



2025年 全球洗地机市场月度追踪

2025年10月

© 2025 Frost & Sullivan. All rights reserved

2025年上半年洗地机行业发展关键词



空间触达升级

洗地机从“平面拖洗”走向对复杂空间的适配，突出低姿态平置（接近 180°）、贴边几何与全幅滚刷开口，提升沙发/柜底与墙边等低矮、边界区域的到达率，缩小残留带。



全链路自动化

从“洗—吸—刮—烘—收纳”形成闭环，基站内集成热洗、热风快烘、自动配液与污水封闭处理，减少用户参与与维护频次，让湿态深清具备“放置—复位”的标准化体验。



多传感发展趋势

多传感融合（脏污/地材识别、流量与阻力反馈等）驱动水量、滚刷与吸力的自适应控制，并结合区域/用户偏好学习，逐步实现从“参数预设”到“场景自决策”的作业逻辑升级。



热洗/蒸汽主流化与高端化

清洁温度普遍提升至 40-90 °C 区间，部分机型引入蒸汽与热烘协同，强化去油、抑味与速干能力；与材料与温控策略配合，兼顾地材安全与卫生感知。



协同效应明显

以“烹饪结束、餐后、入户泥水、宠物意外”等事件为触发，结合家居中枢与分区策略调用快速清洁；在周期层面与扫地机器人编排，实现日常维持+即时处置+周期深清的节奏分工。



企业全球化进程加快

以 CES/IFA 等国际节点为基准统一发布，官网直销与电商并行上新；多 SKU 适配全球不同电压与价位带；多国际自媒体矩阵推广压缩从曝光到转化的周期。

2025年上半年重点新品与技术发布盘点

2025年上半年头部品牌新品发布

品牌	新品机型	发布时间	清洁技术亮点	是否真躺平	自清洁方案	目标人群
<div><div>DREAME</div><div>追觅</div><div>追觅 Dreame</div></div>	T50 Ultra	2025-03	<ul style="list-style-type: none">灵宠除臭泡沫洗地；AI机械臂2.0贴边/入角；瑞士PPA割毛齿刃2.0防缠；100℃远红外热风烘干	是 (贴底清洁能力强)	自清洁 + 100℃热风烘干	养宠/异味重、追求旗舰与低维护
<div><div>tineco 添可</div><div>添可 Tineco</div></div>	FLOOR ONE S9 Artist Steam	2025-01	<ul style="list-style-type: none">140℃高温蒸汽直达地面；180°真躺平；机身薄至约12.85cm；AI助力；2分钟自清洁→85℃热风快干	是	自清洁 + 热风快干 (85℃)	重油污/杀菌诉求、快干与低维护偏好
<div><div></div><div>石头 Roborock</div></div>	F25 / F25 ACE / ACE Combo	2025H1	<ul style="list-style-type: none">JawScrapers零缠绕；FlatReach 2.0真躺平SlideTech 2.0助力；热水自清洁+烘干	是	热水自清洁 + 滚刷烘干 + 底座固液分离	长发/宠物家庭、追求低维护与贴边入角
<div><div>NARWAL</div><div>云鲸</div><div>云鲸 Narwal</div></div>	F2 / F2 超能版	2025-02	<ul style="list-style-type: none">“机身轻集污”维护思路；便捷过滤袋 + 抑菌祛味盒；180°躺平；	是	轻集污 + 滤袋/祛味盒 (低维护)	价敏家庭、异味治理与低维护偏好

2025年上半年洗地机新品节奏，整体从“参数堆叠”转向围绕场景的“工程化闭环”

- 各家在预处理—执行—快干收纳的链路上趋于标准化。由此形成两条明显分化的技术取向：一类侧重“前端预处理+边界强化”（提升一次通过率与边界完成度），一类强调“低维护与快干”（降低日常打理成本与收纳焦虑）。
- 两者正在向中端价位下沉并彼此借鉴融合。面向人群与地域，重油污/高频烹饪家庭、小户型与南方潮湿、宠物/长发等典型场景被进一步明确，产品话术也从“吸力/转速”转为“边角到位、干燥时间、次日无味、维护时长”的可量化体验指标。
- 总体看，行业竞争焦点正在从“峰值能力”过渡到“综合效率”：谁能用更少的人为干预、更低的维护成本，稳定实现一次通过与边界完成度，同时把干燥和异味控制到位，谁就更有机会在中高端价位获得口碑与溢价。

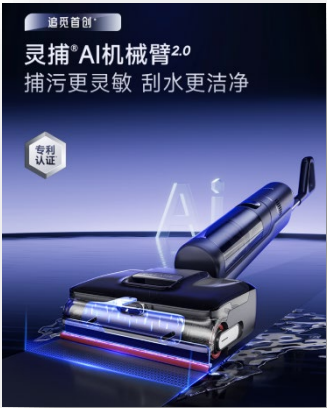
追觅洗地机：核心功能与配置助力完成清洁闭环

从近期产品迭代看，洗地机正在由“参数竞争”转向“流程闭环”。

主流做法是在预处理、执行和收尾三个阶段形成标准路径：前端通过定点泡沫或蒸汽降低油污黏附，执行阶段提升滚刷效率并加强贴边/入角覆盖，收尾阶段把自清洁、挤干与热风烘干做成固定流程。行业评价也逐步从单一吸力、转速，转到一次通过率、边界完成度以及自清洁后的干燥与气味表现等更贴合日常体验的指标。

