

# Global Autonomous Floor Scrubber Market 2024

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## Abstracts

The global market for autonomous floor scrubbers is experiencing significant growth, driven by a variety of factors that are reshaping the demand for robotic cleaning equipment. The expansion of commercial areas and an increase in construction activities are key contributors to this growth, as they fuel the need for efficient cleaning solutions. Furthermore, the rise in tourism has led to a surge in demand for cleaning equipment within the hospitality industry. Additionally, stringent health and safety regulations imposed by governmental and private entities worldwide are further propelling the demand for autonomous floor scrubbers.

In 2023, the segment of autonomous floor scrubbers with a run time of up to 4 hours was valued at \$611 million, with an anticipated compound annual growth rate (CAGR) of 11.4%, projecting a value of \$1,301 million by 2029. This segment is poised to experience substantial growth during the forecast period, owing to its widespread adoption across various industries such as warehouses, shopping malls, and healthcare establishments. The relative affordability of products falling within this segment is expected to drive heightened demand, particularly when compared to variants with longer run times on a single charge.

Disc scrubbers, utilizing two flat brushes to deeply clean or polish floors, represent a specific type of autonomous floor scrubber. They operate at speeds of 250-300 RPM and necessitate pre-sweeping before use. The scrubber head type, typically made from materials like nylon, abrasive bristle, and polypropylene, is selected based on the specific floor type being cleaned. The disc scrubber's ability to apply more down pressure facilitates the removal of thick buildup and dirt, while its pads and brushes are considered versatile for cleaning and polishing floors. In 2023, the market value of autonomous floor scrubbers featuring a disc scrubber head type was estimated at \$656 million and is projected to grow at a CAGR of 11.6% to reach \$1,414 million by 2029.

The retail segment held the largest revenue share in the autonomous floor scrubber market in 2023, reaching USD 231 million, with an expected surge to USD 399 million by 2029, representing a CAGR of 8.1% during the forecast period. Retail stores, including supermarkets, department stores, shopping malls, and other large retailers, attract substantial foot traffic, necessitating a clean and hygienic environment to enhance the customer experience. Consequently, maintaining cleanliness becomes a pivotal aspect of operations, thus supporting market growth.

The direct sales channel segment, with a market value of USD 599 million in 2023, is forecasted to reach USD 1,268 million by 2029, exhibiting a CAGR of 11.3% during the forecast period. This segment is anticipated to undergo significant growth through structured and consistent sales processes, which involve educating potential customers about products and expanding the customer base through inbound and outbound sales efforts. While indirect sales channels currently account for a smaller market share, they are expected to experience the highest CAGR during the forecast period due to their broader reach and ability to leverage distributor relationships.

In 2023, North America emerged as the dominant market for autonomous floor scrubbers, with a market value of USD 299 million and an expected increase to USD 614 million by 2029, reflecting a CAGR of 10.8%. Factors such as heightened awareness of cleanliness, advanced technologies, high labor costs, robust infrastructure, and consistently growing foot traffic across various end-use establishments, including airports and retail stores, are driving the demand for autonomous floor scrubbers in the region. The United States and Canada are the primary drivers of this demand. Meanwhile, Europe emerged as the second-largest geographical segment in the market in 2023, with a strong emphasis on the high influx of tourists and the rapid growth of the hospitality sector. Key markets within the region, such as the UK, Germany, and France, are witnessing increased demand driven by manufacturing companies, major retailers, healthcare facilities, and hotels.

This comprehensive industry report provides market estimates and forecasts, accompanied by a detailed examination of the run time, scrubber head type, end user, sales channel, and region aspects. It delivers a quantitative analysis of the market, empowering stakeholders to leverage existing market opportunities. Furthermore, the report identifies key segments for potential opportunities and strategies, drawing insights from market trends and the approaches of leading competitors.

The global baby bottle market has been extensively analyzed by categorizing it according to various sub-segments in order to provide accurate forecasts of industry

size and assess trends within specific areas.

The global market for autonomous floor scrubber can be segmented by run time: up to 4 hours, more than 4 hours. Up to 4 hours was the highest contributor to the global autonomous floor scrubber market, with 63.9% share in 2023. Going forward, the more than 4 hours segment is projected to witness the highest CAGR during the forecast period.

Autonomous floor scrubber market is further segmented by scrubber head type: disc, cylindrical. Disc was the highest contributor to the global autonomous floor scrubber market, with 68.6% share in 2023. Going forward, the cylindrical segment is projected to witness the highest CAGR during the forecast period.

Based on end user, the autonomous floor scrubber market is segmented into: airport, retail, hospitality, healthcare, warehouse, manufacturing, others. Retail was the highest contributor to the global autonomous floor scrubber market, with 24.2% share in 2023. Going forward, the manufacturing segment is projected to witness the highest CAGR during the forecast period.

On the basis of sales channel, the autonomous floor scrubber market also can be divided into: direct, indirect. Direct was the highest contributor to the global autonomous floor scrubber market, with 62.7% share in 2023. Going forward, the indirect segment is projected to witness the highest CAGR during the forecast period.

Autonomous floor scrubber market by region is categorized into: North America, Europe, Asia-Pacific, MEA (Middle East and Africa), Latin America. North America was the highest contributor to the global autonomous floor scrubber market, with 31.3% share in 2023. Going forward, Asia-Pacific is projected to witness the highest CAGR during the forecast period.

The global autonomous floor scrubber market report offers detailed information on several market vendors, including Tennant Company, Nilfisk A/S, Karcher SA, Hako GmbH, Diversey Holdings, Ltd., Adlatus Robotics GmbH, Amano Corporation, Avidbots Corp., Cleanfix Reinigungssysteme AG, Shanghai Gaussian Automation Technology Development Co., Ltd., Murata Machinery, Ltd., among others. In this report, key players and their strategies are thoroughly analyzed to understand the competitive outlook of the market.

## Why Choose This Report

Gain a reliable outlook of the global autonomous floor scrubber market forecasts from 2024 to 2030 across scenarios.

Identify growth segments for investment.

Stay ahead of competitors through company profiles and market data.

The market estimate for ease of analysis across scenarios in Excel format.

Strategy consulting and research support for three months.

Print authentication provided for the single-user license.

Market Segments Covered in Global Autonomous Floor Scrubber Industry Analysis:

i.) Run time

Up to 4 hours

More than 4 hours

ii.) Scrubber head type

Disc

Cylindrical

iii.) End user

Airport

Retail

Hospitality

Healthcare

Warehouse

Manufacturing

Others

iv.) Sales channel

Direct

Indirect

v.) Region

North America

Europe

Asia-Pacific

MEA (Middle East and Africa)

Latin America

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