MATTRESS INDUSTRY TRENDS REPORT (MITR)

2026 OVERVIEW

ISPA
INTERNATIONAL SLEEP PRODUCTS ASSOCIATION

The 2026 Mattress Industry Trends Report presents 2025 market data and insight. The report indicates continued contraction across the U.S. mattress market, with shipment volumes declining more sharply than dollar value. While average selling prices remain higher than prior-year levels, softer demand and reduced foundation activity contributed to overall market weakness.

MARKET AT A GLANCE (2025 VS. 2024)

TOTAL MARKET VALUE	TOTAL MARKET UNITS	MATTRESS VALUE	MATTRESS UNITS	STATIONARY FOUNDATION VALUE	STATIONARY FOUNDATION UNITS
-6.5%	-13.2%	-4.0%	-6.7%	-23.5%	-25.2%

Key Takeaways

- Demand remains under pressure, with unit declines significantly outpacing value declines
- Pricing and mix continue to support revenue, despite lower shipment volumes
- Foundations are the most impacted category, reflecting changes in purchasing behavior
- Adjustable bases show relative resilience amid broader market softness

Market contraction continues, driven primarily by volume declines

Total U.S. mattress market value declined 6.5% year over year, while units shipped fell 13.2%, highlighting ongoing pressure on shipment volumes across the industry.

Mattresses remain more resilient than foundations

Mattress dollar value decreased 4.0%, compared with a 23.5% decline for stationary foundations. Foundation shipments experienced the steepest contraction, reflecting continued changes in purchasing patterns and product mix.

Pricing and product mix continue to provide support

U.S.-produced mattress average unit price increased nearly 5% despite lower shipment volumes, suggesting manufacturers maintained pricing discipline and benefited from favorable product mix.

Domestic shipments declined across all regions

Every U.S. region reported lower mattress and foundation shipments in 2025. The South remained the largest market, accounting for roughly 42% of dollar value and 45% of units shipped among U.S.-produced products.

Imports softened alongside domestic production

Total mattress imports declined in both value and units, indicating that reduced demand affected both domestic manufacturers and imported products rather than reflecting a major shift in sourcing.

Foundation imports experienced the largest pullback

Imported stationary foundations posted some of the sharpest declines in the report, with unit shipments down more than 30%, signaling substantial weakness in that category.

Adjustable-base demand remains a relative bright spot

While imported motion foundation dollar value declined, unit shipments increased year over year, suggesting continued consumer interest in adjustable sleep products despite broader market softness.

Shifted towards larger mattress sizes

Domestic mattress shipments shifted toward larger sizes in 2025, with Queen and King gaining share while Twin and Full declined, reflecting a continued move toward higher-price products.

Industry conditions reflect a mature, value-focused market

The combination of lower unit demand, higher average prices, and broad-based declines across categories suggests a market that remains challenged by replacement-cycle timing and cautious consumer spending, while still supporting higher-value product offerings.

What's Driving the Trends

- Ongoing softness in overall demand, reflected in broad declines in shipment volumes across categories
- Imports declining alongside domestic production, indicating reduced demand is impacting both supply channels rather than a shift in sourcing strategy
- Sharper contraction in foundation shipments, particularly impacting both domestic and imported foundation categories
- Diverging performance across import categories, with relatively stable mattress imports but steep declines in imported foundations

Source: ISPA Mattress Industry Trends Report, 2026

The full **Mattress Industry Trends Report (MITR) 2026** provides detailed analysis of U.S. and global market performance, including production, pricing, imports/exports, and long-term trends.

👉 For full access, data tables, and detailed insights visit sleepproducts.org/statistics

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Questions?
Mary Thorpe, Director of Industry Research & Analytics
571-482-5455 | mthorpe@sleepproducts.org