

Global Intelligent Robotic Lawn Mowers 2.0 Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Intelligent Robotic Lawn Mowers 2.0 market size is expected to reach \$ 3485 million by 2032, rising at a market growth of 16.1% CAGR during the forecast period (2026-2032).

Intelligent Robotic Lawn Mowers 2.0 represent a new generation of autonomous lawn-care robots evolving beyond conventional robotic mowers that rely on buried electromagnetic perimeter wires and random or semi-systematic mowing. Their defining characteristics are perimeter wire-free operation, autonomous positioning, environmental perception, virtual boundary mapping, systematic path planning and active obstacle avoidance. Major technology architectures include RTK/GNSS, Network RTK, UWB, IMU, machine vision, LiDAR SLAM and multi-sensor fusion, including RTK Plus Vision, RTK Plus IMU And Vision, RTK Plus Ultrasonic Sensors, LiDAR Plus Vision and vision-based localization. The product sits at the system-integration layer of the outdoor power equipment and service robotics value chain, creating increasing value through autonomous navigation, intelligent perception and reduced installation requirements.

Key Findings

Global Intelligent Robotic Lawn Mowers 2.0 shipments reached approximately 1.318 million units in 2025

Intelligent Robotic Lawn Mowers 2.0 accounted for approximately 66.2% of global intelligent robotic lawn mower shipments in 2025

The weighted manufacturer FOB-equivalent average selling price was approximately US\$900 per unit in 2025

Global Intelligent Robotic Lawn Mowers 2.0 shipments increased approximately 182.4% year on year in 2025

Market Trends

The Intelligent Robotic Lawn Mowers 2.0 market is undergoing a structural transition from boundary automation toward environmental autonomy. Earlier robotic lawn mowers primarily relied on buried electromagnetic boundary wires and random or semi-systematic navigation, whereas the 2.0 generation increasingly combines RTK with vision, LiDAR with vision, pure-vision localization and higher-level multi-sensor fusion to achieve virtual boundaries, systematic mowing and active obstacle avoidance. Product development is progressing beyond simply eliminating perimeter wires toward automatic mapping, base-station-free deployment, Network RTK, semantic obstacle recognition and adaptive path planning. Larger lithium-ion batteries, fast charging, all-wheel drive, suspension systems and more powerful drive systems are also extending addressable applications from relatively flat residential lawns to larger areas, steep slopes and complex terrain. As a result, competition is shifting from whether a robot can mow automatically toward positioning continuity, perception reliability, terrain capability, autonomous recovery and final lawn-care quality.

Market Dynamics

Drivers

Demand for Intelligent Robotic Lawn Mowers 2.0 is primarily supported by the substitution of repetitive manual lawn maintenance, particularly in Europe and North America where labor costs are relatively high and private lawns are prevalent. Europe has an established robotic mowing user base, while larger residential lawns in North America create stronger requirements for coverage area, endurance and complex-terrain capability. At the same time, advances in lithium-ion batteries, brushless motors, high-precision GNSS, machine vision, LiDAR, embedded computing and intelligent control are improving autonomous operation. Virtual boundaries also reduce installation and maintenance requirements associated with conventional buried-wire systems, lowering adoption barriers and supporting replacement demand among existing robotic

mower users.

Restraints

Intelligent Robotic Lawn Mowers 2.0 generally remain more expensive than conventional electric lawn mowers, particularly for models equipped with high-precision positioning, multiple cameras, LiDAR and all-wheel-drive systems. Outdoor environments also expose limitations in individual technology architectures. RTK/GNSS performance can deteriorate under dense tree cover or near buildings, vision systems may be affected by lighting and environmental features, while LiDAR increases hardware cost and system complexity. Wet grass, exposed roots, uneven terrain, narrow passages and steep slopes further increase reliability and testing requirements, contributing to higher development, maintenance and after-sales service costs.

Opportunities

The clearest structural opportunity is the continuing replacement of traditional boundary-wire robotic mowers by Intelligent Robotic Lawn Mowers 2.0. The transition toward Network RTK, automatic mapping, vision-based localization and LiDAR-vision fusion can further reduce installation complexity while expanding the types of lawns that autonomous mowers can serve. Large residential lawns, complex gardens and steep terrain provide room for premium all-terrain products, while commercial landscaping, municipal green spaces, golf courses and sports fields create opportunities for larger autonomous machines and fleet-management systems. Over the longer term, autonomous mowing platforms may extend into broader vegetation-management ecosystems through modular mowing, edging, inspection and other functions.

