

**Robot Home Vacuum Cleaning, Cooking, Pool Cleaning,
and Lawn Mowing Market Strategy, Market Shares, and Market
Forecasts, 2008-2014**

Household Cleaning Robots



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

**WinterGreen Research, Inc.
Lexington, Massachusetts**

www.wintergreenresearch.com

CHECK OUT THESE KEY TOPICS

MARKET FORECASTS
HOME CLEANING ROBOTS
Home Lawn Mowing Robots
Consumer Robots
Retail Robots
Robot Market Shares
Vacuum Robots
Lawn Mower Robots
Pool Cleaner Robots
Cooking Robots

Cleaning Robots Provide More Free Time

Robotic Reusable Components

ROBOTIC PLATFORMS

NEXT GENERATION CLEANING ROBOTICS

OPPORTUNITY ABOUNDS

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The automated process revolution in business process and communications is being extended to robots. Robots are automating systems, leaving more time for leisure activities.

Mobile robotics that operates independently of the operator has arrived. Similar technology is used to actuate the disparate robot types. Core robotics research and advances in robotic technology can be applied across a variety of robotic form factors and robotic functionality. Advances feed on and off of each other. With each new round of innovation, a type of technological cross pollination occurs that improves existing robotic platforms and opens up other avenues where intelligent mobile robots can be employed, effectively creating new markets.

What is good for a robotic unmanned ground vehicle is also good for a robotic vacuum and lawn mower. Multiple technological, cultural, political and market forces share a quantum singularity that has brought mobile robotics to the point where consumer markets can evolve. This is a phenomenon that will have a major impact on the way we live our lives.

Home robot markets are anticipated to grow in response to efficiencies offered by automated process. The robot vacuums are ready to start being used by regular people in regular homes. Market growth is rapid with penetration providing the model for growth.

iRobot is the market leader and like its competitors it has products are designed for use in the home. Consumer products are focused on floor cleaning tasks. Consumer products provide value by producing better cleaning results at an affordable price and by freeing people from repetitive home cleaning tasks.

Roomba is an intelligent and effective vacuuming robot. All Roomba Vacuuming Robots feature iRobot's unique AWARE™ Robot Intelligence Systems. AWARE uses dozens of sensors to monitor Roomba's environment, and adjusts Roomba's behavior up to 67 times per second, ensuring that Roomba cleans effectively, intelligently and safely.

Consumer robot markets for cleaning, lawn mowing, pool cleaning, and home services at \$227 million in 2007 are expected to reach \$1.7 billion by 2014. Market growth is a result of the efficiencies offered by automated process. Units are \$300 or less retail, a critical price point for home items.

Companies Profiled

Market Leaders

Home Robot Vacuuming

iRobot
Matsutec
LG Electronics
Husqvarna

Samsung
Karcher
Yujin Robotics

Pool Cleaning

Aquabot
Pentair / Kreepy Krauly

Carlyle Group / Zodiac Marine
Maytronics

Market Participants

Aldebaran Robotics
ELECTroLux
Floorbotics
Husqvarna
Innova Robotics & Automation
QinetiQ

Dyson
Evolution Robotics
Friendly Robots
Honda
Infinuvo
Toro

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REPORT METHODOLOGY

THIS IS THE 330TH REPORT IN A SERIES OF MARKET RESEARCH REPORTS THAT PROVIDE FORECASTS IN COMMUNICATIONS, TELECOMMUNICATIONS, THE INTERNET, COMPUTER, SOFTWARE, TELEPHONE EQUIPMENT, HEALTH EQUIPMENT, AND ENERGY. THE PROJECT LEADERS TAKE DIRECT RESPONSIBILITY FOR WRITING AND PREPARING EACH REPORT. THEY HAVE SIGNIFICANT EXPERIENCE PREPARING INDUSTRY STUDIES. FORECASTS ARE BASED ON PRIMARY RESEARCH AND PROPRIETARY DATA BASES. FORECASTS REFLECT ANALYSIS OF THE MARKET TRENDS IN THE SEGMENT AND RELATED SEGMENTS. UNIT AND DOLLAR SHIPMENTS ARE ANALYZED THROUGH CONSIDERATION OF DOLLAR VOLUME OF EACH MARKET PARTICIPATION IN THE SEGMENT. INSTALLED BASE ANALYSIS AND UNIT ANALYSIS IS BASED ON INTERVIEWS AND AN INFORMATION SEARCH. MARKET SHARE ANALYSIS INCLUDES CONVERSATIONS WITH KEY CUSTOMERS OF PRODUCTS, INDUSTRY SEGMENT LEADERS, MARKETING DIRECTORS, DISTRIBUTORS, LEADING MARKET PARTICIPANTS, OPINION LEADERS, AND COMPANIES SEEKING TO DEVELOP MEASURABLE MARKET SHARE. OVER 200 IN DEPTH INTERVIEWS ARE CONDUCTED FOR EACH REPORT WITH A BROAD RANGE OF KEY PARTICIPANTS AND INDUSTRY LEADERS IN THE MARKET SEGMENT. WE ESTABLISH ACCURATE MARKET FORECASTS BASED ON ECONOMIC AND MARKET CONDITIONS AS A BASE. USE INPUT/OUTPUT RATIOS, FLOW CHARTS, AND OTHER ECONOMIC METHODS TO QUANTIFY DATA. USE IN-HOUSE ANALYSTS WHO MEET STRINGENT QUALITY STANDARDS. INTERVIEWING KEY INDUSTRY PARTICIPANTS, EXPERTS AND END-USERS. OUR RESEARCH INCLUDES ACCESS TO LARGE PROPRIETARY DATABASES. LITERATURE SEARCH INCLUDES ANALYSIS OF TRADE PUBLICATIONS, GOVERNMENT REPORTS, AND CORPORATE LITERATURE.

YOU MUST HAVE THIS STUDY

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