

Mattress supports

HS Code 9404

TRADE FOCUSED PRODUCT REPORTS

MATTRESS SUPPORTS

HS Code 9404

APRIL 2024



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Glossary of terms and abbreviations

Export concentration

This index measures, for each product, the degree of export market concentration by country of origin. It tells us if a large share of commodity exports is accounted for by a few countries or, on the contrary, if exports are well distributed among many countries. The index ranges from 0 to 1, with higher values indicating more market concentration.

Gulf Cooperation Council (GCC) Standardization Organization (GSO)

Gulf Cooperation Council (GCC) member countries created the GSO as a mechanism for developing food and non-food standards. GSO food-related technical regulations and standards serve as the main point of reference for food imports into the Gulf region. Codex Alimentarius, the International Organization for Standardization (ISO), the European Food Safety Agency (EFSA) and the U.S. Food and Drug Administration (FDA) serve as reference points for GSO standards and technical regulations.

HS (Harmonized System) codes

A standardised number classification system for traded goods. It is used by customs officials around the world to identify products for the purpose of applying duties and taxes, as well as for statistical purposes.

Market concentration

Market concentration determines the extent to which countries or firms hold market share. It is frequently used as a measure for the level of competitiveness. Measured on different scales and ranges, the general rule is the higher the score, the greater the level of competitiveness.

In respect to the Shannon Entropy scoring used by the Observatory of Economic Complexity and referenced in the report, the closer the number is to 1, the greater the concentration of just a small number of players and the lower the competitiveness. A score of about 4 for mattress supports, HS code 9404—as stated in this study appears to represent a reasonably small number of competitors, reflecting exports from approximately 14 competing countries.

MFN (Most Favoured Nation) tariff

Tariffs imposed by WTO (World Trade Organization) members on importing goods from other WTO members in the lack of a preferential trade agreement.

Nes (Not elsewhere specified)

Not elsewhere specified (or indicated for NESOI) is stated for an item that is not mentioned elsewhere in a classification system.

NTM (non-tariff measure)

Import and export regulations that reflect conditions of market access other than tariffs. They include numerous regulatory requirements such as health restrictions for food quality, packaging guidelines, minimum safety standards for produced goods, etc.



PCI (Product Complexity Index)

PCI ranks the breadth and sophistication of know-how required in manufacturing. High PCI scores indicate that a product requires significant expertise and particular resources for its production, such as advanced machinery. Goods with a high PCI value, representing a complexity that only a few countries can undertake, include electronics and chemicals. Conversely, a low score suggests that many countries can produce the item, like basic agricultural goods or petroleum. The score's level depends on various factors.

Preferential tariffs

A tariff applied to a product that is less than the MFN levy due to the existence of a preferential trade agreement. This could be a bilateral advantageous trading arrangement or a single system of favours, such as the United States GSP (generalised system of preferences).

Self-sufficiency ratio

The self-sufficiency ratio defines a country's ability to provide for itself and represents the percentage of consumed food that is correspondingly produced within its territory. It can be measured for a specific good, such as wheat or tomatoes, to assess a country's capacity to produce according to its needs. The formula for calculating the ratio, in terms of production and trade, is:

$\text{Production} \times 100 / (\text{Production} + \text{Imports} - \text{Exports})$.

SPS

Sanitary and phytosanitary. In reference to trade, SPS encompasses measures to sustain human, animal and plant health in addition to preventing the spread of diseases and pests.



Product descriptions by HS 6-digit code

HS 940410 Mattress supports for bed frames (excluding spring interiors for seats)

Mattress supports for bed frames (excluding spring interiors for seats) used in bed construction to ensure proper weight distribution and prevent sagging.

HS 940421 Mattresses of cellular rubber or plastics, whether or not covered

Mattresses of a kind made of cellular rubber. These mattresses are commonly used in various applications, including bedding, seating, and other cushioning purposes.

HS 940429 Mattresses, fitted with springs or stuffed or internally filled with any material (excluding cellular rubber, plastic or cotton)

Mattresses made of materials other than cellular rubber, plastics, or cotton. These mattresses are typically used for residential purposes.

HS 940430 Sleeping bags, whether or non-electrically heated

Sleeping bags, whether electrically heated or not typically for outdoor purposes such as camping.



HS 940440 Quilts, bedspreads, eiderdowns and duvets "comforters"

Quilts: Stitched blankets made of layers of fabric, typically with a decorative pattern. Quilts are warm and often used as bed covers or decorative throws.

Bedspreads: Larger coverings that drape over the entire bed, including the sides. Bedspreads are usually lightweight and serve both functional and decorative purposes.

Eiderdowns: Also known as down comforters, eiderdowns are filled with soft feathers or down from ducks or geese. They provide excellent insulation and are perfect for colder climates.

Duvets (Comforters): Thick, fluffy blankets filled with synthetic fibers, down, or feathers. Duvets are encased in removable covers and are popular for their warmth and ease of maintenance.

HS 940490 Articles of bedding and similar furnishing, fitted with springs or stuffed or internally filled...

Articles of bedding and similar furnishing, which are fitted with springs or stuffed or internally filled with any material or made of cellular rubber or plastics. This category excludes items filled with feather or down, mattress supports, mattresses, sleeping bags, pneumatic or water mattresses, and blankets, quilts, bedspreads, eiderdowns, and duvets (also known as "comforters")

Explanatory note

In respect to Jordan's trade data reported in this study, significant discrepancies were identified between category exports and imports, when using the trade statistics database employed in the research, namely ITC Trade Map, which in turn accesses UNCTAD and WTO data.

Fundamentally, here, Jordan's export data varies from that recorded by importing countries—exemplified by the priority markets in this report, the United States, the United Kingdom and Saudi Arabia. It is for this reason that when it comes to assessing Jordan's exports in mattress supports (HS 9404), import data reported by Jordan's partners (referred to as mirror data on the ITC database) is broadly utilised to maintain consistency throughout.



Executive summary

The global mattress and bedding markets continue to grow, driven by several factors. These include rising demand for luxury bedding, sustainable and organic high-quality materials, increasing disposable income, expanding residential construction, and technology integrations such as smart and cooling.

Revenues in the global mattresses market segment were estimated at \$37.3 billion in 2023 and projected to grow annually at a compound rate of 3.78% between 2024 and 2029, rising to \$38.6 billion in 2024, and \$46.4 billion by 2028. The United States represents the largest market by revenue in the category globally, with sales reaching \$13 billion in 2024.

Revenues in the worldwide beddings market on the other hand (excluding sleeping bags) were estimated to turnover \$47.3 billion in 2023 and projected to reach \$49 billion in 2024 and \$58.9 billion by 2029, experiencing an annual growth rate of 3.76% between 2024 and 2029.

Worldwide exports of HS 9404, mattress supports, amounted to \$21.8 billion in 2022. China was the largest exporter that year, at \$10.4 billion, followed by Poland at \$1.4 billion, Germany at \$710.5 million and India at \$645.6 million; together accounting for 60% of category exports.

The United States at \$5.7 billion, Japan at \$1.52 billion and Germany at \$1.48 billion were the largest importers in 2022, together claiming 43% of global category imports in 2022.

Jordan stood 89th in the global mattress supports export rankings during 2022, when the country's category trade was valued at \$2.5 million, reflecting a world share of around 0.01%. Although shipments contracted by 20% between 2018 and 2022, the Hashemite Kingdom's exports grew by 27%, between 2020 and 2022. Here, HS 940490 – articles of bedding and similar furnishing – constituted the most traded sub-category in 2022. In that year Free Zones (markets not mentioned) were the largest market for Jordanian product, valued at \$494,000, followed by Saudi Arabia at \$445,000 and Yemen at \$365,000; together accounting for 53% of the Hashemite Kingdom's mattress supports exports.

Regarding the priority markets in this study, category import trade saw increases between 2018 and 2022. Correspondingly, imports of HS 9404 grew by 30% for the United States, 19% for the United Kingdom and 18% for Saudi Arabia over the respective five-year period, despite the falls brought on by the COVID-19 pandemic in 2020.

Similarly, in trade with Jordan, growth is positive amidst erratic movement in category imports between 2018 and 2022. Respectively, shipments from Jordan grew by about half for the United States, eleven times for the United Kingdom and about thirty-two times for Saudi Arabia over the five-year period.



Product overview



Market revenue¹

Revenues in the mattresses market worldwide were estimated at \$37.3 billion in 2023 and are anticipated to rise to \$38.6 billion in 2024. The United States represents the largest territory by revenue in the category, with sales reaching \$13 billion in 2024.

Looking ahead, worldwide revenue in the mattresses is forecast to grow annually at a compound rate of 3.78% between 2024 and 2029, rising to \$46.4 billion by 2029.² Growth is attributed to rising demand for luxury bedding, sustainable and organic high-quality materials, increasing disposable income, expanding residential construction, and technology integrations such as smart and cooling.

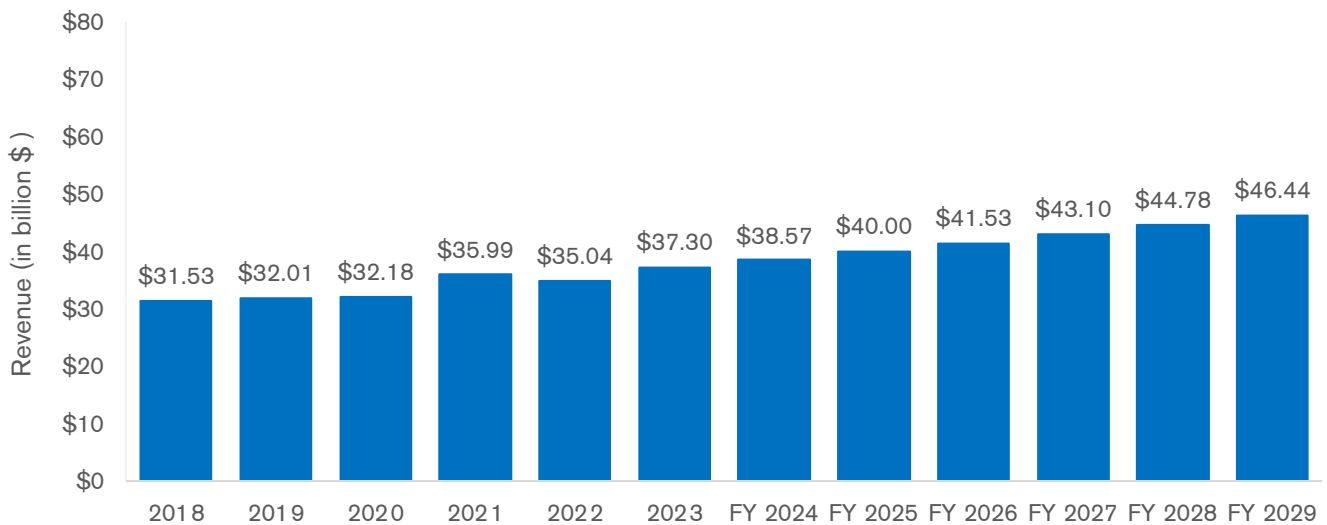


Chart 1 World mattresses market value by revenue in billion \$³

On the other hand, revenues in the worldwide beddings market (excluding sleeping bags) were estimated to turnover \$47.3 billion in 2023 and projected to reach \$49 billion in 2024. The segment is expected to experience an annual growth rate of 3.76% between 2024 and 2029, reaching a revenue of \$58.9 billion by 2029.⁴

