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Residential Robotic Vacuum Cleaner Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Charging Mode (Manual Charging, Auto-Battery Charging), By Type (In-house Robot, Outdoor Robot), By Distribution Channel (Online, Offline), By Region & Competition, 2019-2029F

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Abstracts

Global residential robotic vacuum cleaner market was valued at USD 4.85 Billion in 2023 and is expected to reach USD 9.98 Billion by 2029 with a CAGR of 12.8% during the forecast period. The residential robotic vacuum cleaner market is experiencing significant growth, driven by factors such as increasing consumer demand for convenience, advancements in technology, and rising awareness of home automation solutions. Key growth drivers include the growing adoption of smart home products, the increasing number of dual-income households, and the desire for more efficient cleaning solutions. Robotic vacuum cleaners, which offer the benefit of hands-free operation, have become an essential appliance in modern homes, appealing to consumers looking for time-saving devices that provide effective cleaning with minimal effort. In terms of charging mode, robotic vacuum cleaners are available in two primary categories: manual charging and auto-battery charging. Auto-battery charging systems, where the vacuum returns to its charging station automatically once the battery is low, are gaining popularity due to their convenience and the added value they provide in reducing manual intervention. This feature enhances user experience and is particularly appealing to those with busy lifestyles. Manual charging options, on the other hand, are still present in the market but are typically found in lower-cost models. When it comes to type, the market is divided into in-house robots and outdoor robots. In-house robots are designed for indoor cleaning, providing comprehensive functionality on various floor

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types, including hardwood, tiles, and carpets. These models are the dominant segment, driven by consumer demand for automated floor cleaning. On the other hand, outdoor robots, designed for cleaning yards or patios, are an emerging niche but hold potential as outdoor living spaces become more integrated into home automation systems. In-house robots benefit from significant technological advancements, such as mapping capabilities, smarter navigation, and AI integration, improving their cleaning efficiency and versatility.

The distribution channel plays a crucial role in the market's growth. Online retail channels are gaining significant traction due to the convenience, broader selection, and often better pricing they offer. E-commerce platforms allow consumers to access reviews, compare models, and enjoy promotions, making it easier to purchase robotic vacuums. However, offline channels, including electronics retailers and home appliance stores, remain important, especially for customers who prefer to see the products in person before making a purchase. The residential robotic vacuum cleaner market is driven by convenience, technological innovation, and changing consumer habits, with key segments such as auto-battery charging, in-house robots, and online distribution channels shaping the market's growth.

Market Drivers

Increasing Demand for Convenience and Time-Saving Solutions

The modern lifestyle is becoming increasingly fast-paced, with many consumers balancing work, family, and personal commitments. This has led to a growing demand for products that offer convenience and save time. Residential robotic vacuum cleaners cater to this need by providing an automated cleaning solution that requires minimal human intervention. These devices can clean floors autonomously, enabling users to focus on other tasks without worrying about the time-consuming chore of vacuuming. The time-saving benefits of robotic vacuum cleaners are particularly appealing to busy professionals, dual-income households, and tech-savvy consumers who value convenience and efficiency in their daily lives. With their ability to clean while homeowners are away at work or relaxing at home, robotic vacuums eliminate the need for manual cleaning, thus improving the overall quality of life. This shift in consumer behavior, toward automation and ease of use, is a significant growth driver for the market.

Technological Advancements and Smart Home Integration

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Technological innovation is at the heart of the growing appeal of robotic vacuum cleaners. The introduction of features like advanced sensors, mapping and navigation technology, and AI integration has significantly enhanced the performance and user experience of these devices. Modern robotic vacuums are equipped with capabilities such as room mapping, obstacle detection, and dirt recognition, ensuring a more thorough and efficient cleaning process compared to older models. Additionally, some models are now integrated with smart home ecosystems, allowing users to control them through voice assistants like Amazon Alexa or Google Assistant, or via mobile apps. These technological advancements not only improve the functionality of robotic vacuums but also appeal to consumers who are increasingly adopting smart home devices. The ability to control robotic vacuums remotely and schedule cleaning cycles has made these devices more attractive to consumers looking to build a fully integrated smart home. As a result, robotic vacuum cleaners are not just viewed as cleaning devices, but also as essential components of the broader home automation trend.

