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Global Garden Machinery Market Growth 2026-2032

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Abstracts

The global Garden Machinery market size is predicted to grow from US$ 27597 million in 2025 to US$ 37767 million in 2032; it is expected to grow at a CAGR of 4.5% from 2026 to 2032.

Garden Machinery refers to powered, motorized and autonomous equipment used to maintain lawns, trees, shrubs, landscaped areas and other outdoor environments. The studied market centers on lawn mowers, chainsaws, brush cutters and string trimmers, leaf blowers, snow blowers and robotic mowing systems, while also covering selected powered outdoor-cleaning and pool-maintenance equipment within the report boundary. Products range from handheld and walk-behind machines to ride-on equipment and autonomous robots, using gasoline engines, corded electricity or rechargeable battery systems. Market measurement is based on manufacturer shipments, sales revenue and average selling prices, with analysis by product type, power technology, sales channel, application, region and manufacturer. Demand is generated by residential garden care, commercial landscaping, municipal and park maintenance, forestry and emergency work, property and sports-facility management, snow removal and outdoor cleaning. The market therefore combines durable-equipment characteristics with seasonal consumer demand, professional service requirements and rapidly expanding battery-platform, software and automation content.

Key Findings

Global Garden Machinery shipments reached 131.1 million units in 2025 at an average manufacturer price of US$215 per unit

North America accounted for 52.92% of global revenue and 49.94% of shipments in 2025

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Lawn mowers led revenue with a 39.91% share while chainsaws led shipment volume at 22.29%

Online channels represented 27.96% of 2025 revenue and are projected to reach 36.10% by 2031

Major manufacturer gross margins generally ranged from 21.1% to 31.5% in 2024

Market Trends

The Garden Machinery industry is moving from stand-alone combustion products toward shared battery platforms, low-emission professional equipment and autonomous systems. Cordless product families increasingly use common motors, battery-management systems, chargers and battery packs across lawn mowers, chainsaws, brush cutters and blowers, reducing ownership costs and encouraging repeat purchases within a single platform. In 2024, battery products represented 25% of Stihl Group unit sales, while electrified products reached 44% of Husqvarna motorized-product sales, illustrating how rapidly leading suppliers are changing their product mix. Manufacturers are improving brushless-motor efficiency, power density, thermal management, fast charging and battery interchangeability to support longer professional duty cycles. Robotic lawn mowers are progressing from boundary-wire systems toward RTK positioning, computer vision and multi-sensor navigation, while app control, over-the-air updates and fleet monitoring are creating recurring service value. Distribution is also becoming more digital: online channels accounted for 27.96% of revenue and 30.09% of unit sales in 2025, although dealers and home-improvement retailers remain essential for high-value and service-intensive products. At the same time, the average manufacturer price is projected to decline from US$215 per unit in 2025 to US$199 in 2031, shifting differentiation toward runtime, reliability, software, safety, ergonomics, after-sales coverage and total cost of ownership.

Market Dynamics

Drivers

Demand for Garden Machinery is supported by the continued expansion and more intensive maintenance of residential yards, public parks, roadside greenery, campuses, sports grounds and commercial properties. In mature markets, household gardening and do-it-yourself maintenance sustain recurring replacement demand, while urbanization and investment in green infrastructure expand professional and municipal

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equipment requirements in developing markets. Labor shortages and rising landscaping wages strengthen the economic case for self-propelled, ride-on and autonomous machines, particularly where large areas require frequent maintenance. Environmental and noise regulations are also accelerating the replacement of small combustion engines with battery-powered equipment in dense urban areas. Improvements in lithium-ion cells, brushless motors and electronic control systems have narrowed the performance gap between cordless and gasoline products, making electric models viable in more demanding applications. The expansion of e-commerce and cross-border fulfillment further broadens product availability and gives manufacturers direct access to residential customers, reinforcing demand for standardized, compact and easy-to-install equipment.

