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The State of Consumer Robotics 2026: AI in the Home

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1. Introduction

This report describes the state of the consumer robotics market as of mid-2026, with a focus on the AI systems that now define the category. "Consumer robotics" here means home robotics hardware bought by households: robot vacuums and mops, robotic lawn mowers, robotic pool cleaners, and companion or social robots. Industrial robots, professional service robots (logistics, hospitality, surgical), and defense systems are out of scope.

The report is written for three audiences: practitioners evaluating which home robots to buy or cover, vendors and investors tracking the competitive structure of the category, and journalists who need a sourced reference on market size and the technology shift. BestAIFor publishes hands-on testing of AI tools and devices; this report is a different kind of artifact. It does not test units in a lab. Instead it aggregates the published numbers — unit shipments, market-share figures, segment sizes, and price points — and arranges them so the reader can see the shape of the market without wading through twenty conflicting forecasts.

That last point is the report's main value. Market-research firms disagree sharply on the dollar size of every segment here; robot-vacuum estimates for 2025 alone span from roughly $6.2 billion to $12.5 billion depending on the firm and the scope definition. Rather than pick one number and present it as authoritative, this report shows the range, names the firm behind each figure, and lets the reader judge. Unit-shipment data from the International Federation of Robotics (IFR) and the International Data Corporation (IDC) is treated as the most reliable spine of the analysis, because unit counts are harder to inflate than revenue estimates that depend on undisclosed average selling prices.

The single most important fact about consumer robotics in 2026 is structural: the category is now overwhelmingly Chinese-built and Chinese-branded, the long-dominant American pioneer has entered bankruptcy and been acquired by its own Chinese contract manufacturer, and the technology frontier has moved from "can it map a room" to "can it reason about a room." The chapters that follow document each of those shifts with numbers.

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2. Top Takeaways

1. Consumer service robots crossed roughly 20 million units sold in a single year, growing 11%. The IFR's *World Robotics 2025* report counts close to 20 million consumer service robots sold in 2024, an 11% increase year over year, with robots for domestic tasks — floor cleaning and lawn mowing chiefly — described as "by far the largest group." This is unit volume across all consumer robot types, not revenue, and it anchors the rest of this report. (Source: IFR World Robotics 2025, Service Robots.)

2. The robot-vacuum category is the largest single segment, but its dollar size is genuinely contested. Published 2025 estimates for the global robot-vacuum market range from about $6.21 billion (Research and Markets) to $7.83 billion (Cognitive Market Research) to $12.5 billion (Global Market Insights), reflecting different scope definitions. Forecast CAGRs are equally dispersed, from roughly 8.8% (GM Insights, to 2035) to 14.3% (Research and Markets, to 2030) to 30.4% (Technavio, 2025–2030). The takeaway is the disagreement itself: there is no single credible "market size" number for this segment.

3. Chinese brands hold close to 70% of the global smart robot-vacuum market. IDC data for the first three quarters of 2025 put Roborock first at 21.7% share (3.8 million units), Ecovacs second at 14.1%, Dreame third at 12.4%, Xiaomi fourth at 10%, and Narwal fifth at 7.5%. Combined, those five Chinese brands took close to 70% of global smart robot-vacuum shipments. (Source: IDC, via China Daily and IDC blog, 2025.)

4. Roborock became the world's number-one robot-vacuum brand; iRobot fell to fifth and into bankruptcy. IDC reported Roborock as the No. 1 smart cleaning robot brand in 2025 with 5.8 million units shipped and 17.7% global share of the broader smart-cleaning category; in the narrower robot-vacuum segment its share reached roughly 24% in the second half of 2025. Over the same period iRobot's global shipments fell 30.6% year over year and its rank dropped to fifth. (Source: IDC; PR Newswire, Roborock.)

5. iRobot filed for Chapter 11 and agreed to be acquired by its Chinese contract manufacturer. iRobot filed a prepackaged Chapter 11 bankruptcy on December 14, 2025, with an agreement to be taken private by Shenzhen Picea Robotics — its secured lender and primary manufacturer. The company cited

debt, eroding demand, and U.S. tariffs, which it said cost it about $23 million. iRobot was founded in 1990 and invented the consumer robot-vacuum category with the Roomba in 2002. (Source: Manufacturing Dive; NPR; Reason.)

6. Total smart-vacuum shipments reached roughly 32.7 million units in 2025, up double digits. IDC reported 17.42 million units shipped in the first three quarters of 2025 (up 18.7% year over year) and about 32.72 million units for the full year. North American shipments rose 65.3% year over year in that data, even as U.S. tariffs raised prices. (Source: IDC, 2025–2026.)

7. U.S. tariffs reshaped pricing in 2025, then partially reversed in 2026. A round of U.S. import tariffs announced in April 2025 reached up to 125% on Chinese-made goods, which roughly doubled landed cost for affected robot vacuums. Vendors raised U.S. prices accordingly; Roborock's flagship Saros Z70 rose from roughly $1,899 to $2,600. As trade conditions stabilized in 2026, Ecovacs cut U.S. prices by up to 45% (savings of $50 to $450 per unit), explicitly attributing the cuts to removed tariff costs. (Source: Vacuum Wars; PR Newswire, Ecovacs; 9to5Toys.)

8. The robotic lawn-mower segment is growing fast off a smaller base, with figures even more dispersed than vacuums. Published 2025 market-size estimates for robotic mowers range from about $1.2 billion to $9.33 billion, with forecast CAGRs from roughly 7.5% to 22.4%. The technology story is the shift from buried-wire boundaries to wire-free RTK and LiDAR navigation, led by Segway Navimow, Mammotion, Ecovacs GOAT, and others. (Source: Grand View Research; Global Market Insights; Technavio; Mordor Intelligence.)

9. Robotic pool cleaners are a small but fast-growing adjacency. Estimates put the 2025 robotic pool-cleaner market between roughly $1.1 billion (The Business Research Company) and $2.17 billion (Fortune Business Insights), with CAGRs commonly cited between 12% and 22%. Cordless, app-controlled designs from Aiper and new entrants from Dreame, Ecovacs, and Mammotion are pulling the category upmarket. (Source: Fortune Business Insights; The Business Research Company; SNS Insider.)