Rising Disposable Income and Growing Urbanization

Rising disposable incomes, particularly in emerging markets, have played a crucial role in expanding the residential robotic vacuum cleaner market. As consumers' financial capacity increases, they are more inclined to invest in premium household appliances that offer greater convenience and efficiency. Robotic vacuum cleaners, once considered luxury items, are increasingly becoming accessible to a broader demographic, thanks to decreasing prices and more affordable models entering the market. Urbanization has also contributed to the demand for robotic vacuums. As more people live in apartments or smaller homes, the need for compact, efficient cleaning solutions has increased. Robotic vacuums, with their ability to navigate through tight spaces and clean various floor types, are particularly well-suited to urban dwellers who face challenges in maintaining cleanliness in smaller living environments. Additionally, the growing trend of urban living has led to an increase in dual-income households, further driving demand for time-saving solutions like robotic vacuums.

Key Market Challenges

Technological Limitations and Performance Issues

While robotic vacuum cleaners have seen significant technological advancements, there are still notable limitations in their performance, particularly in terms of cleaning efficiency and navigation in complex home environments. While high-end models have improved mapping, sensors, and obstacle detection, many lower-cost models still

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struggle with precise navigation, often missing spots or getting stuck in tight corners or on obstacles. These performance issues can affect the overall satisfaction of consumers, especially those who expect thorough cleaning from an automated system. Additionally, robotic vacuums may not be as effective on certain floor types, such as deep carpets or uneven surfaces, which could limit their appeal to homeowners with specific cleaning needs. The battery life and charging capabilities, although improving, can also be a limiting factor, especially in larger homes that require more frequent charging. The combination of these performance gaps means that robotic vacuums may not always provide the complete cleaning solution that consumers expect, which could dampen market growth if not addressed.

High Initial Purchase Cost and Consumer Perception

The cost of robotic vacuum cleaners remains one of the biggest barriers for many consumers, especially in emerging markets. Although prices have decreased in recent years, the initial purchase cost of high-end models with advanced features such as AI integration, smart home compatibility, and superior cleaning capabilities can still be prohibitively expensive for some households. While there are lower-cost models available, these often lack the performance and features that justify the higher price tag of premium models. Many consumers may also perceive robotic vacuums as luxury items rather than essential household appliances, leading to hesitation in adoption, especially among cost-conscious buyers. Even though prices are gradually falling, some consumers may still view traditional vacuum cleaners as a more economical choice, particularly when they can provide deep, thorough cleaning at a lower upfront cost. Overcoming these pricing concerns and changing consumer perceptions will be key to widening the market base and driving long-term growth.

Intense Market Competition and Product Differentiation

The residential robotic vacuum cleaner market is highly competitive, with numerous players offering similar products at varying price points. Many established companies, such as iRobot, Dyson, and Neato, dominate the market, but there are also new entrants pushing to capture market share with innovative features and affordable pricing. This intense competition results in a crowded marketplace, making it difficult for consumers to differentiate between products and for brands to stand out. In addition, rapid technological advancements mean that product features and capabilities are constantly evolving, creating pressure for manufacturers to continually innovate and improve. Companies must invest heavily in research and development to stay ahead of the competition and offer unique selling points that can capture the attention of

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consumers. Without clear differentiation, brands may struggle to maintain customer loyalty and gain a competitive edge in the market.

Key Market Trends

AI and Machine Learning in Navigation and Cleaning Efficiency

Advancements in AI (artificial intelligence) and machine learning are revolutionizing the performance of residential robotic vacuum cleaners. In the past, robotic vacuums relied on basic sensors and predefined patterns for cleaning, but now, thanks to AI and machine learning, vacuums can map out rooms, recognize objects, and even adapt to different cleaning conditions.

