

Combi Ovens Market Forecasts to 2032 – Global Analysis By Type (Convection Ovens, Airships Steam Ovens and Combination Ovens), Fuel Type, Method, Capacity, Application, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Combi Ovens Market is accounted for \$20.4 billion in 2025 and is expected to reach \$39.2 billion by 2032 growing at a CAGR of 9.8% during the forecast period. Combi ovens are multifunctional kitchen appliances that integrate three cooking techniques convection, steam, and a combination of both to deliver precise temperature and humidity control. Commonly used in commercial kitchens, bakeries, and food service operations, these ovens are valued for their efficiency and ability to produce a wide range of dishes with consistent quality. They offer several benefits, such as faster cooking times, minimized food shrinkage, and improved flavor retention. The steam function preserves food moisture, making it ideal for baking, roasting, grilling, and sous vide cooking, while the convection mode ensures even heat distribution for crisp textures.

Market Dynamics:

Driver:

Growing demand for energy-efficient cooking equipment

Rising energy costs and stringent emissions regulations, such as the EU Ecodesign Directive, incentivize adoption of energy-efficient models with features like heat recovery systems. Innovations like steam-assisted cooking and AI-driven energy optimization further amplify operational expenditure (OPEX) reduction. This trend is reinforced by government subsidies promoting eco-friendly kitchen technologies in

hospitality and foodservice sectors boosting the market growth.

Restraint:

Complexity in operation and maintenance

Advanced combi ovens often require specialized technical expertise for calibration, programming, and troubleshooting, creating a barrier for small-scale operators. Integration with existing kitchen ecosystems poses interoperability challenges, particularly with legacy infrastructure. Downtime risks associated with malfunctioning multi-functional systems disrupt high-volume kitchen workflows. These factors deter price-sensitive segments, such as independent restaurants, from upgrading to premium models.

Opportunity:

Growing adoption in healthcare and institutional catering

Heightened focus on standardized meal preparation in hospitals and senior care facilities fuels demand for precision-controlled combi ovens. Compliance with stringent nutritional protocols and hygiene standards positions combi ovens as critical for allergen management and dietary customization. Partnerships between OEMs and healthcare foodservice providers aim to develop tailored cooking profiles for therapeutic diets. This segment's growth is further driven by public-sector investments in modernizing institutional kitchen infrastructure.

Threat:

Consumer hesitancy toward high-tech kitchen appliances

Skepticism persists among traditional culinary establishments regarding the ROI of AI-enabled or IoT-integrated combi ovens. Perceived complexity in transitioning from conventional equipment to automated systems discourages adoption in cost-conscious markets. Concerns about cybersecurity vulnerabilities in connected devices and data privacy risks exacerbate reluctance. This hesitancy is mitigated only gradually through targeted demonstrations and localized after-sales support networks.

Covid-19 Impact:

The pandemic accelerated automation in kitchens to address labor shortages and social distancing mandates boosting demand for touchless combi ovens with remote monitoring. Supply chain disruptions temporarily constrained production, delaying installations. However, the rebound in hospitality and cloud kitchen sectors post spurred upgrades to multifunctional models capable of diverse menu execution with minimal staffing. COVID-19 underscored the need for resilient, tech-driven kitchen ecosystems, sustaining post-crisis growth.

The convection ovens segment is expected to be the largest during the forecast period

The convection ovens segment is expected to account for the largest market share during the forecast period driving innovation and expanding functionality. As a core component of combi ovens, convection technology ensures even heat distribution, enabling precise cooking and consistent results. This versatility makes combi ovens ideal for diverse culinary applications, from baking to roasting. The energy efficiency of convection ovens aligns with the growing demand for sustainable kitchen solutions, further boosting their adoption.

The commercial kitchens segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the commercial kitchens segment is predicted to witness the highest growth rate. Commercial kitchens, often found in restaurants, hotels, and catering services, require appliances that can handle high volumes while maintaining consistency and quality. Combi ovens, with their ability to combine convection, steam, and grilling functions, meet these needs by streamlining operations and reducing cooking times. As the foodservice industry continues to expand, the demand for advanced combi ovens is expected to rise, fueling market growth.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, driven by burgeoning urbanization, expansion of quick-service restaurant (QSR) chains, and tourism-driven hospitality investments. Government initiatives, such as India's "Smart Cities Mission" and China's food safety modernization programs, prioritize commercial kitchen automation. Rising disposable incomes and Westernized culinary trends further propel demand in countries like Japan and South Korea.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, fueled by rapid adoption of smart kitchen technologies in corporate cafeterias, universities, and ghost kitchens. Strict energy efficiency standards, including ENERGY STAR certifications, incentivize upgrades to advanced combi ovens. Investments in R&D by key players like Alto-Shaam and Henny Penny focus on AI-driven cooking analytics and cloud connectivity. The region's emphasis on reducing food waste and enhancing kitchen throughput further accelerates market expansion.

Key players in the market

Some of the key players in Combi Ovens Market include Henny Penny, Panasonic, Sirman, Welbilt, Electrolux, Meiko, Zanussi, Blue Seal, Convothem, Alto-Shaam, Lainox, Hobart, Fujimak Corporation, Giorik SpA, Retigo S.R.O and Dover Corporation.

Key Developments:

In February 2025, Hobart's parent company, ITW Food Equipment Group, introduced two new combi ovens Chef'sCombi™ and CoreCombi™ at The NAFEM Show 2025, focusing on performance, customization, and precise humidity control.

In November 2024, Henny Penny launched the FlexFusion Platinum Series combi ovens, featuring advanced cooking technology and a space-saving design.

In February 2023, Electrolux Professional introduced the Green&Smart Connected Combi Ovens, designed to reduce energy consumption by up to 30% while offering remote monitoring and predictive maintenance tools. The line focuses on sustainability and operational efficiency for hotels and institutional catering.

Types Covered:

Convection Ovens

Steam Ovens

Combination Ovens

Fuel Types Covered:

Electric Combi Ovens

Gas Combi Ovens

Methods Covered:

Boiler-based Steam Generation

Injector-based Steam Generation

Capacities Covered:

Low Capacity

Medium Capacity

Heavy Capacity

Applications Covered:

Commercial Kitchens

Bakeries & Patisseries

Residential Kitchens

Other Applications

End Users Covered:

Restaurants

Food Services

Hospitals and Institutions

Other End Users

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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