在具体场景上，边界清洁能力成为突破口。

低腔体与真躺平形态已经普及，主动贴边或入角结构开始向更大区间下沉，用于缩小贴边距离、提高桌椅脚与墙角的触达稳定性。



追觅 T50 Ultra

- 行业常见：拐角/踢脚线残留
- 行业常见：滚刷缠毛费时
- 行业常见：自清洁仍返味

- 追觅：AI 机械臂 2.0 入角/三侧贴边
- 追觅：PPA 割毛齿刃 2.0 自动破断
- 追觅：100℃远红外热风 + 抑味组件

具有多元能力的服务商在多产品中脱颖而出



灵宠除臭泡沫洗地

- 定点泡沫直击异味/顽渍，先溶后洗减少反复。
- 宠物/厨房一遍过更有把握。

行业常见：靠强清洁剂与反复往返
追觅：泡沫预溶+同步吸洗，减少残留

100℃ 远红外热风烘干

- 自清洁后迅速烘干，抑味抑菌。
- 次日使用仍是清爽刷头。

行业常见：湿刷久放返味
追觅：高温热风减少二次污染与异味焦虑

AI 机械臂 2.0 贴边入角

- 三侧贴边，桌椅脚/墙角边界“抠干净”。
- 窄边距 + 入角路径覆盖更完整。

行业常见：贴边距离大、拐角“走神”
追觅：主动伸展+路径优化，边角覆盖更稳

全链路自清洁闭环

- 喷洗→刮洗→回洗→烘干一体化。
- 作用到滚刷/管路/污水路径。

行业常见：自清洁后仍需手洗细节
追觅：闭环把“收尾工作”也做完

瑞士 PPA 割毛齿刃 2.0（防缠）

- 长发/宠物毛自动破断排出。
- 滚刷效率更稳定，后期维护少。

行业常见：滚刷周期性拆洗
追觅：抗缠绕结构把麻烦挡在日常之外

真躺平 + 助力行走

- 180° 低姿态入底，床/沙发底轻松触达。
- 助力行走，久拖肩颈不吃力

行业常见：躺平角度有限、推行费力
追觅：贴底路线顺畅，轻推即走

追觅洗地机：从场景理解到闭环执行的清洁方案

洗地机的演进正从“替代拖把”转向以流程为核心的“工程化地面保洁方案”。在这一框架下，追觅围绕重油污与地面湿垃圾等高难场景，采用“识别—预处理—执行—快干收纳”的闭环。总体来看，这是一套以结果为导向的系统化做法：尽量减少来回与手工干预，用标准流程交付更可预测的日常清洁体验。

场景理解到闭环执行

阶段	追觅（T50 Ultra）核心技术能力	对应表现
感知	✓ 油渍/污渍强度识别； ✓ 水量/负载/地材传感； ✓ 边角/入角路径识别	重污/木地板/瓷砖等场景自适应出水与吸力； 边角规划优先
预处理	✓ 厨房重污：定点“灵宠除臭泡沫”预溶； ✓ 湿垃圾：大口径导流 + 固液分离	降低油污黏度、减少堵塞与残留；进入“泡沫/重污模式”
执行	✓ AI 机械臂 2.0 三侧贴边入角； ✓ 恒压滚刷 + 双刮条； ✓ 瑞士 PPA 割毛齿刃 2.0 防缠	踢脚线/桌椅脚不漏扫；地面残液少；毛发快速破断排出
快干收纳	✓ 自清洁→100℃远红外热风烘干→抑味组件/固液分离	刷头与管路快速干燥、抑味；次日仍“清爽开机”

代表能力对比（聚焦厨房重污 & 地面湿垃圾）

项目	追觅（T50 Ultra）	行业常规（同价位）	应用示例
重油污去除	• 定点泡沫预溶 + 同步吸洗，减少往返、提升一次通过	• 依赖强清洁剂或反复拖洗	厨房地面/灶台周边油渍
湿垃圾处理	• 大口径吸入 + 导流固液分离，降低卡口/残留	• 入口窄/易缠绕，需人工分拣	米面、菜叶、咖啡渣
边角入角	• AI 机械臂 2.0 三侧贴边/入角，贴边距离更小	• 单侧贴边/大边距，角落留痕	踢脚线/桌椅脚/墙角
快干抑味	• 自清洁→100℃热风烘干 + 抑味组件，次日清爽	• 风干或常温烘干，易返味	梅雨/南方潮湿季

价值不止“洗”，更在于方案闭环

- 识别—预处理—执行—快干收纳”的闭环：
- 前端通过污渍、水量与地材感知决定出水与转速，结合定点泡沫/蒸汽降低黏附；
 - 执行阶段以滚刷效率、贴边/入角触达与防缠结构确保稳定清除；
 - 收尾阶段将自清洁、挤干与较高温度热风烘干常态化，以控制残留与气味。
- 该路径的目标是提升一次通过率并降低后续维护强度，但在能耗、噪声与耗材成本之间仍需权衡，实际效果亦受家庭污渍谱、地材与使用频率影响。



用户需求变化与品牌产品策略的场景化演进

随着洗地机从早期的功能探索期迈入全球家庭的常态化应用阶段，用户的关注点正从“能拖干净”逐步演变为“无痕速干、一次通过、用得省心、收纳占地小”。相较于过去只盯着吸力、水量、转速等参数，当前用户更聚焦日常使用中的操作负担、清洁完整性与家居/地材适配能力。这些新诉求正在重构洗地机的产品设计逻辑——从强调单项指标的突破，转向**解决具体生活场景的清洁难题**：厨房重油污、宠物异味与毛发缠绕、地面湿垃圾（米饭/面条/菜叶）、床/沙发底低姿态触达……主流品牌正围绕“**更干净、更省事、更适配**”的方向，通过**结构创新、系统闭环与感知升级**，实现功能配置与用户需求之间的深度对齐。

核心场景	核心用户诉求	背后期望	对应产品策略	代表产品
无痕地面、速干无味 （厨房重油污/宠物家庭/梅雨潮湿）	<ul style="list-style-type: none">拖完地不黏脚、不留水痕，收纳不返味	<ul style="list-style-type: none">清洁→自清洁→烘干→收纳形成闭环。次日再用仍是“清爽刷头”	<ul style="list-style-type: none">✓ 高温介质或化学机理：蒸汽/定点泡沫“先溶后洗”，加速油渍、异味分解。✓ 结构脱水：恒压滚刷+双刮条/刮唇提高出水率，减少地面残水。✓ 维护闭环：自清洁→热风烘干（≈85-100℃）→抑味组件/固液分离，降低返味与二次污染。	追觅 T50 Ultra （定点除臭泡沫+高温烘干）
清洁完全、一次通过 （米粒、酱汁、头发/猫砂混合污）	<ul style="list-style-type: none">干湿混合脏污一遍搞定，减少返工与时间浪费	<ul style="list-style-type: none">在复杂杂质/黏腻物上提高清洁成功率与边角覆盖率	<ul style="list-style-type: none">✓ 动力与控制：大吸力/高频滚刷；污渍/水量传感自适应吸力出水。✓ 防缠绕：割毛齿刃/零缠绕刮条，长发/宠物毛不憋机。✓ 边角能力：三面贴边/入角结构/机械臂，缩小贴边距离，踢脚线/桌椅脚不漏扫。	追觅 T50 Ultra （贴边/入角强化） 石头 F25 ACE/Combo（自清洁/烘干）
空间友好、真躺平 （床底/沙发底/矮柜下）	<ul style="list-style-type: none">不搬家具也能把底部清干净	<ul style="list-style-type: none">低姿态进深+顺手的操控力，覆盖盲区同时不费劲	<ul style="list-style-type: none">✓ 姿态结构：180°真躺平+低腔体厚度（≈12-13 cm 贴底通行）。✓ 机动性：自驱/助力行走与小半径转向，在狭窄空间更省力。	追觅 T50 Ultra （低腔体贴底、真躺平） 添可 S9（真躺平） 云鲸 F2（轻量化+躺平）
易知易控、低维护 （家里长辈/保洁阿姨也能用）	<ul style="list-style-type: none">开机就会用、提示清楚、打理少	<ul style="list-style-type: none">降低认知负担与维护频次，机器长期处于“状态在线”	<ul style="list-style-type: none">✓ 使用指引：屏显/灯环/语音给出水量、污渍识别与维护提示。✓ 维护设计：一键自清洁闭环（喷洗→刮洗→回洗→烘干）；过滤袋/祛味盒/固液分离减少手洗步骤。	追觅 T50 Ultra（自清洁+高温烘干闭环） 石头 F25（热水自清洁+烘干+固液分离）

