

United States Mattress Market, By Product Type (Innerspring, Memory Foam, Latex), By End User (Residential, Commercial), By Distribution Channel (Online, Offline), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

The United States mattress market was valued at USD 18.43 billion in 2024 and is projected to reach USD 23.56 billion by 2030, expanding at a compound annual growth rate (CAGR) of 4.18% over the forecast period. Market growth is primarily driven by increasing consumer demand for enhanced comfort, rising disposable incomes, and innovations in sleep technology. Products such as memory foam, hybrid, and eco-friendly mattresses are witnessing growing adoption due to heightened health consciousness and a stronger focus on sustainability.

The market is also undergoing a transformation through the rapid growth of online retail channels. Direct-to-consumer (DTC) brands such as Casper and Purple are disrupting traditional models by offering competitively priced mattresses via digital platforms. Additionally, the expansion of the hospitality sector and trends in the residential housing market continue to support sustained demand.

Key Market Drivers

Growing Consumer Preference for Comfort and Sleep Wellness

Increasing awareness of the critical role of quality sleep in overall health and well-being is a key driver for the U.S. mattress market. Consumers are placing greater emphasis on sleep comfort, fueling demand for mattresses that offer orthopedic support, pressure relief, and long-term durability. As a result, memory foam, hybrid, and latex mattresses

have gained popularity for their ability to enhance spinal alignment and minimize motion transfer.

Health-conscious buyers are also seeking products with hypoallergenic materials and temperature-regulating features to improve sleep quality. These preferences are further reinforced by research linking poor sleep to chronic health conditions, including obesity, cardiovascular issues, and mental health disorders. Consequently, more consumers are investing in premium sleep solutions that support both recovery and overall wellness.

Key Market Challenges

Volatility in Raw Material Costs and Ongoing Supply Chain Disruptions

One of the major challenges confronting the U.S. mattress industry is the fluctuation in raw material prices and persistent supply chain disruptions. Core materials such as polyurethane foam, latex, steel coils, and textile fabrics are subject to global pricing volatility. For instance, rising petroleum prices have a direct impact on polyurethane-based components, while disruptions in steel supply chains affect innerspring mattress production.

The COVID-19 pandemic and geopolitical uncertainties have exacerbated these issues, leading to increased freight costs, labor shortages, and delays in delivery timelines. These factors either erode manufacturer margins or result in higher prices for consumers. Although some companies are moving toward localized production to reduce exposure to global supply shocks, supply chain instability remains a significant hurdle.

Key Market Trends

Emergence of Bed-in-a-Box Solutions and Growth in Online Sales

A notable trend shaping the U.S. mattress market is the rising adoption of bed-in-a-box formats and the increasing prevalence of online sales channels. In 2024, e-commerce continued its upward trajectory, with online mattress sales forecasted to grow by 8.7%. Unlike the traditional in-store purchasing experience, consumers are now gravitating toward the convenience of buying mattresses online.

DTC brands like Casper, Purple, and Tuft & Needle have leveraged this shift by offering mattresses that are compressed, rolled, and shipped in compact boxes. Features such

as easy delivery, risk-free trial periods, and attractive pricing have significantly boosted consumer interest in online purchases. Technological advances in materials have also enabled these products to retain their quality and performance after unpacking.

As trust in digital transactions grows, even conventional retailers are expanding their e-commerce capabilities to stay competitive. This shift is expected to further solidify online platforms as a dominant distribution channel within the U.S. mattress industry.

Key Market Players

Serta Simmons Bedding LLC

Tempur Sealy International Inc.

Casper Inc.

Saatva Inc.

Purple Innovations Inc.

Spring Air International

Sleep Number Corporation

Tuft & Needle LLC

Kingsdown Mattress

Corsicana Mattress Company

Report Scope:

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

United States Mattress Market, By Product Type:

Innerspring

Memory Foam

Latex

United States Mattress Market, By End User:

Residential

Commercial

United States Mattress Market, By Distribution Channel:

Online

Offline

United States Mattress Market, By Region:

South

West

Midwest

Northeast

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the United States Mattress Market.

Available Customizations:

United States 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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