SCOTTS INTERNATIONAL

Barbeque Grill - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 150 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License $4750.00
- Team License (1-7 Users) $5250.00
- Site License $6500.00
- Corporate License $8750.00

Report description:

Barbeque Grill Market Analysis

The barbeque grill market was valued at USD 6.05 billion in 2025 and estimated to grow from USD 6.36 billion in 2026 to reach USD 8.14 billion by 2031, at a CAGR of 5.06% during the forecast period (2026-2031). Steady gains stem from the sector's integration into a wider outdoor recreation economy, which contributed USD 639.5 billion GDP in 2023. Consumer enthusiasm for home-centered leisure, coupled with rising disposable incomes in emerging markets, sustains consistent demand for gas and pellet units even as raw-material volatility challenges producer margins. Industry consolidation accelerates after the Weber-Blackstone tie-up, creating a global heavyweight with deep R&D resources and an expansive distribution footprint. In parallel, smart-enabled grills move rapidly from premium novelty to mass-market expectation as IoT connectivity improves precision, convenience, and brand differentiation.

Global Barbeque Grill Market Trends and Insights

Rising popularity of outdoor cooking in developed economies

COVID-19 shifted leisure patterns toward outdoor pursuits, drawing 7.1 million additional Americans into recreation in 2020 and fueling an 18.9% jump in the broader outdoor economy by 2021. Consumers now view grills as core components of backyard upgrades, often specifying commercial-grade units and multi-zone cook surfaces in new-build plans. Flavor experimentation spans Asian, Italian, and Mexican profiles, encouraging purchases of specialty accessories such as woks and planchas. Premium outdoor kitchens leverage stainless steel, granite, and modular cabinetry to deliver year-round functionality even in colder climates. The barbeque grill market thus benefits from a durable lifestyle shift rather than a transitory pandemic spike.

Increasing availability of multifunctional smart grills

Traeger's WiFIRE platform allows remote temperature control across 2.7 million connected units, illustrating how IoT elevates convenience and food safety. Weber's 2024 Summit Smart Grill layers touchscreen controls and in-hood sensors that automate searing, roasting, and smoking cycles. Predictive maintenance alerts reduce downtime while app-based recipe libraries deepen brand engagement, keeping consumers within proprietary ecosystems. Mid-tier price points now include Bluetooth probes and voice-assistant integration, widening addressable audiences beyond early adopters. As more households value hassle-free precision, smart functionality becomes a baseline expectation rather than a premium upsell.

Fluctuating raw-material (steel & aluminum) prices

Weber posted a USD 330 million net loss in fiscal 2022 after inflation and currency swings inflated input costs, illustrating margin compression when spot steel rises 15-20% within one quarter. Larger players hedge through multi-year contracts, whereas smaller firms must absorb spikes or raise prices, risking share erosion. Some producers reduce thickness or switch to coated sheet to manage costs, but durability perceptions can suffer. Value-tier items face the harshest impact because price sensitivity limits pass-through latitude. Persistent volatility accelerates consolidation as capitalized manufacturers acquire distressed rivals to secure volume discounts. Premium brands can partially offset material cost increases through value-added features and brand positioning, while value-oriented products face direct margin pressure that may require retail price adjustments or specification reductions.

Other drivers and restraints analyzed in the detailed report include:

Growing disposable income & urbanization in emerging marketsSurge in tail-gating culture around e-sports tournamentsSeasonality of demand in colder regions

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Gas grills hold 47.88% of barbeque grill market share in 2025 to push-button ignition and precise flame control, while pellet units account for 6.54% CAGR through 2031 due to wood-fired flavor and digital thermostats. Charcoal models persist among purists but encounter regulatory pressure from particulate limits, restricting urban adoption. Electric and hybrid designs address apartment rules and wildfire bans, broadening household penetration. Traeger's Woodridge series helped December 2024 sales jump 30%, showcasing pellet appeal among flavor-driven consumers. Manufacturers now bundle multiple fuel options to hedge against regional regulation and taste preferences, supporting category resilience.