产品的服务焦点不再只是一味“功能升级”，而是回到“为谁设计、在什么场景使用、使用强度与时长”等更可持续的价值命题。未来的竞争将从“谁的旗舰参数更猛”，转向“**谁更理解细分人群的真实需求，并以匹配的技术、合适的设计与合理的价格，提供稳定高效的日常体验**”。

在这一进化过程中，洗地机正从“高性能硬件”走向“以人为中心的家庭地面保洁系统”：它不只是一台会“洗”的机器，更是一套围绕**无痕速干、一次通过、真躺平触达、低维护闭环**构建起来的解决方案——这，才是“新家电时代”的真正序幕。

直线与扁平化外观设计服务边界清洁，家居化外观表达减少“工程感”外露

2025年上半年全球洗地机新品示例机型



追觅 Dreame
H15 Pro / H15 Pro Heat



添可 Tineco
FLOOR ONE S9 Artist Steam



小米
米家无线洗地机 4 Max



石头 Roborock
F25 系列



BISSELL
CrossWave Edge

设计特点

前端全幅开口滚刷、边缘触达结构、热水洗地（Heat 版）、一体式维护底座。

低姿态平置结构（接近 180°）、窄高机头截面、集成蒸汽清洁与可视化交互环。

“活水贴边”结构、前段直角化几何开口、热水自清洁与快烘。

FlatReach 低姿态机头、<1 mm 贴边设计、助力行走轮组、热洗/热烘自清洁底座。

直线化前唇与侧缘几何以提升贴墙/踢脚线覆盖、跨材质地面适配。

2025年上半年全球洗地机设计语言特征

- 1
低姿态可达结构
机头厚度与关节位置后移，形成接近 180° 的平置清扫姿态；前段轮廓更扁平，以进入沙发/柜底等低矮空间。
- 2
边缘覆盖
前端与侧缘趋于直线化/削边处理，滚刷开口加宽并延伸至边缘；部分机型配置独立的“贴边/清洁臂”机构，以缩小对墙/踢脚线的残留带。
- 3
助力与感知的外观设计
较大直径后轮罩、低重心水箱布局；以灯环、图标或小型屏进行状态提示，传达“脏污感知/助力行走/语音提示”等功能存在，而不过度外显机械细节。
- 4
深色色系外观设计：
以消光深色为基调（深灰、黑），辅以小比例金属饰条或低饱和点缀色；整体对比度降低，适配客厅长期摆放的家居环境。
- 5
一体化维护底座
底座体块向“家电化”演变，外形多为矩形圆角的单元体，内部集成热洗、热烘、配液与污水处理；外表面减少缝线与开口，强调维护流程的闭环性。
- 6
热能清洁表达
蒸汽或热水能力成为卫生性能的可视化锚点；在外观上通过透明仓体、温度标识与导风/导流件进行识别，减少冗余装饰。

洗地机成为全屋智能清洁解决方案的关键组成部分

全屋智能清洁系统角色分工			
设备	扫地机器人	洗地机	蒸汽/除螨仪
核心职责	覆盖式日常保洁： 干态灰尘、碎屑、 毛发的自动化吸扫； 地图维持	湿污/重污去除、边 缘补强与定期深清； 滚刷+活水循环；自 清洁与快烘	高温杀菌或织物深 清
最佳场景	大面积硬质地面、 日常维持	厨房油污、餐后饮料 /汤汁泼洒、入户泥 渍、宠物足印/排泄 物	卫生间/缝隙/织物
使用频率	每日/隔日	突发事件即时+每周/ 双周深度	每周/月
主要局限	对湿黏污、油渍与 突发泼洒处置能力 有限；角落、墙边 残留	对湿黏污、油渍与 突发泼洒处置能力 有限；角落、墙边 残留	稳态维护，效率受 预热与表面材质限 制
联动点	按时/按区清扫； 与门磁/存在传感 触发；与洗地机 “交接”未清洁区 域	与机器人共享禁区/ 地图；与基站热洗/ 烘干编排；与传感 器（漏水、厨房区 域）联动	与深清日程、材质 库策略联动

洗地机是“全屋智能清洁解决方案”的关键环节

在“全屋智能清洁”体系中，家庭清洁不再是单一设备的线性作业，而是由扫地机器人、洗地机、除螨/蒸汽类设备与智能基站/平台共同组成的协同网络。其中洗地机承担“重污处理、湿态清洁、边界补强与周期性深度维护”的角色，是连接日常保洁与深度清洁之间的关键枢纽：它通过滚刷机械力、活水循环与自清洁/快烘等机制，完成对湿污、黏污与油污的高效去除，并以较低的准备与收尾成本适配用户的即时性与差异化习惯。

- 1 重污与黏污的机械-化学-水洗协同
- 滚刷切削与挤压配合活水冲洗，使番茄酱、酱油、奶茶、食用油、宠物排泄等高黏/有色/含脂类污渍在一次通行内得到拆解与带离；同时通过污清分流与自清洁，降低二次污染与气味残留的风险。
- 2 边缘与近墙补强清洁
- 前端直线化开口、贴边结构与低姿态（接近平置）使其对踢脚线、墙角、家电/家具下沿残留带有更高命中率，弥补扫地机器人在边缘/立体死角的“漏收”。
- 3 从“日常维持”到“深度维护”的桥梁
- 洗地机既能即时应急（突发泼洒）也能周期深清（每周/双周），把高频自动化（机器人）与低频专业化（蒸汽/护理）之间的空档填满，形成闭环的卫生策略。
- 4 更贴合多元家居与使用习惯
- 硬质地面种类（瓷砖、复合木、石材、PVC）与家庭文化习惯（饭后湿拖、入户泥水管理、宠物护理）差异显著。洗地机的水量/流速/滚刷材质与干燥策略可按区域与用户偏好调参，兼顾效率与安全。

2025H1 洗地机全球化：展会同步发布、渠道快上新、多 SKU 本地化与卖点同化

展会带动全球首发与叙事统一

- 添可在 CES 2025 发布 FLOOR ONE S9 Artist Steam，将“高温蒸汽+极简机身”作为国际叙事的核心，官方新闻与媒体报道并行释放，显性面向海外市场。
- 石头在 CES 2025 同期推出 F25 系列湿干洗地机，官方物料明确强调“FlatReach 低姿态”“高温自清洁/烘干”等国际化卖点，属于机器人品牌横向扩品类、直连海外渠道的典型案列。

