

Home Linens - US - July 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"Opportunities exist in the home linens category for brands to emphasize product innovations, such as linens that prevent bed bugs or that improve sleep, as well as focusing on quality in order to attract consumers. Brands can also market toward younger consumers aged 18-44."

- Margie Nanninga, Home and Personal Care Analyst

This report looks at the following areas:

- Home linens sales flat following strong post-recession growth
- Consumers looking for cost savings, consider price when making purchases
- Replacement is driven by existing items being worn-out

This report covers home linens including those for use in the bedroom, bathroom, and kitchen as well as those used for decorative purposes such as curtains.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Home Linens - US - July 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Definition

Executive Summary

The issues

Home linens sales flat following strong post-recession growth

Figure 1: Total US sales and fan chart forecast of home linens market, at current prices, 2010-20

Consumers looking for cost savings, consider price when making purchases

Figure 2: Correspondence analysis – Home linens purchase influencers, April 2015

Replacement is driven by existing items being worn-out

Figure 3: Home linens worn-out replacement drivers – Top three rank, April 2015

The opportunities

Focus on younger consumers, who are more likely to make purchases

Figure 4: Percentage of consumers purchasing home linens in past 12 months, by age, April 2015

Consumers willing to pay for functional benefits which may also increase purchase frequency

Figure 5: Interest in home linens products – Any, April 2015

Technology, improved omnichannel experience can set retailers apart

Figure 6: Attitudes toward home linens, April 2015

What it means

The Market – What You Need to Know

Bed and bath linens experience growth, decorative linens struggle

Opportunities with bed bugs prevention, challenges with linens replacement

Growth in population of those 18-44, increase in home renovations to boost market

Market Size and Forecast

Historic and projected sales for home linens

Figure 7: Total US sales and fan chart forecast of home linens market, at current prices, 2010-20

Figure 8: Total US sales and forecast of home linens market, at current prices, 2010-20

Market Breakdown

Bed and bath linens grow, decorative linens struggle

Figure 9: Total US retail sales of home linens by segment, at current prices in \$ billions, 2013 and 2015

Market Perspective

Replacement for linens tied to items being “worn-out”

Bed bugs present opportunities for linens innovations

Prevalence of sleep issues provides opportunities for “sleep better” products

Current home décor trends value simplicity, alternative fabrics

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Home Linens - US - July 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Green trends can help to boost sales of cloth napkins, kitchen towels

Market Factors

- Increase in US consumers, especially those aged 18-44, to boost market
- Stabilizing birth rates may boost linens purchases
- Growing consumer confidence may encourage increased linens spending
- Post-recession renovations boost market
- Declining home ownership rates slow market
- Cost of cotton can help lower the price of linens

Key Players – What You Need to Know

- Bed and bath linens experience strong sales, celebrity lines set brands apart
- Consumers seek cost savings with decorative linens
- Mix and match lines, improved technology appeal to consumers

What's Working?

- Bedroom and bathroom linens experience strong post-recession growth
- Celebrity lines continue to set brands apart
- Functional benefits catch consumers' attention including bedbug prevention
- "Sleep better" products improve user experience

What's Struggling?

- Decorative linens struggle as consumers seek cost savings

What's Next?

- Technology enhances the in-store shopping experience
- Online sales will grow, improved omnichannel experience
- Customized looks from mix and match lines

The Consumer – What You Need to Know

- Younger consumers buy more linens despite smaller home sizes
- Celebrity endorsements help set brands apart but quality is key
- Replacement driven by fraying, consumers not as concerned about stains
- Consumers interested in functional product innovations

Rooms in the Home

- House sizes smaller among younger consumers
Figure 10: Bedrooms and bathrooms in home (mean), by age, April 2015
- Consumers most likely to splurge on bedroom linens, especially for master
Figure 11: Room types most likely to splurge on – Top three ranking, April 2015

Purchases of Home Linens

- Younger consumers, Hispanics more likely to purchase linens
Figure 12: Percentage of consumers purchasing home linens in past 12 months, by age, April 2015
- Mean spent on bedding, bath, and linens increases

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
 EMAIL: reports@mintel.com

Home Linens - US - July 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 13: Amount spent on bedding, bath, and linens in the past 12 months, October 2009-December 2014

Purchase Influencers

Consumers motivated by price but without sacrificing quality

Figure 14: Correspondence analysis – Home linens purchase influencers, April 2015

Celebrity lines succeed, though consumers stress quality over celebrity endorsements

Consumers prefer shopping in-store, online likely to grow

Figure 15: Attitudes toward home linens, April 2015

Replacement Factors

Fraying most common issue for replacement, stains not as important

Figure 16: Home linens worn-out replacement drivers – Top three rank, April 2015

Product Innovations

Consumers willing to pay more for products that improve user experience

Figure 17: Interest in home linens products – Any, April 2015

Interest in linens that protect from bed bugs due to US bed bug issues

Figure 18: Interest in home linens products – CHAID – Tree output, April 2015

Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

Abbreviations and terms

Abbreviations

Appendix – Market

Figure 19: Total US sales and forecast of home linens market, at inflation-adjusted prices, 2010-20

Figure 20: US population by age, 2010-20

Figure 21: Annual births in the US, 2003-13

Figure 22: US consumer confidence, May 2014-April 2015

Figure 23: NAHB Remodeling Market Index (RMI), Q1 2009-Q1 2015

Figure 24: Homeownership rate by age of householder, 2009-14

Figure 25: Monthly cotton prices, cents per pound, April 2014-March 2015

Figure 26: Monthly cotton prices, cents per pound, April 2010-March 2015

Appendix – Consumer

Figure 27: Consumers purchasing home linens, November 2008-December 2014

Figure 28: Mean spent on window coverings, October 2009-December 2014

Correspondence analysis methodology

Figure 29: Correspondence analysis of home linens purchase influencers, April 2015

CHAID analysis methodology

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Home Linens - US - July 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 30: Interest in home linens products – CHAID – Table output, April 2015

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
EMAIL: reports@mintel.com