Pellet technology narrows performance gaps by introducing sear plates and direct-flame modes that rival gas for high-heat tasks, enhancing perceived versatility. Weber's Searwood line combines app control with 600 F searing, positioning pellets as an all-purpose platform. Renewable propane initiatives also sustain gas relevance by offering carbon-neutral options without hardware changes. The barbeque grill market size for gas models will still expand, but at a slower pace, as pellet adoption accelerates among younger buyers valuing flavor and tech convenience. Competitive dynamics thus hinge on balancing legacy gas loyalty with emerging pellet enthusiasm.

Freestanding units captured 58.05% of the barbeque grill market in 2025 because they balance cooking area, storage, and price.

Portable grills, however, record a 6.06% CAGR on the back of tail-gating, camping, and apartment living trends. Built-in configurations flourish inside luxury outdoor kitchens where homeowners desire cohesive aesthetics and integrated utilities, lifting average transaction values beyond USD 5,000. Disposable single-use trays address convenience but face environmental pushback that deters permanent category growth. Consumers increasingly demand modularity, leading brands to design cart-mounted bases that detach into tabletop mode, blurring historical design boundaries.

Urban millennials gravitate toward Weber's Traveler series, which folds to car-trunk size while retaining 320 sq in of cooking space. Premium homeowners invest in masonry islands featuring gas, charcoal, and pellet bays, illustrating multi-fuel convergence at high price tiers. Product marketers emphasize weight, setup time, and BTU output for portable lines, contrasting with finish, warranty, and customization for built-ins. The barbeque grill market leverages these divergent value propositions to maximize volume and margin across income brackets. Expect continued innovation in collapsible frames and lightweight alloys to satisfy growing mobility demands.

The Global Barbeque Grill Market Report is Segmented by Fuel Type (Gas, Charcoal, Electric, Pellet, Hybrid/Alternative Fuel, Infrared), Product Design (Built-In, Freestanding, Portable/Table-top, Disposable/Single-use), Technology (Conventional, Smart/Connected), End-User (Residential, Commercial), Distribution Channel (B2B/Direct, B2C/Retail), and Geography. The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

North America controlled 28.84% of barbeque grill market size in 2025, propelled by 76 million grill-owning households and a cultural penchant for outdoor gatherings. Southern states permit year-round usage, yet northern zones endure seasonal demand dips despite innovations like insulated fireboxes. Municipal smoke regulations hamper charcoal growth in cities, steering buyers toward gas and pellet alternatives that meet EPA thresholds. Premium adoption continues as suburban homeowners allocate renovation budgets to elaborate outdoor kitchens outfitted with refrigeration, sinks, and smart-enabled grills. Retail partnerships broaden rural reach, sustaining volume even when discretionary spending tightens.

Asia-Pacific delivers the fastest 6.88% CAGR through 2031, fueled by urbanization, rising middle-class incomes, and growing affinity for Western cooking styles blended with regional flavors. Compact electric grills and tabletop gas units cater to limited balcony spaces in megacities such as Shanghai, Mumbai, and Jakarta. Governments encourage communal recreation by adding barbecue pits to public parks, supporting casual social dining. International tourism spreads grilling culture as travelers emulate experiences enjoyed abroad, further stimulating local demand. Currency volatility and trade barriers remain risks, yet multi-plant sourcing within ASEAN reduces supply-chain exposure for global brands.

Europe exhibits steady mid-single-digit expansion as households extend living areas into gardens and terraces post-pandemic. Northern countries normalize winter grilling with double-layer lids and cold-start ignition systems, countering daylight shortages. Mediterranean consumers integrate grills into traditional wood-fired cuisine, preferring ceramic kamado styles for bread and pizza preparation. Stricter emissions frameworks prompt gas and electric substitution in dense urban neighborhoods, though countryside regions continue charcoal traditions. The barbeque grill market benefits from widespread environmental consciousness, spurring interest in renewable propane and sustainably sourced hardwood pellets.