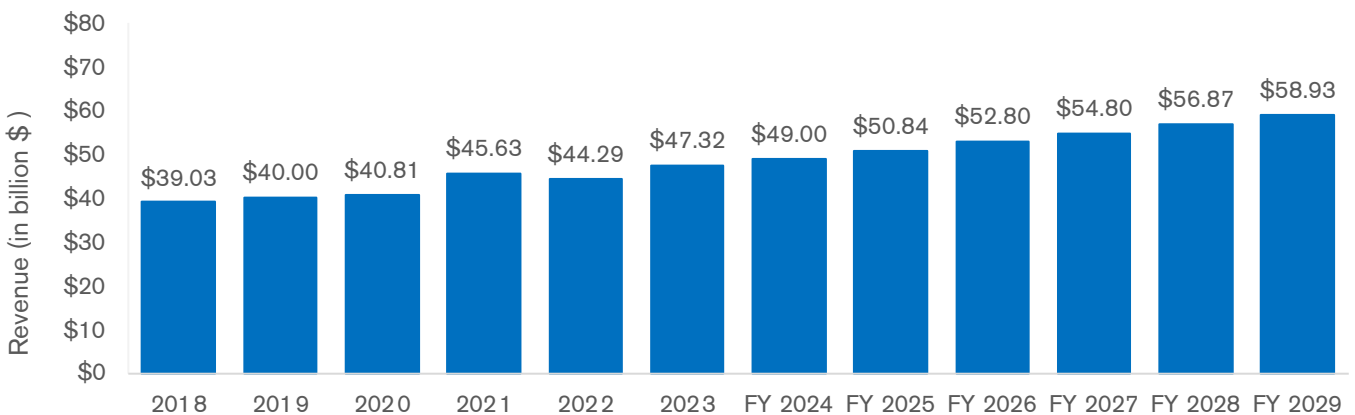


Chart 2 World bedding market value by revenue in billion \$

¹ Production and consumption data was not readily available at the time of reporting, hence the provision of industry revenues. Definitions: Mattresses segment includes spring, foam, and latex mattresses and excludes water mattresses, pneumatic mattresses, and bed frames. Beddings segment includes quilts, eiderdowns, cushions, pouffes, and pillows and excludes mattresses and sleeping bags.

² Statista (2024) Mattresses - Worldwide [online] Accessed: April 25, 2024 at: <https://www.statista.com/outlook/cmo/furniture/bedroom-furniture/mattresses/worldwide#revenue>

³ FY in Chart 1 and in Chart 2 refers to forecast year.

⁴ Statista (2024) Bedding - Worldwide [online] Accessed: April 25, 2024 at: <https://www.statista.com/outlook/cmo/furniture/bedroom-furniture/bedding/worldwide>



Exports and imports

Worldwide export of HS 9404, mattress supports, were valued at \$21.8 billion in 2022. China at \$10.4 billion dominated the category export market by value, accounting for 48% of global category export trade that year. Correspondingly, Poland at \$1.4 billion, Germany at \$710.5 million and India at \$645.6 million followed in the global export ranking; together accounting for 13% of category exports in 2022. Jordan's 2022 category shipments on the other hand were valued at \$2.5 million.⁵ Between 2018 and 2022, global mattress export values experienced a moderate compound annual growth rate (CAGR) of 3.3%.⁶

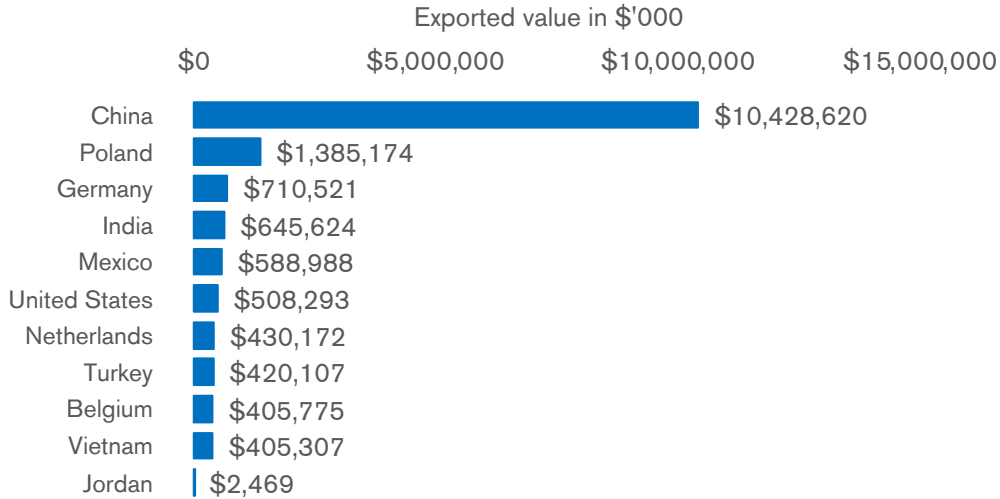


Chart 3 Top mattress supports exporters, HS 9404 by value in 2022, in \$'000

The United States was the largest import market for mattress supports in 2022 valued at \$5.7 billion, representing 28% of global import trade. Japan at \$1.52 billion, Germany at \$1.48 billion and France at \$855.8 million followed in the global import standings, collectively contributing approximately 19% of global mattress supports import trade in 2022. Jordan's imports were valued at \$8.2 million in HS 9404 mattress supports.⁷

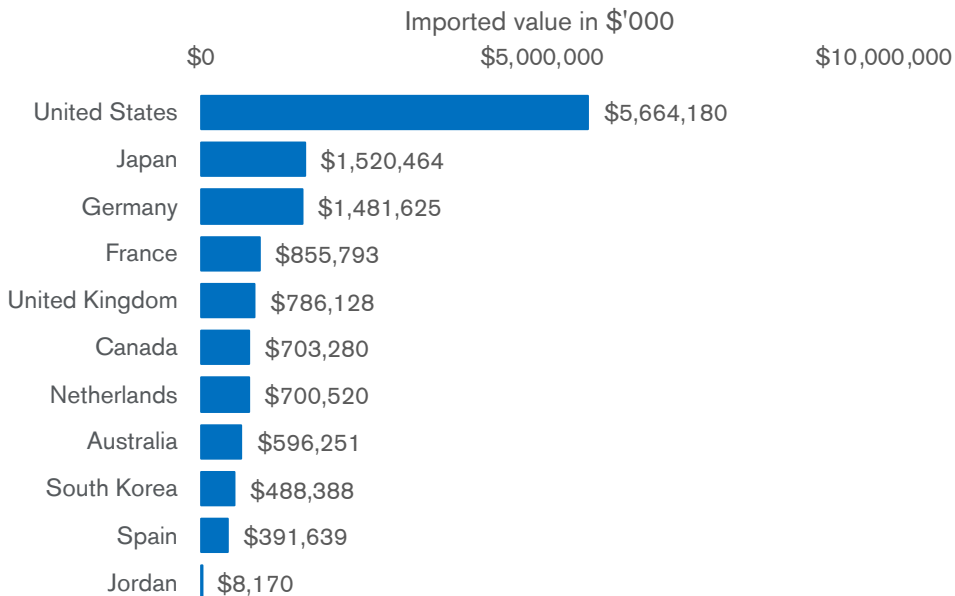


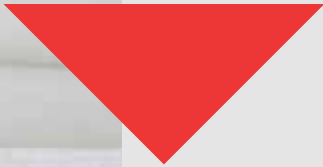
Chart 4 Top mattress supports importers by value in 2022 by value in 2022 in \$'000

⁵ ITC (2022). Trade Map - List of exporters for the selected product (HS 9404 Mattress supports (excl. spring interiors for seats); articles of bedding and similar furnishing, ... [online] Accessed, April 25, 2024 at: https://www.trademap.org/Country_SelProduct_TS.aspx?nvpm=1%7c%7c%7c%7c%7c9404%7c%7c%7c4%7c1%7c1%7c2%7c2%7c1%7c2%7c1%7c1%7c1

Please refer to the explanatory note on page 9 for the calculation of Jordan's export values.

⁶ The Compound Annual Growth Rate (% CAGR) has been calculated based on the annual growth rate of mattress supports exports, utilising data sourced from ITC spanning the years 2018 to 2022. This measurement gives us a yearly growth rate, ironing out any ups and downs to present a stable, year-over-year growth rate.

⁷ International Trade Centre (ITC (2022). Trade Map - List of importers for the selected product (HS 9404 Mattress supports (excl. spring interiors for seats); articles of bedding and similar furnishing, ... [online] Accessed, April 25, 2024 at: https://www.trademap.org/Country_SelProduct_TS.aspx?nvpm=1%7c%7c%7c%7c%7c9404%7c%7c%7c4%7c1%7c1%7c1%7c2%7c1%7c2%7c1%7c1%7c1



Market dynamics



Demand and supply trends

Increasing preference of sustainable and organic high-quality bedding

Climate change is fuelling a shift in consumer preferences towards eco-friendly mattresses. A recent survey in the US market shows that 35% of respondents prioritise organic materials, 28% seek recycled content, and another 28% value local production, indicating a desire for sustainable, locally sourced products. Younger generations, Gen Z and millennials, are leading this charge⁸ and this growing demand is likely to push key mattress players towards adopting more sustainable practices to stay competitive.

Advances in bedding technologies

Young shoppers are driving a surge in demand for mattress materials like memory foam with integrated cooling technology.⁹ Additionally, consumers are increasingly drawn to smart bedding equipped with sensors that monitor sleep habits and adjust comfort settings. From tracking snoring to automatically adjusting pressure points as sleepers move, such features are turning sleep into a personalised experience.¹⁰

Expanding residential construction adding demand for mattress and bedding

Rising middle income households will continue to add demand for mattress and bedding in home furnishings. It is expected this trend will add to increased demand of the category segment, fuelling growth of the global mattress and accessories markets.

Rise of customisable mattresses

Several innovative brands are now pioneering customisable mattresses. This trend empowers buyers to move beyond firmness levels and select specific materials and features to address needs and preferences. Notably, the "split firmness" option has gained traction among couples, enabling partners with differing sleep preferences to find comfort on the same mattress.¹¹

⁸ Mattress Clarity. (2021). The Mattress Industry is Evolving for the Future: Statistics and Trends. [online] Accessed; March 28, 2024 at: <https://www.mattressclarity.com/news/mattress-industry-statistics/>

⁹ Ibid.

¹⁰ Eco Terra Beds (2023). Mattress Trends. [online]. Accessed; March 28, 2024 at: <https://ecoterrabeds.com/blogs/eco-terras-healthy-sleep-blog/mattress-trends>

¹¹ Eco Terra Beds (2023). Mattress Trends. [online]. Accessed; March 28, 2024: <https://ecoterrabeds.com/blogs/eco-terras-healthy-sleep-blog/mattress-trends>



Market concentration and product complexity

Market concentration.

A Shannon Entropy value of 3.84 in 2022 for mattress supports, HS code 9404 as stated in this study appears to represent a reasonably small number of competitors, reflecting exports from approximately 14 competing countries.¹²

Product complexity score.