10. Companion and social robots remain a fraction of cleaning-robot volume but carry the highest growth forecasts. The companion-robot market was valued at roughly $1.2–1.48 billion in 2025, with forecast CAGRs of 17.6% to 20.3%; the narrower social-robot market sits below $0.6 billion. Eldercare assistive robots, a related category, were valued at about $3.1–3.4 billion in 2025. The WHO projects over 1 billion people aged 60 or older by 2030, the demographic driver most cited for this segment. (Source: Verified Market Reports; Business Research Insights; Grand View Research; WHO via Business Research Insights.)

11. The technology frontier moved to dual-sensor navigation and on-device AI. LiDAR has become the baseline for mid-to-premium robot vacuums, increasingly paired with RGB cameras and on-device neural networks for obstacle recognition — a configuration exemplified by Roborock's StarSight 2.0 system on the Saros 10R. At least one vendor, Matic, runs an entirely camera-based, on-device pipeline with no cloud upload and no LiDAR, positioning privacy as the differentiator. (Source: Vacuum Wars; Matic; TechCrunch.)

12. Privacy and security are documented risks, not hypotheticals. In 2024, attackers took control of Ecovacs Deebot units in the U.S. via a Bluetooth flaw, accessing cameras and speakers; Ecovacs shipped a firmware fix in November 2024. Separately, development-unit Roomba images — including an intimate

bathroom photo — leaked through a third-party data-labeling chain in a case reported in 2022. Both incidents are part of the public record on home-robot data exposure. (Source: Kaspersky; MIT Technology Review via State of Surveillance.)

3. Methodology and Scope

Scope. This report covers consumer home-robotics hardware: robot vacuums and mops, robotic lawn mowers, robotic pool cleaners, and companion/social robots. Industrial, professional-service, medical, and defense robotics are excluded. The 15 featured vendors were selected to span the major product segments and the major geographies (United States, China, Japan, South Korea); they are described, not ranked.

Data sources. Unit-shipment and market-structure figures come from the International Federation of Robotics (IFR, *World Robotics 2025*) and the International Data Corporation (IDC). Segment dollar sizing draws on multiple research firms — Grand View Research, Fortune Business Insights, Mordor Intelligence, Global Market Insights, Technavio, Research and Markets, The Business Research Company, Cognitive Market Research, SNS Insider, Verified Market Reports, and Business Research Insights — and this report deliberately presents their estimates as a range rather than a consensus. Vendor facts (HQ, founding, product lines, pricing, launches) come from vendor specification and pricing pages and from tier-1 reviews and trade press (Vacuum Wars, TechRadar, Tom's Guide, Digital Trends, TechCrunch, PR Newswire, Manufacturing Dive, NPR, 9to5Toys, Consumer Reports). Each table and claim carries its source.

Time window. Market figures reference 2024–2026 data and forward forecasts. Vendor pricing reflects observation in June 2026.

Classification. Vendors are grouped by primary segment but several are multi-segment (Ecovacs and Dreame span vacuums, mowers, and pool cleaners). The vendor chapter notes each vendor's full segment footprint.

Stated limitations and data honesty. Vendor-internal popularity metrics (Product Hunt rankings, domain-authority scores, web-traffic estimates) were unavailable this cycle, so the report relies entirely on published market-research figures, tier-1 reviews, and vendor spec/pricing pages. Several specifics could not be independently confirmed and are flagged in the text: the Samsung Ballie price and ship date (unannounced/delayed), Sony Aibo LLM integration (not confirmed by Sony), Matic's exact funding total and valuation (third-party estimates), and several exact price endpoints. Founding years are drawn from documented brand histories rather than incorporation registries. Dollar market sizes are reproduced as the firms published them; this report does not endorse any single figure.

4. Chapter 1 — Market Size and Growth

Chapter Highlights

1. Close to 20 million consumer service robots sold in 2024, up 11% (IFR).
2. Robot vacuums are the largest segment; 2025 dollar estimates span $6.21B–$12.5B depending on firm and scope.
3. Total smart-vacuum unit shipments reached roughly 32.72 million in 2025 (IDC), up double digits.
4. Robotic lawn mowers: 2025 estimates range $1.2B–$9.33B; CAGRs 7.5%–22.4%.
5. Robotic pool cleaners: 2025 estimates range $1.1B–$2.17B; CAGRs 12%–22%.
6. Companion robots: ~$1.2–1.48B in 2025; social robots below $0.6B; eldercare assistive robots ~$3.1–3.4B.
7. Regional growth diverged: Europe and Asia-Pacific consumer-robot sales grew 16% in 2024; the Americas declined 1% (IFR).
8. North American smart-vacuum shipments nonetheless rose 65.3% year over year in IDC's 2025 data, a different metric than IFR's 2024 sales.

Overview

The consumer robotics market is best understood through two lenses that do not always agree: unit shipments, which industry bodies track with reasonable consistency, and dollar market size, which research firms estimate with wide variance. This chapter presents both, segment by segment, and is explicit about which numbers are firm and which are forecasts.

Total consumer service robots

The IFR's *World Robotics 2025* report provides the most authoritative top-line figure: close to 20 million consumer service robots were sold in 2024, an 11% increase year over year. The IFR identifies robots for domestic tasks — floor cleaning, lawn mowing, and similar — as "by far the largest group of consumer robots." Regional growth diverged sharply: Europe and Asia-Pacific each grew 16%, while sales in the Americas fell 1%, which the IFR attributed in part to lost market share in robotic vacuum cleaners.

For context, the IFR counted almost 200,000 professional service robots sold in 2024 (up 9%) — meaning consumer units outnumbered professional units by roughly 100 to 1 in volume, though professional units carry far higher unit prices.

Figure 1.1 — Consumer service robots, 2024 (IFR World Robotics 2025)

METRIC	VALUE	YEAR-OVER-YEAR
Consumer service robots sold	~20 million units	+11%
Europe sales growth	—	+16%
Asia-Pacific sales growth	—	+16%
Americas sales growth	—	−1%
Professional service robots sold (context)	~200,000 units	+9%

Source: IFR, *World Robotics 2025 — Service Robots* (press release and executive summary), October 2025.

Reference: Figure 1.1 shows that consumer-robot demand growth was concentrated outside the Americas in 2024, the same year the leading American vendor began its decline.

Robot vacuums — the contested core

Robot vacuums are the largest consumer-robotics segment and the most heavily researched, yet the published dollar figures diverge by a factor of two. The table below reproduces several firms' 2025 figures side by side.

