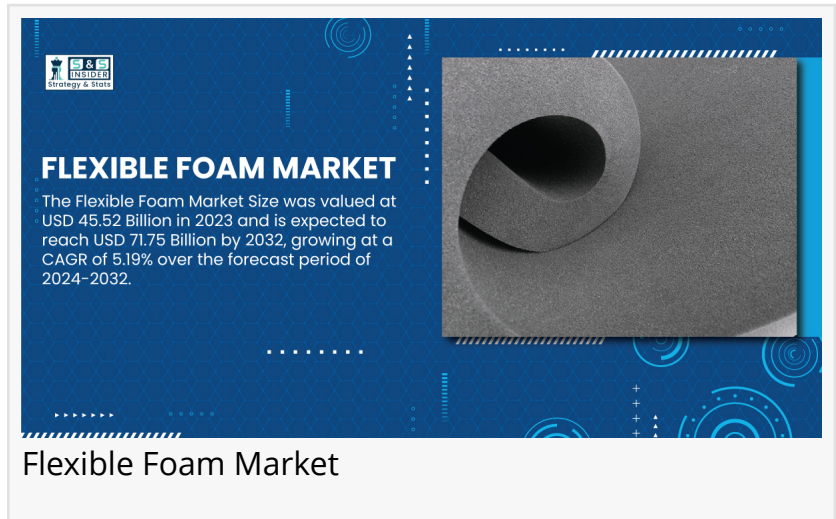


Flexible Foam Market to Grow to USD 71.75 Billion by 2032 with Expanding Industrial Use | SNS Insider

Rising demand for eco-friendly materials drives Flexible Foam Market growth, with industries adopting sustainable and recyclable foam solutions.

AUSTIN, TX, UNITED STATES, February 25, 2025 /EINPresswire.com/ -- The [Flexible Foam Market](#) Size was valued at 45.52 Billion in 2023 and is expected to reach USD 71.75 Billion by 2032, growing at a CAGR of 5.19% over the forecast period of 2024-2032.



Due to its superior cushioning, lightweight properties, and durability, flexible foam is widely used in various industries such as furniture, automotive, packaging, and healthcare. The growth of the industry is driven by the rising demand for sustainable and recyclable foam products. According to the U.S. Environmental Protection Agency (EPA), in the U.S. alone, foam recycling efforts have been on the rise, with more than 1.6 billion pounds of polyurethane foam recycled just in 2023. In addition, rising demand for fuel-efficient alternatives from manufacturers has also driven the automotive industry towards flexible foam, bringing it to seating and interior components. In April 2023, BASF's bio-based polyurethane foams for more sustainable production were in the news. One major application is in the furniture sector, which is by far the biggest consumer of flexible foam and saw North American sales grow 7.5 percent in 2023, according to the American Home Furnishings Alliance (AHFA). These regulations have helped drive innovation for companies, such as Dow and Covestro, that are investing in circular economy initiatives to reduce waste and incorporate eco-friendly foam materials.

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Key Players:

- American Excelsior Company (Excelsior Foam, GeoFoam)

- Armacell (Armaflex, ArmaSound)
- BASF SE (Elastoflex, Neopolen)
- Carpenter Co. (Comfort U, Cellufoam)
- Changzhou Xingang Plastic Products Co., Ltd. (PE Foam, EVA Foam)
- Covestro AG (Desmopan, Bayflex)
- Dow Inc. (DOWTHERM, Styrofoam)
- Foamcraft, Inc. (Polyurethane Foam, Microfoam)
- Future Foam Inc. (Future Foam, Soft Touch)
- Greiner AG (Greiner Foam, Greiner Packaging)
- Huntsman International LLC (Versathane, Flexthane)
- Huebach Corporation (Huebach Foam, Huebach Insulation)
- INOAC CORPORATION (INOAC Polyurethane Foam, Acoustic Foam)
- Interfoam Ltd. (FoamCore, Polyfoam)
- Kaneka Corporation (Kaneka Biofoam, Kaneka Polyurethane)
- Neveon Holding GmbH (Neveon Foams, Neveon Comfort)
- Recticel Group (Recticel Insulation, Comfort Foam)
- Rogers Foam Corporation (Rogers Polyurethane Foam, BioFoam)
- UBE Corporation (UBE Polyurethane Foam, Urethane Foam)
- Zotefoams Plc (Zotefoam, Zotefoams PE Foam)

By Type

In 2023, polyurethane (PU) dominated and held a significant share of the flexible foam market, contributing to 45.2% of the market. Its versatility, lightweight nature, and superior cushioning properties make PU foam the preferred choice for furniture, automotive seating, and packaging applications. The PU foam segment has led the market due to its increasing adoption in the bedding industry owing to high demand for memory foam mattresses. Moreover, the demand for PU foams is also propelled by the utilization of PU foams in transportation sector for vibration and sound insulating applications. Companies including Dow Inc. and Recticel are increasing their PU foam manufacturing capacity to address the growing market requirements.

By Application

In 2023, the furniture and bedding segment dominated the flexible foam market followed with 31.2% of the total share. This dominance has been mainly supported by the factors such as the upward movement in urbanization and the increasing preference for more comfort-driven furniture solutions. The market growth is due to increasing consumer preferences towards memory foam mattresses, cushions and upholstered furniture. Furthermore, the recovery of the hospitality industry from the pandemic has driven the demand for quality bedding products. Brands like Tempur Sealy and Sleep Number have broadened their product ranges to include newer flexible foam technologies to better meet changing consumer demand.

By End-use

In 2023, the residential segment dominated the flexible foam market which accounted for 41.5% of the market value within the end-use sector. This expansion is dominated by mounting consumption for home furnishing, especially in emerging economies. The increasing disposable incomes and the changing consumer inclination toward premium quality furniture and mattresses has also boosted the demand for flexible foam. This sector's dominance is also explained by the post-pandemic trend of home renovations and other interior decor improvements. Furthermore, the government incentives are encouraging energy-efficient construction of homes and this is expected to increase the use of flexible foam in insulation of buildings.

Asia Pacific dominated the Flexible Foam market in 2023, holding a 47.3% market share.

This dominance reflects rapid industrialization, urbanization and booming automobile and furniture industries in China, India and Southeast Asia. Demand has also been driven by government initiatives promoting the use of sustainable materials in furniture manufacturing. For example, recent eco-regulations in China on foam have propelled the eventual use of recyclable and bio-based foams. Moreover, the Indian domestic market demand is met by manufacturers like Sheela Foam, and Recticel ensures its presence overseas, which on the whole is driving the market growth in the Asia Pacific region.

Europe emerged as the fastest-growing region in the Flexible Foam market, with a significant CAGR during the forecast period.

The increasing focus on sustainability and eco-friendly foam materials, especially across Germany, France, and the UK, among others, has further propelled the demand. Regulations in Europe encouraging the circular economy & low-emission foam output have propelled innovation in the industry. The increasing use of flexible foam in health care and bedding applications coupled with research initiatives backed by the government have also contributed to the growth of the vertical Market. Vita Group and Covestro are among the many companies working towards sustainable foam solutions, driving Europe's growth.

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Recent Developments

- September 2024: BASF and Future Foam launched sustainable flexible foam for bedding based on biomass-based Lupranate T 80 TDI, with two condensers in series for CO₂ reduction.
- January 2025: Researchers at Washington State University developed bio-based polyurethane foam from pine lignin, reducing petroleum consumption by 20%.

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