AI-powered vacuums can learn and improve their cleaning routes and techniques over time. For example, they can detect areas that require more attention, such as high-traffic zones, and adjust their cleaning patterns accordingly. Furthermore, the integration of machine learning allows vacuums to recognize and avoid obstacles like cords, furniture, and even pets, reducing the likelihood of the vacuum getting stuck or missing areas. With the increasing prevalence of AI-powered navigation systems (such as LIDAR and SLAM technology), robotic vacuums are becoming more efficient in navigating complex spaces, including homes with multiple rooms, tight corners, or various floor types. These innovations enhance the overall cleaning experience, offering superior performance compared to older models. As AI technology continues to improve, robotic vacuums will become even more autonomous, providing consumers with enhanced functionality and ease of use.

Focus on Sustainability and Eco-Friendly Features

As environmental concerns continue to grow globally, there is an increasing focus on sustainability within the consumer electronics industry, including the robotic vacuum cleaner market. Consumers are becoming more conscious of the environmental impact of their purchases, and companies are responding by introducing more eco-friendly features in their products. Manufacturers are incorporating energy-efficient motors and rechargeable batteries that reduce power consumption and extend battery life. In addition, there is a growing trend toward using recyclable materials in the construction of robotic vacuums. Some brands are even focusing on packaging that is 100% recyclable or made from sustainable sources. These initiatives not only help reduce the environmental footprint of robotic vacuums but also resonate with the increasing number of consumers who are concerned about sustainability. There is a trend toward

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cleaning solutions that minimize chemical usage. Some robotic vacuums are designed to use water or air filtration systems to clean floors, reducing the reliance on harsh cleaning agents that can harm the environment. This trend toward eco-conscious products is not just a passing fad but a growing movement as consumers demand more environmentally responsible options.

Increasing Demand for Multi-Functionality and Hybrid Models

Another prominent trend in the residential robotic vacuum cleaner market is the demand for multi-functional and hybrid models that can perform more than one task. Traditionally, robotic vacuum cleaners were designed solely for floor cleaning, but as consumer needs evolve, there is a rising demand for models that combine multiple functions in one device. Many new robotic vacuums are being designed to not only vacuum but also mop floors, offering hybrid models that can switch between vacuuming and mopping. These models provide a more comprehensive cleaning solution, especially for homes with a variety of floor types, such as hardwood, tiles, and carpets. The ability to mop as well as vacuum saves consumers time and effort, as it combines two essential tasks in one automated device. Additionally, hybrid models are now incorporating UV sanitization features, which allow the vacuums to also act as sanitizers, helping eliminate germs and bacteria from surfaces. This is especially relevant in the context of the ongoing focus on hygiene and cleanliness, particularly in light of the COVID-19 pandemic. These multi-functional models cater to consumers who seek a single appliance that can meet all their cleaning needs, offering both convenience and versatility.

Segmental Insights

Charging Mode Insights

In the residential robotic vacuum cleaner market, the auto-battery charging segment is leading and is expected to maintain its dominant position. Auto-battery charging systems allow robotic vacuums to return to their charging stations automatically when the battery is low, making them highly convenient for users. This feature eliminates the need for manual intervention, enhancing user experience and ensuring that the vacuum is always ready for the next cleaning session. Consumers increasingly prefer auto-battery charging vacuums due to the added convenience, particularly those with busy lifestyles. As robotic vacuums evolve and become more advanced, the automatic return-to-charging feature has become a standard expectation, especially in mid to high-end models. Additionally, this segment benefits from technological advancements that

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enable faster charging times and longer battery life, further driving its adoption.