官网直销 + Amazon 上新，缩短出海的“触达—转化”链路

- 追觅 H15 Pro Heat 在海外采用“官网介绍页 + Amazon 上市”的组合，既利于品牌自叙事也便于本地即时成交与口碑沉淀。
- 石头 F25 与多子型号（ACE/ALT/RT/GT 等）在北美官网分页面展示，同时出现在 Amazon 渠道，显示出多 SKU 并行、按渠道差异化的出海策略。

卖点同化：高温/贴边/自清洁成为跨区域的“卫生通用语言”

- 高温能力：追觅 H15 Pro Heat 标注 85 ° C 热水清洗与 90 ° C 干燥；石头 F25 系列底座标注 194 ° F (≈90 ° C) 热洗/热烘；这些指标在北美/欧洲的宣传与规格页中同频出现，便于跨市场对比。
- 贴边/到角：BISSELL 的 ZeroGap 命名、石头的“<1 mm 贴边”（见其系列页措辞）与小米 4 Max 的“活水贴边清洁臂”（中国市场）共同指向“边界覆盖”的全球化表达。

“机器人生态→洗地机”的品牌外延

- 机器人头部品牌将洗地机并入其多设备生态并统一进站（App/基站逻辑/售后），以机器人既有的全球渠道推动洗地机出海，如石头在 CES 的新闻中将 F25 系列与机器人新品并举。

2025年上半年洗地机全球化轨迹总结

展会/节点全球同步发布

以 CES 为锚点，将新品直接面向北美/欧洲媒体与分销商。

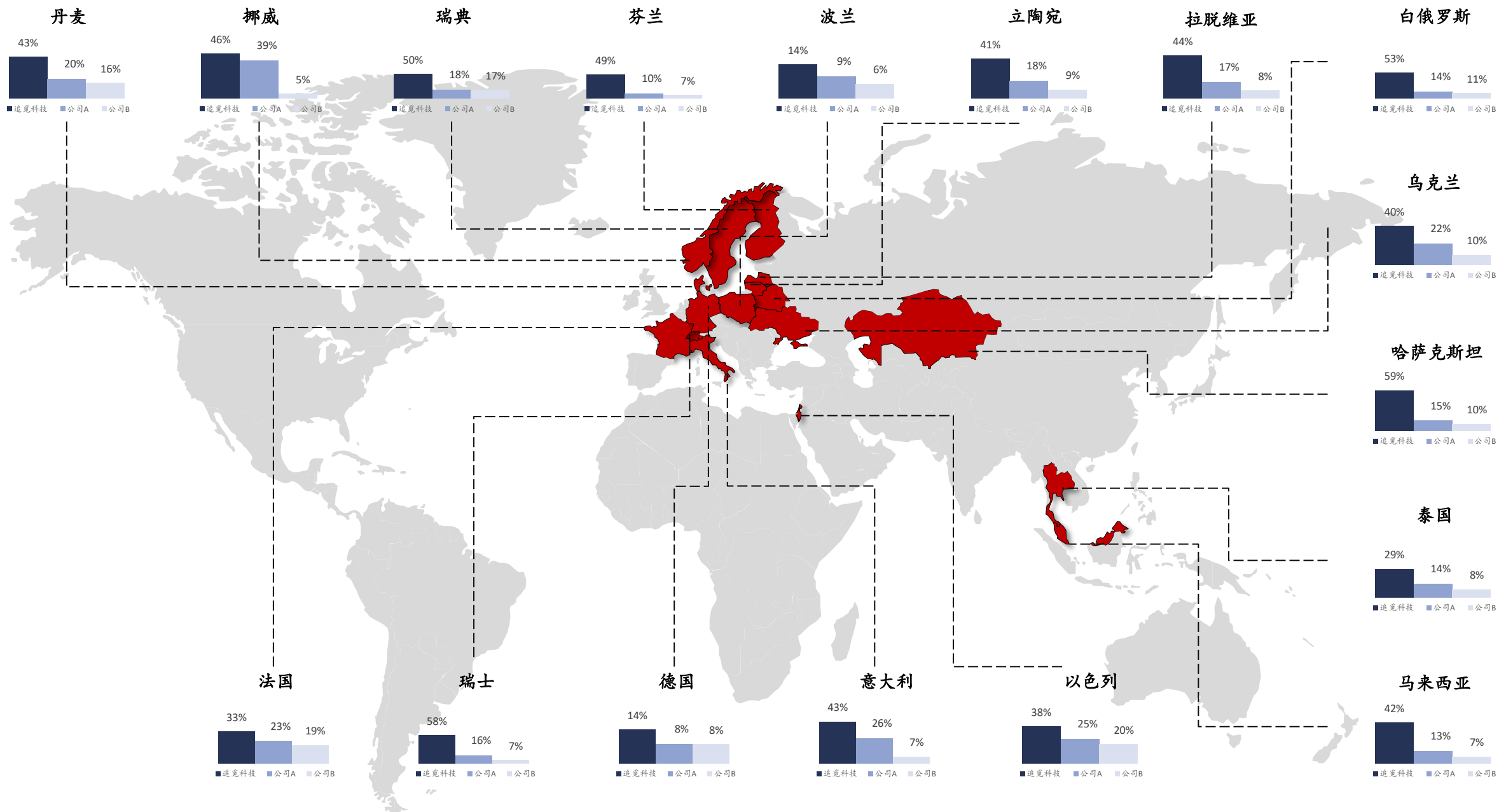
渠道下沉与 SKU 区隔

通过自营官网 + Amazon/本地零售形成“快上架、快评测”的扩散路径，并以多子型号适配地区法规与价位带。

“高温/贴边/自清洁”三大卖点的全球同化

以热洗/蒸汽、边缘覆盖和一体化维护底座作为跨文化的卫生与效率共识。

2025年7月，按销售额计，追觅科技的洗地机产品在全球17个国家问鼎市场占有率第一



资料来源：公开资料整理、沙利文分析



2025

Global Wet-Dry Vacuum Market Monthly Tracker Report

October 2025

© 2025 Frost & Sullivan. All rights reserved

H1 2025: Industry Keywords for Wet-Dry Vacuums



Upgraded spatial reach

Wet-dry vacuums are moving from “flat mopping” to better adaptation to complex spaces. Key themes include low-profile lay-flat designs (approaching 180°), edge-hugging geometries, and full-width roller-brush openings to improve reach under sofas/cabinets and along walls, reducing leftover strips.



Hot-wash / steam mainstreaming and premiumization

Cleaning temperatures commonly rise to the 40–90 °C band. Some models combine steam with hot-air drying to boost degreasing, odor suppression, and fast drying. With the right materials and temperature-control strategies, these features balance floor safety with hygiene perception.