Challenges

Rapid market expansion does not eliminate the difficulty of moving robotic mower platforms from prototypes into stable mass production. Intelligent Robotic Lawn Mowers 2.0 require simultaneous integration of mechanical reliability, batteries, motors, positioning and navigation algorithms, environmental perception, waterproofing, manufacturing yield, overseas certification and global after-sales service. Consequently, product demonstrations, crowdfunding demand or pre-orders cannot automatically be translated into sustainable commercial deliveries. The industry is increasingly entering a stage in which manufacturing execution, supply-chain management, capital efficiency,

product reliability and service capability are as important as navigation technology itself.

Industry Chain Analysis

The upstream supply chain for Intelligent Robotic Lawn Mowers 2.0 includes lithium-ion batteries, brushless motors and controllers, GNSS and RTK modules, cameras, LiDAR, UWB components, ultrasonic and radar sensors, IMUs, processors, cutting blades, transmission systems, engineering plastics, structural components and charging systems. Midstream manufacturers integrate mechanical design, positioning and navigation, environmental perception, path planning, embedded control, battery management, mobile applications, connectivity, system assembly, calibration and reliability testing. Downstream channels include brand-operated online stores, e-commerce platforms, specialist garden-equipment dealers and home-improvement retailers, while professional products increasingly serve landscaping contractors, municipal organizations, sports facilities and golf courses.

Industry value creation is progressively shifting from basic mechanical manufacturing toward the integration of hardware, algorithms and real-world operating data. Mature supply chains can reduce the cost of motors, batteries, structural components and cutting systems, but competitive differentiation increasingly depends on localization stability, perception algorithms, sensor fusion, automatic mapping, complex-terrain capability, software experience and field reliability. The additional sensors, computing hardware and software development required by 2.0 products increase product complexity, but their lower deployment requirements and higher autonomy also support greater customer value. Firmware upgrades, connected services, accessories, replacement parts and after-sales networks are consequently becoming more important to lifetime product value.

Segment Insights

Within Intelligent Robotic Lawn Mowers 2.0, RTK/GNSS-based, vision-based, LiDAR SLAM-based and multi-sensor fusion architectures are developing along parallel technology paths. RTK/GNSS remains important for centimeter-level global positioning, while vision- and LiDAR-based architectures can reduce dependence on local positioning infrastructure. Multi-sensor fusion is increasingly used to compensate for the weaknesses of individual sensors under signal obstruction, changing illumination, vegetation interference and complex obstacle conditions.

Product segmentation is also becoming increasingly distinct by recommended mowing area, maximum slope capability and terrain adaptability. Large-area coverage, all-wheel drive and high-gradient performance are emerging as important differentiators in premium all-terrain models. Technology selection therefore increasingly reflects a balance among positioning continuity, environmental adaptability, hardware cost and target price rather than a single dominant navigation architecture.

Downstream Market Opportunities

Residential lawn care remains the core application for Intelligent Robotic Lawn Mowers 2.0, driven by labor substitution, private garden maintenance and broader household automation. Commercial and municipal landscaping customers place greater emphasis on operating efficiency, labor savings, fleet management and predictable maintenance, creating a different value proposition from consumer convenience. Sports fields and golf courses require consistent cutting quality, repeatable positioning accuracy, long endurance and professional cutting systems, providing opportunities for specialized autonomous platforms. Orchards, solar farms, embankments and other vegetation-management environments remain relatively emerging applications but offer longer-term potential as terrain capability and unattended operation improve.

Regional Insights

Europe remains the most mature demand center for intelligent robotic lawn mowing, supported by an established installed base, developed garden-equipment distribution channels and long-standing consumer acceptance of automated lawn maintenance. The transition toward Intelligent Robotic Lawn Mowers 2.0 is creating replacement demand as users migrate from conventional boundary-wire systems toward virtual-boundary and autonomous-mapping platforms.

North America represents another strategically important market because residential lawns are often larger and can require higher coverage, endurance and terrain capability, supporting demand for high-performance and all-terrain models. China plays a different but increasingly important role as a manufacturing and technology-development base, supported by established battery, motor, sensor, consumer robotics and electronics supply chains. Chinese suppliers are increasingly competing internationally not only on manufacturing efficiency but also through RTK, machine

vision, LiDAR, multi-sensor fusion and global online sales capabilities.

Competitive Landscape Analysis

The global Intelligent Robotic Lawn Mowers 2.0 market is developing into a multi-layer competitive environment involving established outdoor power equipment manufacturers, consumer robotics companies and specialized autonomous mowing suppliers.

