**1. High-Level Summary of the Report (W17-2024)**

The **CSIL World Mattress Industry Report 2024** provides a comprehensive analysis of the **global mattress industry**, covering **market size, production, consumption, trade flows, major manufacturers, and competitive trends**. Key highlights include:

* **Market Size & Growth**:
  + The **global mattress industry** is valued at **$30 billion**.
  + The industry grew by **2% per year over the past decade**, with **an 18% surge in 2021**, followed by **a 9% contraction in 2022 and a 3% decline in 2023**.
  + **Asia-Pacific (39%) and North America (34%)** dominate, while **Europe has declined to 20% market share**.
* **Competitive Landscape**:
  + The **top 100 mattress manufacturers** control **65% of the global market**.
  + **China and the US remain the largest producers and consumers**, followed by **India, Poland, Brazil, and the UK**.
  + The industry is becoming more **vertically integrated**, with foam manufacturers expanding into mattress production.
* **Trade & Supply Chain**:
  + **US trade restrictions** on Chinese mattress imports continue to impact global trade, shifting **production to Mexico, Indonesia, and Vietnam**.
  + **Poland leads European mattress exports**, supplying **Germany and other EU markets**.
  + **Vietnam and Indonesia are emerging as key exporters**.
* **Sustainability & Circular Economy**:
  + **Regulations in Europe (ESPR) and North America are pushing for more sustainable production**.
  + **PU foam recycling is gaining traction**, with increased interest in **bio-based and recycled polyols**.
* **Market Outlook**:
  + **Flat growth is expected in 2024**, but **a 2.3% increase is forecasted for 2025**.
  + Risks include **inflation, geopolitical instability, and supply chain disruptions**.

**2. List of Companies Researched in This Report**

The **CSIL 2024 Report** profiles **35 major mattress manufacturers** from **20 countries** and analyzes the **top 100 global mattress companies**. Key players include:

**✔ Major Mattress Manufacturers (By Region)**

✔ **United States**: Tempur-Sealy, Serta Simmons, Sleep Number, Corsicana, BIA Bedding Industries of America  
✔ **Europe**: Silentnight (UK), Pikolin (Spain), Aquinos (Portugal), Recticel (Belgium), Magniflex (Italy)  
✔ **Asia**: Kuka (China), Mlily (China), Sinomax (China), Man Wah (China), Sheela Foam (India)  
✔ **Emerging Markets**: Flex (Spain), Interplasp (Spain), Qumei (Norway), Leggett & Platt (US)

**3. Relevant Elements for Our Report**

The **CSIL 2024 Report** contains **several valuable insights** that can be leveraged for **our market research**:

**✔ Market Trends & Demand Drivers**

* **Growing demand for premium mattresses** due to increased **consumer focus on sleep health**.
* **Shift to e-commerce and bed-in-a-box sales**, with online mattress sales **reaching 23% of the total market**.
* **Foam mattresses are increasing in share**, particularly in **the US, Europe, and China**.

**✔ Supply Chain & Trade Shifts**

* **Mexico and Indonesia have replaced China as top mattress exporters to the US**.
* **Poland remains Europe’s leading exporter**, primarily serving Germany and France.
* **Vietnam, Malaysia, and Thailand are gaining importance as alternative manufacturing hubs**.

**✔ M&A & Investment Trends**

* **M&A activity is increasing**, particularly **among foam producers acquiring mattress manufacturers**.
* **Key recent acquisitions**:
  + **Vita Group acquired Usleep Ltd. (UK)**
  + **Sheela Foam acquired Interplasp (Spain)**
  + **Tempur-Sealy attempted to acquire Mattress Firm (blocked by US FTC)**
  + **AI Dream acquired King Koil Licensing Co. (US)**

**✔ Competitive Positioning**

* **China remains the largest producer but faces declining exports due to tariffs**.
* **The US and Europe are shifting toward more regionalized production models**.
* **Foam suppliers are expanding into mattress production, increasing vertical integration**.

**4. How to Split Foam Volumes in Mattress vs. Furniture Foam**

The **CSIL report provides some indirect indicators**, but no direct foam volume breakdown between **mattresses and furniture foam**. However:

✔ **Production by material type**:

* **China: 65% innerspring, 25% PU foam, 5% latex**.
* **US: PU foam and hybrid mattresses gaining share**.
* **Europe: PU foam mattresses dominant in many markets**.

✔ **Foam-heavy mattress trends**:

* **Bed-in-a-box segment is PU foam-heavy**.
* **Hybrid mattresses (innerspring + foam) are gaining market share**.

To refine this **mattress vs. furniture foam** split, we should:

* **Analyze foam input costs** for mattress vs. furniture.
* **Cross-reference upholstered furniture reports** for foam demand in sofas & chairs.
* **Use manufacturer data** to estimate foam consumption in each segment.