Restraints

The market remains exposed to seasonality, weather volatility and housing-related discretionary spending, which can produce abrupt inventory corrections after strong selling seasons. Steel, aluminum, engineering plastics, motors, power electronics and lithium-ion cells represent major input categories, so changes in material prices, freight rates and exchange rates can compress margins or force retail price adjustments. Tariffs and origin requirements add further uncertainty for manufacturers that depend on China-centered production and North American or European demand. Battery equipment also faces practical limitations in continuous heavy-duty work, including runtime, charging time, cold-weather performance, battery aging and the cost of keeping multiple packs available. Professional buyers may therefore retain gasoline equipment for high-power forestry, snow-removal and remote applications. Fragmented battery interfaces and limited cross-brand compatibility raise switching costs and can slow adoption. Dealer service capacity, spare-parts availability and safe battery recycling remain important constraints, particularly in emerging markets where after-sales networks are less developed.

Opportunities

The strongest structural opportunity lies in autonomous lawn maintenance and the broader transition from individual machines to connected equipment platforms. Global robotic lawn mower shipments are projected to rise from 2.31 million units in 2025 to 4.48 million units in 2031, while their revenue share increases from 8.96% to 11.93%. Boundary-wire-free navigation, RTK and vision fusion, remote diagnostics and multi-zone scheduling are expanding the addressable market beyond early adopters. In China, robotic lawn mowers represented 10.49% of core-category revenue in 2025 and are projected to reach 14.31% in 2031, providing an important route for Chinese

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manufacturers to move from contract production toward technology-led international brands. Additional opportunities come from professional battery systems, fleet charging, battery leasing, predictive maintenance and subscription-based digital management for municipalities, landscaping contractors and commercial properties. Online channels, which are expected to capture 36.10% of revenue by 2031, also enable smaller manufacturers to enter overseas markets with focused product portfolios, provided they can build local service, parts and compliance capabilities.

Challenges

Competition is intensifying as established gasoline-equipment specialists, diversified power-tool groups, Chinese original-equipment manufacturers and robotics entrants converge on the same cordless and autonomous categories. Falling average prices improve affordability but create sustained pressure on product margins, especially in standardized handheld equipment and online channels. Manufacturers must balance frequent product launches with platform stability because rapid changes in voltage systems, batteries or software can strand customer investments and increase warranty costs. Autonomous equipment introduces additional requirements for functional safety, navigation reliability, weather resistance, cybersecurity, data protection and remote-update management. Product certification, emissions compliance, battery-transport rules and recycling obligations vary across markets and increase the cost of global commercialization. The industry must also manage channel conflict between dealers, large home-improvement retailers, direct websites and marketplaces. Companies that compete mainly on price without differentiated battery ecosystems, reliable software or local service networks face the greatest risk of inventory write-downs and weak customer retention.

Industry Chain Analysis

The upstream Garden Machinery supply chain includes carbon and stainless steel, aluminum alloys, engineering plastics, cutting components, precision gears, bearings, small engines, electric motors, controllers, semiconductor devices, lithium-ion cells, battery-management systems, chargers and packaging materials. Autonomous products add GNSS and RTK modules, cameras, radar or ultrasonic sensors, communication modules, cloud services and navigation software. Midstream manufacturers integrate industrial design, mechanical engineering, electronics, tooling, assembly, testing and regulatory certification, with some groups controlling engines, motors, batteries or software internally and others relying on specialist suppliers. Downstream routes include professional dealers, home-improvement chains, garden

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centers, industrial distributors, e-commerce platforms and direct-to-consumer websites, followed by spare parts, repair, battery replacement and software services. Value capture is highest where companies combine recognized brands, proprietary platforms, broad product compatibility and dependable service coverage. The 2024 gross margins of major manufacturers generally ranged from 21.1% to 31.5%, reflecting differences in brand strength, product mix, outsourcing, channel structure and exposure to high-value ride-on or robotic equipment.

