

Global Lawn Mower Market - Comprehensive Study and Strategic Analysis 2020?2025

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Global Lawn Mower Market Report

The lawn mower market by revenue is expected to grow at a CAGR of ?4.50 % during the period 2019–2025.

The global lawn mower industry is expected to witness surging demand during the period 2019?2025. With the increase in spending toward professional landscaping services, connecting lawn mowers with IoT, and developing sustainable cities, the demand for lawn mowers is anticipated to grow. Further, the increase in leisure activities, such as golf, is growing in Europe, North America, and the APAC, fueling the market growth.

The following factors are likely to contribute to the growth of the lawn mower market during the forecast period:

Increasing Connectivity of Lawn Mowers with IoT

Growing Landscaping Industry

Growing Influx of Alternate Fuel Options and Robotic Lawn Mowers

The study considers the present scenario of the lawn mower market and its market dynamics for the period 2019?2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply

aspect of the market. It profiles and examines leading companies and other prominent ones operating in the market.

Global Lawn Mowers Market Segmentation

The global lawn mowers market research report includes a detailed segmentation by product, end-user, fuel type, end-user, mower blade, drive type, blade type, start type, distribution, geography. Walk-behind mowers have been preferred in the landscaping market largely as they translate to fewer emissions and lower fuel use. These mowers are commonly used to decorate and preserve gardens, lawns, and yards in less than 10,000 square feet of yard area. They are commonly used in industrial and residential gardens, public parks, industry, and institution gardens. Spending on preserving the environment in lawns and gardens is growing in the recent period, which is expected to boost the market for walk-behind mowers.

In 2019, the residential end-user segment dominated the market. The market growth spurt is expected to come from the growing adoption of robotic lawn mowers in the US and the UK. Though robotic variants initially struggled to make a presence among households in these countries, these units have silently penetrated the households. Several vendors have been offering tailor-made products suited to these regions. Factors such as storage, portability, performance, and safety are the deciding factors for residential end-users.

Gas-powered lawn mowers dominated the market with shares of over 79% and 69% in revenue and unit shipment, respectively, in 2019. The increasing demand for lawn and yard landscaping is expected to expand the segment during the forecast period. The electric-powered lawn mower segment is likely to grow owing to the increasing demand for eco-friendly lawn mowers during the forecast period. Hybrid mowers are expected to gain popularity with the combination of battery and engine-powered technology and gas and battery-powered technology due to the existent noise and emission challenges expected to increase in the future. While battery will be the main source of power, small combustion engines are expected to supplement power alternative fuel, and power sources such as propane and solar will become mainstream. Technology such as digital electronic ignition and electronic fuel injection (EFI) are being incorporated in liquid-cooled units instead of air-cooled units as they have operating temperatures that are a lot more consistent.

The global manual drive lawn mower segment is expected to reach \$1.22 billion by 2025. Europe and North America are expected to grow at a steady pace during the

forecast period. The global RWD lawn mower market is likely to reach \$15.73 billion by 2025. The application of rear-wheel drives to perform mowing uphill, and side-hills is expected to influence the segment growth. In terms of unit shipments, the FWD segment is expected to reach 15.11 million units by 2025. FWD drive mowers can have better maneuverability than AWD and RWD mowers. A front-wheel-drive is ideally suited to flat terrain with no barriers, including trees. Europe and APAC are likely to grow at the highest CAGRs during the forecast period. The AWD segment of the global lawn mower market witnessed shipments of 9.22 million units in 2019. The shipments are expected to reach 12.26 million units by 2025, growing at a 4.86% CAGR. All-wheel drive mowers (AWD) deliver power to four wheels, ensuring maximum stability up and down hills and over muddy turf. They use an auto propeller control mechanism that automatically detects and adapts for optimum convenience and ease to the users walking pace. In terms of unit shipment, the segment is expected to reach over \$12.25 million units by 2025.

The distribution environment is rapidly evolving, with systems and processes being upgraded at a rapid pace. With the lawn mower market being highly time-sensitive, distributors are increasingly focusing on extending their reach to improve the speed to market maintenance parts and services. In 2019, the retail segment contributed to the highest market revenue to the global lawn mower market. The online segment faces strong competition from the retail segment because of the entry of traditional garden equipment vendors in the market, which has increased the visibility of lawn mowers on store shelves across the world. Many retail players such as Sears, OBI, Wal-Mart, Tesco, Best Buy, and Costco have started to stock and showcase their products in their retail outlets, leading to an erosion of the market share of the online segment.

