SCOTTS INTERNATIONAL

Global Zero Turn Mowers Market - Comprehensive Study and Strategic Assessment 2022-2027

Market Report | 2022-10-20 | 387 pages | Arizton Advisory & Intelligence

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Report description:

The global zero turn mowers market is expected to grow at a CAGR of 5.80% during 2022-2027.

MARKET OVERVIEW

- The demand for zero turn mowers is witnessing continuous growth due to the development of green acreage. The need for zero turn mowers surges during summer and spring due to the increased time spent on lawn care activities. Additionally, the growing demand for landscaping services across golf courses, sports fields, and public parks fuels the development of the global zero turn mowers market.
- Furthermore, the increasing government endeavors to expand green acreage are pushing the demand for zero-turn mowers in the market. Moreover, the garden equipment industry prospects in many European and North American countries have improved. Further, lawn mowers are becoming a mainstream product, thereby witnessing high end-user adoption. The constant development of lawn mowers maintains a sustainable presence in the market. There have been considerable developments in mowers regarding features and models. For instance, the availability of zero-turn mowers such as HDX Pro XL 72 with 35 horsepower enables the end-users (golf courses & other sports arenas) to mow the lawns of around 3-4 acres efficiently, supporting the global zero turn mowers market growth.
- The commotion formed by the COVID-19 pandemic had a significant effect on the demand for lawn mowers from the commercial sector owing to the closure of most commercial facilities, including hotels, resorts, sports arenas, golf courses, and football stadiums, cricket stadiums, and decline in construction activities. However, the rising gardening and lawn care activities among residential users supported the demand for lawn mowers. Although sales were comparatively weak during H1 2020, H2 2020 witnessed significant growth in demand for lawn mowers.

MARKET TRENDS AND OPPORTUNITIES

- Growth in Commercial Construction

The construction of various hotels is expected to support the global zero turn mowers market growth. In Q1 2021, in Europe, more than 40 hotels were opened. In Germany, Markisches Zentrum Redevelopment is a construction project for building new office space, which is expected to be completed by 2023. The projects involve shopping centers, retail spaces, offices, health centers, residential towers, and hotels.

- Development of Smart Cities

The smart city initiatives are driving the adoption of smart products by the population, thereby improving the individual's living standard. It also expects to monitor and address environmental issues. Hence, energy conservation and efficiency remain the key focus areas of smart city initiatives. Abu Dhabi's economic plan 2030 initiatives are increasingly promoting green and sustainable living. Moreover, smart infrastructure such as smart buildings is expected to drive the global zero-turn mowers market during the forecast period.

SEGMENTATION ANALYSIS

INSIGHTS BY FUEL TYPE

By fuel type, gasoline-powered zero-turn lawn mowers lead the global zero turn mowers market. The highest share of the gasoline-based zero turn mowers market is attributed to their high power compared to battery-based lawn mowers. Moreover, these zero-turn lawn mowers are suitable for tall, thick, and dense grass and get the mowing job done in a shorter period than other mowers.

The rising lawn care and backyard beautification in the residential sector will help the electric-powered zero turn mowers segment gain market share during the forecast period. The segment will grow owing to the rising demand for eco-friendly lawn mowers.

Segmentation by Fuel Type
- Gasoline-Powered
- Electric-Cordless
- Propane-Powered

INSIGHTS BY HORSEPOWER TYPE

The 18-24 HP segment leads the global zero turn mowers market by horsepower type. The zero-turn lawn mowers market is categorized as 18-24 HP, >24 HP, and 24 HP mowers are expected to witness the fastest growth at a CAGR of 6.29% due to the increasing green spaces and golf courses as they can easily mow 4-7 lands.

Segmentation by Horsepower Type
- <18HP
- 18-24HP
- >24HP

INSIGHTS BY END-USER

Professional landscaping zero-turn lawn mowers dominate the global zero turn mowers market by end-user category. The professional landscaping segment has the highest revenue share of 32.52% in the market, ascribed to the growing demand for lawn care and maintenance activities. End-users with low budgets prefer to hire professional landscaping services, which reduces the one-time initial cost and enables individuals to maintain their lawns.

Segmentation by End-User
- Professional Landscaping Services
- Golf Courses & Other Sports Arenas
- Residential
- Government & Others

INSIGHTS BY BLADE TYPE

The global standard blade zero-turn lawn mower is growing at a CAGR of 5.32% during the forecast period and is the largest blade type segment. Standard blades are also known as straight mower blades. It is the most-used blade in lawn mowers that rotates horizontally. The edges of these blades are slightly curved, creating a constant airflow as the blade rotates, producing suction and cutting action. These blades are commonly used in lawn mowers that discharge grass debris sideways. The lawn mowers with these blades are ideal for yards with thick patches of grass.