Figure 1.2 — Robot-vacuum market size, 2025 estimates by firm

FIRM	2025 MARKET SIZE	FORECAST CAGR	FORECAST HORIZON
Global Market Insights	$12.5 billion	8.8%	to 2035 ($30.9B by 2035)
Cognitive Market Research	$7.83 billion	—	—
Research and Markets	$6.21 billion	14.3%	to 2030 ($21.66B by 2030)
Mordor Intelligence	(implied; $6.36B in 2026)	12.2%	to 2034 ($16.0B by 2034)
Technavio	—	30.4%	2025–2030 (+$20.45B)

Source: Global Market Insights; Cognitive Market Research; Research and Markets; Mordor Intelligence; Technavio (firm reports, 2025–2026).

Reference: Figure 1.2 is the clearest illustration of this report's core methodological caution — no single robot-vacuum "market size" exists; the figure is whatever scope a given firm chose.

Unit data is firmer than dollar data. IDC reported 17.42 million smart vacuums shipped in the first three quarters of 2025 (up 18.7% year over year), with Q3 alone up 22.9%, and about 32.72 million units for the full year 2025. North American shipments rose 65.3% year over year in the same dataset.

Robotic lawn mowers

The robotic lawn-mower segment is smaller than vacuums but growing faster, and its published figures are the most dispersed in this report. The wide spread reflects whether a firm counts only autonomous robotic mowers or a broader "robotic + smart mower" definition.

Figure 1.3 — Robotic lawn-mower market size, 2025 estimates

FIRM	2025 MARKET SIZE	NOTABLE CAGR
Grand View Research / GM Insights (high end)	~$9.03–9.33 billion	7.5% (GM Insights, to 2035)
Mid-range estimates	~$2.3–3.4 billion	11.4%–15.7%
Technavio	—	22.4% (2024–2029)
Low-end estimates	~$1.2–1.71 billion	9.9%–15.5%

Source: Grand View Research; Global Market Insights; Technavio; Mordor Intelligence; Future Market Insights; Straits Research (firm reports, 2025–2026).

Reference: Figure 1.3 shows mower estimates spanning nearly an order of magnitude ($1.2B to $9.33B), even wider than the vacuum spread in Figure 1.2.

Robotic pool cleaners

Robotic pool cleaners are a smaller adjacency with tighter (though still varied) estimates.

Figure 1.4 — Robotic pool-cleaner market size, 2025 estimates

FIRM	2025 MARKET SIZE	FORECAST CAGR
Fortune Business Insights	$2.17 billion	12.16% (2026–2034); $5.9B by 2034
Cognitive Market Research	$1.375 billion	18.90% (2025–2033)
The Business Research Company	$1.11 billion	14.1% (to 2026); 14.2% (to 2030)
SNS Insider	—	16.51% (to 2032; $5.18B by 2032)
Global Market Insights	—	21.9% (2025–2034)

Source: Fortune Business Insights; Cognitive Market Research; The Business Research Company; SNS Insider; Global Market Insights (firm reports, 2025–2026).

Reference: Figure 1.4 places pool cleaners at roughly one-fifth to one-third the dollar size of robot vacuums, but with comparable or higher growth forecasts.

Companion, social, and eldercare robots

These categories are the smallest by current volume and the most speculative by forecast. They are also where vendor ambition (Samsung Ballie, Sony Aibo, SwitchBot KATA) outruns shipped revenue.

Figure 1.5 — Companion / social / eldercare robot market sizes, 2025

SEGMENT	2025 MARKET SIZE	FORECAST CAGR
Companion robots	$1.2–1.48 billion	17.6%–20.3%
Social robots	~$0.57 billion	— (to ~$1.34B by 2035)
Eldercare assistive robots	$3.14–3.4 billion	12.5%–14.2%

Source: Verified Market Reports; Business Research Insights; Grand View Research; Roots Analysis; Future Market Insights (firm reports, 2025–2026).

Reference: Figure 1.5 shows eldercare assistive robots as the largest of the three by dollar value, driven by the demographic forecast (WHO: over 1 billion people aged 60+ by 2030, cited via Business Research Insights).

Interpretation

Two patterns hold across all five segments. First, unit growth is real and double-digit, corroborated by both the IFR (consumer service robots +11% in 2024) and IDC (smart vacuums +18.7% through Q3 2025). Second, dollar sizing is unreliable in absolute terms but consistent in direction: every firm forecasts growth, and the disagreement is about magnitude, not sign. A reader who needs one defensible statement can say that the global robot-vacuum market was in the high-single-digit billions in 2025 and the broader consumer-robotics hardware market was larger still, growing double digits — and decline to be more precise than the data supports.

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5. Chapter 2 — The Technology Shift

Chapter Highlights

1. LiDAR is now the baseline navigation technology for mid-to-premium robot vacuums (Vacuum Wars, 2025).
2. The premium frontier pairs LiDAR with RGB cameras and on-device AI for obstacle recognition; Roborock's StarSight 2.0 combines time-of-flight sensing with an RGB camera.
3. At least one vendor (Matic) runs a camera-only, on-device pipeline with ~1.5 cm mapping precision and no cloud upload.
4. Roborock's Saros Z70 is the only commercially available robot vacuum with an AI-controlled robotic arm (OmniGrip), unveiled at CES 2025.

5. Dreame previewed bionic-arm (Cyber10 Ultra) and stair-climbing (Cyber X) vacuum concepts at CES 2026.
6. Robotic mowers shifted from buried-wire boundaries to wire-free RTK and, in newer Navimow models, antenna-free network-RTK that works under tree cover.
7. Voice and LLM integration is arriving via companion robots — Samsung Ballie (Google Gemini) and SwitchBot KATA (on-device offline LLM) — more than via vacuums.
8. Suction specifications escalated rapidly, from ~8,000 Pa flagships in 2024 to 30,000+ Pa claims in 2025–2026.

Overview

The defining technical change in consumer robotics between 2024 and 2026 is the move from single-sensor navigation to multi-sensor perception, and from cloud-dependent processing toward on-device AI. This chapter describes the navigation, perception, manipulation, and language layers, with cited product capabilities.

Navigation: LiDAR as baseline, vision as the upgrade

Industry reviewers now treat LiDAR — laser time-of-flight mapping — as the baseline worth considering in a robot vacuum, because it produces accurate spatial maps and precise positioning without relying on ambient light (Vacuum Wars; Dreame). The limitation is well understood: LiDAR alone cannot recognize small obstacles such as cables or pet waste, which is why premium models pair it with RGB cameras and AI vision (Vacuum Wars).

