Home Textile - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 150 pages | Mordor Intelligence

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Report description:

Home Textile Market Analysis

The Home Textile Market was valued at USD 136.25 billion in 2025 and estimated to grow from USD 145.27 billion in 2026 to reach USD 200.11 billion by 2031, at a CAGR of 6.62% during the forecast period (2026-2031).

Consumer demand for premium decor, combined with the continuing migration from physical to digital retail, sustains steady expansion. Higher disposable income in emerging economies supports volume growth, while renovation-related spending in post-pandemic housing upgrades raises average selling prices. Material innovation in antimicrobial and smart fabrics broadens use cases and lifts margins. Asia-Pacific's integrated manufacturing clusters reinforce supply-side resilience, yet volatile cotton and polyester prices test profitability. Regulatory shifts toward circularity and durability, especially in the European Union, redefine product standards and speed the transition to recycled or specialty fibers.

Global Home Textile Market Trends and Insights

Rising Consumer Spending on Renovation and Decor

Pandemic-driven lifestyle changes elevated home improvement to a budgeting priority, positioning textiles as affordable upgrades that instantly refresh living spaces. Durable product passport mandates taking effect in the EU in 2027 raise perceived value and push consumers toward higher-quality linens . Premium categories benefit from these perceptions, boosting margins across retailers. Smaller urban homes paradoxically increase per-square-foot textile spend as multifunctional pieces become essential. Digital payment innovations, supported by Mastercard's 12% revenue upswing in 2024, facilitate buy-now-pay-later plans that lift average order values.

Boom in Residential Real-Estate in Emerging Economies

Rapid urbanization in India, China, and select Latin American markets generates sustained demand for fully furnished homes. Expanding middle-class cohorts migrate from unbranded basics toward branded offerings, enriching the unit mix. India's Production Linked Incentive (PLI) scheme for technical and home textiles targets USD2.4 billion incremental exports by 2028, reinforcing domestic capacity . Government-backed housing programs that include furnishing allowances assure predictable order pipelines for mills and converters. Domestic champions such as Welspun Group and Trident Group leverage proximity and agile production to outpace multinationals on speed and localized design.

Volatile Cotton and Polyester Prices

Sharp swings in cotton prices driven by climatic shocks and trade policy shifts compress margins, particularly for mills lacking hedging sophistication. Polyester pricing, tethered to crude oil, introduces further unpredictability for blended fabrics. Larger players respond with vertical integration and value-added assortments that cushion commodity swings. Smaller Asian suppliers often lack the scale or financial tools to absorb price spikes, accelerating consolidation.

Other drivers and restraints analyzed in the detailed report include:

Growth of E-commerce and DTC ChannelsAdoption of Antimicrobial and Smart FabricsHousing-Market and Mortgage-Rate Fluctuations

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

Segment Analysis

Bed linen retained a commanding 31.63% slice of the home textiles market in 2025 thanks to frequent replacement and rising demand for high-thread-count cotton. The segment's robust contribution underpins the overall home textiles market size, which is projected to climb at 6.62% CAGR. Manufacturers intensify differentiation through cooling weaves, organic fibers, and digitally embedded washing labels that track lifecycle. Premium bedding brands exploit direct-to-consumer channels to shorten product refresh cycles, nudging consumers toward seasonal collections.

Bathroom linen, while smaller in value, registers the fastest 8.11% CAGR as consumers adopt spa-inspired routines at home. Antimicrobial and quick-dry technologies shift towels from commodity to wellness accessory. Retailers curate coordinated bath ensembles-towels, mats, and robes-to lift basket values. Smart mirrors and connected bathroom ecosystems amplify cross-selling opportunities with responsive fabrics, positioning bathroom items as gateways to smart-home platforms.

Specialty stores preserved a 43.78% share of the home textiles market in 2025 by offering tactile experiences and expert guidance. Many chains now install interactive design hubs that blend augmented reality with fabric swatching to defend foot traffic. Yet online channels expanding at 9.71% CAGR siphon share away, propelled by free returns and rich content libraries. Brands experiment with showroom-only footprints, where customers touch and feel but finalize purchases online for home delivery.

Hypermarkets struggle under price-first propositions, prompting an increased emphasis on private-label ranges to recover margin.

Pop-up installations and mobile trucks surface as low-overhead avenues to extend reach in secondary cities. The bankruptcy of At Home in 2025 illustrates the peril of large-box formats unable to pivot swiftly to hybrid commerce models.

The Home Textile Market Segments by Product (Bed Linen, Bathroom Linen, and More), by Distribution Channel (Super/Hypermarkets, Specialty Stores, and More), by Material (Cotton, Polyester, and More), by End User (Residential, and Commercial), by Price Tier (Mass, Premium, and More), by Geography (North America, South America, and More). The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

Asia-Pacific controlled 45.12% of the home textiles market in 2025 and is projected to post a rapid 9.02% CAGR through 2031. Domestic champions in China and India vertically integrate spinning, weaving, and finishing to cut lead times and supply fast-fashion home collections. Government housing drives sustain volume, while e-commerce platforms like Flipkart and JD.com democratize access to premium lines. Russian suppliers diversify raw cotton feedstock for Chinese mills, easing reliance on traditional sources.

North America, though mature, retains high margin potential owing to consumer readiness to pay for sustainability and advanced features. Near-shoring to Mexico reduces transit risk and shortens replenishment cycles. Regulations such as the U.S. Uyghur Forced Labor Prevention Act tighten compliance scrutiny, steering buyers toward transparent supply networks.

Europe balances heritage craftsmanship with cutting-edge sustainability mandates expected to reshape the home textiles market over the next five years. Digital product passports and minimum durability thresholds shift competition toward quality and recyclability. Energy price volatility pressures EU mills, yet investment in renewable-powered factories and waterless dyeing builds long-term advantage. Brexit-induced customs friction nudges continental retailers to stockpile or diversify sourcing into Northern Africa and Turkey.

List of Companies Covered in this Report:

Welspun Group Springs Global Ralph Lauren Home Trident Group IKEA Systems B.V. New Sega Home Textiles Shenzhen Fuanna H&M Home Sheridan WestPoint Home Himatsingka Seide Ltd. American Textile Co. Pacific Coast Feather Mohawk Industries Loftex China Sunvim Group Sheridan Boll & Branch Casper Sleep Inc. Brooklinen Coyuchi Inc. Crane & Canopy Williams-Sonoma Inc.*

Additional Benefits:

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

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