Segmentation by Blade Type
- Standard Blades
- Mulching Blades
- Lifting Blades

INSIGHTS BY START TYPE

By start type, push start zero-turn lawn mowers lead the global zero turn mowers market. The push-start lawn mowers use an electrical circuit to power the engine efficiently and quickly. However, this does not mean that the push-button start is only used on lawn mowers with electric power. It can be found in gas-powered and propane-powered zero-turn lawn mowers as well.

Segmentation by Start Type
- Push Start
- Key Start

INSIGHTS BY DISTRIBUTION CHANNEL

The distribution channel encompasses offline and online distribution channels. Zero-turn lawn mowers are sold across manufacturers, dealers, distributors, specialty stores, sites such as amazon & eBay, etc. The offline distribution channel dominates the global zero turn mowers market and accounts for a revenue share of 61.68%. Factors such as the more significant reach in areas lacking connectivity and consumers' trust associated with personally experiencing the quality of the products are driving the growth of the offline segment.

Segmentation by Distribution Channel
- Offline
- Online

GEOGRAPHICAL ANALYSIS

North America accounts for a revenue share of 39.30% and dominates the global zero turn mowers market. The high demand is attributed to the presence of many golf courses and the increased demand for landscaping services due to the widespread green areas across the region. The country holds well-established economies U.S. and Canada. The need for mowers is ascribed to the country's growing number of golf courses. In 2022, the U.S. will open 22 new golf courses across the region. North America accounts for about 50% of the world's overall number of golf courses.

However, Europe is expected to witness the fastest growth rate due to the increasing demand from the hospitality sector. Europe is significantly growing at the highest CAGR of 6.59% due to the extensive penetration of green areas across the region. Moreover, the increasing government efforts to cut down the dangerous impact of gas-powered lawn mowers, such as harmful air and noise pollution, are encouraging the adoption of electric cordless zero-turn lawn mowers, which are expected to support the market growth.

In APAC, the growth of the global zero-turn lawn mowers market is mainly driven by Australia, China, and Japan. The rising demand for autonomous equipment in these countries is supported by their strong economic growth, increased construction activities, and higher disposable income among the population. Moreover, Japan is considered the leading start-up and technology ecosystem.

Segmentation by Geography
- North America
o U.S.
o Canada
- Europe
o UK
o Germany
o France
o Spain
o Italy
o Sweden
o Netherlands
o Belgium
o Poland
o Switzerland
o Finland
o Austria
- APAC
o China
o Australia
o Japan
o South Korea
o India
- Latin America
o Brazil
o Argentina
o Mexico
- Middle East & Africa
o South Africa
o Saudi Arabia
o UAE

COMPETITIVE LANDSCAPE

The market comprises various vendors, including Deere & Company, Husqvarna Group, KUBOTA Corporation, STIGA, ARIENS CO., and others. Among the vendors, there is intense competition for zero turn mowers market share. As a result, a lot of mergers & acquisitions are taking place to develop and enhance the offerings to survive in the market. Market leaders are currently highlighting the adoption of energy-efficient goods owing to the increasing trend of using less-carbon energy sources. It is due to growing environmental issues such as global warming combined with gasoline or exhaust emissions.

Key Vendors
- Deere & Company
- Honda
- Husqvarna Group
- Kubota Corporation
- MTD Products
- STIGA Group
- The Toro Company

Other Prominent Vendors
- Ariens Company
- Altoz
- Bad Boy Mowers
- Bobcat Company
- Briggs & Stratton
- Chervon Group
- Greenworks Tools
- IHI Shibaura Machinery Corporation
- Masport
- Metalcraft of Mayville
- Stanley Black & Decker
- Swisher Inc.
- The Grasshopper Company
- Textron Inc.
- Techtronic Industries
- WALKER MANUFACTURING
- Wright Manufacturing
- Yangzhou Weibang Garden

Recent Developments

- In 2022, Ego announced to launch a new product ZT5207L 52" a cut zero turn that will come with 6 of their new BA6720T 12-amp hour batteries, which efficiently can mow up to 1900 sq. meter, and the expected run time is approximately 340 minutes at a single charge.
- In 2022, Dixie Chopper introduced its new product line "SS" model, with a new powerful engine configuration. This model is anticipated to provide better performance, speed, and power to both professional and residential customers.
- In 2021, Husqvarna Group witnessed an annual organic sales growth of 5% and an operating margin of 13%. This factor has raised overall financial targets and growth ambitions for battery-powered and robotic lawn mowers.

-In 2021, John Deere launched its latest product portfolio of Zero-turn mowers involving the Z500 series and introduced Z365R. The mowers offer a simple operating system with convenient solutions for its wide variety of residential lawn care projects.
-In 2020, Robert Bosch invested over USD 6.66 billion in R&D activities to enhance its product offerings. It invested around 8.24% of its sales revenue in R&D activities.

KEY QUESTIONS ANSWERED
1. How big is the global zero lawn mowers market?
2. What is the growth rate of the global zero turn mowers market?
3. How many Zero turn mowers are estimated to be sold in 2027?
4. Who are the key players in the zero-turn mowers market?
5. Which region has the largest share in the global zero-turn mowers market?

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