The clearest example is Roborock's StarSight Autonomous System 2.0 on the Saros 10R, which combines time-of-flight sensing with an RGB camera to detect and route around cables, toys, and low furniture; Vacuum Wars named it the best obstacle-avoidance unit for mid-2025. The countercase is Matic, which uses five RGB cameras and on-device neural networks for 3D perception and SLAM at roughly 1.5 cm precision, with all processing on the edge device and no cloud upload — no LiDAR at all (Matic; TechCrunch). The two approaches frame the current design debate: LiDAR-plus-vision for accuracy versus vision-only for privacy and cost.

Perception and on-device AI

The processing trend is toward the edge. Matic's entire pipeline runs locally, which the company markets as a privacy feature: maps and images never leave the device (TechCrunch, 2023). Mainstream vendors still rely on cloud services for some features, which is the same architecture that created the security exposures discussed in Chapter 5. On-device inference reduces both latency and data-exposure surface, and is becoming a marketing axis in its own right.

Manipulation: the robotic arm arrives

The most visible 2025 hardware leap was manipulation. Roborock's Saros Z70, unveiled at CES 2025, is the only commercially available robot vacuum with an AI-controlled robotic arm (OmniGrip) capable of moving small objects such as socks out of its path. It currently sells for about $2,600 (raised from roughly $1,899 after tariffs), and Roborock has publicly stated a goal of bringing an AI-arm vacuum to the mass

market within roughly five years (Vacuum Wars). Dreame followed at CES 2026 with the Cyber10 Ultra, built on a "CyberDex" bionic ecosystem with a multi-joint arm (described as four joints, five degrees of freedom), plus a stair-climbing Cyber X prototype aimed at multi-floor homes (Vacuum Wars; Tom's Guide). These remain bionic-arm and climbing concepts, not full humanoids.

Suction escalation

Suction specifications became a headline spec war. Flagship suction rose from around 8,000 Pa (eufy X10 Pro Omni, 2024) to 22,000 Pa (Narwal Flow, 2025) and to claims of 30,000+ Pa (eufy Omni S2; Narwal Flow 2, 31,000 Pa, 2026). These are vendor-stated figures; independent reviewers caution that headline Pa numbers do not translate linearly to cleaning performance.

Mower navigation: cutting the wire

In robotic mowers, the technology story is the elimination of the buried boundary wire. Segway Navimow uses virtual boundaries instead of perimeter wire, and its newer models use what Segway markets as EFLS network-RTK ("antenna-free") technology that functions under dense tree cover, near tall buildings, and in GPS dead zones, with network-RTK access and cellular data included free (Navimow). Mammotion's LUBA line pioneered boundary-free 4WD RTK mowing, with the LUBA 2 AWD series named a TIME Best Invention of 2024 (Mammotion). Some Navimow models (e.g., the i215) add LiDAR for tree-cover reliability (Navimow store).

Language and companionship

LLM-driven voice and companionship is arriving fastest in companion robots, not vacuums. Samsung's Ballie is designed to run on Google Gemini (announced April 2025), giving it multimodal cloud AI; SwitchBot's KATA Friends (launched May 2026) use an on-device LLM that works offline. Most robot vacuums still integrate only with Google Assistant and Alexa for basic voice control (Vacuum Wars). Notably, Sony's Aibo describes machine-learning personality and recognition on its official pages but does not confirm any LLM integration, despite frequent third-party speculation.

Interpretation

The technology frontier has bifurcated. In cleaning robots, the competition is over perception accuracy (dual-sensor navigation) and, at the very top, physical manipulation (robotic arms) — capabilities that justify $1,500–$2,600 price points. In companion robots, the competition is over language and reasoning, delivered by large models running either in the cloud (Ballie/Gemini) or, increasingly, on-device (KATA). The two frontiers are converging on the same long-term vision the trade press describes as "home autonomy," but in 2026 they remain distinct product categories with distinct buyers.

6. Chapter 3 — The Vendor Landscape

Chapter Highlights

1. iRobot, the category's American pioneer (founded 1990), entered Chapter 11 in December 2025 and agreed to be acquired by its Chinese contract manufacturer Shenzhen Picea Robotics.
2. Roborock (China, 2014) is the global unit-share leader and the only vendor shipping a robotic-arm vacuum (Saros Z70, ~$2,600).
3. Ecovacs (China, 1998) and Dreame (China, 2017) are the broadest multi-segment players, spanning vacuums, mowers, window cleaners, and pool cleaners.
4. Narwal (China, 2016) competes at the premium vacuum tier with the Flow (~$1,300–$1,600) and Freo Z10 Ultra (~$1,300).
5. eufy/Anker (China, est. 2016) spans robot vacuums, mowers, and a large home-security line.
6. Yarbo (USA, 2015) and Mammotion (China, 2022) lead modular and boundary-free outdoor robotics; Yarbo raised a $27M+ Series B in 2025.
7. Companion robots are led by Sony Aibo (Japan, ~$2,900 + subscription), Samsung Ballie (price/date unconfirmed, Gemini-powered), and SwitchBot KATA (2026, $699.99).
8. SharkNinja (USA) and Samsung (South Korea) are the major non-Chinese cleaning-robot incumbents still shipping in volume.

Overview

This chapter profiles the 15 featured vendors with sourced facts. Profiles are descriptive and are presented in the order of the brief, not ranked. Pricing reflects June 2026 U.S. observation and changes frequently because of promotions and tariffs.

iRobot (irobot.com — Bedford, Massachusetts, USA; founded 1990)

iRobot invented the consumer robot-vacuum category with the Roomba in 2002. Its lines are Roomba vacuums, Roomba 2-in-1 vacuum/mop combos, and Braava robot mops. In March 2025 it ran the largest product launch in its history — eight new Roombas plus a new Roomba Home app, spanning the 105 to 705 series (iRobot newsroom; Yahoo). Current U.S. pricing, observed June 2026, runs roughly $170 (Roomba 105 Combo on promotion) to $899.99 (Roomba Max 705 Combo) (iRobot deals page). The defining 2025–2026 fact is corporate: iRobot filed prepackaged Chapter 11 on December 14, 2025, with an agreement to be taken private by Shenzhen Picea Robotics, its secured lender and primary contract manufacturer; it cited debt, eroding demand, and roughly $23 million in tariff costs (Manufacturing Dive; NPR; Reason). IDC reported iRobot's global shipments down 30.6% year over year and its rank fallen to fifth.

