

Smart Bed - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 120 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

Smart Bed Market Analysis

The smart bed market is valued at USD 3.21 billion in 2025 and is forecast to reach USD 4.13 billion by 2030, expanding to a 5.17% CAGR. Heightened interest in connected wellness, the rollout of IoT infrastructure across healthcare settings, and rapid innovation in sensor technology are moving smart beds from novelty status to mainstream healthcare and consumer products. Large hospital networks see the beds as a pathway to lower readmissions, while wellness-focused households view them as an everyday health hub. Manufacturers are capturing new revenue by bundling software subscriptions that unlock analytics and personalized sleep coaching, and by tailoring integration kits that connect directly to hospital electronic medical records. Competitive intensity is rising as medical-grade incumbents, consumer electronics brands, and smart-home platforms all target the same opportunity, prompting faster product cycles and richer feature sets that make the smart bed market one of the most dynamic segments of connected health equipment.

Global Smart Bed Market Trends and Insights

IoT-enabled Post-Acute-Care Adoption

Smart beds are redefining how caregivers keep tabs on patients once they leave the acute ward. Built-in sensors track heart rate, breathing, movement, and sleep quality, then stream that information straight into hospital records under the ISO/IEEE 11073-10206 interoperability standard . A 2024 multi-facility pilot-designed to test whether round-the-clock, bed-based

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

monitoring could cut 30-day returns-found that the connected-bed cohort recorded a 23% drop in readmissions compared with matched patients treated the previous year. Researchers aimed to determine whether real-time alerts would let clinicians intervene at the first sign of trouble rather than waiting for scheduled vital-sign rounds. Parallel work published the same year showed that wireless biomonitoring hardware can replace tethered leads, giving patients more freedom of movement while still feeding continuous data back to the care team . Taken together, these results point to a care model where proactive alerts-not readmission paperwork-drive the workflow, all while meeting FDA device guidelines for safety and data integrity.

Premium-Hotel Deployment of Smart Adjustable Beds

Boutique hotels and marquee city properties are re-imagining sleep as a revenue lever, integrating connected beds that automatically fine-tune firmness, surface temperature, and lumbar support to each guest's circadian rhythm. Properties report nightly rate uplifts of up to 15% after introducing the technology, supported by in-app check-in that stores preferred sleep settings across chains. The adoption curve is steepest in boutique resorts, where unique wellness features translate quickly into higher booking rates and stronger satisfaction scores, confirming that experience, not price, is steering the premium end of the market . Cloud-based fleet dashboards also help operators schedule predictive maintenance, extending asset life and protecting brand consistency. Short payback periods are fueling rollouts across Asia-Pacific resort destinations and European wellness retreats, giving the smart bed market a vibrant premium-commercial subsegment that thrives on experiential differentiation rather than cost competition.

Public-Hospital Budget Freezes Delaying Replacement Cycles

Fiscal pressures stemming from pandemic aftershocks compel European and North American public systems to stretch bed lifespans up to 15 years. Aging fleets lack modern sensors and cannot connect to electronic records, widening the gap between public wards and privately funded facilities. Manufacturers now market retrofit sensor mats and clip-on gateways, but these partial fixes capture only basic vitals and omit software-driven comfort features. The resulting two-tier environment slows volume growth in the largest institutional buyer segment, although it also spurs innovation in modular add-ons that can later be migrated to full smart frames.

Other drivers and restraints analyzed in the detailed report include:

Aging Population and Government Health Directives / E-commerce-led AI Sleep-Tracking Bed Sales / General Data Protection Regulation (GDPR)-Driven Cloud-Connectivity Compliance Costs /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Fully electric models controlled 60% of 2024 revenue and anchor the smart bed market because their multi-axis motors support automated anti-pressure-injury routines and effortless patient mobilization. This segment is forecast to expand to a 4.7% CAGR, adding connectivity layers such as voice assistants and health-record APIs that transform beds into care platforms. Integrated micro-controllers now enable millisecond-level pressure redistribution, and embedded RFID coils capture sleep posture data validated for sleep-apnea screening. The result is enhanced clinical utility that justifies premium pricing in hospitals and delivers tangible wellness benefits in homes.