The product complexity score of -0.31 for mattress supports in 2022, ranking it 659 out of 1033 in the HS 4 classifications, indicates that the products are moderately less complex to produce. Product complexity scores at the HS6 levels in 2022 ranged from -1.26 for HS 940430 sleeping bags, to -0.27 for HS 940421 mattresses of cellular rubber or plastic.¹³

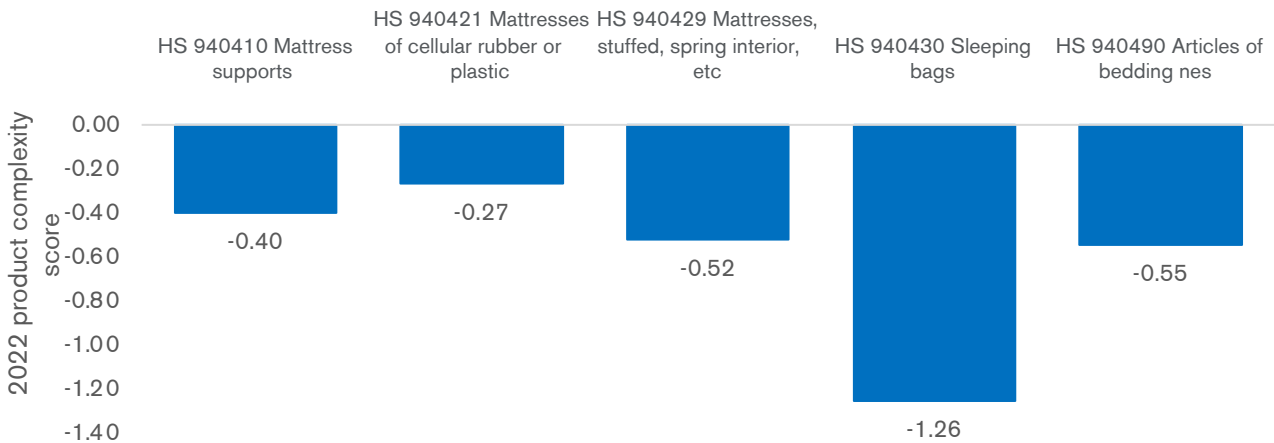


Chart 5 Mattress supports complexity on the HS6 level in 2022

Regarding historical progress in the Product Complexity Index (PCI) on the H4 level, mattress supports HS 9404 scores, budged from -0.54 to -0.31 between 2013 and 2022, with some variance in between.¹⁴

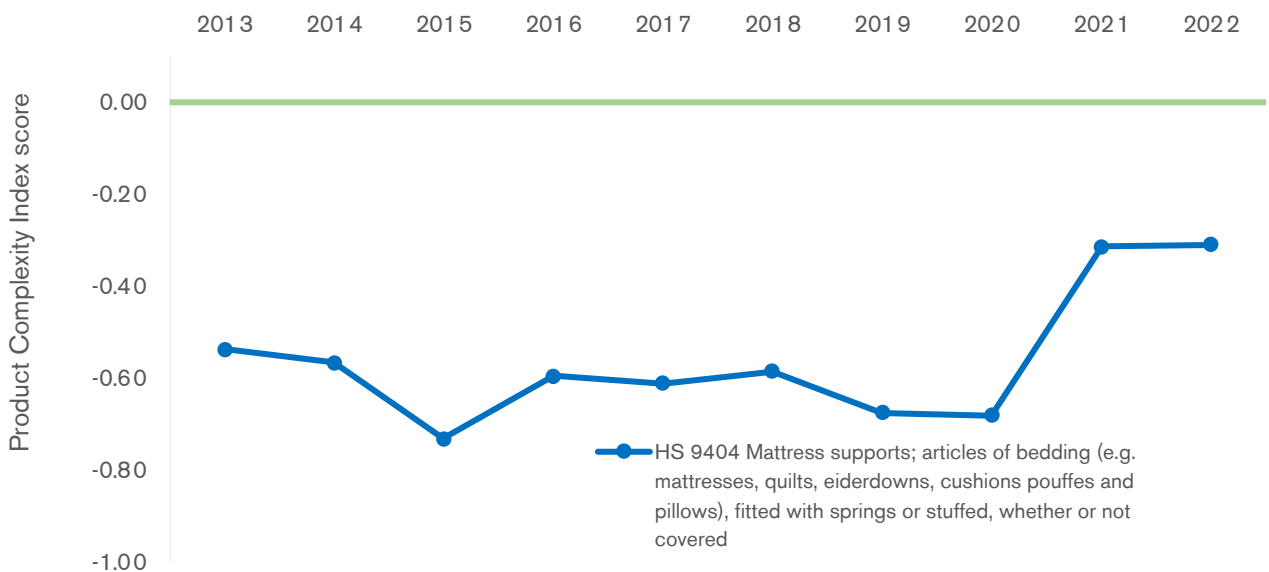


Chart 6 Mattress supports, HS 9404 product complexity, 2013 to 2022

¹² Observatory of Economic Complexity–OEC (2022). HS 9404 Mattress supports (excl. spring interiors for seats); articles of bedding and similar furnishing, ... [online] Accessed, April 25, 2024 at: <https://oec.world/en/profile/hs/mattresses>

¹³ Observatory of Economic Complexity–OEC (2022). Product rankings. HS 9404 Mattress supports (excl. spring interiors for seats); articles of bedding and similar furnishing, ... [online] Accessed, April 25, 2024 at: <https://oec.world/en/rankings/pci/hs6/hs92?tab=ranking>

¹⁴ Observatory of Economic Complexity–OEC (2022). Product rankings. HS 9404 Mattress supports (excl. spring interiors for seats); articles of bedding and similar furnishing, ... [online] Accessed, April 25, 2024 at: <https://oec.world/en/rankings/pci/hs4/hs92?tab=ranking>

World trade statistics by mattress category on the HS6 level

Colour key
Jordan represents > 10% of 2022 world exports
Jordan represents > 1% and <5% of 2022 world exports
Jordan represents > 0% and <1% of 2022 world exports
Exports from Jordan not in evidence in 2022

HS Code	2022 world exports	2022 top export value and territory	2022 top import value and territory	Jordan 2022 export value	Jordan's share in global export markets
940490 Articles of bedding and similar furnishing, fitted with springs or stuffed or internally filled	\$10.9 billion	\$6.5 billion China	\$2.4 billion United States	\$1.3 million	0.01156%
940421 Mattresses of cellular rubber or plastics, whether or not covered	\$3.2 billion	\$ 656.7 million China	\$1.1 billion United States	\$67,000	0.00207%
940429 Mattresses, fitted with springs or stuffed or internally filled with any material	\$3 billion	\$400 million China	\$455.3 million United States	\$276,000	0.00908%
940440 Quilts, bedspreads, eiderdowns and duvets "comforters"	\$2 billion	\$1.5 billion China	\$1.4 billion United States	\$18,000	0.00089%
940410 Mattress supports for bed frames (excl. spring interiors for seats)	\$1.6 billion	\$ 896.3 million China	\$ 83 million France	\$518,000	0.03157%
940430 Sleeping bags, whether or non-electrically heated	\$917.9 million	\$519.7 million China	\$194.4 million United States	\$0	0%

Table 1 Mattresses, export and import statistics and Jordan export market share



HS 9404 in the context of Jordanian exports

Jordan's overall mattress support exports contracted by 20% between 2018 and 2022, decreasing from \$3.1 million in 2018 to \$2.5 million in 2022. In 2022, the leading markets for Jordan's HS 9404 shipments were the Free Zones,¹⁵ Saudi Arabia, and Yemen, with trade values of \$494,000, \$445,000, and \$365,000 respectively, accounting for 53% of the category exports. The United States and Qatar were also top markets, with exports valued at \$298,000 and \$234,000 respectively, together accounting for 22% of Jordan's category exports.¹⁶

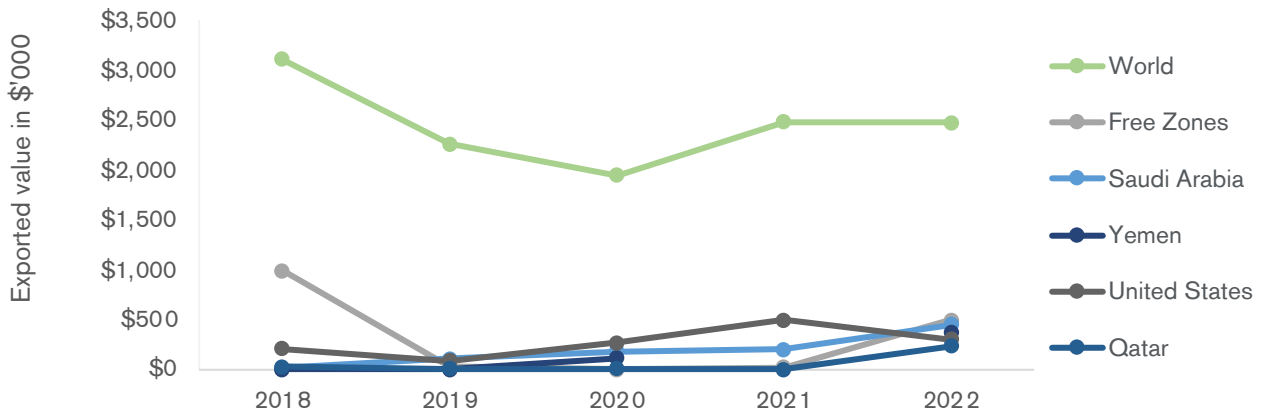


Chart 7 Top Jordanian export markets for mattress supports (HS 9404), 2018 to 2022, in \$'000

¹⁵ Detail is not provided on the respective free zones receiving goods.

¹⁶ ITC (2022). Trade Map - List of importing markets for a product exported by Jordan (HS 9404 Mattress supports (excl. spring interiors for seats); articles of bedding and similar furnishing, ... [online] Accessed, April 25, 2024 at: https://www.trademap.org/Country_SelProductCountry_TS.aspx?nvpm=1%7c400%7c%7c%7c%7c9404%7c%7c%7c4%7c1%7c2%7c2%7c2%7c1%7c2%7c1%7c1%7c1 and https://www.trademap.org/Country_SelProductCountry_TS.aspx?nvpm=1%7c400%7c%7c%7c%7c9404%7c%7c%7c4%7c1%7c1%7c2%7c2%7c1%7c2%7c1%7c1%7c1 Please see the explanatory note on Page 6.



Priority markets



United States of America

Representing the world's largest economy at \$27 trillion in 2023, real GDP in the United States is reported to have grown 2.5% in 2023, compared with 1.9% in 2022, reflecting growth in consumer spending, exports, government spending and investment. Imports in the meantime also increased.¹⁷ Per capita GDP in 2022 was registered at \$76,330.¹⁸

United States bedding market size

In 2023, the revenue generated in the mattresses market in the United States amounted to \$12.6 billion and is projected to grow annually growth at a rate of 3.3% between 2024 and 2029, reaching \$13 billion in 2024 and \$15.3 billion by 2029.¹⁹ Correspondingly, revenue generated in the bedding market segment stood at \$18.7 billion in 2023 and is anticipated to rise to \$19.4 billion in 2024. The bedding market segment is projected to experience an annual growth rate of 3.8% between 2024 and 2029, reaching \$23.4 billion by 2029. Growth is driven by demand for eco-friendly and organic luxury bedding, with consumers seeking high-quality materials and innovative designs.²⁰



United States mattress supports imports

In 2022, United States' mattress supports, HS 9404, imports were valued at \$5.7 billion, representing growth of 30% between 2018 and 2022. Since 2018 China remained the largest supplier, with shipments to the United States valued at \$2.8 billion in 2022, accounting for about a half of category imports. Also, among the top five supplying countries to the United States in 2022 were Mexico at \$565 million, Indonesia at \$474.3 million, India at \$462.9 million and Taiwan at \$192.6 million.²¹

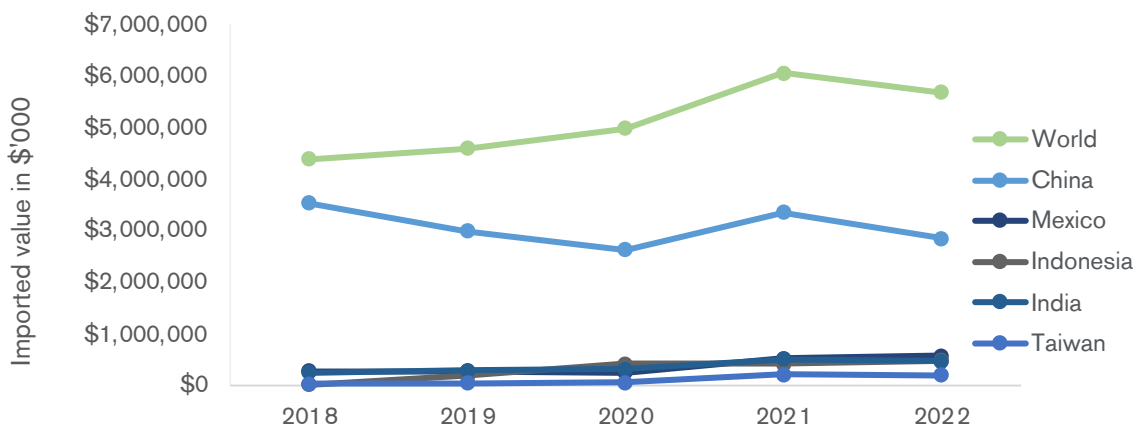


Chart 8 United States mattress supports imports values, top exporters, 2018 – 2022, in \$'000

¹⁷ Bureau of Economic Analysis (BEA), Gross Domestic Product, Fourth Quarter and Year 2023 (Advance Estimate). [Online]. Accessed; April 6 2024 at: <https://www.bea.gov/news/2024/gross-domestic-product-fourth-quarter-and-year-2023-advance-estimate>.

