

Robotic Floor Scrubber Market - Global Outlook & Forecast 2024-2029

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Report description:

The global robotic floor scrubber market is expected to grow at a CAGR of 13.40% from 2023 to 2029.

MARKET TRENDS & OPPORTUNITIES

Growing Popularity of EC H2O Technology

Few companies like Tennant offer EC-H2O technology, which assists in conventional floor cleaning. Regarding cleanliness and hygiene, water is as crucial as disinfectants. Though abundant, water is limited in quantity due to the limited availability of potable water. This technology requires less water and thus helps reduce usage. It is an ideal choice, leading to the demand for machines involving EC-H2O technology. The robotic floor scrubbers equipped with EC-H2O technology use less water, leading to three times longer scrubbing.

Growing Adoption of Robotics in the Commercial Sector

The growing adoption of robotics in the commercial sector is a prominent driver within the global robotic floor scrubber market. In recent years, there has been a significant shift in the use of robotics beyond traditional industrial settings, driven by technological advancements and evolving needs in response to factors such as labor shortages. Autonomous technology to optimize floor cleaning in commercial facilities is essential, particularly where visible and consistent cleaning is crucial for customer satisfaction. With significant advancements in robotics, artificial intelligence, cloud computing, and mobile data transmission, driverless robotic floor cleaners offer a reliable and logical upgrade from traditional human-operated cleaning equipment.

INDUSTRY RESTRAINTS

Limited Source of Procuring Raw Materials

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The global robotic floor scrubber market faces significant challenges due to limitations in the procurement of raw materials. These challenges can impact manufacturers, supply chains, and the entire industry. The major challenges arise from disruptions in the global supply chain, which can occur due to various factors such as natural disasters, geopolitical tensions, or economic fluctuations. When the supply chain is disrupted, manufacturers may experience delays in obtaining critical raw materials and components needed for production, leading to shortages of finished products and increased costs.

SEGMENTATION INSIGHTS

INSIGHT BY VARIANT

The global robotic floor scrubber market by variant is segmented into only scrubber and scrubber & dryer. In 2023, the only scrubber variant dominated the global market share. The only scrubber segment encompasses a range of robotic floor scrubbers designed specifically for scrubbing and cleaning floor surfaces autonomously. These systems leverage advanced robotics, AI, and sensor technology to deliver efficient and consistent cleaning performance across various industries and applications. The robotic scrubber & dryer segment represents a further advancement in robotic floor cleaning technology, integrating scrubbing and drying capabilities into a single automated system. These systems combine the cleaning power of floor scrubbing with the drying efficiency, offering a comprehensive and time-saving solution for maintaining clean and dry floors.

Segmentation by Variant

- ☐ Only Scrubber
- ☐ Scrubber & Dryer

INSIGHT BY RUNTIME

The robotic floor scrubbers with a runtime of less than 4 hours held the higher share in the global market in 2023. For the less than 4 hours runtime segment, the primary market dynamics revolve around the need for efficiency in smaller-scale applications. End-users in small retail, offices, and residential complexes prioritize compact designs, fast charging capabilities, and ease of use. In contrast, the more than 4-hour runtime segment is driven by the demand for robust, high-performance solutions capable of sustaining prolonged cleaning operations in larger facilities.

Segmentation by Runtime

- ☐ Less than 4 Hours
- ☐ More than 4 hours

INSIGHT BY SCRUBBER HEAD TYPE

The global robotic floor scrubber market by scrubber head type is segmented into disc and cylindrical. Among these, the disc scrubber head dominated the market. 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 retail sectors is expected to support market growth during the forecast period. Moreover, the growing investments in warehouses across countries owing to the rising e-commerce are expected to push the demand for cylindrical head robotic floor scrubbers in the market.

Segmentation by Scrubber Head Type

- ☐ Disc
- ☐ Cylindrical

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INSIGHT BY END-USER

The global robotic floor scrubber market by end-user is segmented into retail & shopping centers, manufacturing, airports, healthcare, warehouse & logistics, education industry, and others. The retail & shopping end-user sector is expected to showcase the highest growth in the market. The continuous expansion of giant retailers across several countries will likely boost the demand for robotic floor scrubbers in this segment. The retail & shopping centers segment represents a significant market for robotic floor scrubbers, driven by the need to maintain clean and hygienic environments in high-traffic areas. Furthermore, the education sector segment is anticipated to grow at a CAGR of around 13% in the global robotic floor scrubber market during the forecast period. The growth is due to rising adoption in educational institutions, hotels, and public facilities. Also, using robotic floor scrubbers enables educational institutions to allocate cleaning staff to other important high-touch areas requiring regular manual cleanings, such as countertops, door handles, bathrooms, classroom desks, etc.

Segmentation by End-User

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

INSIGHT BY SALES CHANNEL

The direct sales channel dominated the global robotic floor scrubber market in 2023. The direct sales channel segment is expected to witness incremental growth of more than USD 700 million. It helps sell products at a relatively lower price than the indirect sales channel by eliminating intermediaries and helping manufacturers gain a competitive edge. Moreover, the indirect channel enables manufacturers to leverage the distributors' relationship with their customers.

Segmentation by Sales Channel

- Direct
- Indirect

GEOGRAPHICAL ANALYSIS

North America dominated the global robotic floor scrubber market, accounting for a share of over 34% in 2023. 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. Also, labor costs across North America are rising continuously, leading to several end users moving towards technology, which could help minimize the expenditure on labor and increase productivity. It will also help the organizations utilize the labor for other value-added tasks and focus on activities likely to enhance their revenue. Hence, the high labor cost is expected to boost the demand for robotic floor scrubbers across the region.

The high arrival of tourists and the rapidly growing hospitality sector across Europe drive the robotic floor scrubber market's growth. Countries such as the UK, Germany, and France are the leading markets in the region where the demand for robotic floor scrubbers is driven by manufacturing, big retailers, healthcare, and various hotels. Furthermore, there is a growing trend towards using environmentally sustainable cleaning solutions in Europe, driving the demand for robotic floor scrubbers that use eco-friendly cleaning agents and materials.

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Segmentation by Geography

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

COMPETITIVE LANDSCAPE

The competition within the global robotic floor scrubber market is high, with numerous vendors. Rapid technological advancements pose challenges for these vendors as consumers increasingly demand continuous innovations and upgrades in products. In response to this dynamic landscape, vendors are compelled to reassess and refine their unique value propositions to establish a stronger foothold in the market. Key players in the global robotic floor scrubber market holding prominent positions include Nilfisk, Tennant, Alfred Karcher, and Hako Group. While Nilfisk and Tennant specialize in manufacturing premium professional cleaning equipment, Alfred Karcher offers a range of high-end and mid-market products. The market is characterized by the presence of global giants and regional players, each striving to differentiate themselves. Vendors are investing in enhancing various features of their products, such as reducing machine weight, lowering noise levels, improving tank capacities, and extending battery life. These strategic initiatives aim to gain a competitive advantage in the market and evolve customer expectations.

Key Company Profiles

- Amano
- Hako
- Karcher

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- Nilfisk
- Tennant

Other Prominent Vendors

- Adlatus
- Avidbots
- Aziobot
- Bharati Robotic Systems
- Cleanfix Robotics
- DDROBO
- Diversey
- Gaussian Robotics
- Murata Machinery
- Peppermint Robotics
- LionsBot International
- ICE Cobotics
- i-team Global
- Fimap
- KEMARO

KEY QUESTIONS ANSWERED:

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

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