

## **Upholstered Furniture - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-06-01 | 150 pages | Mordor Intelligence

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### **Report description:**

Upholstered Furniture Market Analysis

The upholstered furniture market size stands at USD 65.72 billion in 2025 and is forecast to reach USD 82.29 billion in 2030, expanding at a 4.60% CAGR. Steady urbanization, sustained home-improvement spending, and faster e-commerce adoption are keeping the upholstered furniture market on a growth path despite input-cost volatility and supply-chain friction. Manufacturers are prioritizing customization, shorter lead times, and automation to offset rising foam and leather prices while competing on design flexibility and sustainable sourcing. Asia-Pacific is set to overtake all other regions in growth momentum as middle-income households in China, India, and Southeast Asia trade up from unbranded seating to branded, multifunctional pieces. At the product level, chairs are outpacing sofas as hybrid-work habits push ergonomic seating to the forefront, and the shift is sharpening the competitive focus on motion technology and embedded power features.

Global Upholstered Furniture Market Trends and Insights

Rising Urbanization & Compact Living Spaces Driving Multifunctional Upholstery Demand

Shrinking city apartments are forcing buyers to favor furniture that performs double duty, making hidden storage, modular layouts, and convertible sleeping solutions baseline expectations instead of upgrades. Smaller apartments are recasting design priorities, making hidden storage, modular layouts, and convertible sleeping functions the norm rather than premium upgrades. Manufacturers have responded with sofas that hide ottomans, recliners with USB-C charging, and sectionals that split into guest

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beds. The 2025 style outlook highlights seating with built-in bookcases and quick-swap arm modules, reflecting consumers' desire to personalise small spaces without clutter

#### Accelerated E-commerce Penetration Boosting Direct-to-Consumer Sofa Sales

Digital furniture revenue is forecast to grow at a higher rate, with upholstered seating absorbing a rising share of that spend. Pure-play brands leverage 3D visualization, AR room placement, and narrow freight surcharges to convert shoppers who once hesitated to buy bulky items online. Furniture.com surpassed 60 retail partners in April 2025, signaling platform consolidation and stronger bargaining power with logistics providers. Digital natives routinely offer six-week delivery for made-to-order couches, a timeline big-box stores struggle to match. The shift online is also democratizing custom fabrics, letting buyers specify color and texture combinations once confined to designer showrooms.

#### Volatile Foam & Leather Prices Compressing Manufacturer Margins

Polyurethane and leather costs spiked in 2024, widening the gap between order intake and profit realization. Many mid-sized plants cannot fully hedge commodity swings, forcing selective material substitutions or lean inventory models. Looming tariff proposals on Chinese upholstery could pile billions onto U.S. consumer bills if enacted. To blunt exposure, producers are adopting nested cutting software and diversified supplier pools, while some U.S. brands explore nearshoring leather sourcing to Mexico.

Other drivers and restraints analyzed in the detailed report include:

Hospitality Construction Boom Fueling Contract Upholstery Demand / Millennial Preference for Eco-Certified Fabrics Propelling Sustainable Upholstery / Skilled Upholstery Labor Shortages /

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

#### Segment Analysis

The product hierarchy of the upholstered furniture market shows sofas retaining a dominant 35% share in 2024, while chairs are set to outpace every other category with a 5.2% CAGR through 2030. Chairs are benefiting from employer subsidies for home-office setups, brisk demand for lumbar-support designs, and the trickle-down of motion technology into mid-price tags. USB-equipped recliners and adjustable accent chairs that blend task and leisure functions are redefining segment boundaries. The upholstered furniture market frequently rewards brands that compress delivery times for chairs, as their lower cubic volume favors direct-to-door shipment.

Beds, stools, poufs, and ottomans round out the portfolio by answering specific room scenarios. Upholstered headboards are now bundled with integrated reading lights, while storage ottomans satisfy the compact-living trend. Sofas, however, retain brand visibility; modular sectionals with swappable arms and slipcovers extend product life and nurture repeat purchases. Curved silhouettes-popularized at Milan Design Week-require more pliable materials and skilled sewing, raising barriers to new entrants but enabling premium price points. As OCTO's OctoBox 1000 actuator filters into recliner SKUs, power-motion sofas are set to narrow the performance gap between seating categories, keeping the upholstered furniture market dynamic and innovation-led.

