

Japan Adhesives for Mattress Market Assessment, By Adhesives Type [Water Based, Solvent Based, Hotmelt], By Application [Memory Foam Mattress, Latex Foam Mattress, Gel Foam Mattress], By Region, Opportunities and Forecast, FY2018-FY2032F

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Report description:

Japan adhesives for mattress market is projected to witness a CAGR of 4.85% during the forecast period FY2025-FY2032, growing from USD 270.15 million in FY2024 to USD 394.60 million in FY2032. Japan adhesives market for mattresses is growing steadily due to increasing demand for comfortable and durable bedding products, along with growth in new construction, propelling the demand for mattresses in the country. In mattress manufacturing, adhesives are key components that bond several layers of material such as foam, latex, and fabrics, into a single product designed to last.

Additionally, the mattress market in Japan is majorly driven by rising discretionary income and evolving lifestyles among consumers. As disposable incomes increase, individuals are more willing to invest in quality sleep products, leading to heightened demand for mattresses. The expansion of structured retail and consumer sectors, including housing, hospitality, and healthcare, significantly boosts mattress demand in Japan. Geographically, the central region of Japan, especially the Kanto and Chubu areas, is noteworthy as a significant market contributor. The Kanto region, with the Tokyo metropolitan area on its side, is the most populous and urbanized part of Japan. In October 2023, Tokyo's total population was 14.08 million persons, which is 11.3% of the country's total population. Further, Chubu is known for its large-scale industrial and manufacturing work. Both regions are significant drivers of demand for adhesives used in mattress production given the high concentration of consumers in these regions seeking premium bedding solutions.

Increase in Mattress Comfort and Durability Increasing Japan's Need for Mattress Adhesives

Increased consciousness towards quality sleep in Japan coupled with rising demand for comfortable and durable mattresses has also increased readiness to spend on high-quality bedding that will give them better support and comfort, reflecting direct influences in the adhesives market. Adhesives are critical to ensure that the multiple layers of materials used in a mattress, such

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as foam, fabric, and springs, are well secured, providing both durability and comfort. The heightened demand for mattresses from consumers wanting to experience improved quality of sleep has seen manufacturers shift towards the utilization of advanced adhesive technologies in a bid to improve the life and performance of the resultant products. The two main mattress functions that adhesives employ are layer separation prevention and storage of the mattress structure after a long period of time. Furthermore, the rising demand by consumers for softer, more durable mattresses pushes the market of adhesives in Japan, with manufacturers trying their best to guarantee customer satisfaction.

According to Observatory of Economic Complexity (OEC) reports indicate that in FY2022, the total export value of Mattresses originating from Japan stood at USD 32.7 million. The country stood as the world's 51st largest exporter of Mattresses and ranked as the 612th most exported product from Japan.

Emerging Bedding Market Driving Growth in the Japanese Adhesives Market for Mattresses

The expansion of the Japanese bedding market, prompted by an increase in disposable incomes and improvement in urbanization with a rising focus on comfort at home, has positively contributed to its growth. A rise in demand from Japanese consumers investing more in home furnishings through high-end bedding products increases the demand for adhesives in the production of mattresses. A real estate boom in Tokyo and Nagoya urban centers has also contributed to this growth since new housing developments have boosted demands for quality mattresses and furniture.

Modern mattresses are often made from multiple layers and hybrid designs incorporating different materials. For example, in September 2023, Paramount Bed Co., Mitsui Chemicals, and Rever Corporation announced that their initiative for the chemical recycling of polyurethane in mattresses has been selected by Japan's Ministry of the Environment for its FY2023 Project to Promote Decarbonized Circular Economy Systems. This project aims to develop plastic recycling processes and reduce CO2 emissions through demonstration projects.

Adhesives are required for mattresses assembly. The end-product must be satisfactory to consumers in comfort, durability, and performance. The market for adhesives, particularly high-performance solutions tailored to the needs of luxury mattress manufacturers, is expected to remain stable in Japan due to the country's expanding bedding demand.

Solvent-Based Adhesives are Mostly used Adhesive in Mattress Manufacturing

Solvent-based adhesives are among the most widely used substances in mattress manufacturing due to their versatility and strong bonding capabilities. This type of adhesive is typically applied to bond different layers of materials, such as foam, latex, and fabric, ensuring that the mattress is solid and long-lasting. Additionally, solvent-based adhesives dry faster and maintain exceptional strength even under extreme conditions.

However, while solvent-based adhesives are still prevalent because of their excellent bonding properties, the increasing shift toward green alternatives, such as water-based adhesives, poses a significant challenge to their continued use. Nonetheless, in the Japanese mattress manufacturing industry, where high-strength bonding is essential, solvent-based adhesives remain crucial.

Central Region Dominates the Mattress Adhesives Market

The central region of Japan, which encompasses the Kanto and Chubu areas, is a substantial market driver for the mattress adhesives market. The Kanto region is the most urbanized and populous region of Japan, hosting the highly developed urban area, which includes Tokyo, and nearby cities. It is, therefore, an important market for premium bedding products. The region also has a high-class population whose quality-of-life orientation seeks high-quality mattresses, which directly incites demand for advanced adhesives for the mattresses' production.

Furthermore, the Chubu region is a core industrial city where Nagoya plays a central role. The region houses an impressive furniture and bedding manufacturing sector that is creating a huge demand. Chubu is characterized by a solid manufacturing base and proximity to cities and rural areas, thus having a significant role in the mattress adhesives market. The need for adhesives in mattresses, particularly high-performance ones that meet additional needs from customers in these areas, will increase along with Kanto and Chubu's growth.

In January 2024, Inter IKEA Systems B.V., opened its first store in Japan's north Kanto region, Maebashi, Gunma Prefecture. The tenth store in Japan, the store offers affordable and sustainable home furnishing solutions, furniture, and services. Located two hours north of Tokyo, the store caters to the needs of the region's over seven million people.

Future Market Scenario (FY2025 - FY2032F)

- Continued urbanization in major cities like Tokyo, Kanagawa and Nagoya will maintain the impetus of demand for high quality

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mattresses, driving in its wake advances in adhesive technology.

-□ In coming years, new innovative technologies in adhesives will continue to make mattress manufacturing even more efficient through stronger bonding and reducing drying time.

-□ The hybrid and multi-layered mattress segment are growing at a rapidly increasing rate, thereby requiring effective adhesives for bonding materials.

-□ The smart mattresses trend, envisaged to bring in more technology as a step toward achieving better sleep quality, opens greater scope for adhesives with improved performance.

-□ With the expansion of online retail channels of mattresses, the market accessibility for adhesives is likely to increase, which will lead to the demand for adhesives in mattress manufacturing.

Key Players Landscape and Outlook

The landscape of key players in the adhesives market for mattresses in Japan is characterized by a significant number of companies. Prominent players are investing in innovative adhesive solutions tailored for various applications, including the mattress industry. These companies focus on developing high-performance adhesives that enhance product quality and durability, catering to the specific needs of manufacturers. They specialize in industrial coatings and adhesives, emphasizing the importance of customer satisfaction and product performance. Additionally, these companies are committed to sustainability and innovation, ensuring that their adhesive products meet the evolving demands of the mattress market. Together, they dominate the Japanese adhesives market for mattresses, with a strong focus on quality, performance, and customer service.

In September 2020, Bostik-Nitta Co., Ltd., a subsidiary of the Arkema Group, announced the startup of its new, large-scale industrial adhesives plant in Japan. The additional capabilities enabled Bostik to better service its Japanese clientele in the steadily expanding markets for electronics, diapers, cushioning, packaging, labeling, and transportation.

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