¹⁸ The World Bank, GDP per capita (current US\$) - United States. [Online]. Accessed; April 6 2024 at: <https://data.worldbank.org/indicator/NY.GDP.PCAP.CD?locations=US>.

¹⁹ Statista (2024) Mattresses – United States [online] Accessed: April 27, 2024 at: <https://www.statista.com/outlook/cmo/furniture/bedroom-furniture/mattresses/united-states#revenue>

²⁰ Statista (2024) Bedding – United States [online] Accessed: April 27, 2024 at: <https://www.statista.com/outlook/cmo/furniture/bedroom-furniture/bedding/united-states#revenue>

²¹ International Trade Centre–ITC (2022). Trade Map - List of supplying markets for a product imported by the United States of America (HS 9404 Mattress supports (excl. spring interiors for seats); articles of bedding and similar furnishing, ... [online] Accessed, April 25, 2024 at: https://www.trademap.org/Country_SelProductCountry_TS.aspx?nvpm=1%7c842%7c%7c%7c%7c9404%7c%7c%7c4%7c1%7c1%7c1%7c2%7c



At the time of research, accurate unit values for United States' imports of mattress supports in \$ per ton were broadly not identified.²² Imports however, reported by partner country China were valued at \$6,148 per ton, in 2022.²³

United States mattress supports import from Jordan

United States' import of mattress supports, HS 9404, from Jordan, fell from \$202,000 in 2018 to \$85,000 in 2019, subsequently rising consistently to \$495,000 in 2021 then falling again to \$298,000 in 2022. Overall, shipments between 2018 and 2022 nonetheless grew by 48%.²⁴

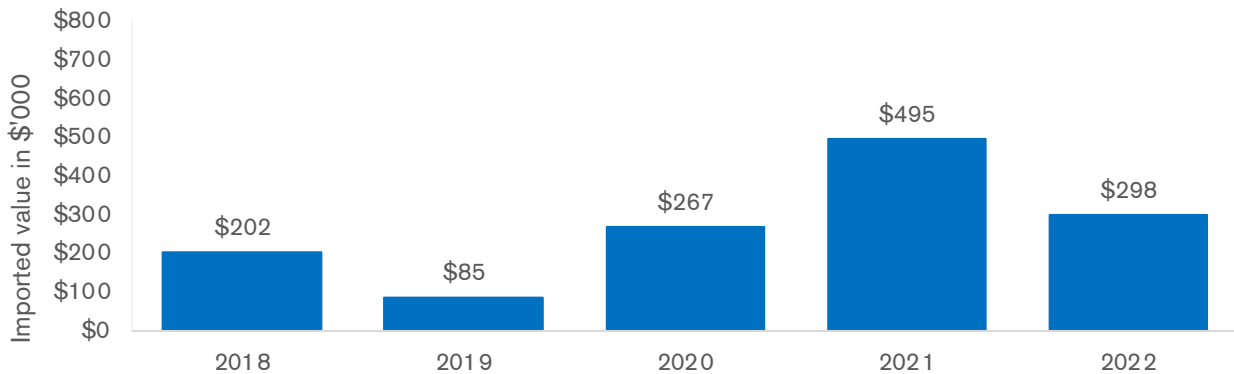


Chart 9 United States mattress supports imports from Jordan, in \$'000

United States trade agreements with Jordan

United States-Jordan Free Trade Agreement. This agreement entered into force on December 17, 2001, and was fully implemented on January 1, 2010. Under this FTA, products can enter the United States duty-free if manufactured in Jordan.

Qualifying Industrial Zones (QIZs). The QIZ initiative, established in 1996, allows qualifying industrial zones in Jordan and Egypt, in addition to the West Bank and Gaza, to export products based on United States qualifying criteria, without tariff or quota restrictions.²⁵

²² Unit values are given on a per item basis in the United States, which differs from reporting in the United Kingdom and Saudi Arabia, which report in \$ per ton. ITC (2022) Trade Map - List of supplying markets for a product imported by the United States of America (HS 9404 Mattress supports (excl. spring interiors for seats); articles of bedding and similar furnishing, ... [online] Accessed, April 25, 2024 at: https://www.trademap.org/Country_SelProductCountry_TS.aspx?nvpm=1%7c842%7c%7c%7c7c9404%7c%7c%7c4%7c1%7c1%7c1%7c2%7c1%7c2%7c3%7c1%7c1

²³ ITC (2022). Trade Map - List of supplying markets for a product imported by the United States (HS 9404 Mattress supports (excl. spring interiors for seats); articles of bedding and similar furnishing, ... [online] Accessed, April 25, 2024 at: https://www.trademap.org/Country_SelProductCountry_TS.aspx?nvpm=1%7c842%7c%7c%7c7c9404%7c%7c%7c4%7c1%7c2%7c1%7c2%7c1%7c2%7c3%7c1%7c1

²⁴ ITC (2022). Trade Map - Existing and potential trade between United States of America and Jordan (HS 9404 Mattress supports (excl. spring interiors for seats); articles of bedding and similar furnishing, ... [online] Accessed, April 25, 2024 at: https://www.trademap.org/Bilateral_TS.aspx?nvpm=1%7c842%7c%7c400%7c%7c9404%7c%7c%7c4%7c1%7c1%7c1%7c2%7c1%7c1%7c1%7c1

²⁵ Qiz Jordan." International Trade Administration | Trade.Gov, 21 Nov. 1996, HYPERLINK "http://www.trade.gov/qiz-jordan"www.trade.gov/qiz-jordan



United States of America PESTEL analysis

Politics

The United States is a federal republic with a presidential system of government. It consists of 50 states, each with its own government, and a federal government that oversees the entire country. The President serves as both the head of state and government, and there is a bicameral Congress composed of the Senate and the House of Representatives.

The United States and Jordan maintain strong political relations, characterised by mutual cooperation on regional and global issues. Both nations work closely together within the framework of regional and international organisations to foster peace, stability, and development in the Middle East.

Economics

The United States has the world's largest economy, with a nominal GDP of approximately 25.4 trillion in 2022. It is defined by a diverse and advanced economy, with key sectors including technology, healthcare, finance, manufacturing, and energy. The US economy is driven by strong consumer spending, innovation, and a robust financial system.

The United States is a significant trading partner with Jordan. A key factor in the relationship between both countries is the United States-Jordan Free Trade Agreement (FTA), entered on 17 December 2001 and removing duties starting 1 January 2010. The total trade in goods and services between the two countries reached \$6.3 billion in 2022, with Jordan's exports to the United States amounting to around \$3.9 billion. In addition to direct investment, the United States provides development aid to Jordan, focusing on economic reform, governance, education, and infrastructure development.

Social

The United States has a population of around 333 million people, with a diverse cultural and ethnic composition. English is the primary language, and the country practices a variety of religions, reflecting its multicultural society. The US is known for its high standard of living, social mobility, and a significant emphasis on individual rights and freedoms.

The United States has a strong educational system, with world-renowned universities and research institutions. The literacy rate is high, and there is a strong focus on higher education and research. The healthcare system, while advanced, faces challenges with access and affordability. Health insurance is often provided through private companies, and there are ongoing debates about healthcare reform.

Technology

The US is a leader in technological innovation and research and development (R&D). It is home to many of the world's leading tech companies and has a strong culture of entrepreneurship and innovation. The government and private sector invest heavily in R&D in areas including biotechnology, information technology, and renewable energy.

The United States boasts advanced digital infrastructure with widespread internet access and high penetration of mobile and broadband services. The country is at the forefront of developing technologies such as 5G, artificial intelligence, electric vehicles, and cybersecurity. There is a strong emphasis on digital transformation and the integration of technology across all sectors of the economy.

Environment

The United States is committed to environmental sustainability by setting ambitious goals for reducing greenhouse gas emissions and promoting renewable energy. Key initiatives include investments in clean energy, energy efficiency, and conservation programmes.

The US faces several environmental challenges, including climate change, pollution, and natural resource management. The federal and state governments work on policies to address these issues, such as reducing emissions, improving air and water quality, and conserving natural habitats. However, there is political debate over environmental regulations and their economic impact.

Legal

The United States has a comprehensive legal framework that supports business operations, protects intellectual property, and ensures compliance with regulations. Laws and regulations cover areas such as antitrust, labour, environmental protection, and consumer rights. The legal system provides a fair and transparent environment for businesses and investors.

US labor laws aim to protect workers' rights and ensure fair treatment in the workplace. Key regulations include minimum wage laws, workplace safety standards, and anti-discrimination laws. The labour market is flexible, with significant mobility and opportunities for workers. There are also ongoing discussions about improving workers' rights and benefits, particularly in sectors such as the gig economy.



United States mattress supports suppliers and distributors

Domestic producers:

Casco Manufacturing Solutions: Manufacturer of variety of specialty products including medical mattresses, upholstered products, and specialty bedding. **Website:** <https://cascomfg.com/>

Fibre Processing Corp.: Manufactures both standard and custom mattresses that are made from wool, kapok, polyester, and upholstery cotton. The company is located in Wilmington, Delaware, and specialises in futons, mattresses and accessories. **Website:** <https://fibrep.com/>

Sealy Mattress Manufacturing Co LLC: A significant manufacturer of mattresses and bedsprings. The company offers foam rubber, memory material, innerspring, box spring, and latex foam mattresses. **Website:** <https://www.sealy.com/>

Serta Simmons Bedding, LLC: A leading mattress manufacturer in North America headquartered in Georgia. **Website:** <https://www.serta.com/>

Importers and Distributors:

A-E Distributors: A wholesale distributor of mattresses, mattress sets, box springs and sales of bedding and furniture. The company is located in Rochester, Monroe Count, New York.

Website: <https://a-edistributors.net/about-us/>

Direct Textile Store: Bedding wholesalers and bulk distributors for various grades of wholesale beddings for the hotel and hospitality industry. **Website:** <https://directtextilestore.com/wholesale-bedding>

Furniture Distributors: Furniture Distributors is a family-owned and operated retail store, offering a wide range of styles and prices on furniture, mattresses, area rugs, accessories, electronics, and appliances. The company offers delivery and setup to virtually anywhere within the state of North Carolina.

Website: <https://www.furnitureistributors.net/>

Rotary Supply Corporation: Rotary Supply Corporation is a family owned and operated wholesale linen distributor. Product include bedding, bath, dinning and resort supplies.