Fabric continued to lead with 55% of 2024 volume, anchoring the upholstered furniture market through breadth of patterns, tactile variety, and competitive cost. Performance fabrics featuring stain resistance, bleach cleanability, and pet-friendly coatings make fabric the go-to choice for young families. Emerging color palettes-magenta, tangerine, and basil green-signal a shift from safe neutrals and are stimulating refresh cycles in both residential and hospitality channels. Cooling-fiber innovations like Innofa's Snophyte let upholstered headboards and recliners address thermal comfort without resorting to active ventilation systems.

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Leather, by contrast, is repositioning as a responsibly sourced luxury material and is forecast to grow at a 4.8% CAGR. Tighter European regulations on chromium tanning are prompting investment in water-based or vegetable-derived alternatives, helping leather appeal to eco-conscious buyers. Chinese leather sofa exports grew 15% year-on-year in 2023, underscoring continued global appetite for leather statement pieces. Hybrid upholstery-fabric on seat cushions, leather on high-wear arm panels-is spreading in the commercial lounge segment, marrying softness with cleanability. Overall, material choice is increasingly dictated by the desired sensory narrative, sustaining product diversity across the upholstered furniture market.

The Upholstered Furniture Market Report is Segmented by Product (Chair, Sofas, Tables, Beds, and More), by Material (Fabric, Leather, and More), by Price Range (Economy, Mid-Range, and Premium), by End User (Residential, and Commercial), by Distribution Channel (B2C/Retail, and B2B/Projects), and Geography (North America, South America, Europe, Asia-Pacific, and More). The Market Forecasts are Provided in Terms of Value (USD).

## Geography Analysis

North America generated 33% of 2024 revenue, underpinned by resilient renovation spend, a maturing direct-to-consumer infrastructure, and an entrenched preference for personalized seating. Domestic makers harness synchronized supply chains spanning Mississippi, Tennessee, and North Carolina to deliver six-week sofas, a lead-time advantage over Asian imports. Skilled-labor deficits, however, threaten throughput; incentive packages and training academies are a rising line item across corporate budgets.

Asia-Pacific is the fastest-growing territory with a 6.0% CAGR outlook. China's scale economies, evident in its multi-billion-dollar leather sofa export tally, keep global sourcing anchored in the Pearl River Delta. Rising urban home ownership pairs with aspirational design cues pulled from social media, reinforcing demand for multifunctional furniture.

Europe combines heritage design credentials with progressive sustainability frameworks that shape global standards. Actona Group's February 2025 acquisition of Polish sofa maker SITS expands Scandinavian footprints and signals ongoing consolidation aimed at doubling turnover to DKK 4 billion [3]. Circular-economy mandates are nudging producers toward detachable covers and mono-material builds that simplify recycling. South America, the Middle East, and Africa form smaller yet opportunity-rich pockets where rising disposable incomes, tourism infrastructure, and retail-chain expansion are unlocking incremental demand for the upholstered furniture market.

## List of Companies Covered in this Report:

La-Z-Boy Incorporated / Ashley Furniture Industries / DFS Furniture PLC / Natuzzi S.p.A. / MillerKnoll, Inc. / Steelcase Inc. / Man Wah Holdings Ltd. / B&B Italia / Ekornes ASA / Williams-Sonoma, Inc. / HNI Corporation / Hooker Furnishings Corporation / Godrej Interio / Rolf Benz / Flexsteel Industries, Inc. / Kimball International, Inc. / Rowe Furniture, Inc. / Ethan Allen Interiors Inc. / ZUO Modern / Sofa Brands International Ltd. / Sauder Woodworking Co. / Sherrill Furniture Company / Global Furniture Group / Style Upholstering Inc. / Bassett Furniture Industries /

## Additional Benefits:

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

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