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Chinese AI Lawnmowers Gain Ground In Europe

by **Bamboo Works** Benzinga Contributor Follow

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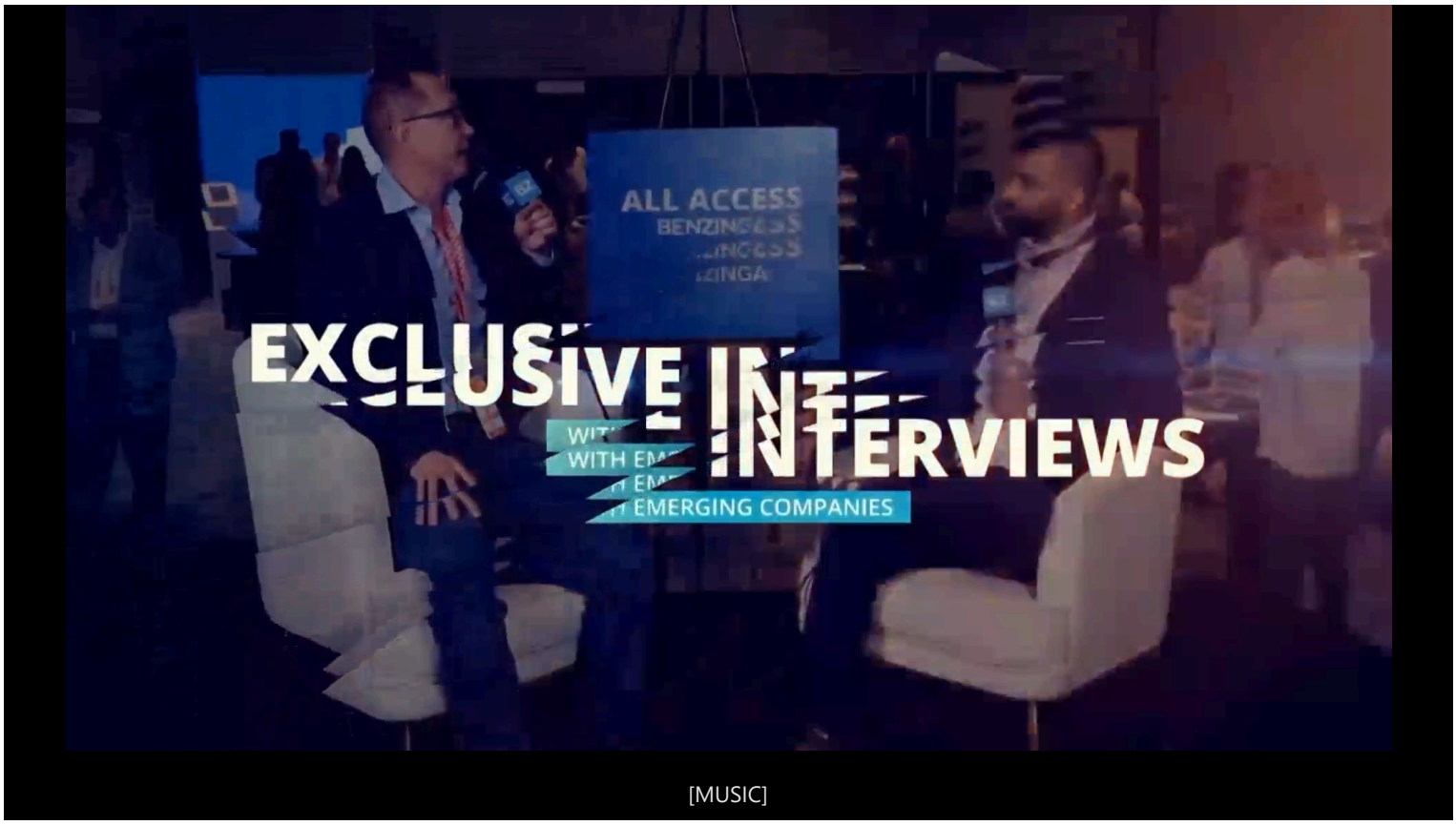
Rapid advances in AI navigation, LiDAR and RTK positioning are helping manufacturers accelerate overseas, with Europe and North America in their sights



image credit: Bamboo Works

Robotic lawnmowers are becoming the new standard in smart gardening. According to data from LeadLeo Research Institute, China's intelligent robotic lawnmower exports reached $1.01 billion in the first quarter of 2025, up nearly 60% year-on-year. Some companies serving the European market even received an additional 30% in orders after the Lunar New Year holiday. As navigation, obstacle-avoidance and lithium battery technologies rapidly mature, Chinese companies are stepping up their efforts to rake in global market share.