Regional Insights

In the residential robotic vacuum cleaner market, North America is the leading region. The U.S. and Canada are at the forefront of this market, driven by high consumer demand for smart home technologies, increased disposable income, and a growing preference for time-saving appliances. North America’s leadership in the market is also attributed to the high adoption of robotic vacuum cleaners in both urban and suburban households, where busy lifestyles and a strong focus on home automation are prevalent. Several factors contribute to North America's dominance in the market. First, the region benefits from a mature and tech-savvy consumer base that is open to adopting new technologies. As a result, robotic vacuums are widely viewed as convenient, innovative, and time-saving appliances, particularly for dual-income households and families with busy schedules. The region also boasts a well-established retail and e-commerce infrastructure, making it easier for consumers to access a wide range of products both online and offline.

North America has seen substantial growth in the smart home industry, with consumers increasingly integrating robotic vacuums into their smart home ecosystems. Robotic vacuums that can be controlled via smartphones, voice assistants like Amazon Alexa or Google Assistant, and other smart devices are particularly popular in the region. These connected devices enhance the consumer experience, allowing for remote control, scheduling, and monitoring of cleaning tasks. As a result of these factors, North America holds the largest market share for residential robotic vacuum cleaners, with strong growth in both product sales and consumer adoption. The presence of major players such as iRobot, Dyson, and Neato further strengthen the region's dominance.

Key Market Players

- iRobot Corporation
- Xiaomi Corporation
- Neato Robotics Inc.
- Dyson Limited
- Frootle India Pvt. Ltd.

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Hayward Industries Inc.

Koninklijke Philips N.V.

Samsung Electronics Co. Ltd.

Pentair PLC

Pyramis Lifestyle India Private Limited

Report Scope:

In this report, the global residential robotic vacuum cleaner market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Residential Robotic Vacuum Cleaner Market, By Charging Mode:

Manual Charging

Auto-Battery Charging

Residential Robotic Vacuum Cleaner Market, By Type:

In-house Robot

Outdoor Robot

Residential Robotic Vacuum Cleaner Market, By Distribution Channel:

Online

Offline

Residential Robotic Vacuum Cleaner Market, By Region:

North America

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United States

Canada

Mexico

Europe

France

Germany

Spain

Italy

United Kingdom

Asia-Pacific

China

Japan

India

Vietnam

South Korea

Middle East & Africa

South Africa

Saudi Arabia

UAE

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Turkey

Kuwait

Egypt

South America

Brazil

Argentina

Colombia

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the global residential robotic vacuum cleaner market.

Available Customizations:

Global Residential Robotic Vacuum Cleaner market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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Contents

1. INTRODUCTION

1.1. Market Overview
1.2. Key Highlights of the Report
1.3. Market Coverage
1.4. Market Segments Covered
1.5. Research Tenure Considered

2. RESEARCH METHODOLOGY

2.1. Objective of the Study
2.2. Baseline Methodology
2.3. Key Industry Partners
2.4. Major Association and Secondary Sources
2.5. Forecasting Methodology
2.6. Data Triangulation & Validation
2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

3.1. Market Overview
3.2. Market Forecast
3.3. Key Regions
3.4. Key Segments

4. VOICE OF CUSTOMER

4.1. Factors Influencing Purchase Decision
4.2. Sources of Information

5. GLOBAL RESIDENTIAL ROBOTIC VACUUM CLEANER MARKET OUTLOOK

5.1. Market Size & Forecast
  5.1.1. By Value
5.2. Market Share & Forecast
  5.2.1. By Charging Mode Market Share Analysis (Manual Charging, Auto-Battery Charging)

+357 96 030922
info@marketpublishers.com

5.2.2. By Type Market Share Analysis (In-house Robot, Outdoor Robot)
5.2.3. By Distribution Channel Market Share Analysis (Online, Offline)
5.2.4. By Regional Market Share Analysis
5.2.4.1. North America Market Share Analysis
5.2.4.2. Europe Market Share Analysis
5.2.4.3. Asia-Pacific Market Share Analysis
5.2.4.4. Middle East & Africa Market Share Analysis
5.2.4.5. South America Market Share Analysis
5.2.5. By Top 5 Companies Market Share Analysis, Others (2023)
5.3. Global Residential Robotic Vacuum Cleaner Market Mapping & Opportunity Assessment
5.3.1. By Charging Mode Market Mapping & Opportunity Assessment
5.3.2. By Type Market Mapping & Opportunity Assessment
5.3.3. By Distribution Channel Market Mapping & Opportunity Assessment
5.3.4. By Regional Market Mapping & Opportunity Assessment

