

Lawn Mower Market by Type (Walk-Behind, Riding & Robotic), End Use (Residential & Commercial), Propulsion Type (ICE & Electric), Battery Type (Lithium-Ion, Lead-Acid), Lawn Size (Small, Medium & Large), Autonomy and Region - Global Forecast to 2027

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Abstracts

The lawn mower market, by value, is projected to grow to USD 33.6 billion by 2027 from USD 23.5 billion in 2022, at a CAGR of 7.4% from 2022 to 2027. The market is expected to witness strong growth due to factors like rising applications in residential segment along with commercial spaces like golf clubs, office and public lawns spaces, etc., including stringent emissions regulatory norms for maintaining green areas around the cities across different regions of the world. The growth opportunity is also driven by factors such as rising popularity of robotic mowers which are integrated with automation and AI enabled self-operated technology for uniform and efficient lawn mowing operations.

“Medium Size Lawns: The fastest-growing segment in terms of lawn size for lawn mowers”

Lawn mowers, suitable for lawn areas between 0.25 acres to 0.5 acres, i.e., from 1000 m² to 2000 m², are considered medium lawn sizes. The lawn mowers with mid-range capability in terms of cutting width, engine/battery discharge time, cordless/automatic, robotic, etc., are used specifically in residential and commercial spaces where the home or business has a medium size lawn area at the front/back, wherein each lawn is considered as a zone. Lawn mower models like Honda HRG 416 PK IZY, Husqvarna LC 247SP, Bosch Universal Verticut 1100, Toro 20836 Aluminium Deck Super

Recycler, etc., along with robotic mowers are some of the majorly used lawn mowers for medium size lawn spaces across different regions.

“The autonomous lawn mower is estimated to register highest CAGR, under level of autonomy segment”

Automated solutions for lawn mowing provide efficient, aesthetic, and uniformity in mowing operations without or only minimal involvement of human labor. Due to the aging population and unavailability of cheap labor across European and other developed countries, the demand for autonomous technologies for lawn mowers is likely to register an increase in demand. Technological advancements like IoT and AI-assisted mowing will be the future in the lawn mower market. Newer versions of robotic mowers, such as the CEORA by Husqvarna & Miimo by Honda, have an autonomous capability that enables them to cater to various lawn sizes. In August 2021, Husqvarna launched CEORA, a solution for commercial turf care management. This is expected to revolutionize an industry dominated by heavy, conventional diesel mowers that require manual operation. It can independently mow an area the equivalent of up to 8 football pitches day or night. The purpose-built robotic mower is made to be autonomous and designed with safety in mind. Thus, the autonomous lawn mower market is expected to grow with increasing environmental concerns and development in the product range with varied capabilities.

“The Asia Oceania is estimated to be fastest and Americas to be the largest market for lawn mower during the forecast period”

The Asia Oceania region market comprising China, India, Japan, South Korea, New Zealand, and Australia, and it has a comparatively less market share for the lawn mowers than other major regions of the world, but is expected to register the fastest growth in terms of CAGR during the forecast period. The region has recently witnessed many foreign companies offering new technology-driven robotic and walk-behind lawn mowers. An increase in disposable family income and people’s interest in gardening activities in emerging economies have opened new avenues and created several opportunities for lawn mower manufacturers in the region. The Chinese lawn mower market is the largest in the Asia Oceania region and is witnessing significant growth in sales and demand for different types of lawn mowers. China is one of the fastest-growing markets for robotic lawn mowers, given the rising disposable income in the country.

On the otherside, Americas, comprising countries like US, Canada, Mexico and Brazil is

projected to be the largest market for lawn mowers in terms of volume sold annually during the forecast period. It houses major OEMs such as John Deere (US), MTD Products Inc (US) (with major sub-brands like Cub Cadets, Troy-Bilt, Rover, Robomow, etc.), The Toro Company (US) along with several multinationals like Honda Motors Co. Ltd., (Japan) and Husqvarna (Sweden). The US, traditionally one of the global technological leaders, is the largest American lawn mower market. The large customer base and high disposable income levels fuel the demand for lawn mowers resulting in increased manufacturing activities. The growth of the lawn care industry and a higher annual cost of landscaping services are the major factors for the growth in this region.

Breakdown of Primaries

In-depth interviews were conducted with CXOs, marketing directors, other innovation and technology directors, and executives from various key organizations operating in this market

By Stakeholder: Demand-side- 45%, and Others 55%

By Designation: C Level -10%, D Level -10%, and Others -80%

By Region: North America - 30%, Europe - 20%, Asia Pacific - 50%

The lawn mower market is primarily dominated by globally established players John Deere (US), Honda Motor Co Ltd. (Japan), The Toro Company (US), Husqvarna (Sweden), MTD Products Inc (US), and Kubota (Japan).

Study coverage

The study segments the lawn mower market by Type (Walk-behind, Riding & Robotic); Distribution channel (Online & Retail); Lawn Size (Small, Medium & Large); End User (Residential & Commercial); Propulsion Type (Electric and ICE); Level of Autonomy (Autonomous and Non-Autonomous); Battery Type (Lithium-ion and Lead acid) and Region (Asia Oceania, Europe and Americas).

Key Benefits of Buying the Report:

The report will help the market leaders/new entrants in this market with the information on the closest approximations of the revenue numbers for the overall lawn mower

market. This report will help stakeholders understand the competitive landscape and gain valuable insights to better position their businesses and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them information on key market drivers, restraints, challenges, and opportunities.

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