Segment Insights

Lawn mowers remained the largest Garden Machinery segment by value in 2025, representing 39.91% of revenue and 17.19% of unit shipments. Their high value share reflects the contribution of self-propelled, ride-on, zero-turn and robotic machines. Chainsaws were the largest conventional category by volume at 22.29%, compared with 14.03% of revenue, while cleaning machines represented 21.36% of units and 9.76% of revenue. Brush cutters and string trimmers accounted for 13.24% of shipments and 8.79% of revenue. These differences show that category economics depend heavily on equipment size and power configuration: ride-on and autonomous products support high selling prices, whereas handheld tools compete on scale, battery compatibility and distribution efficiency. The segments also have different seasonal and service profiles, affecting inventory planning, dealer support and manufacturers' working-capital requirements.

Robotic equipment is the clearest source of mix improvement. The global revenue share of robotic lawn mowers is projected to expand from 8.96% in 2025 to 11.93% in 2031, and pool-cleaning robots also increase their share from 4.40% to 4.93%. Within China's core Garden Machinery categories, wheeled lawn mowers represented 47.05% of 2025 revenue, while chainsaws led volume with a 26.28% share. Robotic lawn mowers accounted for only 2.23% of Chinese core-category units but generated 10.49% of revenue, demonstrating their much higher unit value. The most attractive segment strategies therefore combine scale-oriented cordless handheld tools with higher-value mower, robotic and professional equipment platforms. This mix supports premium pricing but also requires stronger software support, local installation guidance and longer-term warranty capability.

Downstream Market Opportunities

Residential users form the broadest customer base and prioritize simple starting, low noise, compact storage, low maintenance and battery interchangeability. Their

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purchases are increasingly influenced by online reviews, platform compatibility and bundled kits, making digital marketing and direct fulfillment more important. Professional landscaping contractors, property managers, hotels, schools, industrial parks and sports facilities require higher utilization, rapid battery replacement, durable drivetrains and dependable local service; these customers offer opportunities for commercial-grade cordless portfolios, fleet charging and maintenance contracts. Municipal and public-sector users place greater emphasis on noise, local emissions, worker safety and life-cycle cost, supporting gradual electrification of park, roadside and campus maintenance. Forestry, emergency and heavy brush-clearing applications continue to require high power and long operating time, leaving room for advanced gasoline equipment alongside professional battery models. Snow removal remains concentrated in cold regions and is highly seasonal, while robotic mowers are opening unattended maintenance opportunities in residential communities, corporate campuses, solar parks and large landscaped sites.

Regional Insights

North America remained the largest regional Garden Machinery market in 2025, accounting for 52.92% of global revenue and 49.94% of shipments. Large residential yards, a mature do-it-yourself culture, strong home-improvement retail networks and demand for ride-on mowers, zero-turn equipment, snow blowers and pressure washers support its value premium. Europe ranked second with 26.56% of revenue and 26.25% of shipments; tighter noise and emissions requirements, compact gardens and strong adoption of robotic mowing and battery platforms shape its product mix. China represented 10.08% of global revenue and 11.66% of shipments under the global report boundary and is projected to record a 5.32% regional revenue CAGR from 2025 to 2031. It combines expanding domestic demand with an export-oriented manufacturing base and is particularly competitive in cordless equipment, contract manufacturing and robotic systems. Japan accounted for 3.34% of revenue and 3.52% of shipments as a mature, quality-focused market, while Southeast Asia offers incremental opportunities from urban development, landscaping investment and a growing middle class, subject to smaller private yards and hotter operating conditions.

