Modern life style leaves us with very little time to spare, especially for sleep. Sleep has not been given due importance it deserves and has been taken for granted by most for a long time. The last few years saw growing awareness towards the importance of good quality sleep and not just the number of hours one sleeps. The Indian mattress sector has transformed over the years from a dull, predictable and slow growth market into an aggressive, dynamic and lucrative marketplace. Technology advancement, innovative products and the consumers’ willingness for a comfortable and durable mattress is driving the growth in the Indian mattresses market. Witnessing numerous new product innovations and launches over the years resulting in a wide array of choices for consumers, Indian mattress market has something for every consumer, ranging from general purpose to specialized products and from high-priced/premium/luxury bedding to affordable products. Even though a change has come in, India has a long way to go if compared to awareness in the developed countries. The huge unorganized sector has as yet not been influenced much and it may take years to happen.
Everything that can contribute to improving the quality of sleep is gaining importance along with growing realization that a good mattress is vital for a good night's sleep. Change at the consumer level for the mid to high end products has also come about due to increased exposure. The world has shrunk and Indians are travelling a lot. The exposure of the consumers to international brands and latest advances in sleep technology has led to the revolution in the Mattresses market. Consumers are willing to pay more for a mattress provided they see a reason for doing so. Customers are upgrading from traditional mattresses to contemporary RC / Spring / Foam / Sandwich Mattresses is on the rise.

The Indian mattress industry is Rs. 5,000 to 8,000 crore approx, of which 75% is the unorganized sector and only 25% is organized. The potential for growth is tremendous and the combined growth of the industry is estimated at 8% to 10%, for the next few years. Of the 25% organized mattress industry, 4.5 % is the premium segment. The growth in the premium segment is estimated at around 10% to 12%, substantially higher than the overall growth. The mattress industry has grown and seen many changes but these are just small beginnings as they impact a small percentage of the population.

Advent of new materials, ever increasing knowledge of the human body and the science of sleep, has brought the use of science and technology in manufacturing of mattress that assures quality sleep. This is the reason why products related to sleep are being clubbed together and the term 'Sleep Technology' has got coined in the mature international markets. Technology is being put to use to research and produce high quality, high technology sleep products. This is not only a trend internationally but certain market leaders in India too are introducing the same modern technologies in their mattresses. A lot of brands in India have collaborated with leading international brands bringing home those very technologies that are available in the international markets besides doing their own research and development. Leading manufacturers are now increasingly making available detailed literature with technical details and medical advantages of the products they are offering to the retailers. Products are being designed as per the BMI of persons, comfort indicators are being displayed on the mattresses, options of having one side firm while the other softer are also on offer now.

A variety of materials are used for mattresses in the international market like spring, memory foam, coir, water beds, air beds, gel mattresses and mattresses made from animal hair. “A very controlled environment and high tech machines are needed for manufacturing these mattresses. India as of now is not manufacturing that level of machinery and as such the premium brands are all using imported machines, especially German,” says Bharat Grover, Business Head, Springwel Mattresses.

Retail sector's growth has led to a lot many changes in the mattresses market in recent years. Leading brands have responded to the demands of the consumer and many have brand stores where they display their entire range and present their mattresses in an ambiance of professional knowledge and encourage customers to experience the mattresses in order to choose the
one that suits them the best. Retail environment has evolved that supports quality customer interaction. Gone are the days when a mattress was purchased from a specific market. Mattresses are now being retailed in Shopping Malls, Hyper Markets, Super Markets and stand-alone exclusive branded stores. Mattresses are also increasingly being stocked at lifestyle stores along with furniture stores as they are becoming a part of the home and lifestyle industry. Smart and educative marketing options in price points and smart salesmanship will further drive the growth at the retail level.