Website: <https://rotary-linens.com/collections/bedding>

Exhibitions and trade fairs in the United States²⁶

Dates	Exhibition name	City	Country	Website
4 to 7 August 2024	ASD Market Week	Las Vegas	United States	https://asdonline.com/buyer/home-decor-decorative/
1 September 2024	Las Vegas Market	Las Vegas	United States	https://www.lasvegasmarket.com/en/exhibitor/Categories/Mattress-and-Bedding
TBC, 2025	Foam Expo North America	Michigan	United States	https://www.foam-expo.com/
TBC, 2025	The Ocean City Spring Trade Expo	Ocean City	United States	https://oceancitytradeexpo.com/
10 to 12 March 2026	ISPA EXPO	Orlando	United States	https://www.ispaexpo.com/

²⁶ TBC is the acronym for 'to be confirmed.' At the time of reporting, specific dates had not been published for 2025 trade shows.

United Kingdom

United Kingdom macroeconomic overview

The Gross Domestic Product (GDP) of the United Kingdom fell to 0.5% in 2023, after reaching an all-time high of 7.6% in 2021 since the beginning of the century. Inflation moderated from 9.1% in 2022 to 7.7% in 2023. In 2024, GDP is anticipated to moderate to 1% and is forecast to slow down in the medium term.²⁷ Looking ahead, lower energy prices and emerging economic slack are projected to help pull back inflation to around to the 2% target by mid-2025.²⁸

United Kingdom bedding market size

In 2023, the mattresses market in the United Kingdom generated a revenue of \$0.92 billion and is projected to grow annually growth at a rate of 3.2% between 2024 and 2029, reaching \$0.95 billion in 2024 and \$1.1 billion by 2029.²⁹ Correspondingly, revenue in the bedding market amounted to \$1.49 billion in 2023 and is anticipated to rise to \$1.55 billion in 2024.

Additionally, the bedding market is projected to experience an annual growth rate of 4.6% between 2024 and 2029, rising to \$1.94 billion. Growth is driven by demand for high-quality and luxurious bedding products.³⁰



United Kingdom mattress supports imports

The United Kingdom's imports of mattress supports, HS 9404, grew 19% between 2018 and 2022, rising from \$659.8 million to \$786.1 million. China was the largest supplier over the period, with shipments valued at approximately \$386.6 million in 2022, accounting for 49% of category imports. Poland and Ireland followed as the second and third largest suppliers, with goods valued at about \$55.2 million and \$44.8 million, respectively.³¹

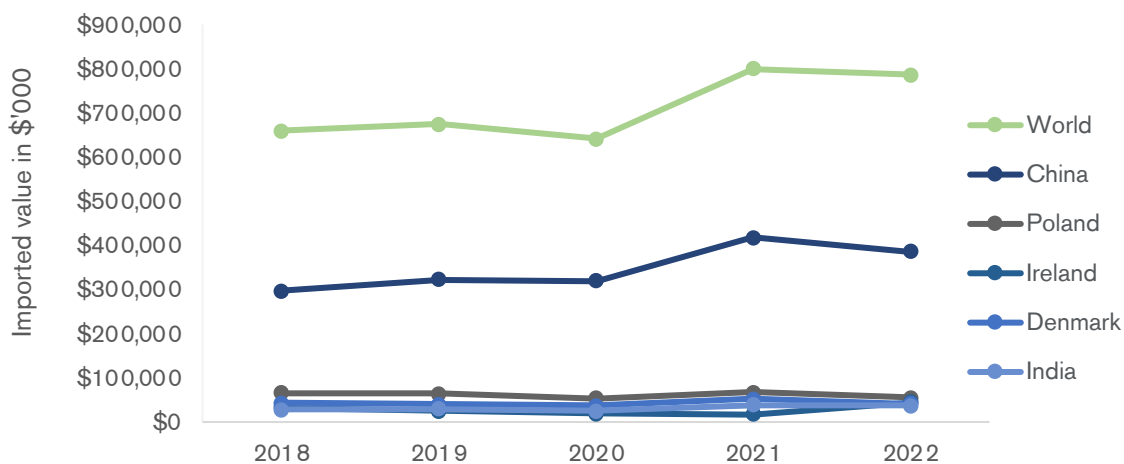


Chart 10 United Kingdom mattress supports imports values, top exporters, 2018 – 2022, in \$'000

²⁷ International Monetary Fund - IMF (2023) Country Data: IMF Data Mapper – October 2023 [online] Accessed; December 28, 2023 at: <https://www.imf.org/en/Countries/GBR>

²⁸ International Monetary Fund - IMF (2023) 2023 Article IV Consultation-Press Release; Staff Report; and Statement by the Executive Director for the United Kingdom – July 2023 [online] Accessed, December 28, 2023 at: <https://www.imf.org/en/Publications/CR/Issues/2023/07/10/United-Kingdom-2023-Article-IV-Consultation-Press-Release-Staff-Report-and-Statement-by-the-535878>

²⁹ Statista (2024) Mattresses – United Kingdom [online] Accessed: April 27, 2024 at: <https://www.statista.com/outlook/cmo/furniture/bedroom-furniture/mattresses/united-kingdom#revenue>

³⁰ Statista (2024) Bedding – United Kingdom [online] Accessed: April 27, 2024 at: <https://www.statista.com/outlook/cmo/furniture/bedroom-furniture/bedding/united-kingdom#revenue>

³¹ ITC (2022). Trade Map - List of supplying markets for a product imported by the United Kingdom (HS 9404 Mattress supports (excl. spring interiors for seats); articles of bedding and similar furnishing, ... [online] Accessed, April 25, 2024 at: https://www.trademap.org/Country_SelProductCountry_TS.aspx?nvpm=1%7c826%7c%7c%7c%7c9404%7c%7c%7c4%7c1%7c1%7c1%7c2%7c



In 2022, the United Kingdom's import of mattress supports were valued at \$5,766 per ton at average prices and ranged from \$2,581 per ton to \$8,815 per ton among the top five supplying countries. Prices from Turkey was the most competitive between 2018 and 2022 while import prices per ton from Ireland remained the highest over five-year period.³²

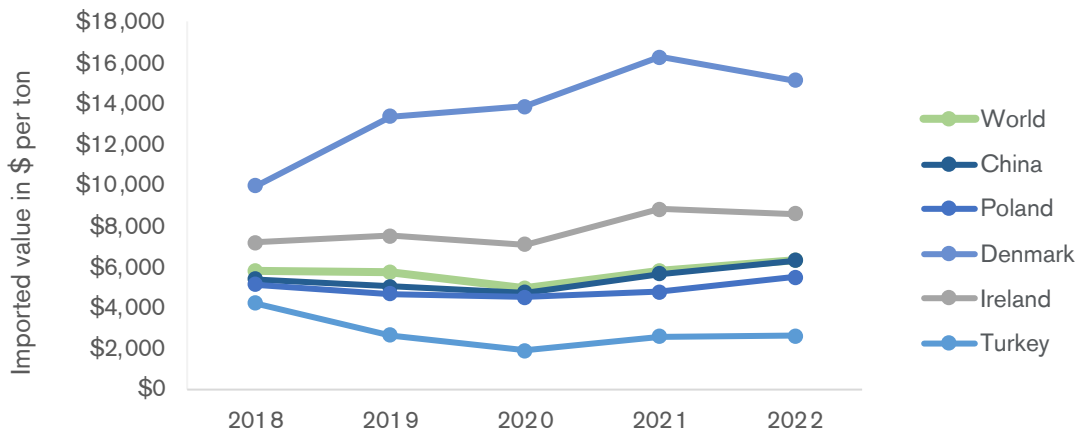


Chart 11 United Kingdom mattress supports imports, main supplying countries, in \$ per ton

United Kingdom mattress supports imports from Jordan

The United Kingdom's import of Jordanian mattress supports, HS 9404, saw significant growth between 2018 and 2022, however, remain varied. Imports rose from \$2,000 in 2018 to \$59,000 in 2021 and then fell to \$22,000 in 2022. Overall, shipments between 2018 and 2022 grew by more than tenfold.³³

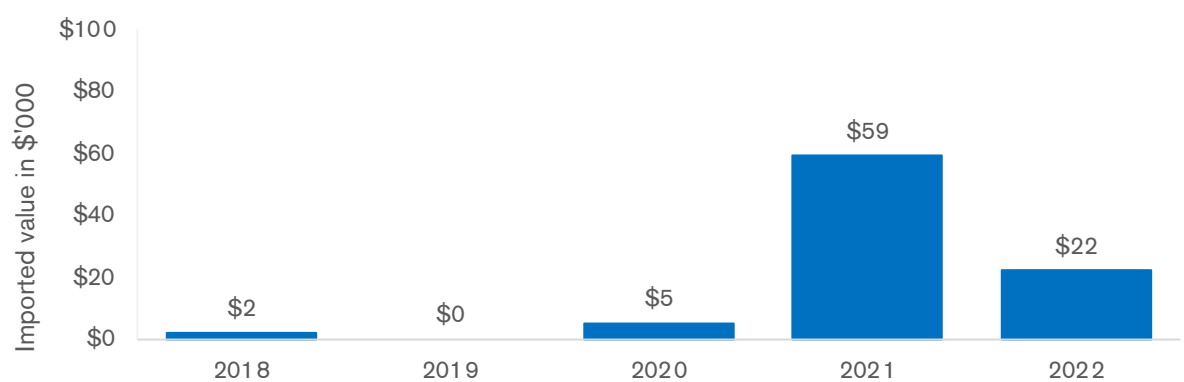


Chart 12 United Kingdom mattress supports imports from Jordan, in \$'000

United Kingdom trade agreements with Jordan

UK-Jordan Association Agreement. The UK and Jordan signed an association agreement in November 2019 to maintain trade relations following Brexit. The agreement, effective from 1 January 2021, aims to ensure continuity of trade and economic cooperation. It mirrors the existing EU-Jordan Association Agreement, covering factors such as tariff-free access for Jordanian goods to the UK market and vice versa, facilitating the exchange of goods and services, and fostering investment opportunities.³⁴

³² ITC (2022). Trade Map - List of supplying markets for a product imported by the United Kingdom in 2022 (HS 9404 Mattress supports (excl. spring interiors for seats); articles of bedding and similar furnishing, ... [online] Accessed, April 25, 2024 at: https://www.trademap.org/Country_SelProductCountry_TS.aspx?nvpm=1%7c826%7c%7c%7c9404%7c%7c%7c4%7c1%7c1%7c1%7c2%7c1%7c2%7c3%7c1%7c1 Note: Import values per ton for Denmark are seemingly higher compared to global averages, showcasing potential outliers over the period.
³³ ITC (2022). Trade Map - Existing and potential trade between United Kingdom and Jordan (HS 9404 Mattress supports (excl. spring interiors for seats); articles of bedding and similar furnishing, ... [online] Accessed, April 25, 2024 at: https://www.trademap.org/Bilateral_TS.aspx?nvpm=1%7c826%7c%7c%7c9404%7c%7c%7c4%7c1%7c1%7c1%7c2%7c1%7c1%7c1%7c1%7c1
³⁴ Gov.jo- UK and Jordan association agreement- November 2019, Available at: https://mit.gov.jo/EBV4.0/Root_Storage/AR/EB_List_Page/Jordan-UK_Association_Agreement.pdf



United Kingdom PESTEL analysis

Politics

The United Kingdom is a constitutional monarchy with a parliamentary democracy. The monarch serves as the ceremonial head of state, while the Prime Minister is the head of government. The UK comprises four countries: England, Scotland, Wales, and Northern Ireland, each with varying degrees of legislative autonomy. The Parliament in Westminster holds the supreme legislative authority.

