

Robotic Floor Scrubber Market - Global Outlook & Forecast 2023-2028

Market Report | 2023-04-06 | 302 pages | Arizton Advisory & Intelligence

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Report description:

The global robotic floor scrubber market is expected to grow at a CAGR of 13.26% during 2023-2028

MARKET TRENDS & OPPORTUNITIES

Growing Inclination Towards Automation

Automation is being increasingly adopted in all sectors of life. Adopting automation and robotic technologies can significantly change the overall cleaning industry. Organizations of all kinds are becoming aware of the impact that automation could make on businesses and employees. It helps organizations to become more competitive and is essential for small and medium-sized businesses that are the backbone of developing countries' economies. Hence, this is expected to drive several companies manufacturing floor scrubbers towards automation in the coming years. Automation is likely to benefit small companies to compete on a larger scale and where the labor market is compact, thereby benefitting many businesses in increasing the speed of product development and delivery.

Stringent Regulations To Maintain Cleanliness & Employee Safety

Maintaining cleanliness and hygiene in commercial and industrial places such as schools, offices, airports, stations, and food & beverage production sites is critical. Across all industrial sectors, stringent controls & regulations are being applied to ensure the safety of the workers and the environment. Further, product safety is an absolute priority worldwide. Maintaining cleanliness and hygiene in places with large footfalls and high human traffic becomes difficult without professional cleaning equipment. As a result, several end users, such as airports, retail establishments, and healthcare centers, are adopting robotic floor scrubbers to adhere to various cleanliness regulations. A robotic floor scrubber can reduce the chances of serious and fatal infections and injuries by minimizing manual work. Hence, the robotic floor scrubber market is rising remarkably from such growing industries.

INDUSTRY RESTRAINTS

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Rising Demand For Carpet Flooring

The rising demand for carpet flooring could challenge the global robotic floor scrubber market, as these machines are primarily designed for hard floor surfaces. While some robotic floor scrubbers can clean carpets, they are less effective than traditional carpet cleaners. They may not be able to meet the demands of commercial or industrial cleaning applications. Moreover, the carpet flooring market has gained popularity recently due to its comfort, aesthetics, and sound-dampening properties. In addition, technological advancements have led to the development of more durable and stain-resistant carpet materials, making them a viable option for high-traffic areas. The maintenance of carpet flooring does not require robotic floor scrubbers; thus, its popularity poses a challenge to the growth of the robotic floor scrubber market.

SEGMENTATION INSIGHTS

INSIGHTS BY VARIANT TYPE

The only scrubber variant type dominated the global robotic floor scrubber market in 2022 and accounted for a revenue share of nearly 60%. The segment is expected to witness considerable incremental growth during the forecast period. Scrubber & dryer variants are often preferred by commercial users with frequent footfall, like government offices, and are slightly more expensive. However, the scrubber and dryer hold a relatively low share of the robotic floor scrubber market. However, it is expected to grow at a higher CAGR during the forecast period.

Segmentation by Variant

- Only Scrubber
- Scrubber & Dryer

INSIGHTS BY RUNTIME

The global robotic floor scrubber market by runtime can be classified under the less than 4 hours and more than 4 hours segments. Runtime (duration for which the machine runs on a single charge) is one of the most important factors that end-use industries consider while purchasing robotic floor scrubbers. The availability of high runtime at a lower cost will enable vendors to expand their customer base and witness significant growth. In 2022, robotic floor scrubbers with a runtime of fewer than 4 hours held a higher share in the robotic floor scrubber market. The robotic floor scrubbers with a runtime of more than 4 hours in the same year accounted for a revenue share of more than 36%. However, the more than 4 hours segment is expected to grow at a significant CAGR during the forecast period owing to the increasing application in various areas worldwide.

Segmentation by Run Time

- Less than 4 Hours
- More than 4 hours

INSIGHTS BY SCRUBBER HEAD TYPE

The disc scrubber head type dominated the global robotic floor scrubber market in 2022. These scrubbers are ideal for smooth and finished floors and are widely used in areas where floors must be polished regularly, such as schools, retail stores, healthcare facilities, and other industries. The rising demand for sustainability and minimizing water usage to protect the environment will likely support the growth of disc head floor scrubbers. The rapid expansion of the hospitality, healthcare, and the retailing sector is expected to support industry growth during the forecast period.

