

CIC 灼识



Global Intelligent Robot Lawn Mower Industry Report

© 2026 CIC. All rights reserved. This document contains highly confidential information and is solely for the use of our client.

No part of it may be circulated, quoted, copied or otherwise reproduced without the written consent of CIC.

Executive Summary

The global intelligent robot lawn mower industry is in an early explosive growth phase following the 2021 technological inflection point, and driven by technological upgrades, rising consumer demand, environmental regulations and expanding commercial applications.

Table of Contents

1. Market Overview

1.1 Market Definition

1.2 Market Size and Growth

2. Key Growth Drivers

2.1 Key Drivers

2.2 Future Outlook

1. Market Overview

1.1 Market Definition

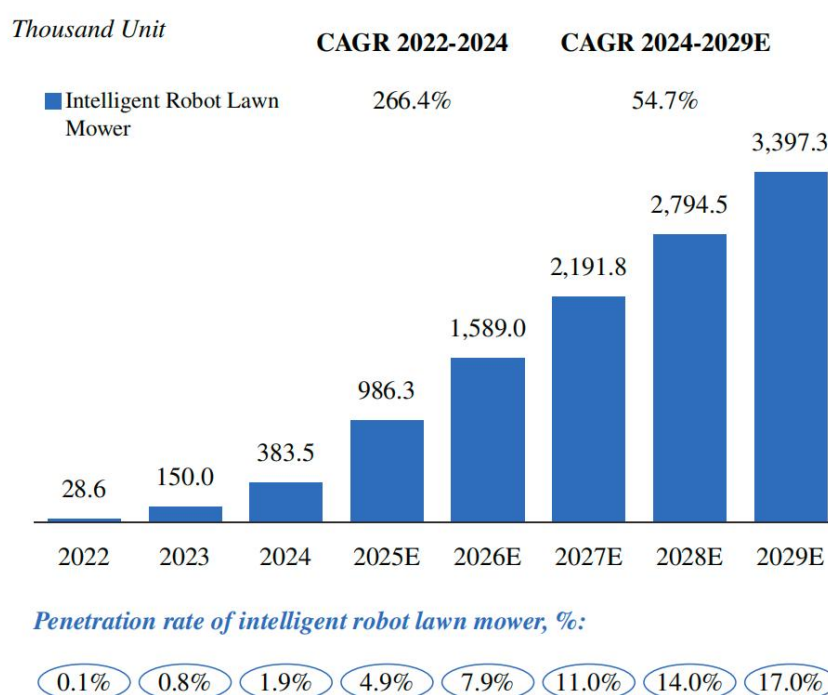
Robotic lawn mowers represent the automated evolution of traditional residential yard maintenance machinery, transforming manual grass-cutting into autonomous operations that optimize efficiency and trim quality for global households. The industry has evolved from first-generation traditional robotic mowers to modern intelligent robotic mowers. Driven by technological breakthroughs in multi-sensor fusion and advanced algorithms, these intelligent models achieve autonomous virtual mapping, precise outdoor positioning, and dynamic obstacle avoidance. Despite multidimensional technical hurdles—including terrain adaptability, fluctuating lighting conditions, weather resistance, and strict safety standards, the market exhibits immense growth potential.

1.2 Market Size and Growth

In 2024, the market was in its early stages, capturing a penetration rate of under 2.0%. However, penetration is projected to surge to 17% by 2029, driving the market size to approximately RMB 47.6 billion. Looking ahead, if these intelligent models completely replace traditional and basic robotic mowers across the 20.0 million annual

global demand for lawn care machinery, the Total Addressable Market (TAM) is expected to exceed RMB 300.0 billion.

Global intelligent robot lawn mower market size, in terms of sales volume, 2022-2029E



Notes:

(1) Intelligent robot lawn mower has seen product launches starting from 2021, with large-scale deliveries commencing in 2022.

(2) The penetration rate of global intelligent robot lawn mower is defined as the sales volume of global intelligent robot lawn mower expressed as a percentage of global lawn mowing machinery demand.

Source: Expert Interview, CIC Reports

2. Key Growth Drivers

2.1 Key Drivers

Technological Advances Drive Increased Utility.