6. NORTH AMERICA RESIDENTIAL ROBOTIC VACUUM CLEANER MARKET OUTLOOK

6.1. Market Size & Forecast
6.1.1. By Value
6.2. Market Share & Forecast
6.2.1. By Charging Mode Market Share Analysis
6.2.2. By Type Market Share Analysis
6.2.3. By Distribution Channel Market Share Analysis
6.2.4. By Country Market Share Analysis
6.2.4.1. United States Residential Robotic Vacuum Cleaner Market Outlook
6.2.4.1.1. Market Size & Forecast
6.2.4.1.1.1. By Value
6.2.4.1.2. Market Share & Forecast
6.2.4.1.2.1. By Charging Mode Market Share Analysis
6.2.4.1.2.2. By Type Market Share Analysis
6.2.4.1.2.3. By Distribution Channel Market Share Analysis
6.2.4.2. Canada Residential Robotic Vacuum Cleaner Market Outlook
6.2.4.2.1. Market Size & Forecast
6.2.4.2.1.1. By Value
6.2.4.2.2. Market Share & Forecast
6.2.4.2.2.1. By Charging Mode Market Share Analysis
6.2.4.2.2.2. By Type Market Share Analysis

+357 96 030922
info@marketpublishers.com

6.2.4.2.2.3. By Distribution Channel Market Share Analysis
6.2.4.3. Mexico Residential Robotic Vacuum Cleaner Market Outlook
6.2.4.3.1. Market Size & Forecast
6.2.4.3.1.1. By Value
6.2.4.3.2. Market Share & Forecast
6.2.4.3.2.1. By Charging Mode Market Share Analysis
6.2.4.3.2.2. By Type Market Share Analysis
6.2.4.3.2.3. By Distribution Channel Market Share Analysis

7. EUROPE RESIDENTIAL ROBOTIC VACUUM CLEANER MARKET OUTLOOK

7.1. Market Size & Forecast
7.1.1. By Value
7.2. Market Share & Forecast
7.2.1. By Charging Mode Market Share Analysis
7.2.2. By Type Market Share Analysis
7.2.3. By Distribution Channel Market Share Analysis
7.2.4. By Country Market Share Analysis
7.2.4.1. France Residential Robotic Vacuum Cleaner Market Outlook
7.2.4.1.1. Market Size & Forecast
7.2.4.1.1.1. By Value
7.2.4.1.2. Market Share & Forecast
7.2.4.1.2.1. By Charging Mode Market Share Analysis
7.2.4.1.2.2. By Type Market Share Analysis
7.2.4.1.2.3. By Distribution Channel Market Share Analysis
7.2.4.2. Germany Residential Robotic Vacuum Cleaner Market Outlook
7.2.4.2.1. Market Size & Forecast
7.2.4.2.1.1. By Value
7.2.4.2.2. Market Share & Forecast
7.2.4.2.2.1. By Charging Mode Market Share Analysis
7.2.4.2.2.2. By Type Market Share Analysis
7.2.4.2.2.3. By Distribution Channel Market Share Analysis
7.2.4.3. Spain Residential Robotic Vacuum Cleaner Market Outlook
7.2.4.3.1. Market Size & Forecast
7.2.4.3.1.1. By Value
7.2.4.3.2. Market Share & Forecast
7.2.4.3.2.1. By Charging Mode Market Share Analysis
7.2.4.3.2.2. By Type Market Share Analysis
7.2.4.3.2.3. By Distribution Channel Market Share Analysis