Traditional lawn-equipment companies such as Husqvarna, STIGA, WORX and Kress benefit from established garden-equipment channels, brand recognition and after-sales networks, while emerging robotic technology suppliers including MAMMOTION, ECOVACS, Segway Navimow, Dreame, Roborock, Sunseeker, TerraMow and eufy are accelerating product development around virtual boundaries, automatic mapping and intelligent environmental perception. Competitive differentiation is therefore expanding beyond basic mowing performance toward positioning continuity, obstacle recognition, path-planning algorithms, complex-terrain mobility, manufacturing reliability, channel coverage and after-sales capability. The transition to perimeter wire-free architectures reduces user dependence on conventional boundary-wire ecosystems but simultaneously raises the technological requirements for software, localization, perception, field data and system reliability, making technology upgrading and commercial execution increasingly important competitive variables.

Report Scope

This report studies the global Intelligent Robotic Lawn Mowers 2.0 production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Intelligent Robotic Lawn Mowers 2.0 and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Intelligent Robotic Lawn Mowers 2.0 that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Intelligent Robotic Lawn Mowers 2.0 total production and demand,
2021-2032, (K Units)

Global Intelligent Robotic Lawn Mowers 2.0 total production value, 2021-2032, (USD Million)

Global Intelligent Robotic Lawn Mowers 2.0 production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Intelligent Robotic Lawn Mowers 2.0 consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Intelligent Robotic Lawn Mowers 2.0 domestic production, consumption, key domestic manufacturers and share

Global Intelligent Robotic Lawn Mowers 2.0 production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Intelligent Robotic Lawn Mowers 2.0 production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Intelligent Robotic Lawn Mowers 2.0 production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Intelligent Robotic Lawn Mowers 2.0 market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Husqvarna, STIGA S.p.A., ASI Robots (Scythe Robotics), Zucchetti Centro Sistemi (Ambrogio Robot), YAMABIKO EUROPE S.A. (Belrobotics), The Toro Company, Positec, Mammotion, ECOVACS, Segway(Navimow), etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Intelligent Robotic Lawn Mowers 2.0 market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Intelligent Robotic Lawn Mowers 2.0 Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Intelligent Robotic Lawn Mowers 2.0 Market, Segmentation by Type:

RTK

Visual SLAM

LiDAR SLAM

UWB

Others

Global Intelligent Robotic Lawn Mowers 2.0 Market, Segmentation by Rated Lawn Area:

Up to 500 m²

Above 500 to 1,500 m²

Above 1,500 to 3,000 m²

Above 3,000 m²

Global Intelligent Robotic Lawn Mowers 2.0 Market, Segmentation by Maximum Operating Slope:

Below 45%

45% to Below 60%

60% and Above

Global Intelligent Robotic Lawn Mowers 2.0 Market, Segmentation by Application:

Residential Lawn Care

Commercial and Municipal Landscaping

Others

Companies Profiled:

Husqvarna

STIGA S.p.A.

ASI Robots (Scythe Robotics)

Zucchetti Centro Sistemi (Ambrogio Robot)

YAMABIKO EUROPE S.A. (Belrobotics)

The Toro Company

Positec

Mammotion

ECOVACS

Segway(Navimow)

Dreame

SUMEC Hardware & Tools Co., Ltd.

Greenworks

Chervon Holdings Limited

Ruichi Smart Technology (Anji) Co., Ltd.

Ningbo Daye Garden Machinery Co., Ltd.

Dongcheng

LDRobot

Beijing Roborock Technology Co., Ltd.

UBTECH ROBOTICS

Yarbo

HOOKII Neomow

Sunseeker

Lymow

Ezviz

Zhejiang Zhongjian Technology Co., Ltd.

TerraMow

Anker(Eufy)

Shenzhen Kaiqi Technology Co., Ltd.(RoboUP)

Changke Technology

Yosemite Shanghai Robotics Co., Ltd

AIRSEEKERS

LOPKIN

KEENON Robotics

URSROBOT

Key Questions Answered

1. How big is the global Intelligent Robotic Lawn Mowers 2.0 market?
2. What is the demand of the global Intelligent Robotic Lawn Mowers 2.0 market?

3. What is the year over year growth of the global Intelligent Robotic Lawn Mowers 2.0 market?
4. What is the total value of the global Intelligent Robotic Lawn Mowers 2.0 market?
5. Who are the Major Players in the global Intelligent Robotic Lawn Mowers 2.0 market?
6. What are the growth factors driving the market demand?

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