Source: Public information compilation and Frost & Sullivan analysis



End-to-end automation

A closed loop of “wash — suction — squeegee — dry — dock.” Base stations integrate hot-wash, rapid hot-air drying, auto-dosing, and sealed dirty-water handling to minimize user intervention and maintenance frequency, delivering a standardized “place — replace” experience for wet deep-cleaning.



Visible orchestration synergies

Triggered by events such as “post-cooking, after meals, muddy entry, pet accidents,” quick cleans can be called via home hubs and zone strategies. On a cadence level, wet-dry vacuums are orchestrated with robot vacuums to divide labor among daily upkeep, instant spot handling, and periodic deep cleaning.



Multi-sensor trend

Sensor fusion (soil/floor-type recognition, flow and resistance feedback, etc.) drives adaptive control of water flow, brush, and suction. Combined with regional/user-preference learning, operating logic is shifting from “parameter presets” to “scene-based self-decision.”




Accelerating globalization

Unified launches pegged to CES/IFA; new releases through both official DTC sites and e-commerce; multiple SKUs tuned for different voltages and price bands worldwide; and broad international social-media matrices compress the cycle from exposure to conversion.

H1 2025 Key Product and Technology Releases — A Review

H1 2025 new releases by leading brands.

Brand	New model	Release time	Key cleaning-tech highlights	True lay-flat?	Self-cleaning solution	Target users
<div><div>DREAME</div><div>追觅</div><div>追觅 Dreame</div></div>	T50 Ultra	2025-03	<ul style="list-style-type: none">Pet-odor-removal foaming floor washAI Mechanical Arm 2.0 for edge-hugging and corner entrySwiss PPA anti-tangle cutting teeth 2.0100 ° C far-infrared hot-air drying	<ul style="list-style-type: none">Yes (strong under-bed cleaning)	<ul style="list-style-type: none">Self-cleaning + 100 ° C hot-air drying	<ul style="list-style-type: none">Pet/odor-sensitive households; users who want easy handling and low maintenance
<div><div>tineco 添可</div><div>添可 Tineco</div></div>	FLOOR ONE S9 Artist Steam	2025-01	<ul style="list-style-type: none">140 ° C high-temperature steam to the floor180° true lay-flatBody as thin as ~12.85 cmAI assistance • 2-minute self-cleaning → 85 ° C hot-air quick dry	<ul style="list-style-type: none">Yes	<ul style="list-style-type: none">Self-cleaning + hot-air quick dry (85 ° C)	<ul style="list-style-type: none">Heavy grease / frequent cooking; preference for fast drying and low maintenance
<div><div></div><div>石头 Roborock</div></div>	F25 / F25 ACE / ACE Combo	2025H1	<ul style="list-style-type: none">Jaw Scrapers seam scrapingFlat Reach 2.0 true lay-flatSlide Tech 2.0 assisted pushHot-water self-cleaning + quick dry	<ul style="list-style-type: none">Yes	<ul style="list-style-type: none">Hot-water self-cleaning + roller drying + base-station solid-liquid separation	<ul style="list-style-type: none">Long-hair/pet households; pursue low maintenance and strong edge/corner reach
<div><div>NARWAL</div><div>云鲸</div><div>云鲸 Narwal</div></div>	F2 / F2 Super Edition	2025-02	<ul style="list-style-type: none">“Light internal-soiling” maintenance conceptConvenient filter bag + anti-bacterial/deodorizing cartridge180° lay-flat	<ul style="list-style-type: none">Yes	<ul style="list-style-type: none">Light dirt collection + filter bag / deodorizing box (low-maintenance)	<ul style="list-style-type: none">Price-sensitive households; focus on odor control and low maintenance

In H1 2025, the release cadence for wet-dry vacuums shifted from “spec stacking” to scene-centered engineered closed loops.

- Across brands, the chain of front-end pre-treatment → execution → wrap-up is becoming standardized, forming two clear technology paths:

Pre-treatment + boundary reinforcement to raise one-pass rates and edge completeness;

End-stage cleaning and fast drying to cut daily upkeep costs and storage anxiety.
- These two paths are converging into mid-price bands while borrowing from each other. Target scenes are clearer— heavy kitchen grease, small apartments and humid southern climates, pets/long hair, etc. Product messaging is moving from suction/RPM to measurable experience metrics such as edge coverage, drying time, odor the next day, and maintenance effort.
- Overall, competition is shifting from peak parameters to stable daily performance with lower manual intervention and lower maintenance cost, which is more likely to win reputation and premium in the mid-to-high segment.

Dreame Wet-Dry Vacuums : Core Functions and Configurations That Complete the Cleaning Loop

From recent product iterations, wet-dry vacuums are shifting from “spec competition” to a “process closed loop”.

The mainstream approach standardizes three stages—pre-treatment, execution and wrap-up: at the front end, targeted foam or steam reduces grease adhesion; during execution, roller efficiency is improved and edge/corner coverage is strengthened; in the wrap-up stage, self-cleaning, squeezing and hot-air drying are made routine. Industry evaluation is also moving away from single metrics such as suction or RPM toward indicators that better reflect daily use, including one-pass rate, edge completeness, and drying/odor performance after self-cleaning.

In concrete scenes, edge-area cleaning has become the breakthrough.