+357 96 030922
info@marketpublishers.com

7.2.4.4. Italy Residential Robotic Vacuum Cleaner Market Outlook
7.2.4.4.1. Market Size & Forecast
7.2.4.4.1.1. By Value
7.2.4.4.2. Market Share & Forecast
7.2.4.4.2.1. By Charging Mode Market Share Analysis
7.2.4.4.2.2. By Type Market Share Analysis
7.2.4.4.2.3. By Distribution Channel Market Share Analysis
7.2.4.5. United Kingdom Residential Robotic Vacuum Cleaner Market Outlook
7.2.4.5.1. Market Size & Forecast
7.2.4.5.1.1. By Value
7.2.4.5.2. Market Share & Forecast
7.2.4.5.2.1. By Charging Mode Market Share Analysis
7.2.4.5.2.2. By Type Market Share Analysis
7.2.4.5.2.3. By Distribution Channel Market Share Analysis

8. ASIA-PACIFIC RESIDENTIAL ROBOTIC VACUUM CLEANER MARKET OUTLOOK

8.1. Market Size & Forecast
8.1.1. By Value
8.2. Market Share & Forecast
8.2.1. By Charging Mode Market Share Analysis
8.2.2. By Type Market Share Analysis
8.2.3. By Distribution Channel Market Share Analysis
8.2.4. By Country Market Share Analysis
8.2.4.1. China Residential Robotic Vacuum Cleaner Market Outlook
8.2.4.1.1. Market Size & Forecast
8.2.4.1.1.1. By Value
8.2.4.1.2. Market Share & Forecast
8.2.4.1.2.1. By Charging Mode Market Share Analysis
8.2.4.1.2.2. By Type Market Share Analysis
8.2.4.1.2.3. By Distribution Channel Market Share Analysis
8.2.4.2. Japan Residential Robotic Vacuum Cleaner Market Outlook
8.2.4.2.1. Market Size & Forecast
8.2.4.2.1.1. By Value
8.2.4.2.2. Market Share & Forecast
8.2.4.2.2.1. By Charging Mode Market Share Analysis
8.2.4.2.2.2. By Type Market Share Analysis
8.2.4.2.2.3. By Distribution Channel Market Share Analysis

+357 96 030922
info@marketpublishers.com

8.2.4.3. India Residential Robotic Vacuum Cleaner Market Outlook
8.2.4.3.1. Market Size & Forecast
8.2.4.3.1.1. By Value
8.2.4.3.2. Market Share & Forecast
8.2.4.3.2.1. By Charging Mode Market Share Analysis
8.2.4.3.2.2. By Type Market Share Analysis
8.2.4.3.2.3. By Distribution Channel Market Share Analysis
8.2.4.4. Vietnam Residential Robotic Vacuum Cleaner Market Outlook
8.2.4.4.1. Market Size & Forecast
8.2.4.4.1.1. By Value
8.2.4.4.2. Market Share & Forecast
8.2.4.4.2.1. By Charging Mode Market Share Analysis
8.2.4.4.2.2. By Type Market Share Analysis
8.2.4.4.2.3. By Distribution Channel Market Share Analysis
8.2.4.5. South Korea Residential Robotic Vacuum Cleaner Market Outlook
8.2.4.5.1. Market Size & Forecast
8.2.4.5.1.1. By Value
8.2.4.5.2. Market Share & Forecast
8.2.4.5.2.1. By Charging Mode Market Share Analysis
8.2.4.5.2.2. By Type Market Share Analysis
8.2.4.5.2.3. By Distribution Channel Market Share Analysis

9. MIDDLE EAST & AFRICA RESIDENTIAL ROBOTIC VACUUM CLEANER MARKET OUTLOOK

9.1. Market Size & Forecast
9.1.1. By Value
9.2. Market Share & Forecast
9.2.1. By Charging Mode Market Share Analysis
9.2.2. By Type Market Share Analysis
9.2.3. By Distribution Channel Market Share Analysis
9.2.4. By Country Market Share Analysis
9.2.4.1. South Africa Residential Robotic Vacuum Cleaner Market Outlook
9.2.4.1.1. Market Size & Forecast
9.2.4.1.1.1. By Value
9.2.4.1.2. Market Share & Forecast
9.2.4.1.2.1. By Charging Mode Market Share Analysis
9.2.4.1.2.2. By Type Market Share Analysis
9.2.4.1.2.3. By Distribution Channel Market Share Analysis