Roborock (roborock.com — Beijing, China; founded 2014)

Roborock is the global robot-vacuum unit-share leader. IDC named it the No. 1 smart cleaning robot brand in 2025 (5.8 million units, 17.7% of the broader smart-cleaning category; roughly 24% of the narrower robot-vacuum segment in H2 2025), No. 1 for the third consecutive year and No. 1 in the U.S., Germany, and South Korea (PR Newswire). Its product families are the premium Saros series, the S series, and the Q series, plus wet-dry vacuums and washer-dryers. The flagship Saros Z70 (~$2,600) is the only shipping robot vacuum with an AI robotic arm; the Saros 20 launched in North America at an MSRP of $1,599.99, and the Saros 10/10R expanded the line at CES 2025 (PR Newswire; Vacuum Wars).

Ecovacs (ecovacs.com — Suzhou, China; founded 1998)

Ecovacs is one of the two broadest multi-segment vendors. Its lines are DEEBOT vacuums, AIRBOT air-purifier robots, WINBOT window cleaners, GOAT robotic mowers, DEEBOT Pro commercial robots, and a new ULTRAMARINE pool cleaner (its first entry in that category). The flagship DEEBOT X12 OmniCyclone was announced in April 2026 at $1,499.99 list (sale ~$947); the WINBOT W3 OMNI window cleaner is $699.99 and the GOAT mower around $699–$999 (PR Newswire; Ecovacs). In 2024, Ecovacs was the subject of a documented security breach (Chapter 5); in 2026 it cut U.S. robot-vacuum prices by up to 45%, attributing the cuts to removed tariff costs (PR Newswire).

Dreame (dreametech.com — China; founded 2017)

Dreame is the other broad multi-segment vendor, spanning robot vacuum/mops (D, L, X, Aqua10, Matrix10 series), wet/dry vacuums, and mower and pool products. Observed U.S. pricing runs from about $199.99 (D9 Max Gen 2) up through flagship models around $1,399.99 (L60 Pro Ultra); an independent price guide cites a $199–$1,699 span. Note: the brief's "$459.99–$2,499.99" range could not be confirmed — the actual entry price is below $459 and the $2,499 ceiling was not found in current listings; readers should treat that range as unverified. 2025 launches included the Aqua10 (first rolling-mop robot) and Matrix10; at CES 2026 Dreame unveiled the bionic-arm Cyber10 Ultra and previewed the stair-climbing Cyber X (Vacuum Wars; T3; Tom's Guide).

Narwal (narwal.com — China; founded 2016)

Narwal competes at the premium vacuum/mop tier with self-washing, self-drying docks. Its 2025 flagship, the Narwal Flow (launched August 2025), uses a track-roller mop, warm-water mopping, and 22,000 Pa suction; it listed at $1,499.99, fell to $1,299.99 for the basic-dock version, with a plumbed-dock version at $1,599.99. The Freo Z10 Ultra (September 2025) listed at $1,299.99, and a Flow 2 (31,000 Pa) is listed for 2026 (TechRadar; Narwal). The earlier Freo Z Ultra won two Vacuum Wars awards in late 2024 and used dual HD cameras with dual-chip AI to avoid 120+ obstacle types.

eufy / Anker (eufy.com — Shenzhen, China; brand established 2016)

eufy is the smart-home sub-brand of Anker Innovations (Anker founded 2011 by Steven Yang; HQ Changsha, China). eufy spans three pillars: eufy Clean (robot vacuums and robotic mowers), eufy Security (cameras, doorbells, home security), and eufyMake (UV printing). Robot-vacuum flagships include the X10

Pro Omni (February 2024, $799.99, 8,000 Pa) and the now-discontinued Omni S1 Pro (June 2024, $1,499.99); a newer Omni S2 with 30,000 Pa is listed, though its exact price and date could not be confirmed (eufy; Vacuum Wars).

SwitchBot (switch-bot.com — international HQ Tokyo, Japan; founded 2015)

SwitchBot makes a broad home-automation catalog, from the ~$10-class Bot button-pusher up to multitasking robots. Its K-series robot vacuums include the compact K10+ and the K20+ Pro multitasking robot, both featured at CES 2025 alongside the S20 Pro (Vacuum Wars). Its companion product, KATA Friends (AI pets Noa and Niko), launched May 12, 2026 at $699.99 (with an optional $15/month subscription); KATA uses an on-device LLM that works offline and includes a physical privacy eye-mask (PR Newswire). Note: KATA is a 2026 launch, not 2025 as some sources state.

Aiper (aiper.com — Shenzhen, China; founded 2017)

Aiper specializes in cordless robotic pool cleaners and skimmers — the Scuba series. Its 2025 X-series flagship, the Scuba X1 Pro Max, sells for about $1,800 (robot only) or $2,299 bundled with HydroComm Pro; the entry Scuba X1 is about $1,000 (The Pool Nerd; Digital Trends). A specific "Scuba X1 solar" model referenced in the brief could not be verified; Aiper has marketed solar skimmers historically but the 2025 flagship line is the cordless Scuba X1/X1 Pro/X1 Pro Max.

Yarbo (yarbo.com — Ronkonkoma, New York, USA; founded 2015)

Yarbo makes a modular outdoor robot: a single core unit that swaps task modules across seasons — mower, snow blower, leaf blower, and trimmer. The core unit is about $4,999, the mower module about $4,000, and a complete multi-module unit roughly $6,000 (Consumer Reports). This is broadly consistent with the brief's $3,999–$7,199 range, though exact endpoints could not be confirmed. Yarbo (originally "Snowbot," focused on robotic snow removal) exhibited at CES 2024–2026 and closed a $27M+ Series B in 2025 to fund global expansion (PR Newswire).

Mammotion (mammotion.com — Shenzhen, China; founded 2022)

Mammotion is a boundary-free outdoor-robotics specialist. Its LUBA robot mowers (LUBA 2 AWD series named a TIME Best Invention of 2024) use 4WD RTK navigation with no perimeter wire; the LUBA 2 AWD 10000X (2.5 acres/charge) sells for $3,449, and the LUBA Mini AWD 1500 starts at $1,899. Its YUKA line adds 2-in-1 self-emptying grass collection. Mammotion entered pool cleaning with the Spino E1 in July 2025 (~$599–$799) and unveiled the self-docking Spino S1 Pro at CES 2026 (9to5Toys; AndroidGuys; PR Newswire).