Robotic lawnmowers are intelligent gardening devices that combine AI, navigation systems and cutting mechanisms to autonomously trim grass using preset programs. Compared with manual mowing, they improve efficiency, reduce labor costs and deliver more consistent mowing performance. The industry has entered a phase of rapid development, evolving from early "random collision" operating models to more advanced systems featuring route planning and active obstacle avoidance.



The upstream supply chain currently includes key components such as real-time kinematic (RTK) modules, LiDAR sensors, vision modules, system on chips (SoC), lithium batteries and drive motors. China has largely completed domestic substitution across much of the supply chain. Companies including **Bynav Technology**, **Unicore Communications**, **Rockchip Electronics** (603893.SH) and **RoboSense** (2498.HK) have already entered the mainstream OEM supply chain. As technologies mature and production scales up, component costs have fallen sharply. For example, LiDAR prices have dropped from 200,000 yuan ($29,400) to 300,000 yuan a few years ago to roughly $200 today, while RTK module prices have declined from around 2,000 yuan to about 300 yuan, accelerating the adoption of boundary-wire-free robotic lawnmowers.

Current mainstream technologies are broadly divided into wired and wire-free systems. Earlier products required boundary wires buried underground around lawns, resulting in higher installation costs and more complicated maintenance. New-generation products increasingly rely on RTK positioning, AI vision and LiDAR solutions, enabling them to create virtual boundaries and map routes directly, significantly improving intelligence levels. The industry widely believes wire-free systems will become the dominant technology in coming years, presenting a major opportunity for Chinese companies moving into the high-end market.

The competitive landscape is also changing. The global market was long dominated by Sweden's **Husqvarna** (HUSQ-B.ST) and China's **Ninebot**(689009.SH), using self-developed RTK navigation and vision systems, has become a leading wire-free robotic lawnmower brand with annual shipments exceeding 80,000 units. **Greenworks** (301260.SZ) reported that revenue related to its third-generation products surged 68.92% year-on-year after launching in Europe.

In addition to Ninebot and Greenworks, other Chinese companies including **Ecovacs Robotics** (603486.SH), **Daye Garden** (300879.SZ) and **Zhongjian Technology** (002779.SZ) are also aggressively expanding overseas. Emerging brands such as **Mammotion**, **Dreame Technology**, **MOVA** and **Lymow Tech** are focusing on RTK, LiDAR and AI-vision integrated solutions to target the mid- to high-end market. Some startups are even promoting fully AI-powered lawn management systems, hoping to expand their products beyond mowing tools into broader smart garden ecosystems.

Big potential in Europe, U.S.

Europe is currently the world's largest market, boasting the highest robotic lawnmower penetration rate due to its high proportion of standalone homes, expensive labor costs and widespread lawn maintenance culture. Meanwhile, larger yard sizes are fueling rapidly growing demand for high-endurance and high-efficiency products in the U.S. Research indicates that overall penetration of robotic lawnmowers remains below 10% globally, leaving substantial room for future growth.

On the distribution side, offline sales still account for roughly 70% to 80% of the market. Since European and North American consumers place strong emphasis on after-sales service and installation support, many Chinese companies are aggressively building overseas channel networks. Ninebot has partnered with Orgill to enter the North American market, while **Sanfun** has cooperated with European retail giant Lidl. Dreame and Ecovacs are also accelerating their rollout of overseas offline retail channels.

LeadLeo Research Institute forecasts the global robotic lawnmower market will grow from $5.91 billion in 2025 to $22.2 billion by 2030, growing at an average rate of 30.34% annually over that time. Key growth drivers include environmental policies, falling upstream component costs and enormous global demand for lawn maintenance. The world currently has roughly 200 million lawns, while annual shipments of traditional lawnmowers total around 30 million units, all representing potential replacement demand.

The industry has evolved into a multi-player competitive structure. The first tier includes Husqvarna, Positec and Ninebot, while the second consists of companies such as Ecovacs, Greenworks and Mammotion. As technologies continue to mature, the market is expected to move toward greater concentration and differentiated competition, with companies introducing products tailored to different lawn sizes, terrains and price ranges. For Chinese firms, the robotic lawnmower export boom is no longer just a competition in home appliances or gardening tools, but increasingly a broader contest in AI, navigation and intelligent hardware capabilities.

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