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9.2.4.2. Saudi Arabia Residential Robotic Vacuum Cleaner Market Outlook
9.2.4.2.1. Market Size & Forecast
9.2.4.2.1.1. By Value
9.2.4.2.2. Market Share & Forecast
9.2.4.2.2.1. By Charging Mode Market Share Analysis
9.2.4.2.2.2. By Type Market Share Analysis
9.2.4.2.2.3. By Distribution Channel Market Share Analysis
9.2.4.3. UAE Residential Robotic Vacuum Cleaner Market Outlook
9.2.4.3.1. Market Size & Forecast
9.2.4.3.1.1. By Value
9.2.4.3.2. Market Share & Forecast
9.2.4.3.2.1. By Charging Mode Market Share Analysis
9.2.4.3.2.2. By Type Market Share Analysis
9.2.4.3.2.3. By Distribution Channel Market Share Analysis
9.2.4.4. Turkey Residential Robotic Vacuum Cleaner Market Outlook
9.2.4.4.1. Market Size & Forecast
9.2.4.4.1.1. By Value
9.2.4.4.2. Market Share & Forecast
9.2.4.4.2.1. By Charging Mode Market Share Analysis
9.2.4.4.2.2. By Type Market Share Analysis
9.2.4.4.2.3. By Distribution Channel Market Share Analysis
9.2.4.5. Kuwait Residential Robotic Vacuum Cleaner Market Outlook
9.2.4.5.1. Market Size & Forecast
9.2.4.5.1.1. By Value
9.2.4.5.2. Market Share & Forecast
9.2.4.5.2.1. By Charging Mode Market Share Analysis
9.2.4.5.2.2. By Type Market Share Analysis
9.2.4.5.2.3. By Distribution Channel Market Share Analysis
9.2.4.6. Egypt Residential Robotic Vacuum Cleaner Market Outlook
9.2.4.6.1. Market Size & Forecast
9.2.4.6.1.1. By Value
9.2.4.6.2. Market Share & Forecast
9.2.4.6.2.1. By Charging Mode Market Share Analysis
9.2.4.6.2.2. By Type Market Share Analysis
9.2.4.6.2.3. By Distribution Channel Market Share Analysis

10. SOUTH AMERICA RESIDENTIAL ROBOTIC VACUUM CLEANER MARKET OUTLOOK

+357 96 030922
info@marketpublishers.com

10.1. Market Size & Forecast
10.1.1. By Value
10.2. Market Share & Forecast
10.2.1. By Charging Mode Market Share Analysis
10.2.2. By Type Market Share Analysis
10.2.3. By Distribution Channel Market Share Analysis
10.2.4. By Country Market Share Analysis
10.2.4.1. Brazil Residential Robotic Vacuum Cleaner Market Outlook
10.2.4.1.1. Market Size & Forecast
10.2.4.1.1.1. By Value
10.2.4.1..2. Market Share & Forecast
10.2.4.1.2.1. By Charging Mode Market Share Analysis
10.2.4.1.2.2. By Type Market Share Analysis
10.2.4.1.2.3. By Distribution Channel Market Share Analysis
10.2.4.2. Argentina Residential Robotic Vacuum Cleaner Market Outlook
10.2.4.2.1. Market Size & Forecast
10.2.4.2.1.1. By Value
10.2.4.2.2. Market Share & Forecast
10.2.4.2.2.1. By Charging Mode Market Share Analysis
10.2.4.2.2.2. By Type Market Share Analysis
10.2.4.2.2.3. By Distribution Channel Market Share Analysis
10.2.4.3. Colombia Residential Robotic Vacuum Cleaner Market Outlook
10.2.4.3.1. Market Size & Forecast
10.2.4.3.1.1. By Value
10.2.4.3.2. Market Share & Forecast
10.2.4.3.2.1. By Charging Mode Market Share Analysis
10.2.4.3.2.2. By Type Market Share Analysis
10.2.4.3.2.3. By Distribution Channel Market Share Analysis