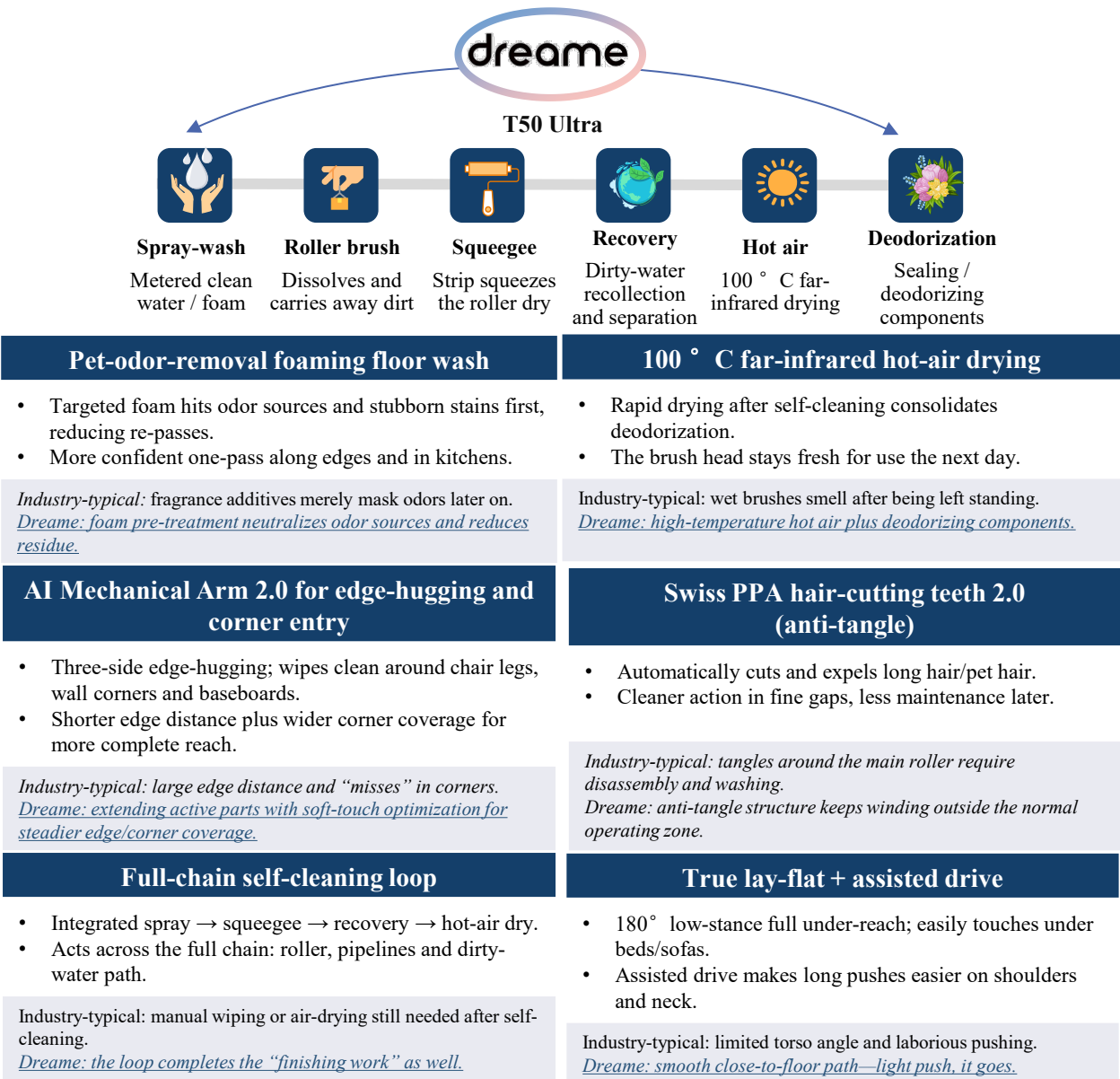
Low-cavity bodies and true lay-flat forms have become common. Active edge-hugging or corner-entry structures are trickling down into broader price bands to shorten edge distance and improve stable reach to baseboards and wall corners in real homes.



Common issues vs. Dreame solutions — T50 Ultra

- Industry-typical: residue around corners/baseboard
→ Dreame: AI Mechanical Arm 2.0 for corner entry and three-side edge-hugging
- Industry-typical: time-consuming roller hair tangles
→ Dreame: PPA cutting teeth 2.0 for automatic hair breaking
- Industry-typical: lingering odor after self-cleaning
→ Dreame: 100 ° C far-infrared hot air + deodorizing module

Core functions in the cleaning loop



Dreame Floor Washer: From Scene Understanding to Closed-Loop Execution

The floor washer is evolving from a “mop replacement” to an engineered, process-centric floor-care solution. Under this framework, Dreame addresses difficult scenarios such as heavy kitchen grease and wet floor trash through a closed loop of identify → pre-treat → execute → fast-dry dock. Overall, it is a results-oriented, systemized approach: minimize back-and-forth and manual intervention, and use standardized flows to deliver a predictable daily-cleaning experience.

From Scene Understanding to Closed-Loop Execution

Stage	Dreame (T50 Ultra) – Core technical capabilities	Observable outcomes
Sensing	• Recognition of oil/soil intensity • Sensing of water volume/load/floor material • Path recognition for edges/corner entry	Adaptive water output and suction for heavy-soil / wood floor / tile scenes; edge and corner routing prioritized
Pre-treatment	• Heavy kitchen grease: targeted Pet-Odor-Removal Foaming pre-soak • Wet trash: large-mouth guidance + solid–liquid separation	Lowers grease viscosity and reduces clogging/residue; switches to “Foam/Heavy-Soil Mode”
Execution	• AI Mechanical Arm 2.0 with three-side edge-hugging and corner entry • Constant-pressure roller + dual squeegee strips • Swiss PPA hair-cutting teeth 2.0 (anti-tangle)	Baseboards/chair legs not missed; less liquid residue on the floor; hair quickly broken and discharged
Fast-dry docking	• Self-cleaning → 100 ° C far-infrared hot-air drying → deodorizing module / solid–liquid separation	Brush head and pipelines dry quickly and suppress odor; fresh and ready to start the next day

Representative Capability Comparison (Focus on Heavy Kitchen Grease & Wet Floor Trash)

Item	Dreame (T50 Ultra)	Industry routine (same price band)	Use cases
Heavy-grease removal	Targeted foaming pre-soak + simultaneous suction/wash; fewer back-and-forth passes; higher one-pass rate	Relies on strong detergents or repeated scrubbing/mopping	Kitchen floor; grease around the cooktop
Wet-trash handling	Large-mouth intake + guided solid–liquid separation, reducing clogs/residue	Narrow inlets / easy tangling, manual sorting required	Rice/noodles, vegetable leaves, coffee grounds
Edges & corners	AI Mechanical Arm 2.0 with three-side edge-hugging/corner entry; smaller edge distance	Single-side edge-hugging / large edge distance; marks left in corners	Baseboards; chair/table legs; wall corners
Fast drying & deodorization	Self-clean → 100 ° C hot-air drying + deodorizing module; fresh next day	Air-dry or room-temperature drying; odor returns easily	Plum-rain season / humid southern climates

The value is not only “washing,” but the closed-loop solution

The closed loop of identify → pre-treat → execute → fast-dry dock:

- Front end:** sensing of stain, water volume and floor material determines water output and speed; targeted foam/steam reduces adhesion.
- Execution:** roller efficiency, edge/corner reach and anti-tangle structures ensure stable removal.
- Wrap-up:** normalize self-cleaning, squeezing and higher-temperature hot-air drying to control residue and odor.

The goal is to raise the one-pass rate and reduce maintenance intensity. Trade-offs remain among energy use, noise and consumable costs, and real-world effects also vary with each home’s soil profile, flooring and usage frequency.



Evolution of Scenario-Based Product Strategies as User Needs Change

As wet-dry vacuums move from early feature exploration to routine, global household use, user focus is shifting from “can it clean” to “streak-free fast drying, one-pass completion, peace of mind in daily use, and small storage footprint.” Compared with earlier attention to suction, water flow, and RPM, users now care more about operating burden, cleaning completeness, and adaptation to home layouts and floor types. These new needs are reshaping product logic—away from parameter stacking and toward solving concrete, everyday scenes: heavy kitchen grease, pet hair and odor, wet floor trash (rice/noodles/leafy scraps), and quick reach under beds/sofas. Leading brands are converging on the direction of “cleaner and faster-drying,” using structural innovation, system closed loops, and sensing upgrades to align functions with user needs more deeply.

