Australia Mattress - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 130 pages | Mordor Intelligence

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Report description:

Australia Mattress Market Analysis

The Australia Mattress Market is expected to grow from USD 738.91 million in 2025 to USD 763.37 million in 2026 and is forecast to reach USD 898.58 million by 2031 at 3.31% CAGR over 2026-2031.

Rising residential construction costs, strong e-commerce penetration, and a renewed focus on sleep wellness continue to stimulate demand, even as macro-economic headwinds temper discretionary spending. New-build activity and a steep 31.1% increase in national building prices since 2020 have lengthened replacement cycles but lifted ticket prices as consumers shift toward premium materials and recyclable designs. Online "bed-in-a-box" brands have broadened reach: 82% of households shopped online in 2022, with free delivery and 100-night trials resetting service benchmarks. At the same time, hotel refurbishment programs are back in motion; Melbourne alone added 22 hotels and 5,000 rooms between 2019 and 2025, driving steady commercial procurement. Regulatory scrutiny from the Australian Competition and Consumer Commission (ACCC) around truthful discounting and recycling compliance is also shaping competitive playbooks as firms prioritize transparent pricing and product stewardship.

Australia Mattress Market Trends and Insights

Accelerating Residential Construction & Renovations

Building construction prices surged 31.1% between September 2020 and June 2024, and house-specific costs jumped 40.8% over the same span. Even as new starts normalize, large-scale renovation work, 40% of total residential outlays, keeps mattress replacement top-of-mind. Homeowners often upgrade entire sleep systems during bedroom refresh projects, particularly in growth corridors such as Brisbane's northern suburbs. Extended renovation timelines caused by trade labor shortages give buyers more time to research premium and recyclable options. The outcome is a steady flow of higher-value purchases that bolsters the Australia mattress market even when dwelling approvals dip. The construction sector's labor shortages and high wages for tradespeople have paradoxically extended project timelines, allowing consumers more time to research and invest in higher-quality mattresses during extended renovation periods. This driver's impact extends beyond immediate replacement needs, as improved living spaces justify premium mattress investments that align with overall home value enhancement strategies.

E-commerce "Bed-in-a-Box" Boom

Australia's parcel-led retail economy logged USD 45.96 billion in online revenue during 2024, reinforcing the clout of digital-first brands. Vacuum-packed mattresses ship in car-boot-friendly boxes, arrive within days and include no-risk 100-night trials that sidestep showroom pressure. Transparent pricing resonates: shoppers routinely save up to 40% versus traditional stores, according to recent ACCC filings on discount structures. Lower overhead has let pure-play brands scale quickly, yet rising return freight costs are pushing firms to fine-tune trial periods and invest in eco-friendly donation programs for resells. Brick-and-mortar chains have responded with hybrid models, click-and-collect, VR bed selectors, and live-chat consultations, that keep footfall meaningful while migrating transactions online. Strategic sales events continue driving online mattress purchases, with retailers leveraging consumer price sensitivity to capture mattress market share through limited-time promotions and financing options.

Consumer Price Sensitivity Amid Cost-of-Living Squeeze

Households face sharply higher energy and grocery bills, prompting 64% of consumers to hunt for savings on non-essentials. Online mattress spend dipped 3.1% in 2023 as shoppers delayed upgrades; value seekers negotiate aggressively in-store, often securing 30-plus-percent discounts. Retailers now bundle finance plans and extended warranties to justify price points, while budget brands promote transparent "one-price-all-year" models that undercut inflated RRPs. Durable-but-affordable foam hybrids are gaining traction among first-home buyers squeezed by mortgage rates. The longer payback window on premium beds means high-end sales persist, yet volume momentum is tilting toward mid-tier ranges until wage growth catches up. The economic constraint has accelerated the adoption of direct-to-consumer models that eliminate traditional retail markups, forcing established retailers to justify their value proposition through enhanced customer service, extended warranties, and comprehensive sleep consultation services.

Other drivers and restraints analyzed in the detailed report include:

Premium Wellness-Driven Spending on Sleep ProductsHospitality Rebound Fueling Commercial Replacement CycleVolatile Foam & Latex Input Costs

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

Segment Analysis

Innerspring models maintained leadership with 41.12% of Australia mattress market share in 2025 on the back of trusted support characteristics and broad price coverage. Hybrids, however, are expanding at a 4.18% CAGR because they fuse spring responsiveness with foam pressure relief, addressing diverse sleeper preferences. Foam-only mattresses have entrenched loyalty among couples seeking motion isolation, while latex retains a green-minded niche to its natural provenance and heat-dissipating cell structure. Air-adjustable and therapeutic varieties occupy specialized corners for medical or RV use, but their unit numbers stay small. Manufacturers now prioritize modular hybrid chassis that simplify recycling and cut raw-material tonnage, reflecting ESG imperatives.

Consumers perceive hybrids as a cost-effective bridge between old and new technologies; the ability to tweak comfort layers without replacing the core drives repeat purchases sooner than the traditional eight-year cycle. Local stalwart A.H. Beard reports growing export demand for its recyclable hybrid line into Asia, illustrating how innovation can open adjacent markets. Smart-bed entrants add health-tracking sensors, pairing posture data with app analytics that upsell mattress toppers or pillows. Retail associates increasingly use pressure-mapping kiosks to pair shoppers with the right hybrid SKU, boosting conversion and reducing return rates. As these innovations converge, hybrids are set to eclipse all-foam units by the end of the decade within the Australia mattress market.

Queen-size SKUs commanded 38.22% of the Australia mattress market size in 2025 by balancing comfort and bedroom footprint. Yet king-size is rising the fastest, charting a 4.74% CAGR as new-build master suites grow larger and remote-working couples prize sleep sanctuary. Singles and doubles remain staples for kids' rooms, student housing and furnished rentals, where price and space trump luxury. Specialty sizes-caravan, yacht and extra-long, meet niche demand tied to Australia's strong domestic travel culture. Online sales have eased logistics barriers for bulky king units, with rolled-packed deliveries bypassing stairwells and multi-story lifts.

Upsizing also mirrors wellness goals: more surface area reduces partner disturbance, aiding deep-sleep cycles. Home-renovation shows on Australian television spotlight king beds as aspirational centerpieces, fueling consumer desire. Retailers bundle king mattresses with adjustable bases and cooling protectors, lifting average order value. Sustainability is not sidelined; large mattresses channel additional steel and foam, so brands tout take-back programs to offset material impact. As living-space metrics continue to climb in detached-housing markets like Queensland's Sunshine Coast, king-size penetration is expected to chip away at queen dominance across the Australia mattress market.

The Australia Mattress Market Report is Segmented by Product Type (Innerspring/Coil, Foam Including Memory Foam, Latex, Hybrid, Other Mattress Types), Mattress Size (Single-Size, Double-Size, Queen-Size, King-Size, Custom & Specialty Sizes), End User (Residential, Commercial), Distribution Channel (B2C/Retail and B2B/Project), and Geography. The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Sealy of Australia A.H. Beard SleepMaker Koala Ecosa Emma Sleep King Koil (A.H. Beard) Domino (A.H. Beard) Sleeping Duck Ergoflex Tempur Sealy International Snooze (Retail) Harvey Norman Bedding Fantastic Furniture Bedding Beds R Us Forty Winks IKEA Australia Mattresses Freedom Furniture Bedding Plush Clark Rubber Bedding

Additional Benefits:

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

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