Competitive Landscape Analysis

The Garden Machinery market has a moderately concentrated premium tier and a broad specialist and manufacturing tail. Under the report’s 2024 manufacturer convention, Husqvarna AB and Stihl Holding AG & Co. KG led global revenue with shares of 11.69% and 9.05%, respectively. The Toro Company and Deere & Company

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retain strong positions in ride-on, turf and dealer-served professional equipment, while Stanley Black & Decker, Inc. has expanded its outdoor platform through the integration of MTD, which should be consolidated at parent-company level rather than treated as an independent group. Techtronic Industries Company Limited, Robert Bosch GmbH, Makita Corporation and Chervon Holdings Limited compete through broad cordless ecosystems; STIGA S.p.A., Ariens Company, Einhell Germany AG, Emak S.p.A., Oregon Tool, Inc., Positec Group Limited and Greenworks (Jiangsu) Co., Ltd. add specialist, regional and battery-led depth. China's wider production pool also includes Jiangsu Dongcheng M&E Tools Co., Ltd., Kingclean Electric Co., Ltd., SUMEC Corporation Limited, Zhejiang Zhongjian Technology Co., Ltd., Ningbo Daye Garden Machinery Co., Ltd., Zhejiang YAT Electrical Appliance Co., Ltd. and Zhejiang Safun Industrial Co., Ltd., combining branded products with OEM and ODM capabilities. International leaders retain advantages in brand, dealer service, durability and certification, whereas Chinese competitors emphasize integration, development speed, cost control and cross-border e-commerce. Future leadership will depend on combining mechanical performance, batteries, electronics, software, compliance and local service without sacrificing margin discipline.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the "Garden Machinery Industry Forecast" looks at past sales and reviews total world Garden Machinery sales in 2025, providing a comprehensive analysis by region and market sector of projected Garden Machinery sales for 2026 through 2032. With Garden Machinery sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Garden Machinery industry.

This Insight Report provides a comprehensive analysis of the global Garden Machinery landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Garden Machinery portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Garden Machinery market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Garden Machinery and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up

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qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Garden Machinery.

This report presents a comprehensive overview, market shares, and growth opportunities of Garden Machinery market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Lawn Mower

Chainsaw

Brush cutter

Hedge Trimmer

Leaf Blower

Snow Throw

Others

Segmentation by Classification:

Engine

Electric

Segmentation by Power:

Cordless

Corded

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Fuel Powered

Segmentation by Application:

Residential Use

Commercial Use

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

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Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Husqvarna AB

Andreas Stihl AG & Co. KG

Deere & Company

The Toro Company

Techtronic Industries Company Limited

Stanley Black & Decker, Inc.

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Honda Motor Co., Ltd.

Robert Bosch GmbH

Makita Corporation

Stiga S.p.A.

Yamabiko Corporation

Kubota Corporation

Chervon Holdings Limited

Positec Technology (China) Co., Ltd.

Greenworks (Jiangsu) Co., Ltd.

Ningbo Daye Garden Machinery Co., Ltd.

Briggs & Stratton, LLC

Einhell Germany AG

Koki Holdings Co., Ltd.

Ariens Company

Emak S.p.A.

Iseki & Co., Ltd.

Maruyama Mfg. Co., Inc.

Zhejiang Yat Electrical Appliance Co., Ltd.

Jiangsu Dongcheng Power Tools Co., Ltd.

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KingClean Electric Co., Ltd.

Sumec Corporation Limited

Zhejiang Zhongjian Technology Co., Ltd.

Zomax Group Co., Ltd.

Zhejiang Sunseeker Industrial Co., Ltd.

Shandong Huasheng Zhongtian Machinery Group Co., Ltd.

Chongqing Zongshen Power Machinery Co., Ltd.

Jiangsu World Machinery & Electronics Group Co., Ltd.

Yangzhou Weibang Garden Machine Co., Ltd.

Oregon Tool, Inc.

Jiangsu Jinding Electric Co., Ltd.

Zhejiang Safun Industrial Co., Ltd.

Ningbo Aosheng Machine Co., Ltd.

Taizhou Kewaqi Tools Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Garden Machinery market?

What factors are driving Garden Machinery market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

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How do Garden Machinery market opportunities vary by end market size?

How does Garden Machinery break out by Type, by Application?

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