Thus, the changes are at three levels-manufacturers, consumers and retailers. It’s a combination of consumer awareness giving the manufacturers an impetus to research and develop better quality mattresses and the diverse options creates’ a sense of need amongst customers. Nitin Gupta, Director, Real Innerspring Technologies P Ltd., makers of Sleepzone mattresses feels “the mattress industry is bullying in India with the entry of new players and increased customer awareness. The scenario has changed a lot in the last 3-5 years.”

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The most popular mattress materials in India are- 1. Cotton mattresses- Traditionally prevalent and widely used. They are reasonably affordable. 2. Flexible Polyurethane Foam (Popularly known as P U Foam) and its value added variants like Visko Elastic foam, high resilience foam, extra firm/soft P U Foams are the highest selling in India. They are 100% synthetic and the cheaper qualities are not good for health as they generate heat and are not breathable. Its value added variants have the advantages of being more flexible, breathable, odourless, light weight, durable and can also be treated with an anti-bacterial treatment. 3. Spring mattresses are gaining popularity amongst customers, largely owing to international exposure and affordability and for those who prefer higher thicknesses and bounce. 4. Coir mattresses have dominated the market in earlier years as they have been affordable and eco-friendly. Their popularity is now slowly shrinking mainly due to lesser comfort factor and availability of other options. 5. In recent years another variety has sprung up called Sandwich mattresses. As the name suggests, a sectional view of the mattress would reveal that it is composed of a hybrid of materials resembling a sandwich. These mattresses are gaining popularity because of their affordability, novelty and comfort. Water beds, air beds, gel beds and mattresses made of animal hair are yet to really find their space in the Indian market.

There had been an upward shift in the average buying prices of mattresses in India in the past few years. Earlier the average consumer would buy a mattress for about Rs 3000-Rs 5000 a pair whereas now consumers are happily purchasing mattresses in the range of Rs 10000 to 30000 a pair or even more. Of this range one can say that Rs
6,000-14,000, is the most popular price point for a king size mattress in India.

Furniture stores in India normally keep just 1-2 brands in the mid-price range. Some of them are now creating dedicated spaces. Mattresses have not gained popularity as of now in larger departmental stores and hyper marts because of the non-standard sizes used in India, logistics and warehousing issues and the policy of centralized purchasing. When it comes to EBO's, the sales pattern is based on the price range their mattresses belong to as all EBO's do typically keep their entire range. In the branded segment, EBO's are the future of the market. "Sleepwell mattresses are presented to the customers at our Brand Stores “Sleepwell World” where we not only display our entire range but also present our mattresses in an ambiance of professional knowledge and encourage customers to experience the mattresses in order to choose the one that suits them the best,” says Manoj Sharma, VP Marketing, Sleepwell mattresses from Sheela Foams.

"There have been rapid developments in the mattress industry during the last 5 years and the quality and variety of materials that are used in mattresses have changed dramatically," feels Manoj Sharma. Technology has been put to use to create very different types of mattresses, which suit diverse needs. The use of anti-bacterial treatments and new foaming technologies that keep the mattress fresh and ventilated have started playing an important role.

International Brands have a very small presence in the India. It’s less than 5% of the organized sector and is present only in few metropolitan cities. Some of the prominent brands are Sealy, Tempur, Simmons, Serta, Hastens, Spring Air, Magniflex and King Koil, besides others. They are in India either directly or through their collaborators or partners. Sealy is marketing in India directly. Hastens mattresses, made from horse hair are priced very high and as such have had v little success in India.

Tempur-Pedic is selling in India through Springwel. The mattresses from Tempur-Pedic, a US based company, a world leader in mattresses, is made from materials that change according to the shape of the users and they also bring down the amount of motion transfer between two people using them. These are offered with limited warranties of 25 years and trial periods of 90 days.

"It the only mattress and pillow recognized by NASA and certified by the Space Foundation”, says Bharat Grover, Business Head, Springwel.

Amongst the Indian Brands Sleepwell mattresses are the largest selling in the economy segment and are specializing in foam mattresses even though they make all other varieties too. Kurion mattresses are the largest selling in the coir and variants of coir segment and Springwel are the market leaders in the spring mattress segment.