The United Kingdom and Jordan maintain strong and historic political relations, underscored by mutual cooperation and support on a wide range of regional and international issues. Both nations collaborate closely within the framework of regional and international organizations to promote peace, stability, and development in the Middle East and beyond.

Economics

The UK has a diversified and advanced economy, with a GDP of approximately \$3.1 trillion in 2022. The services sector, particularly finance and insurance, plays a dominant role, contributing around 80% to the GDP. Key industries also include manufacturing, pharmaceuticals, and technology. The economic outlook is influenced by factors such as Brexit, inflation, and global economic trends.

The United Kingdom is a significant trading partner with Jordan, where its investment strategy focuses on fostering long-term economic resilience and enhancing bilateral trade relations. Initiatives like the UK-Jordan Association Agreement aim to facilitate economic cooperation and expand trade opportunities. Subsequently, the total trade in goods and services between the two countries was reported at £810 million in the 12 months to September 2022, where Jordan's exports to the United Kingdom were registered £249 million. In addition to direct investment, the UK provides significant development aid to Jordan, focusing on areas such as economic reform, governance, and infrastructure development.

Social

The UK has a diverse population of around 67 million people, with significant immigrant communities contributing to its cultural diversity. The official language is English, and the country practices a variety of religions, reflecting its multicultural society. The UK is known for its high quality of life, with well-developed education and healthcare systems.

The UK boasts a high literacy rate and a strong emphasis on education, with prestigious institutions like the University of Oxford and the University of Cambridge, while the National Health Service (NHS) provides comprehensive government funded healthcare.

Technology

The UK is a leader in innovation, with significant investment in research and development (R&D). Key areas include biotechnology, information technology, and renewable energy. Government initiatives and funding support innovation through various programs and research councils. The UK's commitment to innovation is reflected in its numerous technology clusters, such as Silicon Roundabout in London.

The UK has a well-developed digital infrastructure, with extensive broadband coverage and rapidly expanding 5G networks. The government promotes digital transformation through initiatives like the Digital Strategy, which aims to improve internet accessibility, cybersecurity, and e-government services.

Environment

The UK is committed to reducing its carbon footprint and enhancing environmental sustainability. The country has set ambitious targets for reducing greenhouse gas emissions, aiming for net-zero emissions by 2050. Initiatives such as the Green Industrial Revolution and investment in renewable energy sources like wind and solar power highlight the UK's focus on sustainability.

The UK faces environmental challenges, including air pollution, waste management, and biodiversity loss. Climate change impacts, such as rising sea levels and extreme weather events, pose additional risks. The government is actively addressing these issues through policies and regulations focused on environmental protection and conservation.



Legal

The UK has a comprehensive legal framework that supports business operations and investor confidence. Regulations cover areas such as corporate governance, data protection, and intellectual property rights. Post-Brexit, the UK is developing its regulatory landscape to align with international standards while maintaining competitiveness.

The UK has robust labour laws that ensure fair treatment and rights for workers. These include regulations on minimum wage, working hours, and health and safety standards. Recent reforms focus on improving job security, enhancing worker rights in the gig economy, and addressing gender pay gaps. Labour market flexibility and protections make the UK an attractive destination for businesses and skilled workers.

United Kingdom mattress supports suppliers and distributors

Domestic producers:

Harrison Spinks: Harrison Spinks is a Leeds-based fifth generation luxury bedmaker, which has been producing British mattresses and beds since 1840. **Website:** <https://www.harrisonspinks.co.uk/>

Peter Reed: Peter Reed produces bespoke embroidered bedlinen and personalised items including duvet covers, shams, pillowcases and sheets since 1861. The company is located in Lancashire, the United Kingdom. **Website:** <https://www.peterreed.com/>

Pristine Beds Ltd: Pristine Beds Ltd is a UK manufacturer of upholstered fabric sleigh bed frames, divan beds, mattresses, and ottoman storage beds. The company is located in Batley. **Website:** <https://www.pristinebeds.co.uk/>

Robinsons Beds: Robinsons Beds is a family business specialising in the manufacture and sale of handmade divan beds and bed frames, headboards and mattresses throughout the United Kingdom since its establishment in 1975. **Website:** <https://www.robinsonsbeds.co.uk/>

Importers and Distributors:

Ark Wholesale Limited: Importers and wholesalers of furniture, mattresses and beddings based in Darwen. **Website:** <https://arkfw.co.uk/about-us/>

Endurance Beds: Endurance Beds is an online bed and mattress retailer specialising in made-to-order beds, as well as metal, wooden and upholstered bed frames. The company is a family run business, registered under the name of Bedcare Ltd and is based in Norfolk. **Website:** <https://www.endurancebeds.co.uk/pages/about-us>

Hill Interiors: One of the United Kingdom's leading importers and distributors of wholesale furniture, home accessories, lighting, artificial flowers and gifts. **Website:** <https://www.hill-interiors.com/>

Wholesale Beds & Furniture: Established in 1995, Wholesale Beds & Furniture is one of the largest importers and wholesalers of budget flat pack furniture and mattresses in Ireland, yet is also registered in England and Wales. **Website:** <https://wholesalebeds.net/about-us>

Exhibitions and trade fairs in the United Kingdom³⁵

Dates	Exhibition name	City	Country	Website
24 to 25 September 2024	Bed Show	Telford	United Kingdom	https://www.bedshow.co.uk/
TBC 2025	INDX Beds & Bedroom	Shirley	United Kingdom	https://www.indxshows.co.uk/indx-home/beds/beds
TBC, 2025	Spring Furniture & Bed Show Furniture Show	Coventry	United Kingdom	https://www.springfurnitureshow.co.uk/

³⁵ TBC is the acronym for 'to be confirmed.' At the time of reporting, specific dates had not been published for 2025 trade shows.



Saudi Arabia

Saudi Arabia macroeconomic overview

GDP growth of 8.7% was estimated for Saudi Arabia in 2022, falling to 0.8% in 2023—driven by oil production cuts. Average inflation in 2023 remained unchanged from 2022 level of 2.5% and is projected to decline to 2.2% in 2024.³⁶ Pursuing Vision 2030 reforms, the country was the fastest-growing G20 economy in 2022, driven by increases in oil production and growth in the non-oil GDP. Despite lower overall growth in 2023, non-oil growth stood close to 5% in 2023—purred by strong domestic demand. Growth in 2024 is forecast to adjust upward to 4% but the long-term sustainability of economic performance according to the IMF will require maintaining the reform momentum, irrespective of developments in oil markets.³⁷



Saudi Arabia bedding market size

The mattresses market in Saudi Arabia generated a revenue of \$480 million in 2023. In 2024, revenue in the segment is expected to remain flat, amounting to \$480 million, however, anticipated to grow annually at a rate of 0.41% between 2024 and 2029, reaching \$940 million by 2029.³⁸ Correspondingly, revenue in the Saudi Arabia bedding market segment stood at \$530 million in 2023 and is forecast to record a revenue of \$540 million in 2024. Looking forward, the bedding market segment is projected to experience an annual growth rate of 1.11% between 2024 and 2029, reaching \$560 million by 2029. Growth is driven by rise in demand for luxury and bespoke beddings by the country’s affluent population.³⁹

Saudi Arabia mattress supports imports

Saudi Arabia’s import of mattress supports, HS 9404, grew about 18% between 2018 and 2022, increasing from \$157.8 million in 2018 to \$186.6 million in 2022. China remained the largest supplier over the five years, with shipments to Saudi Arabia valued at \$116.7 million in 2022; accounting for 63% of the category’s imports that year. India at \$18.1 million and the United Arab Emirates at \$14.6 million were the second and third largest suppliers in 2022.⁴⁰

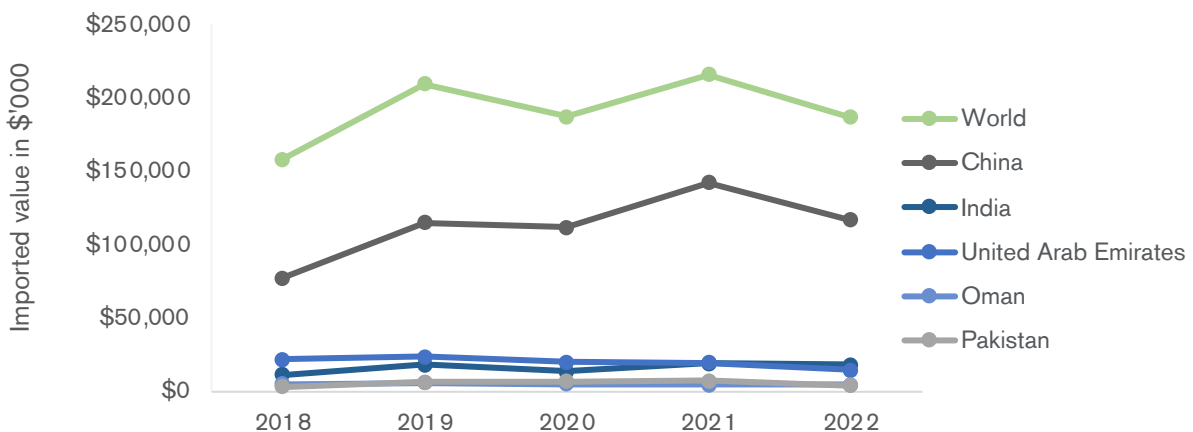


Chart 13 Saudi Arabia mattress supports imports values, top exporters, 2018 – 2022, in \$'000

³⁶ International Monetary Fund - IMF (2023) Country Data; Saudi Arabia – October 2023 [online] Accessed; December 28 2023 at: <https://www.imf.org/en/Countries/SAU>

³⁷ International Monetary Fund - IMF (2023): Saudi Arabia’s Economy Grows as it Diversifies [online] Accessed; December 28 2023 at: <https://www.imf.org/en/News/Articles/2023/09/28/cf-saudi-arabias-economy-grows-as-it-diversifies>

³⁸ Statista (2024) Mattresses – Saudi Arabia [online] Accessed: April 27, 2024 at: <https://www.statista.com/outlook/cmo/furniture/bedroom-furniture/mattresses/saudi-arabia>

³⁹ Statista (2024) Bedding – United Arab Emirates [online] Accessed: April 27, 2024 at: <https://www.statista.com/outlook/cmo/furniture/bedroom-furniture/bedding/saudi-arabia#revenue>

⁴⁰ ITC (2022). Trade Map - List of supplying markets for a product imported by the Saudi Arabia (HS 9404 Mattress supports (excl. spring interiors for seats); articles of bedding and similar furnishing, ... [online] Accessed, April 25, 2024 at: https://www.trademap.org/Country_SelProductCountry_TS.aspx?nvpm=1%7c682%7c%7c%7c%7c9404%7c%7c%7c4%7c1%7c1%7c1%7c2%7c1%7c2%7c1%7c1%7c1



In 2022, Saudi Arabia's import of mattress supports were valued at \$3,967 per ton at average prices and ranged from \$3,270 per ton to \$5,640 per ton among the top five supplying countries. Prices from Oman and China were the most competitive between 2018 and 2022 while import prices per ton from Pakistan and India remained the highest over the respective five-year period.⁴¹