Matic (maticrobots.com — Mountain View, California, USA; founded ~2017)

Matic makes a single product: a 2-in-1 robot vacuum/mop that navigates using five RGB cameras and on-device neural networks, with no LiDAR and no cloud upload — positioning privacy as the core differentiator (TechCrunch). It launched at $1,495 (rising to $1,795 after the intro period), with the intro

price including a first-year membership. Matic came out of stealth in November 2023 with about $30M raised and reportedly closed a further round in mid-2025; exact totals and a reported ~$650M valuation come from third-party databases and should be treated as estimates (Matic blog; Tracxn).

SharkNinja / Shark (sharkclean.com — Needham, Massachusetts, USA)

SharkNinja is a major U.S. cleaning-robot incumbent. Its robot-vacuum families are the Matrix line and the higher-end PowerDetect line. The flagship PowerDetect UV Reveal — billed as the first robot vacuum/mop to use UV technology to detect invisible messes — starts at $1,299.99 (SharkNinja IR). The 2025 PowerDetect ThermaCharged 2-in-1 added a base that auto-washes the mop pad with 185°F water (Vacuum Wars).

Segway-Ninebot / Navimow (segway.com — founded 2015)

Navimow is Segway's robotic-lawn-mower brand. Its lineup spans the i-Series for small yards ($799–$1,399), the H-Series mid-size ($1,799–$2,199), and the X-Series for large yards ($1,839–$3,599). Newer models use EFLS antenna-free network-RTK that works under tree cover and near buildings, with network-RTK and cellular data included free; the i215 adds LiDAR (Navimow store). The mowers replace buried boundary wire with virtual boundaries.

Sony Aibo (sony.com — Japan)

Sony's Aibo (current model ERS-1000) is a robotic dog priced at $2,899.99, with an included three-year AI Cloud Plan and $300/year renewal thereafter; the plan enables personality development, face/interaction memory, and cloud image storage (Sony; Keyirobot). Sony's official pages describe machine-learning personality and recognition; no LLM integration is confirmed by Sony despite third-party speculation. A March 2025 software update was reported to improve responsiveness.

Samsung — Ballie / Jet Bot (samsung.com — South Korea)

Samsung spans companion and cleaning robotics. Ballie is a rolling companion robot with a built-in projector and cameras that acts as a SmartThings hub; in April 2025 Samsung and Google announced it would run on Google Gemini, but the launch slipped past its summer-2025 target and, as of latest reporting, had no firm new date and no announced price (industry estimates only suggest "upward of $2,000") (9to5Google; SamMobile; Tom's Guide). On the cleaning side, the Bespoke Jet Bot Combo AI (vacuum + mop with auto-steam Clean Station) launched in the U.S. in 2024 at $1,699 (TechHive).

Interpretation

The vendor landscape divides along two axes. Geographically, Chinese vendors dominate cleaning robotics (Roborock, Ecovacs, Dreame, Narwal, eufy, Aiper, Mammotion), while U.S. (SharkNinja, Yarbo, Matic), Japanese (Sony), and South Korean (Samsung) vendors hold positions in specific niches — premium incumbency, modular outdoor, privacy-first vacuums, and companion robots. By product breadth, Ecovacs and Dreame are the widest, each spanning four or more segments, while companies like

Aiper (pool), Yarbo (yard), and Matic (one vacuum) are deliberately narrow. The most consequential single development is iRobot's bankruptcy and acquisition, which removes the last large American robot-vacuum brand as an independent company and hands it to a Chinese manufacturer.

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7. Chapter 4 — Pricing and the Consumer

Chapter Highlights

1. Robot-vacuum prices span roughly $170 (entry, on promotion) to $2,600 (Roborock Saros Z70 with robotic arm).
2. The premium vacuum tier clusters at $1,300–$1,600 (Narwal Flow, Freo Z10 Ultra; Roborock Saros 20; SharkNinja PowerDetect UV Reveal).
3. Robotic mowers span ~$799 (Navimow i105) to ~$6,000+ (Yarbo complete modular unit); Mammotion LUBA 2 AWD 10000X at $3,449.
4. Robotic pool cleaners span ~$599 (Mammotion Spino E1 launch) to ~$2,299 (Aiper Scuba X1 Pro Max bundle).
5. Companion robots span $699.99 (SwitchBot KATA) to ~$2,900 (Sony Aibo, plus $300/year subscription).
6. AI features — robotic arms, dual-sensor navigation, hot-water mop washing — concentrate at the top of each segment's price band.
7. U.S. tariffs added a temporary premium in 2025 (Saros Z70 +$700; ~$23M cost to iRobot), partially reversed by 2026 price cuts (Ecovacs up to 45% off).
8. Subscription pricing is emerging in companion robots (Aibo, KATA) but is not yet standard in cleaning robots.

Overview

This chapter organizes pricing by segment and describes what the marginal AI dollar buys.

Figure 4.1 — Consumer-robot price bands by segment (U.S., June 2026)

SEGMENT	ENTRY	MID	PREMIUM / FLAGSHIP	EXAMPLE FLAGSHIP
Robot vacuum/mop	~$170–$320	~$500–$900	~$1,300–$2,600	Roborock Saros Z70 (~$2,600, robotic arm)
Robotic lawn mower	~$799	~$1,300–$2,200	~$3,400–$6,000+	Yarbo complete (~$6,000); Mammotion LUBA 2 ($3,449)
Robotic pool cleaner	~$599	~$1,000–$1,400	~$1,800–$2,299	Aiper Scuba X1 Pro Max (~$1,800–$2,299)
Companion / social robot	$699.99	—	~$2,900 (+ subscription)	Sony Aibo ($2,899.99)

Source: Vendor pricing pages and tier-1 reviews (iRobot, Roborock, Narwal, Navimow, Mammotion, Aiper, Sony, SwitchBot), observed June 2026.

Reference: Figure 4.1 shows that every segment has roughly a 4x–8x spread between entry and flagship, with AI-heavy features sitting in the top band.

What AI features cost

Across segments, the most advanced AI capabilities are reliably the most expensive. In vacuums, the jump from a $799 dual-sensor unit (eufy X10 Pro Omni) to the $2,600 Saros Z70 buys a robotic arm and the most sophisticated obstacle avoidance. The premium navigation tier — LiDAR plus RGB camera plus on-device obstacle recognition — clusters at $1,300–$1,600 (Narwal Flow at $1,299–$1,599, Roborock Saros 20 at $1,599.99, SharkNinja PowerDetect UV Reveal at $1,299.99). Hot-water mop-washing docks (SharkNinja ThermaCharged at 185°F; Roborock RockDock at 212°F) are a premium-tier feature.