Core scenarios → user needs → expectations → product strategies → example models

Core scenario	Core user need	Underlying expectation	Corresponding product strategy	Representative products
Streak-free fast drying (heavy kitchen grease / pet households / humid rainy season)	No wet footprints after cleaning; streak-free finish; dries fast without odors	Self-cleaning + drying that keeps the head fresh the next day; withstands high-frequency kitchen use without “musty/odor” issues	Chemistry + temperature: high-temp or steam plus targeted foam for pre-soak, then clean, then quick dry ; Structure: constant-pressure roller + dual squeegee / strong water extraction to cut floor residue; Drying: self-cleaning → high-temp hot air (≈85–100 ° C) → deodorizing + solid–liquid separation to reduce odor re-emergence	Dreame T50 Ultra (targeted odor-removal foam + high-temp hot-air drying)
Complete clean in one pass (mixed soils such as vomit, sauces, hair, cat-litter)	Fewer re-passes; remove sticky soils and clumps in one go	Lower viscosity after pre-treatment; avoid clogging and wrapping; push easily across complex soils	Power & flow: wide inlet / high airflow & negative pressure; strong pick-up for wet trash; Anti-winding: cutting-teeth / anti-tangle structures; Pipeline: self-clean + base-station separation to keep passages clear; Edge ability: strengthen edge/corner reach so stains do not remain along baseboards	Dreame T50 Ultra (edge/corner reinforcement); Roborock F25 / ACE / Combo (self-clean + drying)
Space-friendly, true lay-flat (under beds/sofas/stairs)	Reach low spaces and keep the top surface clean; smooth under-furniture glide	Posture structure with 180° true lay-flat and low body height (≈12–13 cm) for deep reach; Assisted motion that stays stable and light under furniture	Posture: 180° true lay-flat + low-profile body; Mobility: self-propelled/assisted drive so long pushes feel light while maintaining control in tight spaces	Dreame T50 Ultra (low-cavity heat-pressed body, true lay-flat); Tineco S9 (true lay-flat); Narwal F2 (lightweight + assisted drive)
Intuitive & low-maintenance (elder-friendly / easy daily care)	Clear status and prompts; easy upkeep	Reduce learning cost and maintenance burden; keep the machine in a “ready to use” state	Interaction: large display/voice prompts/water-output tips; Pipeline design: one-touch deep self-clean (or base-station circulation) + filter bag / deodorizing cartridge; Consumables: easy replacement parts for sustained freshness	Dreame T50 Ultra (self-clean + high-temp drying closed loop); Roborock F25 (hot-water self-clean + drying + solid–liquid separation)

The competition focus is no longer mere “feature upgrades,” but returns to **for whom, in what scenes, and at what intensity/duration**—more sustainable value questions. Future competition will shift from “whose headline specs look stronger” to **who understands target sub-segments better** and delivers **stable, efficient daily experiences with matching technology, appropriate design, and reasonable pricing**.

In this evolution, the floor washer is moving from **high-performance hardware** to a **human-centered home floor-care system**. It is not simply a machine that “washes,” but a solution built around **streak-free fast drying, one-pass completion, true lay-flat reach, and low-maintenance closed loops**—the true opening of the **new home-appliance era**.

Low-profile, linear geometry improves edge coverage, while home-centric styling mutes industrial cues

H1 2025 Representative Wet-Dry Vacuum launches (global)



**Dreame
H15 Pro / H15 Pro
Heat**



**Tineco
FLOOR ONE S9 Artist
Steam**



**Xiaomi
Mijia Wireless Floor
Scrubber 4 Max**



**Roborock
F25 series**



**BISSELL
CrossWave Edge**

Design Features

Full-width front intake and edge-reach design; hot wash & dry (Heat); integrated self-care dock.

Near lay-flat ($\approx 180^\circ$) upright with a slim head; steam cleaning; clear visual UI.

Right-angled front with multi-port edge intake for active edge rinsing, plus heated self-cleaning and rapid drying.

FlatReach head with <1 mm edge clearance; assist wheels; hot wash/dry dock.

Straightened front lip and side edges for better wall/baseboard reach; multi-surface use.

H1 2025 Design Language Highlights

- 1 Low-profile access**
Slimmer heads and rear-biased pivots enable near- 180° lay-flat reach under furniture.
- 2 Edge cleaning**
Straight or chamfered perimeters with edge-to-edge intakes; some models add dedicated edge modules to reduce wall-line residue.
- 3 Discreet assist & sensing**
Enclosed rear wheels and low-center tanks, with feedback via light rings, icons, or compact displays; minimal exposed mechanics.
- 4 Subdued dark palettes**
Matte charcoal/black with restrained metal or low-saturation accents to blend into living spaces.
- 5 Integrated maintenance docks**
Appliance-style bases with heated wash/dry, detergent auto-mix, and sealed wastewater handling; fewer openings and a closed-loop service cycle.
- 6 Heat as a hygiene signal**
Steam or hot-water capability positioned as the primary hygiene cue, expressed through clear chambers and temperature indicators rather than decorative elements.

The Wet-Dry Vacuum: Core to Whole-Home Smart Cleaning

Role Allocation Across Devices			
Equipment	Robot Vacuum	Wet-Dry Vacuum	Steam/Anti-mite Device
Core Role	Daily dry pick-up of dust and hair; mapping and navigation.	Removes grease and sticky soils; reinforces edge pickup; on-board water and recovery; heated self-clean	High-temperature sanitization and mite removal on heat-tolerant surfaces and textiles
Best scenes	Large areas, routine upkeep	Kitchens and dining areas, entryway mud, pet accidents and other wet waste; footprints and sticky films	Bathrooms, tiles and grout, bedding and soft furnishings where allowed
Frequency	Daily or every other day	Event-driven spot care plus weekly or biweekly deep cleans	Weekly or monthly
Limits	Poor on sticky or liquid messes; weak edge lift; wall-line residue	With very viscous waste, risks re-deposition if edge control is weak	Condensation; efficacy and coverage limited by material heat tolerance
Linkage	Room/zone scheduling; hands off to the Wet-Dry Vacuum before/after tasks	Triggered by kitchen/entry/pet zones; works with the robot vacuum and the maintenance dock	Used in scheduled deep-clean and seasonal mite-removal cycles

Why the Wet-Dry Vacuum Is the Key Link

In a whole-home intelligent cleaning stack, tasks shift from single devices to a coordinated loop across robot vacuums, Wet-Dry Vacuums, and steam/sanitizing tools under a sensing/control platform. The Wet-Dry Vacuum anchors four jobs—heavy-soil decomposition, wet cleaning, edge reinforcement, and periodic hygiene upkeep—bridging daily upkeep with deep sanitation while reducing user intervention and variability.