By Product

Walk-behind Mowers

Reel/Cylinder Mowers

Self-propelled Mowers

Push Mowers

Hover Mowers

Ride-on Mowers

Standard Ride-on Mowers

Zero-turn Mowers

Lawn Tractors

Garden Tractors

Robotic Mowers

By End-users

Residential Users

Professional Landscaping Services

Golf Courses

Government

Others

By Fuel Type

Manual-powered

Gas-powered

Propane-powered

Electric-corded

Electric-cordless

By Other Type

Blade Type

Cylinder

Standard

Mulching

Lifting

Drive Type

AWD

FWD

RWD

Manual

Start Type

No start Required

Keyed Start

Push Start

Recoil Start

By Distribution

Retail

Specialty Stores

Mass Market Players

Dealers & Distributors

Online

INSIGHTS BY GEOGRAPHY

North America is expected to observe a high demand for commercial lawn mowers worldwide. An increasing number of policies and programs focusing on greenery in public spaces are projected to affect the US market significantly. Several commercial clients will probably opt for eco-friendly methods to support sustainability efforts. Several industry players emphasize the implementation of environmentally sustainable alternatives that produce fewer toxic emissions and superior and improved efficiency. The share of gas-powered garden products remains almost unchanged. However, the market has been witnessing increased demand for cordless equipment. The disadvantages related to corded equipment such as electric hazards (electrocution and tripping off) and limited mobility are boosting the demand for cordless products. Further, other vendors are strengthening their presence in the region. Increasing competition in the market is propelling vendors to constantly introduce new lawn mowers, which employ advanced technology and are more efficient than their predecessors.

By Geography

North America

US

Canada

Europe

UK

Germany

France

Italy

Spain

Sweden

Netherlands

Switzerland

Belgium

APAC

China

Japan

South Korea

Australia

Latin America

Brazil

Mexico

Argentina

Middle East & Africa

Saudi Arabia

UAE

South Africa

INSIGHTS BY VENDORS

The global lawn mower market is moderately fragmented, with several local and global market players. As consumers expect constant advances and upgrades in garden equipment, the increasingly changing economic environment could harm vendors. While the market is characterized by diversified international vendors and a few regional vendors as foreign players will expand their market footprint, it would be increasingly difficult for regional vendors to compete with them, particularly in terms of technology and customer base. A rise in product/service expansions, technical advances, and M&A are expected to exacerbate industry competitiveness. Deere & Co., Husqvarna, Kubota, MTD Goods, STIGA, & The Toro Group are among the major vendors in the global commercial lawn mower market. Several players offer a wide variety of gardening equipment to achieve economies of scale. The market concentration in developed countries such as the US and other Western European countries is high. Simultaneously, the demand is nascent in emerging economies such as India due to the entry of many foreign brands into these countries.

Prominent Vendors

Ariens Company

Briggs & Stratton

Deere & Company

Honda Motor Company

Husqvarna Group

Kubota

MTD Products

Robert Bosch

STIGA Group

Techtronic Industries

Textron

The Toro Company

Other Prominent Vendors

Alamo Group

Alfred Kärcher

AL-KO

Altoz

AGCO

AS-Motor

Bad Boy Mowers

Black + Decker

Blount International

Bobcat Company (Doosan Bobcat)

Carraro

Chervon Group

Cobra Garden Machinery

Einhell Germany

Emak Group

Erkunt Traktor Sanayii

Excel Industries

Future Gen Robotics

Generac Power Systems

Greenworks Tools

Grey Technology

Hangzhou Favor Robot Technology

Hayter Limited

Hitachi

The Hyundai Motor Group

iRobot

LG

LOWE's Corporation (KOBALT)

Makita Corporation

Mamibot

McLane Manufacturing

Mean Green Products

Metalcraft

Moridge Manufacturing

Ningbo NGP INDUSTRY

Positec Tool (WORX)

R&R Products

Schiller Grounds Care

Shibaura

Snow Joe

STIHL

The SUMEC Corp.

Swisher Acquisition

The Kobi Company

Turflynx

Venture Products

Volta

Walker Manufacturing

Weibang

WIPER ECOROBT by NIKO

Wright Manufacturing

Yamabiko Europe (Belrobotics)

Zhejiang Tianchen Intelligence & Technology

ZIPPER Maschinen

Zucchetti Centro Sistemi (ZCS)

KEY QUESTIONS ANSWERED

1. What is the global lawn mower market size and growth rate during the forecast period?
2. What are the factors affecting the growth of the lawn mower market share?
3. What is the growth of Asia Pacific lawn mower market during the forecast period?
4. Who are the leading vendors in the market?

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