There also are other brands like Century, Duroflex, Prime Foam, MM Foam and many others in India.
Rubco mattresses are produced by Rubberized Coir Mattress Division of the Kerala State Rubber Co-operative Limited and are offering seven types of coir mattresses that serve the purposes of various types of users. The mattress segment is a critical component of the Godrej Interio Group too and was introduced in 2007. Someshwar Prasad, General Manager- Marketing of the Mattress division, shares “the company is aiming to take up its market share in the mattress industry with regards to the organized sector.”

The Indian and international brands are not really in a state of competition as of now as the international brands have a very insignificant presence in India as on today in terms of sales. If we look beyond sales then they have had an influence which is very important as it has helped in increasing awareness about quality mattresses and technology that goes into making one. “This has increased the interest of the Indian consumers towards high end products and has thus provided an ideal environment to the Indian brands to present their own technology driven products”, feels Manoj Sharma, Sleepwell.

The manufactures have to often deal with dealers lack of brand loyalty as there is always a clash of margins. There is an influx of brands and to be able to survive and flourish, the product has to be both, competitive for the consumer and the margins have to be good for the retailer. “In India the real estate cost is high and as a mattress is not an impulse purchase product, sustainability in investing in retail space is a challenge. This has to be kept in mind by the manufactures who are setting up EBO’s. The entire trade runs on dealer network as it’s the only way penetration can happen pan India,” shares Bharat Grover of Springwel.

The consumer needs to be aware that a mattress purchase is an important decision that he makes, the quality of life is directly related to his quality of sleep. Hence the amount of time and understanding that he spends on choosing the right mattress for him is critical as it becomes the basis of good health and serenity in his life. Very few Indians understand the need for mattresses to breathe. The obsession with box beds in India continue even today because the awareness is not there that the bed needs to help the mattress to breathe by providing air vents. The other factor which the Indian consumer needs to understand is that a replacement of a mattress is a must as its not furniture. Maintenance issues are largely ignored by most in India like the life of a mattress can be extended by periodically rotating it and airing it and that it needs to be replaced within a maximum of 8 years.

Earlier mattresses were stocked vertically where as now they are increasingly being presented horizontally. There is an experiential element which is required to help the consumer take an informed decision and the retailers are beginning to provide that. In place of showing the potential...
consumer, a 2 by 2 inch piece of mattress, entire mattresses are being put on display. This is true especially of the EBO's which are stocking the entire range and have the growing presence of trained retail staff. Manufacturers are investing money and time to train front end staff so that the consumer understands what is on offer and its health benefits.

Online selling has scope for a product like mattress but at present it's in a nascent stage in India. Most beds in India are not of a standard size and therefore mattresses have to be customized, Indian consumer still prefers to see, feel and experience the product before purchasing it, especially for the high end mattresses, it's a bulky product which increases the cost of transportation and with it the price. Given these challenges, the convenience factor of online retail will in time still encourage sale of mattresses online. A few manufacturers like Springwel have taken baby steps in online retailing through existing portals and by setting up their own.

The mattress industry is realizing that there are large benefits which can be derived from advertising, trade show participation and all other initiatives that lead to increased visibility. The importance of these initiatives increase especially as the target audience is now a consumer who is beginning to seek information on quality mattresses and their benefits. All efforts to reach out to the end user contribute in the growth of an industry.

The entire trade in the mattress industry runs on a widespread and penetrated distribution network. India is a very diverse country and so logistics is a problem with preferences changing every 100 kms. Brands are recognising this fact and offering the widest possible range in different price points to ensure a large consumer base and are continuously reviewing their distribution strategy to improve the availability of their products.

As the mattress market grows, it does have a positive impact on the allied products because these products go hand in hand and generally a new mattress would call for a new allied product whose product life cycle is much lower than that of a mattress. So one can say that they complement each other and they are likely to grow hand in hand.