

Europe Mattress - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 145 pages | Mordor Intelligence

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Report description:

The Europe Mattress Market size is estimated at USD 11.58 billion in 2025, and is expected to reach USD 13.76 billion by 2030, at a CAGR of greater than 3.5% during the forecast period (2025-2030).

The European mattress market shifted towards more technologically advanced and eco-friendly products. For example, memory foam and latex mattresses gained popularity due to their comfort and support. There's also a growing emphasis on sustainable materials and manufacturing processes. Modern mattresses mainly contain innerspring materials such as latex, elastic, or polyurethane foam. A mattress can also be filled with air, water, or natural materials.

During the initial stage of COVID-19, due to supply chain disruptions, the market experienced losses due to stoppages in manufacturing and distribution services. Later, due to lockdowns and the work-from-home culture, the demand for mattresses rose. Post-COVID, the market is experiencing gradual growth according to seasonal demand fluctuations.

In past decades, people bought cotton or coir and converted it into mattresses. After diversity, it changed by using rubber and latex. Like many markets, the mattress industry is influenced by the rise of e-commerce. Online mattress retailers gained prominence, making it easier for consumers to research and purchase mattresses. Traditional brick-and-mortar stores are still significant, but the competition from online retailers led to innovation in both sales channels.

In the healthcare industry, the demand for mattresses is rising in nursing homes, clinics, and hospitals. The major players in the mattress market in Europe launched convenient, multifunctional hospital beds characterized by height adjustment and electronic connectivity features. The sale of innerspring mattresses in Europe is calculated to be consistent during the forecast period, which contributes more than 50% of the market share.

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Europe Mattress Market Trends

Increasing Trend of Disposable Income in Europe is Driving the Market

The disposable income of consumers in Europe significantly impacts the European mattress market. Disposable income directly affects consumers' purchasing power. When disposable income is high, people spend more on non-essential items, including big-ticket purchases like mattresses. As a result, a rise in disposable income can lead to increased spending on quality mattresses. Disposable income also affects homeownership rates. More people may be inclined to purchase homes in regions with strong economies and higher disposable incomes. Homeownership often goes hand in hand with purchasing new mattresses to fit the different bedroom sizes and preferences in new homes.

Highest Share of Purchasing Mattress by Residentials

A strong residential market typically means an increase in demand for mattresses. People often invest in new mattresses as they buy new homes or renovate existing ones. This increased demand can drive sales and revenue for mattress manufacturers. A robust residential market often increases the preference for premium and high-end mattresses. Consumers investing in their homes are more likely to choose high-quality, comfortable mattresses, which can drive the sale of luxury and specialized mattresses. The residential market's growth may further fuel the expansion of e-commerce in the mattress industry. Consumers looking for convenience may purchase mattresses online, leading to the development of online mattress retailers and direct-to-consumer (DTC) brands. Manufacturers may need to optimize their supply chain and logistics processes to meet the increasing demand efficiently. A strong residential market may necessitate the streamlining of manufacturing and distribution to keep up with consumer needs.

Europe Mattress Industry Overview

With many international players active in Europe's mattress market, it is very intense. The market studied provides opportunities for growth over the forecast period, which is anticipated to intensify competition in this sector. The market examined is competitive, with several players having large shares. The competitive landscape of the European mattress market is diverse and dynamic. It features a mix of well-established global players, regional manufacturers, and newer entrants. Competition in this industry is driven by product innovation, quality, brand recognition, distribution channels, and pricing. Physical stores still play an essential role in mattress sales. Many customers prefer to try out mattresses in person before making a purchase. Established retailers like IKEA, department stores, and specialized bedding stores hold a strong presence in the market. These stores may carry a mix of both global and local brands. Following is the list of companies operating in the market: Emma, Idle Sleeps, Brooklyn Bedding, Saatva, Nolah, Sweetnight, etc.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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