With the continuous evolution of key technologies such as computer vision, AI algorithms, positioning navigation and battery energy efficiency, intelligent robot lawn mower are rapidly achieving upgrades, including more accurate path planning, stronger endurance and smarter obstacle avoidance behaviors.

Market Demand Continues to Grow.

Driven by rising consumer demand for efficient, automated lawn care and tightened global regulations—such as the EU's strict outdoor noise limits and California's ban on new gas-powered equipment—intelligent robotic lawn mowers have become a major home gardening trend, rapidly replacing traditional fuel-powered models due to their low noise, zero emissions, and energy efficiency.

High Value-added Scenario Expansion.

Intelligent robot lawn mower is expanding from home scenarios to specialized and large-scale applications. For instance, on golf courses, multiple units can operate collaboratively to manage large,

undulating terrains with precision-cutting patterns, while in public parks, they can autonomously maintain lawns during off-peak hours to reduce disruption to visitors.

Increasing Significance of User-Friendly and Convenient Design.

The market is placing greater emphasis on usability and convenience in design. Manufacturers of intelligent robotic lawn mowers are advancing their products towards a “plug-and-play” model, which offers users a seamless and enjoyable experience, encouraging more people to invest in the products.

2.2 Future Outlook

The global intelligent robot lawn mower market is poised to maintain explosive growth over the forecast period, with sales volume and market size expanding dramatically and market penetration increasing substantially across major regions. Technological iteration will deepen multi-modal perception fusion and AGI integration to enhance product intelligence and reliability, while the commercial market will emerge as a core growth driver.

However, this industry will face four entry barriers: technological and integration, manufacturing and supply chain, certification and compliance, channel and marketing barriers.



About CIC

CIC is a professional consulting firm offering tailored end-to-end support across the full investment and financing lifecycle. The firm boasts a world-leading track record in guiding landmark first-in-sector IPOs across global markets, alongside unrivaled reach and in-depth coverage capabilities across specialized niche market segments.

CIC helps enterprises refine scalable business models and craft compelling capital narratives to enable seamless access to global capital markets, while serving as a trusted due diligence partner to investment institutions. It delivers granular industry insights and direct access to subject matter experts, empowering clients to identify high-value opportunities and mitigate critical risks effectively.

CIC team maintains deep, real-time market intelligence across a diverse set of sectors—including financial services, artificial intelligence, big data, internet, high technology, healthcare, education, entertainment, consumer goods, transportation and logistics, energy and power, environmental and building technology,



chemicals, industrial manufacturing, and agriculture—delivering unparalleled access to sector-specific, actionable insights.

CIC Reports & Industry Overview

At CIC, we employ a rigorous, multi-method research framework, combining primary and secondary sources to underpin our analysis. Primary research involves in-depth engagements with industry thought leaders and practitioners, particularly in supply chain finance. Secondary research synthesizes publicly available datasets from authoritative bodies, including the National Bureau of Statistics of the People's Republic of China, the State Administration of Financial Regulation (SAFR, formerly the China Banking and Insurance Regulatory Commission), the China Securities Regulatory Commission (CSRC), and public company filings. We apply proprietary data analytics frameworks to process collected information, validating findings through cross-referencing data from multiple research streams to ensure analytical rigor and reliability.

All statistical data presented is verifiable and grounded in information available as of the date of this report.



Extracts are refined summaries of in-depth CIC industry research reports, highlighting supply and demand trends, key growth drivers, R&D trends and future outlook, etc. of various segmented fields, integrating multi-dimensional insights such as expert interviews, market surveys and industry data analysis.

Disclaimer

This report (the "Report") is prepared by CIC based on information available as of the date hereof. The Report is furnished strictly for informational and reference purposes only and is not intended to, nor shall it be construed as, being definitive or conclusive. Nothing contained herein shall constitute or be deemed to constitute investment advice, a recommendation, or an offer, solicitation or inducement to engage in any investment activity. CIC hereby expressly disclaims any and all liabilities for any loss, damage or claims of any nature howsoever arising, whether directly or indirectly, from the use of or reliance upon any information contained in the Report.



CIC Reports | Global Intelligent Robot Lawn Mower Industry Report

Contact CIC

For more information about this report or to learn more about CIC services, please visit [CIC official website](#), or email us at marketing@cninsights.com.