- 1 **Mechanics–chemistry–rinse synergy for heavy and sticky soils**
Roller agitation plus detergency/heat and fresh-water circulation disperses and lifts cooking oil, sauces, milk tea, baby food and pet waste in one pass while extracting dirty solution, cutting repeat passes and odor risk.
- 2 **Edge and 3-D reinforcement**
Straight front lips and edge-to-edge intakes improve pickup along skirting and in corners; together with the robot vacuum, coverage gaps at edges/under furniture are closed.
- 3 **Bridge from daily upkeep to deep hygiene**
Instant response to spills, with scheduled hot-wash/hot-dry cycles (weekly/biweekly). It sits between high-frequency robot upkeep and low-frequency steaming/sanitizing to form a layered routine for a cleaner home.
- 4 **Fit for diverse floors and habits**
Performs on sealed wood, laminate, stone and PVC; aligns with household routines such as post-meal cleaning. Water/flow/temperature controls balance fast drying with user safety, especially in compact urban homes with mixed wet/dry zones.

H1 2025 Wet-Dry Vacuum Globalization

Flagship trade shows serve as launch pads and align global messaging

- CES/IFA serve as launch pads; brands frame high-temperature hygiene and low-profile edge reach as core claims.
- PR calendars, media reviews and retail demo assets are coordinated across North America, Europe and Asia for consistent messaging.

DTC + Amazon compress the export path

- Official webstores and Amazon country stores go live in parallel, shortening the awareness-to-conversion cycle.
- Multi-SKU assortments appear simultaneously across regions, signaling voltage/plug/price variants.

Global messaging converges on three pillars: heat, edge reach, and self-maintenance

- Heat: hot-wash or steam ($\approx 85\text{--}90^\circ\text{C}$ / 194°F) positioned for degreasing, odor control and quick drying.
- Edge: low-profile heads, edge-to-edge intakes and sub-millimeter wall clearance highlighted for baseboard coverage.
- Self-care: docks with hot wash, hot-air dry, detergent mixing and sealed wastewater handling—promoted as a closed-loop maintenance system.

Robot vacuum ecosystems expand into the Wet-Dry Vacuum category

- Robot-first brands extend into Wet-Dry Vacuums, aligning apps, docks and voice control for cross-device routines.
- Joint CES campaigns reinforce the integrated “robot vacuum + Wet-Dry Vacuum” proposition.

H1 2025 Globalization Patterns

Synchronized launches

New models are timed to global shows for direct reach into North American and European media and distributor networks.

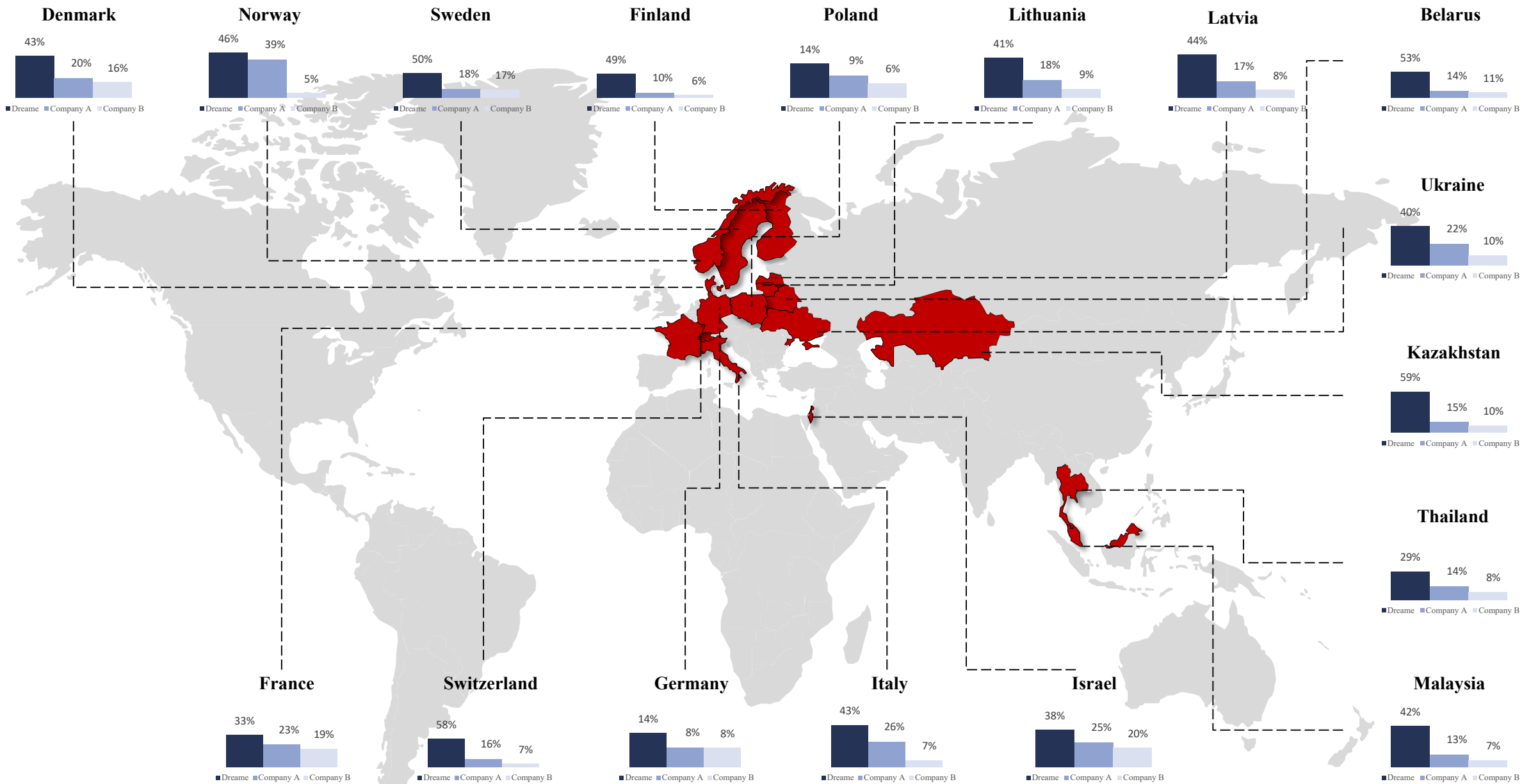
Layered channels, segmented SKUs

Brand DTC, Amazon, and local retail run in parallel to speed launches and shorten iteration; assortments are tailored to regional specs and price tiers.

Harmonized messaging

Three global claims—high-temperature cleaning, edge reach, and self-clean/dry—are standardized, while execution is localized by market.

As of July 2025, Dreame Wet-Dry Vacuums held the No. 1 market share by sales value across 17 countries worldwide.



Source: Public information compilation and Frost & Sullivan analysis