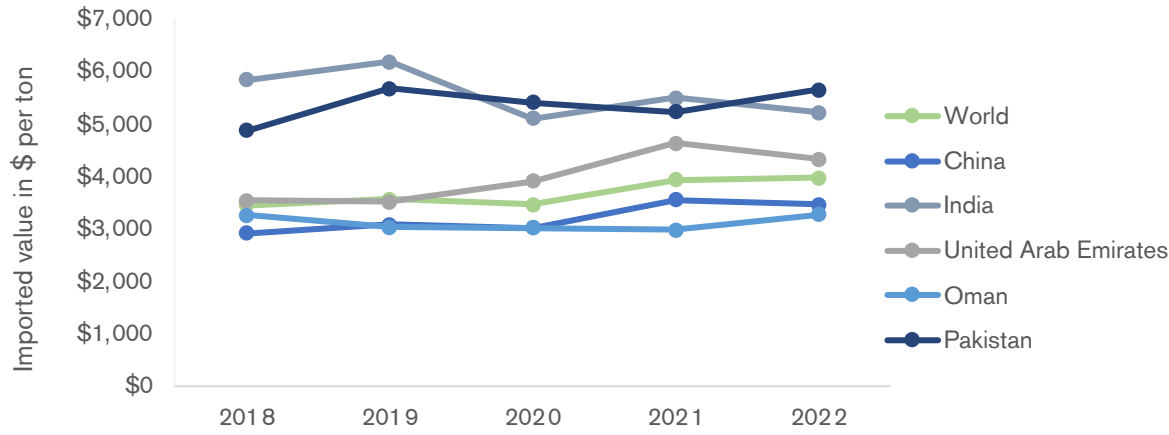


Chart 14 Saudi Arabia mattress supports imports, main supplying countries, in \$ per ton

Saudi Arabia mattress supports imports from Jordan

Saudi Arabia's imports of Jordanian mattress supports, HS 9404, increased from \$14,000 in 2018 to \$445,000 in 2022. Overall, shipments between 2018 and 2022 grew by more than thirty times.⁴²

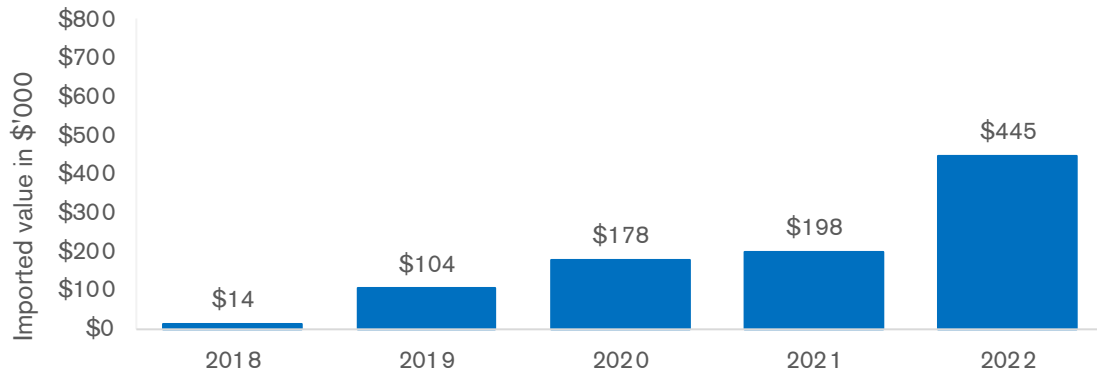


Chart 15 Saudi Arabia mattress imports from Jordan

⁴¹ ITC (2022). Trade Map - List of supplying markets for a product imported by the Saudi Arabia (HS 9404 Mattress supports (excl. spring interiors for seats); articles of bedding and similar furnishing, ... [online] Accessed, April 25, 2024 at: https://www.trademap.org/Country_SelProductCountry_TS.aspx?nvpm=1%7c682%7c%7c%7c%7c9404%7c%7c%7c4%7c1%7c1%7c1%7c2%7c1%7c2%7c3%7c1%7c1

⁴² ITC (2022). Trade Map - Existing and potential trade between Saudi Arabia and Jordan (HS 9404 Mattress supports (excl. spring interiors for seats); articles of bedding and similar furnishing, ... [online] Accessed, April 25, 2024 at: https://www.trademap.org/Bilateral_TS.aspx?nvpm=1%7c682%7c%7c400%7c%7c9404%7c%7c%7c4%7c1%7c1%7c1%7c2%7c1%7c1%7c1%7c1%7c1%7c1



Saudi Arabia trade agreements with Jordan

Greater Arab Free Trade Area (GAFTA), 1997. Saudi Arabia and Jordan are members of GAFTA, which was established under the umbrella of the Arab League. The agreement aims to create a free trade area among Arab countries by reducing and eliminating tariffs and trade barriers among member states. GAFTA includes 18 Arab countries and promotes increased trade and economic integration in the region.

Bilateral Economic Agreement, 1962. This agreement covers various aspects of economic cooperation, including the movement and transfer of persons, commodities, and capital. It also addresses transportation and transit regulations, the facilitation of commerce, and the fishing rights of professional fishermen in each other's territorial waters.

Trade and Economic Cooperation Agreement, 2022. A memorandum of understanding was signed between the Makkah Chamber of Commerce and Industry and its counterpart in Amman. This agreement aims to develop bilateral economic relations and increase trade exchange.⁴³

Agricultural Trade Agreement, 2023. Saudi Arabia and Jordan signed an agreement to boost agricultural trade, largely focused on fish. This agreement aims to strengthen trade exchanges between the private sectors of both countries and support the development of the fishery industry in Jordan.

Agreement Land Transport Connectivity, 2023. Saudi Arabia and Jordan reached an agreement to enhance land transport connectivity, which is expected to significantly improve trade and economic collaboration between the two countries. This agreement is part of broader efforts to strengthen bilateral trade ties.

⁴³ Arab News: March 04, 2022- Saudi Arabia, Jordan eye trade relations over \$1bn with new agreement: [online] Available at: <https://www.arabnews.com/node/2036126/business-economy>



Saudi Arabia PESTEL analysis

Politics

Saudi Arabia is a monarchy with strong governance, where political stability is a central feature. As a key Middle Eastern state, its foreign policies and relations within the Gulf Cooperation Council, the United Nations and OPEC have significant regional and global implications.

Saudi Arabia and Jordan have worked closely on regional and international issues and are seen as having model diplomatic relations.

Economics

In 2022, Saudi Arabia's GDP was \$1.1 trillion, making it the largest economy in the Middle East. Oil and gas revenues contribute about 80% to GDP. Economic diversification is currently underway through the Vision 2030 programme.

Saudi Arabia is furthermore Jordan's largest economic partner, with investments exceeding \$13 billion. Trade between the two countries reached around \$5 billion in 2021. Saudi Arabia has also been a major donor to Jordan, providing substantial financial assistance, including a 2022 direct funding of \$50 million as part of a larger economic aid package agreed upon in 2018.

Social

Saudi Arabia has a young population, with over 50% under the age of 25. The country has a high standard of living and a significant expatriate community. Arabic is the official language, and Islam is the state religion.

Saudi Arabia has undertaken reforms as part of its Vision 2030 programme, to increase the inclusion of females in the workforce, and promote entertainment and tourism.

The government is investing in education and skills development to prepare the workforce for a diversified economy. There is a focus on STEM (science, technology, engineering, and mathematics) education to meet the needs of emerging industries.

Technology

Saudi Arabia is investing in research and development to foster innovation, particularly in technology and renewable energy sectors. Initiatives such as NEOM, a planned smart city, are examples of this push towards innovation. Notable sector programmes include the Badir technology incubator, Middle East Venture Partners, Monshaat and UnitX, an artificial intelligence and digital transformation startup.

Saudi Arabia is rapidly advancing its digital infrastructure, with widespread adoption of technologies like 5G, e-commerce, and digital banking. The government supports digital transformation through various policies and investments.

With increasing digitalization, cybersecurity has become a critical focus area to protect against cyber threats and ensure the safety of digital transactions and data. The government and private sector are investing heavily in cybersecurity measures to safeguard the growing digital economy.

Environment

The country is engaged in global environmental agreements and is investing in renewable energy sources. Efforts are being made to reduce CO2 emissions and reliance on fossil fuels, in addition to managing water resources more efficiently.

Environmental issues include desertification and water scarcity. The government is actively working on environmental sustainability projects.



Legal

The legal system is based on Sharia law. There have been efforts to improve the business environment, including reforms in judicial processes and regulations affecting foreign investments. Saudi Arabia has also enhanced its corporate governance standards to attract more foreign direct investment.

Businesses operating in Saudi Arabia must comply with stringent regulations related to anti-corruption, financial reporting, and corporate governance. The government is enhancing regulatory frameworks to align with international standards

Saudi Arabia has implemented labour reforms to improve working conditions and promote the employment of Saudi nationals over expatriates. The Nitaqat program is a key initiative in this regard.

Saudi Arabia mattress supports suppliers and distributors

Domestic producers :

King Koil Middle East: Established in 1898, King Koil is one of the oldest mattress brands since 1898, with a strong presence in Middle Eastern markets including Saudi Arabia and also the United Arab Emirates.

Website: <https://kingkoilme.com/>

Middle East Mattress Factory (Sealy Middle East): One of the largest brands in the mattress segment in the Middle East. Middle East Mattress Factory benefits as an operation licensee of Sealy Inc. for Saudi Arabia and the MENA region. The company has a production facility at Jeddah, Saudi Arabia.

Website: <https://sealyme.com/en/>

Sleep High: Established in 1963, Sleep High is one of the largest mattress manufacturers in Saudi Arabia, offering mattresses, beds, pillows, comforters, bed sheet, mattress topper and protector, and bath towels.

Website: <https://sleephigh.com/>

Sleep Royal: A company specialised in manufacturing high-quality mattresses, sleep and comfort supplies since 1998. **Website:** <https://sleeproyal.com.sa/>

Importers and Distributors:

Bed House Trading Company: Bed House is a mattress supplier in Saudi Arabia. The company offers a variety of products including medical and hotel mattresses and sleeping supplies with five branches in the Kingdom of Saudi Arabia. **Website:** <https://bedhouse.com.sa/>

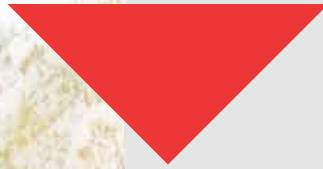
Bed Quarter: A premium bedroom furniture, mattress, bed linen, bath linen, and table linen products supplying company that was established in 1997. Brands represented include Tempur, Nolte, Ogawa, Maya, Gentug, Himmola And Yatsan. **Website:** <https://bedquarter.com/>

International Mattress House: Registered as Pillows and Covers Company Limited, International Mattress House is a Saudi company with its headquarters in Dammam and with branches in most regions of the Kingdom of Saudi Arabia. Specialised in sleep systems for more than 21 years the firm supplies international mattress, bed, pillows and sleeping system brands. **Website:** <https://wesada.co/>

Manam Mattresses: Mattress retailer in Saudi Arabia, supplying brands such as Simmons, Intercoil and Muhldorfer. **Website:** <https://manammattress.com/>

Exhibitions and trade fairs in Saudi Arabia

Dates	Exhibition name	City	Country	Website
17 to 19 September 2024	Index Saudi Arabia	Riyad	Saudi Arabia	https://www.index-saudi.com/product-sectors/bed-and-bedding/
17 to 19 September 2024	Hotel & Hospitality Expo	Riyad	Saudi Arabia	https://www.thehotelshowsaudiarabia.com/exhibitor-list/sleep-nice/
18 to 20 February 2025	Saudi Interiors & Furniture Expo	Jeddah	Saudi Arabia	https://www.saudifurnitureexpo.com/



Recommendations

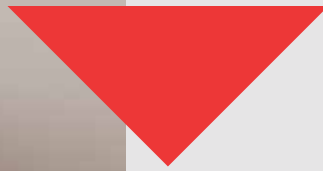


Recommendations in summary

For strategic positioning, we highlighted three priority markets in this report: the United States, the United Kingdom and the Saudi Arabia.

For Jordan's HS 9404 mattress supports, exports remained generally varied between 2018 and 2022. Shipments nonetheless increased by about half for the United States, eleven times for the United Kingdom and about thirty-two times for Saudi Arabia over the five-year period.