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Segmentation by Scrubber Head Type

- Disc
- Cylindrical

INSIGHTS BY END-USER

The retail and shopping center segment dominated the global robotic floor scrubber market in 2022. The highest share is due to the high footfall and the continuous movement of many customers throughout the facility. Moreover, the continuous expansion of giant retailers across several countries will likely boost the demand for robotic floor scrubbers in this segment.

Segmentation by End-User

- Retail & Shopping Center
- Manufacturing
- Airports
- Healthcare
- Warehouse & Logistics
- Education Industry
- Others

INSIGHTS BY SALES CHANNEL TYPE

The direct sales channel dominated the global robotic floor scrubber market in 2022. This segment is expected to witness a three-digit incremental growth during the forecast period and involves the manufacturer selling the robotic floor scrubber directly to the end user. This is typically done through a sales team that works directly with customers, providing product demonstrations and technical support. Manufacturers often prefer direct sales channels to maintain control over the sales process and build close customer relationships. Nevertheless, the indirect sales channel holds a relatively low industry share; however, it is expected to grow at a higher CAGR in the global robotic floor scrubber market during the forecast period.

Segmentation by Sales Channel

- Direct
- Indirect

GEOGRAPHICAL ANALYSIS

The growth of construction activities and the expansion of commercial areas drive the global demand for robotic cleaning equipment. The growth of tourism is increasing the demand for cleaning equipment in the hospitality industry. Additionally, implementing stringent health and safety regulations worldwide by government and private bodies fuels the robotic floor scrubber market. North America dominated the robotic floor scrubber market in 2022. The high awareness about cleanliness, technology, high labor cost, better infrastructure, and continuously growing footfall across various end users such as airports, retailers, and others are leading to the growth of robotic floor scrubber demand in the market.

Segmentation by Geography

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- North America
 - o US
 - o Canada
- Europe
 - o Germany
 - o UK
 - o Italy
 - o France
 - o Spain
 - o Rest of Europe
- APAC
 - o China
 - o Australia
 - o Japan
 - o South Korea
 - o India
 - o Rest of APAC
- Middle East & Africa
 - o South Africa
 - o Saudi Arabia
 - o UAE
 - o Turkey
 - o Rest of the Middle East & Africa
- Latin America
 - o Brazil
 - o Mexico
 - o Argentina
 - o Rest of Latin America

COMPETITIVE LANDSCAPE

The global robotic floor scrubber market is highly competitive, with the presence of many vendors. The rapid technological changes adversely impact market vendors as consumers increasingly expect continuous technology-enabled innovations and upgrades to existing products. The present scenario drives vendors to alter and refine their unique value proposition to achieve a stronger market presence. Some major players with a prominent presence in the global robotic floor scrubber market include Nilfisk, Tennant, Karcher, and Hako Group. Nilfisk and Tennant specialize in manufacturing high-end professional cleaning products, while Karcher manufactures high-end and mid-market products. The presence of diversified global and regional vendors characterizes the market. Many vendors are enhancing several product features by reducing machine weight, lowering sound level, improving recovery and solution tank capacity, and enhancing battery run time. Such initiatives will enable vendors to gain a competitive edge over other vendors in the industry.

Key Vendors

- Diversey
- Hako
- Karcher
- Nilfisk

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-□Tennant

Other Prominent Vendors

- Adlatus
- Amano
- Avidbots
- Aziobot
- Bharati Robotic Systems
- Cleanfix
- DDROBO
- Gaussian Robotics
- iClean Robotics Co.
- Murata Machinery
- getpeppermint
- LionsBot International
- ICE Cobotics
- Brain Corporation

KEY QUESTIONS ANSWERED:

- 1.□How big is the robotic floor scrubber market?
- 2.□What is the growth rate of the global robotic floor scrubber market?
- 3.□Who are the key players in the global robotic floor scrubber market?
- 4.□What are the key trends in the robotic floor scrubber market?
- 5.□Which region dominates the global robotic floor scrubber market?

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29 APPENDIX
29.1 ABBREVIATIONS

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