Semi-electric designs offer electric back and knee articulation but retain manual height cranks, positioning them for price-sensitive buyers in emerging markets or cash-strapped long-term care facilities. Manual frames persist where grid power is unreliable or regulatory rules restrict electrified furniture. While these lower-spec categories provide entry points, innovation

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

continues to cluster inside fully electric portfolios where firmware upgrades unlock recurring revenue. Consequently, manufacturers prioritize software scalability and modular sensor bays that future-proof new shipments, reinforcing the smart bed market's steady migration toward fully digital architectures.

The Smart Bed Market Report is Segmented by Product (Manual Beds, Semi-Electric Beds, and Fully Electric Beds), End User (Residential and Commercial), Distribution Channel (B2C/Retail, B2B/Projects), and Geography (North America, South America, Europe, Asia-Pacific, Middle East and Africa). The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

North America commanded 42% of 2024 revenue, propelled by advanced care-delivery infrastructure, payer incentives that reward fall-prevention technology, and high discretionary spending on at-home wellness devices. Integrated EMR environments accelerate institutional adoption because procurement committees can quantify nursing-hour savings and shorter lengths of stay. High-income households embrace premium adjustable bases that sync with wearables, expanding the region's cross-segment usage footprint. Canada mirrors the United States but on a smaller scale, and Mexico shows momentum in private tertiary hospitals and coastal resort corridors.

Asia-Pacific is the fastest-growing territory, posting a 6.4% CAGR forecast that reflects rising urban incomes and the ubiquity of mobile commerce. In China, 64% of residents expressed sleep-quality concerns, steering them toward algorithm-guided bedding that slots into existing smart-home ecosystems. Brands leverage direct-to-consumer apps to roll out firmware updates, addressing newly identified snoring patterns and boosting user retention. South Korea's tech-forward culture fuels rapid uptake of AI-driven sleep coaching, while Japan's aging society spurs demand for beds that flag nocturnal bathroom trips and trigger caregiver alerts. India edges forward as premium urban consumers purchase imported wireless monitoring frames, and Australia leads per-capita adoption through insurer-funded home tele-health pilots.

Europe maintains solid volume anchored in Germany, France, and the United Kingdom, each balancing healthcare innovation with strict data-governance mandates. GDPR builds trust among users but slows time-to-market for upgrades that rely on cloud analytics. Nordic countries register the highest household penetration, reflecting broad acceptance of smart-home devices and state-backed programs that reimburse sleep-health interventions. Southern Europe shows hospitality-led growth as upscale resorts use connected bedding to differentiate room categories. Public-sector budget caps, however, delay hospital refresh cycles, prompting manufacturers to push retrofit sensor kits that extend legacy assets while preserving care-quality gains.

List of Companies Covered in this Report:

Sleep Number Corporation / Hill-Rom Holdings Inc. (Baxter) / Stryker Corporation / Arjo AB / Invacare Corporation / LINET Group SE / Paramount Bed Holdings Co. Ltd. / Tempur Sealy International Inc. / Eight Sleep / ReST Performance / Ergomotion Inc. / Drive DeVilbiss Healthcare / Medline Industries LP / Joerns Healthcare / Stiegemeyer GmbH & Co. KG / Auping / Guldmann A/S / Leggett & Platt Inc. / Xiaomi Inc. / Reverie / Hi-Interiors Srl / Bryte / American National Manufacturing /

Additional Benefits:

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

Table of Contents:

1 Introduction
1.1 Study Assumptions & Market Definition

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

1.2 Scope of the Study

2 Research Methodology

3 Executive Summary

4 Market Landscape

4.1 Market Overview

4.2 Market Drivers

4.2.1 IoT-enabled Post-Acute-Care Adoption

4.2.2 Premium-Hotel Deployment of Smart Adjustable Beds in Luxury Hospitality

4.2.3 Aging Population & Governments' Health Directives Driving Bed Upgrades in Long-Term Care

4.2.4 E-commerce-led AI Sleep-Tracking Bed Sales Surge in China & South Korea

4.2.5 Hospital EMR Integration of Smart-Bed APIs Automating Vital-Signs Capture

4.2.6 Growing Expenditures in Sleep Technology

4.3 Market Restraints

4.3.1 Public-Hospital Budget Freezes Delaying Replacement Cycles

4.3.2 GDPR-Driven Cloud-Connectivity Compliance Costs

4.3.3 Humidity-Induced Sensor Failure Rates

4.4 Industry Value Chain Analysis

4.5 Porter's Five Forces Analysis

4.5.1 Threat of New Entrants

4.5.2 Bargaining Power of Suppliers

4.5.3 Bargaining Power of Buyers

4.5.4 Threat of Substitutes

4.5.5 Competitive Rivalry

4.6 Insights into the Latest Trends and Innovations in the Market

4.7 Insights on Recent Developments (New Product Launches, Strategic Initiatives, Investments, Partnerships, JVs, Expansion, M&As, etc.) in the Market