List of Companies Covered in this Report:

Blackstone Broil King (Onward Mfg.) Bull Outdoor Products Char-Broil (W.C. Bradley) Char-Griller Coleman Company Cuisinart (HomeWorld) Dyna-Glo (GHP Group) Empire Comfort Systems Everdure (Heston Blumenthal) Fire Magic (RH Petersen) George Foreman (Spectrum) Kamado Joe Kenmore Landmann Lynx Grills Masterbuilt Mfg. The Middleby Corporation MHP Grills Napoleon Grills Newell Brands Pit Boss (Dansons) Traeger Inc. Weber Inc. Z Grills

Additional Benefits:

 The market estimate (ME) sheet in Excel format
 3 months of analyst support

Table of Contents:

5.1.5 Hybrid/Alternative Fuel
5.1.6 Infrared
5.2 By Product Design
5.2.1 Built-In
5.2.2 Freestanding
5.2.3 Portable / Table-top
5.2.4 Disposable / Single-use
5.3 By Technology
5.3.1 Conventional
5.3.2 Smart/Connected
5.4 By End-User
5.4.1 Residential
5.4.2 Commercial
5.5 By Distribution Channel
5.5.1 B2B/Direct from the Manufacturers
5.5.2 B2C/Retail
5.5.2.1 Specialty Stores
5.5.2.2 Home Centers & DIY Stores
5.5.2.3 Mass Merchandisers
5.5.2.4 Online
5.5.2.5 Other Distribution Channels
5.6 By Geography
5.6.1 North America
5.6.1.1 United States
5.6.1.2 Canada
5.6.1.3 Mexico
5.6.2 South America
5.6.2.1 Brazil
5.6.2.2 Peru
5.6.2.3 Chile
5.6.2.4 Argentina
5.6.2.5 Rest of South America
5.6.3 Europe
5.6.3.1 United Kingdom
5.6.3.2 Germany
5.6.3.3 France
5.6.3.4 Spain
5.6.3.5 Italy
5.6.3.6 BENELUX
5.6.3.7 NORDICS
5.6.3.8 Rest of Europe
5.6.4 Asia-Pacific
5.6.4.1 India
5.6.4.2 China
5.6.4.3 Japan
5.6.4.4 Australia
5.6.4.5 South Korea

5.6.4.6 South East Asia
5.6.4.7 Rest of Asia-Pacific
5.6.5 Middle East and Africa
5.6.5.1 United Arab Emirates
5.6.5.2 Saudi Arabia
5.6.5.3 South Africa
5.6.5.4 Nigeria
5.6.5.5 Rest of Middle East and Africa

6 Competitive Landscape
6.1 Market Concentration
6.2 Strategic Moves
6.3 Market Share Analysis
6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products & Services, and Recent Developments)
6.4.1 Blackstone
6.4.2 Broil King (Onward Mfg.)
6.4.3 Bull Outdoor Products
6.4.4 Char-Broil (W.C. Bradley)
6.4.5 Char-Griller
6.4.6 Coleman Company
6.4.7 Cuisinart (HomeWorld)
6.4.8 Dyna-Glo (GHP Group)
6.4.9 Empire Comfort Systems
6.4.10 Everdure (Heston Blumenthal)
6.4.11 Fire Magic (RH Petersen)
6.4.12 George Foreman (Spectrum)
6.4.13 Kamado Joe
6.4.14 Kenmore
6.4.15 Landmann
6.4.16 Lynx Grills
6.4.17 Masterbuilt Mfg.
6.4.18 The Middleby Corporation
6.4.19 MHP Grills
6.4.20 Napoleon Grills
6.4.21 Newell Brands
6.4.22 Pit Boss (Dansons)
6.4.23 Traeger Inc.
6.4.24 Weber Inc.
6.4.25 Z Grills

7 Market Opportunities & Future Outlook
7.1 Premium Outdoor Kitchens In Emerging Luxury Housing Markets
7.2 Eco-Friendly Solid-Biofuel Pellet Supply Chains
7.3 Smart Iot-Enabled Grills For Health-Conscious Consumers

SCOTTS INTERNATIONAL

Barbeque Grill - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 150 pages | Mordor Intelligence

To place an Order with Scotts International:
- - Print this form
- - Complete the relevant blank fields and sign
- - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	$4750.00
	Team License (1-7 Users)	$5250.00
	Site License	$6500.00
	Corporate License	$8750.00
	VAT	
	Total	

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2026-02-26
		Signature	

Scotts International. EU Vat number: PL 6772247784
tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com

Scotts International. EU Vat number: PL 6772247784
tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com