Expanding trade opportunities for Jordan's mattress supports, offers significant prospects across the United States, the United Kingdom and the Saudi Arabia; not least since they represent sizeable or affluent markets, driven by global trends that include the increasing demand for eco-friendly and organic high-quality bedding, expanding residential construction, increasing disposable income, demand for luxury bedding, and advancements in mattress and bedding technologies.



Reference information



Priority markets tariff and non-tariff barriers⁴⁴

United States

Tariffs

For HS 940490—Articles of bedding and similar furnishing, fitted with springs or stuffed or internally filled with any material; a preferential tariff of 0% is applied for Jordan.

It is important to note that other countries may be subjected to MFN duties at a rate of 5.75%.

The United States does not apply any trade remedy on HS 940490

General requirements

The U.S. Customs and Border Protection (CBP) develops and implements the regulations on imports requirements in consultation with the Environmental Protection Agency (EPA). The Customs and Border Protection (CBP) requires multiple documents when importing to the United States. Many federal agencies besides CBP regulate imports into the United States.

Several U.S. federal agencies administer regulations associated with furniture for residential and commercial purposes. Notably, the Consumer Product Safety Commission (CPSC) sets standards and requirements for mattresses such as flammability, labelling, recordkeeping and chemical content. Mattress requirements in the United States under the regulation of the CPSC, constitute

- The Flammable Fabrics Act (FFA)
- The Federal Hazardous Substances Act (FHSA) and
- The Consumer Product Safety Act (CPSA).

The Flammable Fabrics Act (FFA) regulates the issue of flammability for textile products such as mattresses, garments, carpets, and fabric furniture, which are either manufactured in or imported to the United States.⁴⁵

Broadly, regulations on imports include the following requirements:

- Importers certification: a certification must be signed and filed electronically or in writing with CBP by the importer or an authorised agent of the importer, and must also include the certifier's name, email address, and telephone number
- Declaration of conformity: an application and submission of Supplier's Declaration of Conformity (SDoC)
- Certificate of origin signed by the exporter, including necessary details like the shipping line, supplier's name, and address.
- Bill of lading provided by the shipping line and includes information such as value, description, weight, labels, quantity, and details of the products being transported.
- Packing list providing additional information about quantity, value, weight, etc.

⁴⁴ In respect to the identification of tariff and non-tariff barrier rules for import, the following section details requirements for HS 940490, where Jordan's major exports are classified.

⁴⁵ Compliance Gate (January 19, 2021) Mattress Regulations in the United States: An Overview: Accessed; April 29 2024 at: <https://www.compliancegate.com/mattress-regulations-united-states/>



Additional detail

Further details on the United States' import requirements for mattresses can be found in the following references:

Consumer Product Safety Commission (CPSC)

Link: <https://www.cpsc.gov/>

U.S. Environmental Protection Agency

Link: <https://www.epa.gov/>

Overview of U.S. Mattress Requirements

Link:

https://www.cpsc.gov/s3fspublic/15BCampbellCPSC.En_.pdf?3Mke6e54IAvMen7h841int2aautCzR.w

The US Customs and Border Protection

Link: <https://www.cbp.gov/trade/basic-import-export/importer-exporter-tips>

ITC market access map

Link: <https://www.macmap.org/>



United Kingdom

Tariffs

For HS 940490—Articles of bedding and similar furnishing, fitted with springs or stuffed or internally filled with any material; a preferential tariff of 0% is applied for Jordan.

It is important to note that other countries may be subjected to MFN duties at a rate of 2%.

The United Kingdom does not apply any trade remedy on HS 940490

General requirements

Goods entering into the United Kingdom are subject to import controls, whether because they are banned, subject to quotas or where the import is monitored with license. The Department for Business & Trade's Import Licensing Branch (ILB) is responsible for the issuance of licenses for imports into the United Kingdom and provides further guidance on import controls. Import license is not required for majority of industrial goods entering the United Kingdom (UK).

In addition to achieving with UKCA (UK Conformity Assessed and CE (European Conformity) standards, various furniture products imported or manufactured for the United Kingdom's market are subject to specific relevant safety regulations and standards. Beds or mattresses need to pass ignition resistance tests before furniture makers and suppliers can sell them in the UK. In the UK there are two pieces of legislation specifying flammability requirements:

- The General Product Safety Regulations 2005 details imports requirements on product safety information, traceability and risk assessment for consumer electronics.
- The Furniture and Furnishings (Fire Safety) Regulations 1988 (FFR; amended 1989, 1993 and 2010) ensures that upholstered furniture and composites used for furniture products placed in the UK meet specific fire resistance levels and are appropriately labelled. The regulation covers most furniture products that are ordinarily used for private use and collections of components designed to be assembled into such furniture products, including beds and divans, Sofa-beds, high-chairs, etc.
- The FFR requires testing which must be done otherwise it may affect your furniture product. For instance, upholstery that fails the cigarette test cannot be added in furniture products that fall under the FFR.^{46 47}

Broadly, the requirements for imports into the United Kingdom include the following:

- Economic Operators Registration and Identification number (EORI number): Importers must get EORI number that starts with GB to import goods into England, Wales or Scotland.
 - To get an EORI number, the importer's business usually needs to have premises based in the country importing to or exporting from—this is called 'being established'. The business premises needs to be one of the following: a registered office, a central headquarters and a permanent business establishment
- export declaration in the exporter's country if applicable
- licences or certificates to send goods to the UK if applicable
- hiring a transporter or customs agent to deal with UK customs, where applicable
- import declaration at UK customs
- import certificate or license: applicable to special goods.
- Most printed matter is free from customs duty and is also free from VAT in the UK.
- Goods imported to the UK must comply with domestic business standards

Additional detail

Further details on the United Kingdom's import requirements for mattress supports can be found in the following references:

Department for Business and Trade

Link. <https://www.gov.uk/guidance/uk-standards-and-regulatory-import-requirements>

Department for Business and Trade

Link. <https://www.gov.uk/guidance/using-the-ukca-marking>

The Furniture and Furnishings (Fire) (Safety) Regulations 1988

Link. <https://www.legislation.gov.uk/ukSI/1988/1324/contents/made>

International Trade Administration – Country Commercial Guide, United Kingdom

Link. <https://www.trade.gov/knowledge-product/united-kingdom-trade-standards>

ITC market access map

Link. <https://www.macmap.org/>

⁴⁶ GOV.UK: Importing. Accessed; April 9 2024 at: <https://www.gov.uk/browse/business/imports>

⁴⁷ Compliance Gate (July 21, 2022) Furniture Regulations and Standards in the United Kingdom: Accessed; April 27 2024 at: <https://www.compliancegate.com/furniture-regulations-united-kingdom>



Saudi Arabia

Tariffs

For HS 940490—Articles of bedding and similar furnishing, fitted with springs or stuffed or internally filled with any material; a preferential tariff of 0% is applied for Jordan.

It is important to note that other countries may be subjected to MFN duties at a rate of 10.71%.

Saudi Arabia does not apply any trade remedy on HS 940490

General requirements

The Saudi Standards, Metrology, and Quality Organization (SASO) issues regulations for conformity assessment procedures of commodities, products and services according to its approved standards.

On 24 August 2018, the Saudi Standards, Metrology and Quality Organization (SASO) published a new Technical Regulation (TR) for Technical Regulations of Textile Products. This regulation outlines the basic requirements for textile products and determines conformity assessment procedures that suppliers must comply with during the presentation and placement of textile products onto the market in the Kingdom of Saudi Arabia (KSA), and also to ensure environmental protection and consumer's health and safety. The Technical Regulation applies to all textile products when made available in the Kingdom of Saudi Arabia (KSA) including furniture, umbrella and sunshade coverings containing at least 80% by weight of textile components such as the upper layer of the multi-layered floor covering and mattress covers.⁴⁸

SASO rolled out Saleem Saber, an electronic certification and conformity assessment system, that became mandatory for all imported goods entering Saudi Arabia as of July 2018. Saber is an electronic service provider for obtaining Certificates of Conformity for products destined to the Saudi Arabian market under applicable Saudi standards and specifications rules. Additionally, the Zakat, Tax and Customs Authority of the Kingdom of Saudi Arabia, requires importers to present a commercial invoice, a bill of lading, and a certificate of origin to import goods into Saudi Arabia.⁴⁹

Broadly, the requirements for imports into the Saudi Arabia include the following: Supplier conformity

- declaration form from the manufacturer or importer
- Risk assessment document
- Warnings and instruction manuals
- Written acknowledgement that the same application has not been submitted to any other acceptable party
- ISO 9001 Quality Management System certificate (as applicable)
- Technical documentation: name and address of manufacturer, general description of the product, design and manufacturing drawings, graphs, elements, units, subdivisions, description and explanations necessary for understanding drawings, graphs, and operation (list of Saudi standard specifications or any other technical specifications, results of the reports, graphical calculations of the design, control operations, tests performed, etc.)
- Test reports
- Evidence that supports the appropriateness of technical solutions taken in the design
- Required documents for import permit and clearance must be obtained and include
 - Certificate of conformity issued by SASO
 - Import licence issued by the Ministry of Commerce and Investment
 - Commercial invoice issued by the seller with details about the trade, including quantity, type, seller, and buyer.
 - Certificate of origin signed by the exporter, including necessary details like the shipping line, supplier's name, and address.
 - Bill of lading provided by the shipping line and includes information such as value, description, weight, labels, quantity, and details of the chemicals being transported.
 - Packing list providing additional information about quantity, value, weight, etc.

⁴⁸ SGS Société Générale de Surveillance SA (November 22, 2018) Saudi Arabia Publishes New Technical Regulations for Textile Products. [Online] Accessed; April 29, 2024 at:

<https://www.sgs.com/en/news/2018/11/safeguards-15118-saudi-arabia-published-new-technical-regulations-for-textile-products>

⁴⁹ International Trade Administration (November 25, 2023) Country Commercial Guide— Saudi Arabia. [Online] Accessed; January 3, 2024 at <https://www.trade.gov/country-commercial-guides/saudi-arabia-import-requirements-and-documentation>



Additional detail

Further detail on Saudi Arabia's import requirements for mattress supports can be found in the following references:

The Saudi Standards, Metrology, and Quality Organization (SASO)

Link. <https://www.saso.gov.sa/en/pages/default.aspx>

SASO SABER system

Link. <https://saber.sa/>

SASO–Technical Regulations

Link.

https://www.saso.gov.sa/en/laws-and-regulations/technical_regulations/pages/default.aspx?TechnicalCat=2

Zakat, Tax and Customs Authority

Link. <https://zatca.gov.sa/en/Pages/default.aspx>

International Trade Administration – Saudi Arabia country commercial guide

Link. <https://www.trade.gov/country-commercial-guides/saudi-arabia-standards-trade>

ITC market access map

Link. <https://www.macmap.org/>



Methodology

The study employs desktop research and concentrates on the underlying product, its capacity, supply, demand globally and in particular priority markets. In addition, the study covers export and import statistics, trade barriers and import requirements. The objective is to give insight on merchandise trade dynamics in the Jordanian context.

Priority Markets Selection Criteria

The selection of priority markets is based on a comprehensive set of criteria:

- **Annual Imported Quantities:** Evaluating the volume of imports to gauge market size.
- **Growth Rate in Quantities:** Assessing the rate of growth to identify expanding markets.
- **Market Concentration:** Analyzing the distribution of market share among competitors.
- **Export Potential:** Determining the potential for export between Jordan and the target market.
- **Tariff and Non-Tariff Barriers:** Considering the impact of trade barriers on market entry.

Additionally, all financial figures are conducted in US dollars.

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