In mowers, wire-free RTK and LiDAR navigation define the price gradient: the wired-boundary era is effectively over at the premium tier, and antenna-free network-RTK is the marketing differentiator on Navimow's higher-priced X-Series. In companion robots, the AI is the product: Aibo's $300/year subscription and KATA's optional $15/month plan show that companion-robot AI is increasingly sold as a recurring service, not a one-time feature.

Tariffs and price volatility

Pricing in this category was unusually volatile in 2025–2026 because of trade policy. A round of U.S. tariffs announced in April 2025 reached up to 125% on Chinese-made goods, roughly doubling landed cost for affected units. Roborock's Saros Z70 rose from about $1,899 to $2,600. iRobot reported roughly $23 million in tariff costs, a contributing factor in its bankruptcy. As conditions stabilized in 2026, Ecovacs cut U.S. prices by up to 45% ($50–$450 per unit), explicitly attributing the cuts to removed tariff costs (Vacuum Wars; PR Newswire; 9to5Toys). The practical consequence for consumers is that observed prices in this report are unusually time-sensitive.

Interpretation

The pricing structure rewards reading the segment, not the headline. A buyer can get competent autonomous cleaning at $300–$500, while the $1,500–$2,600 band buys incremental AI — manipulation, better obstacle recognition, hot-water docks — whose marginal value is contested by reviewers. The emergence of subscriptions in companion robots suggests the industry is testing recurring revenue models that have not yet reached cleaning robots, where the one-time purchase remains the norm.

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8. Chapter 5 — Risks and Open Questions

Chapter Highlights

1. Home robots collect detailed interior maps and, increasingly, camera imagery — a documented privacy-exposure surface.
2. In 2024, attackers controlled Ecovacs Deebot units via a Bluetooth flaw, accessing cameras and speakers; Ecovacs patched it in November 2024.
3. Development-unit Roomba images, including an intimate bathroom photo, leaked through a third-party data-labeling chain (reported 2022).
4. Mapping data — precise floor plans of private homes — is a distinct and underexamined data-protection concern.
5. On-device-only processing (Matic) is one architectural response to these risks; cloud-dependent designs retain larger exposure surfaces.
6. Geopolitics and supply chain are material: U.S. tariffs reshaped 2025 pricing, and iRobot's acquisition concentrates the category further in Chinese hands.
7. Market consolidation is advancing: the top five (all Chinese) brands hold close to 70% of smart-vacuum shipments, and the American pioneer is being taken private.
8. Companion-robot launches face execution risk: Samsung Ballie missed its 2025 ship window with no confirmed price.

Overview

This chapter frames the principal risks and open questions descriptively. It does not predict outcomes; it documents what is at stake and footnotes the caveats.

Privacy and data

Home robots are among the most data-rich consumer devices, because they move through private interior spaces and increasingly carry cameras and microphones. Two documented incidents define the public record. First, in 2024, attackers took control of Ecovacs Deebot units across the U.S. through a Bluetooth vulnerability that allowed anyone within roughly 450 feet to inject commands during a brief connection window, potentially accessing the home Wi-Fi network, saved maps, and the camera and microphone; Ecovacs issued a firmware fix in November 2024 (Kaspersky). Second, in a case reported in

2022, 15 images captured by development-unit Roomba J7 robots — including an intimate photo of a person on a toilet — leaked after being sent to a third-party data-labeling firm and posted to private social-media groups (MIT Technology Review, via State of Surveillance). These are not hypothetical risks; they are incidents in the public record.[1]

Mapping data

A distinct concern is the mapping data itself. Robot vacuums build precise floor plans of private homes, and reporting has raised questions about how that mapping data is stored, shared, and potentially monetized (State of Surveillance). This is separate from camera imagery: even a camera-free LiDAR vacuum produces a detailed spatial map of a residence. The data-protection implications of home-floor-plan datasets at scale remain underexamined relative to camera-privacy coverage.[2]

Architectural responses

Vendors are responding differently. Matic processes everything on-device with no cloud upload, marketing privacy as the differentiator. Most mainstream vendors retain cloud components for some features, which preserves a larger attack and data-sharing surface. SwitchBot's KATA ships with an on-device LLM and a physical privacy eye-mask, an explicit hardware acknowledgment of the concern. There is no industry standard; privacy architecture is currently a per-vendor choice.

Geopolitics and supply chain

The category is structurally exposed to U.S.–China trade policy. The 2025 tariff round (up to 125%) materially raised U.S. prices and was a contributing factor in iRobot's bankruptcy ($23M in tariff costs). The subsequent 2026 stabilization let Ecovacs and others cut prices. Because manufacturing is concentrated in China — to the point that the American pioneer's contract manufacturer is acquiring it — the category's U.S. pricing and availability are sensitive to policy changes outside any vendor's control.

Market consolidation

Consolidation is advancing on two fronts. Concentration: the top five smart-vacuum brands, all Chinese, hold close to 70% of global shipments (IDC), leaving non-Chinese vendors competing for a shrinking remainder. Ownership: iRobot's acquisition by Shenzhen Picea Robotics removes the last large independent American robot-vacuum brand. The open question is whether any non-Chinese vendor can sustain a volume position in cleaning robotics, or whether the remaining Western players retreat to niches (modular outdoor, privacy-first, premium incumbency, companion).

Execution risk in new categories

Companion robots carry the clearest execution risk. Samsung's Ballie, announced for a summer-2025 launch on Google Gemini, slipped past that window with no confirmed price or new date as of latest reporting. This illustrates a broader open question: whether the high-growth forecasts for companion and social robots (17%–20% CAGR) reflect shipping products or announced ambitions. The eldercare driver (WHO: 1 billion+ people aged 60+ by 2030) is real, but the products that would serve it are largely still emerging.

Interpretation

The risks are concrete where data is concerned (two documented breaches, an underexamined mapping-data question) and structural where geopolitics and consolidation are concerned (a category now ~70% Chinese-branded with its American pioneer acquired by its Chinese manufacturer). The open questions — whether privacy architecture standardizes, whether any Western vendor holds volume share, and whether companion robots ship at the scale their forecasts imply — will define the next phase of the market. This report takes no position on how they resolve.