11. MARKET DYNAMICS

11.1. Drivers
11.2. Challenges

12. IMPACT OF COVID-19 ON GLOBAL RESIDENTIAL ROBOTIC VACUUM CLEANER MARKET

12.1. Impact Assessment Model
12.1.1. Key Segments Impacted

+357 96 030922
info@marketpublishers.com

12.1.2. Key Regions Impacted
12.1.3. Key Countries Impacted

13. MARKET TRENDS & DEVELOPMENTS

14. COMPETITIVE LANDSCAPE

14.1. Company Profiles
14.1.1. iRobot Corporation
14.1.1.1. Company Details
14.1.1.2. Product
14.1.1.3. Financials (As Per Availability)
14.1.1.4. Key Market Focus & Geographical Presence
14.1.1.5. Recent Developments
14.1.1.6. Key Management Personnel
14.1.2. Xiaomi Corporation .
14.1.2.1. Company Details
14.1.2.2. Product
14.1.2.3. Financials (As Per Availability)
14.1.2.4. Key Market Focus & Geographical Presence
14.1.2.5. Recent Developments
14.1.2.6. Key Management Personnel
14.1.3. Neato Robotics Inc.
14.1.3.1. Company Details
14.1.3.2. Product
14.1.3.3. Financials (As Per Availability)
14.1.3.4. Key Market Focus & Geographical Presence
14.1.3.5. Recent Developments
14.1.3.6. Key Management Personnel
14.1.4. Dyson Limited
14.1.4.1. Company Details
14.1.4.2. Product
14.1.4.3. Financials (As Per Availability)
14.1.4.4. Key Market Focus & Geographical Presence
14.1.4.5. Recent Developments
14.1.4.6. Key Management Personnel
14.1.5. Frootle India Pvt. Ltd.
14.1.5.1. Company Details
14.1.5.2. Product

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14.1.5.3. Financials (As Per Availability)
14.1.5.4. Key Market Focus & Geographical Presence
14.1.5.5. Recent Developments
14.1.5.6. Key Management Personnel
14.1.6. Hayward Industries Inc.
14.1.6.1. Company Details
14.1.6.2. Product
14.1.6.3. Financials (As Per Availability)
14.1.6.4. Key Market Focus & Geographical Presence
14.1.6.5. Recent Developments
14.1.6.6. Key Management Personnel
14.1.7. Koninklijke Philips N.V.
14.1.7.1. Company Details
14.1.7.2. Product
14.1.7.3. Financials (As Per Availability)
14.1.7.4. Key Market Focus & Geographical Presence
14.1.7.5. Recent Developments
14.1.7.6. Key Management Personnel
14.1.8. Samsung Electronics Co. Ltd.
14.1.8.1. Company Details
14.1.8.2. Product
14.1.8.3. Financials (As Per Availability)
14.1.8.4. Key Market Focus & Geographical Presence
14.1.8.5. Recent Developments
14.1.8.6. Key Management Personnel
14.1.9. Pentair PLC.
14.1.9.1. Company Details
14.1.9.2. Product
14.1.9.3. Financials (As Per Availability)
14.1.9.4. Key Market Focus & Geographical Presence
14.1.9.5. Recent Developments
14.1.9.6. Key Management Personnel
14.1.10. Pyramis Lifestyle India Private Limited.
14.1.10.1. Company Details
14.1.10.2. Product
14.1.10.3. Financials (As Per Availability)
14.1.10.4. Key Market Focus & Geographical Presence
14.1.10.5. Recent Developments
14.1.10.6. Key Management Personnel

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15. STRATEGIC RECOMMENDATIONS/ACTION PLAN

15.1. Key Focus Areas
  15.1.1. Target Charging Mode
  15.1.2. Target Type
  15.1.3. Target Distribution Channel

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