2. By Distribution Channel (Offline, Online)
 - 5.2.3. By Region
 - 5.2.4. By Company (2025)

5.3. Market Map

6. NORTH AMERICA MEMORY FOAM MATTRESS MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Product Type

6.2.2. By Distribution Channel

6.2.3. By Country

6.3. North America: Country Analysis

6.3.1. United States Memory Foam Mattress Market Outlook

6.3.1.1. Market Size & Forecast

6.3.1.1.1. By Value

6.3.1.2. Market Share & Forecast

6.3.1.2.1. By Product Type

6.3.1.2.2. By Distribution Channel

6.3.2. Canada Memory Foam Mattress Market Outlook

6.3.2.1. Market Size & Forecast

6.3.2.1.1. By Value

6.3.2.2. Market Share & Forecast

6.3.2.2.1. By Product Type

6.3.2.2.2. By Distribution Channel

6.3.3. Mexico Memory Foam Mattress Market Outlook

6.3.3.1. Market Size & Forecast

6.3.3.1.1. By Value

6.3.3.2. Market Share & Forecast

6.3.3.2.1. By Product Type

6.3.3.2.2. By Distribution Channel

7. EUROPE MEMORY FOAM MATTRESS MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Product Type

7.2.2. By Distribution Channel

7.2.3. By Country

7.3. Europe: Country Analysis

7.3.1. Germany Memory Foam Mattress Market Outlook

7.3.1.1. Market Size & Forecast

7.3.1.1.1. By Value

7.3.1.2. Market Share & Forecast

7.3.1.2.1. By Product Type

7.3.1.2.2. By Distribution Channel

7.3.2. France Memory Foam Mattress Market Outlook

7.3.2.1. Market Size & Forecast

7.3.2.1.1. By Value

7.3.2.2. Market Share & Forecast

7.3.2.2.1. By Product Type

7.3.2.2.2. By Distribution Channel

7.3.3. United Kingdom Memory Foam Mattress Market Outlook

7.3.3.1. Market Size & Forecast

7.3.3.1.1. By Value

7.3.3.2. Market Share & Forecast

7.3.3.2.1. By Product Type

7.3.3.2.2. By Distribution Channel

7.3.4. Italy Memory Foam Mattress Market Outlook

7.3.4.1. Market Size & Forecast

7.3.4.1.1. By Value

7.3.4.2. Market Share & Forecast

7.3.4.2.1. By Product Type

7.3.4.2.2. By Distribution Channel

7.3.5. Spain Memory Foam Mattress Market Outlook

7.3.5.1. Market Size & Forecast

7.3.5.1.1. By Value

7.3.5.2. Market Share & Forecast

7.3.5.2.1. By Product Type

7.3.5.2.2. By Distribution Channel

8. ASIA PACIFIC MEMORY FOAM MATTRESS MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Product Type

8.2.2. By Distribution Channel

8.2.3. By Country

- 8.3. Asia Pacific: Country Analysis
 - 8.3.1. China Memory Foam Mattress Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Product Type
 - 8.3.1.2.2. By Distribution Channel
 - 8.3.2. India Memory Foam Mattress Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value
 - 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Product Type
 - 8.3.2.2.2. By Distribution Channel
 - 8.3.3. Japan Memory Foam Mattress Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Product Type
 - 8.3.3.2.2. By Distribution Channel
 - 8.3.4. South Korea Memory Foam Mattress Market Outlook
 - 8.3.4.1. Market Size & Forecast
 - 8.3.4.1.1. By Value
 - 8.3.4.2. Market Share & Forecast
 - 8.3.4.2.1. By Product Type
 - 8.3.4.2.2. By Distribution Channel
 - 8.3.5. Australia Memory Foam Mattress Market Outlook
 - 8.3.5.1. Market Size & Forecast
 - 8.3.5.1.1. By Value
 - 8.3.5.2. Market Share & Forecast
 - 8.3.5.2.1. By Product Type
 - 8.3.5.2.2. By Distribution Channel

9. MIDDLE EAST & AFRICA MEMORY FOAM MATTRESS MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Product Type
 - 9.2.2. By Distribution Channel

- 9.2.3. By Country
- 9.3. Middle East & Africa: Country Analysis
 - 9.3.1. Saudi Arabia Memory Foam Mattress Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Product Type
 - 9.3.1.2.2. By Distribution Channel
 - 9.3.2. UAE Memory Foam Mattress Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Product Type
 - 9.3.2.2.2. By Distribution Channel
 - 9.3.3. South Africa Memory Foam Mattress Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
 - 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Product Type
 - 9.3.3.2.2. By Distribution Channel

10. SOUTH AMERICA MEMORY FOAM MATTRESS MARKET OUTLOOK

- 10.1. Market Size & Forecast
 - 10.1.1. By Value
- 10.2. Market Share & Forecast
 - 10.2.1. By Product Type
 - 10.2.2. By Distribution Channel
 - 10.2.3. By Country
- 10.3. South America: Country Analysis
 - 10.3.1. Brazil Memory Foam Mattress Market Outlook
 - 10.3.1.1. Market Size & Forecast
 - 10.3.1.1.1. By Value
 - 10.3.1.2. Market Share & Forecast
 - 10.3.1.2.1. By Product Type
 - 10.3.1.2.2. By Distribution Channel
 - 10.3.2. Colombia Memory Foam Mattress Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Value

10.3.2.2. Market Share & Forecast

10.3.2.2.1. By Product Type

10.3.2.2.2. By Distribution Channel

10.3.3. Argentina Memory Foam Mattress Market Outlook

10.3.3.1. Market Size & Forecast

10.3.3.1.1. By Value

10.3.3.2. Market Share & Forecast

10.3.3.2.1. By Product Type

10.3.3.2.2. By Distribution Channel

11. MARKET DYNAMICS

11.1. Drivers

11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

12.1. Merger & Acquisition (If Any)

12.2. Product Launches (If Any)

12.3. Recent Developments

13. GLOBAL MEMORY FOAM MATTRESS MARKET: SWOT ANALYSIS

14. PORTER'S FIVE FORCES ANALYSIS

14.1. Competition in the Industry

14.2. Potential of New Entrants

14.3. Power of Suppliers

14.4. Power of Customers

14.5. Threat of Substitute Products

15. COMPETITIVE LANDSCAPE

15.1. Serta, Inc.

15.1.1. Business Overview

15.1.2. Products & Services

15.1.3. Recent Developments

15.1.4. Key Personnel

15.1.5. SWOT Analysis

- 15.2. Sleep Number Corporation
- 15.3. Tempur Sealy International, Inc.
- 15.4. Casper Sleep Inc.
- 15.5. DeRUCCI International Holdings Limited
- 15.6. Kingsdown, Inc.
- 15.7. Simmons Bedding Company
- 15.8. Spring Air International.
- 15.9. Dorel Industries Inc.
- 15.10. Restonic Mattress Corporation

16. STRATEGIC RECOMMENDATIONS

17. ABOUT US & DISCLAIMER

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