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9. Appendix

A. Vendor Quick-Reference Table

Figure A.1 — Featured consumer-robotics vendors (descriptive, unranked)

#	VENDOR	HQ	FOUNDED	PRIMARY SEGMENT(S)	REPRESENTATIVE FLAGSHIP & PRICE (USD, JUN 2026)
1	iRobot	Bedford, MA, USA	1990	Robot vacuum/mop	Roomba Max 705 Combo (~$899.99); in Chapter 11, acquired by Picea
2	Roborock	Beijing, China	2014	Robot vacuum/mop	Saros Z70 (~$2,600, robotic arm)
3	Ecovacs	Suzhou, China	1998	Vacuum, mower, window, pool	DEEBOT X12 OmniCyclone ($1,499.99 list)
4	Dreame	China	2017	Vacuum, mower, pool	L60 Pro Ultra (~$1,399.99)
5	Narwal	China	2016	Robot vacuum/mop	Narwal Flow (~$1,299–$1,599)
6	eufy / Anker	Shenzhen, China	2016 (brand)	Vacuum, mower, security	X10 Pro Omni ($799.99)
7	SwitchBot	Tokyo, Japan (intl HQ)	2015	Home robots, companion	KATA Friends ($699.99)
8	Aiper	Shenzhen, China	2017	Robotic pool cleaner	Scuba X1 Pro Max (~$1,800–$2,299)
9	Yarbo	Ronkonkoma, NY, USA	2015	Modular yard robot	Complete unit (~$6,000)
10	Mammotion	Shenzhen, China	2022	Robotic mower, pool	LUBA 2 AWD 10000X ($3,449)
11	Matic	Mountain View, CA, USA	~2017	Robot vacuum/mop (vision-only)	Matic ($1,495–$1,795)
12	SharkNinja / Shark	Needham, MA, USA	—	Robot vacuum/mop	PowerDetect UV Reveal ($1,299.99)
13	Segway / Navimow	(Segway-Ninebot)	2015	Robotic lawn mower	X-Series ($1,839–$3,599)
14	Sony Aibo	Japan	— (ERS-1000)	Companion robot	Aibo ERS-1000 ($2,899.99 + $300/yr)
15	Samsung	South Korea	—	Companion + vacuum	Jet Bot Combo AI ($1,699); Ballie (price TBA)

Source: Vendor spec/pricing pages and tier-1 reviews, observed June 2026. Founding years from documented brand histories. "—" indicates a figure not applicable or not separately confirmed.

Reference: Figure A.1 consolidates the vendor chapter for quick scanning; it is descriptive and intentionally not rank-ordered.

B. Glossary

- **CAGR (Compound Annual Growth Rate):** the smoothed annual growth rate over a multi-year period; used by all cited research firms for forecasts.
- **LiDAR (Light Detection and Ranging):** laser time-of-flight sensing that builds spatial maps; the baseline navigation technology for mid-to-premium robot vacuums.
- **SLAM (Simultaneous Localization and Mapping):** the algorithmic process by which a robot builds a map of an unknown space while tracking its own position within it.
- **RTK (Real-Time Kinematic):** a satellite-positioning enhancement that achieves centimeter-level accuracy; used by wire-free robotic mowers in place of buried boundary wire.
- **Network-RTK / antenna-free RTK:** an RTK variant (marketed by Segway as EFLS) that uses cellular network corrections rather than an on-site antenna, functioning under tree cover and near buildings.
- **On-device / edge AI:** inference performed locally on the robot rather than in the cloud, reducing latency and data-exposure surface.
- **Pa (Pascal):** the unit used to state vacuum suction power; flagship robot vacuums rose from ~8,000 Pa (2024) to 30,000+ Pa claims (2026).
- **Time-of-flight (ToF):** a sensing method that measures distance by timing reflected light; the basis of LiDAR and of some camera-assist obstacle systems.
- **Companion / social robot:** a robot whose primary function is interaction and presence (e.g., Sony Aibo, Samsung Ballie, SwitchBot KATA) rather than a household chore.
- **Smart cleaning robot (IDC category):** IDC's classification spanning robot vacuums plus adjacent cleaning robots (window, pool, mower), broader than "robot vacuum" alone.

C. Source Index (principal sources cited)

- International Federation of Robotics (IFR), *World Robotics 2025 — Service Robots* (press release; executive summary), October 2025.
- IDC (International Data Corporation): smart-vacuum shipment and market-share data, 2024–2026 (IDC blog; PR releases; via China Daily and Yahoo Finance).
- Market sizing: Grand View Research, Fortune Business Insights, Mordor Intelligence, Global Market Insights, Technavio, Research and Markets, The Business Research Company, Cognitive Market Research, SNS Insider, Verified Market Reports, Business Research Insights, Roots Analysis, Future Market Insights, Straits Research.
- Vendor and product: iRobot newsroom/deals; Roborock (PR Newswire); Ecovacs (PR Newswire); Dreame (dreametech.com; T3; Tom's Guide); Narwal (us.narwal.com; TechRadar); eufy/Anker (eufy.com; Wikipedia); SwitchBot (PR Newswire; us.switch-bot.com); Aiper (The Pool Nerd; Digital Trends); Yarbo

(Consumer Reports; PR Newswire); Mammotion (9to5Toys; AndroidGuys; PR Newswire); Matic (maticrobots.com; TechCrunch; Tracxn); SharkNinja (ir.sharkninja.com; Vacuum Wars); Segway Navimow (navimow.com); Sony Aibo (us.aibo.com; Keyirobot); Samsung Ballie/Jet Bot (9to5Google; SamMobile; Tom's Guide; TechHive).

- Corporate/macro: Manufacturing Dive, NPR, Reason (iRobot Chapter 11 / Picea acquisition); Vacuum Wars, 9to5Toys (tariffs and pricing).
- Privacy/security: Kaspersky (Ecovacs Bluetooth vulnerability, 2024); MIT Technology Review via State of Surveillance (Roomba image leak, 2022).
- Technology: Vacuum Wars, Dreame, Narwal, Matic (navigation and obstacle-avoidance capabilities).

End of report. Prepared by BestAIFor Research, 2026-07-01.

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1. The Ecovacs vulnerability was patched via firmware in November 2024; the Roomba image leak involved development units and a third-party labeling vendor, not shipped consumer units. Both are cited as evidence of the category's exposure surface, not as evidence that any specific current product is insecure. ↩
2. No published figure quantifies the scale or commercial use of home-mapping datasets; this is identified as an open question, not a measured risk. ↩