5 Market Size & Growth Forecasts (Value)

5.1 By Product

5.1.1 Manual Beds

5.1.2 Semi-Electric Beds

5.1.3 Fully Electric Beds

5.2 By End User

5.2.1 Residential

5.2.2 Commercial

5.2.2.1 Hospitals

5.2.2.2 Long-Term-Care Facilities

5.2.2.3 Home-Healthcare Settings

5.2.2.4 Hotels & Resorts

5.2.2.5 Others

5.3 By Distribution Channel

5.3.1 B2C/Retail

5.3.1.1 Home Centers

5.3.1.2 Specialty Furniture Stores

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.3.1.3 Online
- 5.3.1.4 Other Distribution Channels
- 5.3.2 B2B/Projects (directly to businesses)
- 5.4 By Geography
 - 5.4.1 North America
 - 5.4.1.1 Canada
 - 5.4.1.2 United States
 - 5.4.1.3 Mexico
 - 5.4.2 South America
 - 5.4.2.1 Brazil
 - 5.4.2.2 Peru
 - 5.4.2.3 Chile
 - 5.4.2.4 Argentina
 - 5.4.2.5 Rest of South America
 - 5.4.3 Europe
 - 5.4.3.1 United Kingdom
 - 5.4.3.2 Germany
 - 5.4.3.3 France
 - 5.4.3.4 Spain
 - 5.4.3.5 Italy
 - 5.4.3.6 BENELUX (Belgium, Netherlands, and Luxembourg)
 - 5.4.3.7 NORDICS (Denmark, Finland, Iceland, Norway, and Sweden)
 - 5.4.3.8 Rest of Europe
 - 5.4.4 Asia-Pacific
 - 5.4.4.1 India
 - 5.4.4.2 China
 - 5.4.4.3 Japan
 - 5.4.4.4 Australia
 - 5.4.4.5 South Korea
 - 5.4.4.6 South East Asia (Singapore, Malaysia, Thailand, Indonesia, Vietnam, and Philippines)
 - 5.4.4.7 Rest of Asia-Pacific
 - 5.4.5 Middle East And Africa
 - 5.4.5.1 United Arab of Emirates
 - 5.4.5.2 Saudi Arabia
 - 5.4.5.3 South Africa
 - 5.4.5.4 Nigeria
 - 5.4.5.5 Rest of Middle East And Africa

6 Competitive Landscape

6.1 Market Concentration

6.2 Strategic Moves

6.3 Market Share Analysis

6.4 Company Profiles {(includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products & Services, and Recent Developments)}

6.4.1 Sleep Number Corporation

6.4.2 Hill-Rom Holdings Inc. (Baxter)

6.4.3 Stryker Corporation

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.4.4 Arjo AB
- 6.4.5 Invacare Corporation
- 6.4.6 LINET Group SE
- 6.4.7 Paramount Bed Holdings Co. Ltd.
- 6.4.8 Tempur Sealy International Inc.
- 6.4.9 Eight Sleep
- 6.4.10 ReST Performance
- 6.4.11 Ergomotion Inc.
- 6.4.12 Drive DeVilbiss Healthcare
- 6.4.13 Medline Industries LP
- 6.4.14 Joerns Healthcare
- 6.4.15 Stiegelmeyer GmbH & Co. KG
- 6.4.16 Auping
- 6.4.17 Guldmann A/S
- 6.4.18 Leggett & Platt Inc.
- 6.4.19 Xiaomi Inc.
- 6.4.20 Reverie
- 6.4.21 Hi-Interiors Srl
- 6.4.22 Bryte
- 6.4.23 American National Manufacturing

7 Market Opportunities & Future Outlook

- 7.1 Rising Adoption of Smart Home Technology
- 7.2 Rising Focus on Health and Wellness

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

**Smart Bed - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts
(2025 - 2030)**

Market Report | 2025-06-01 | 120 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scott's-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scott's-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-26"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scott's-international.com

www.scott's-international.com

