

4th Quarter 2020 data less severe than Q2 or Q3; 6% Increase Forecasted for 2021, largely in second half

Overall sales in the 4th Quarter of 2020 shrank by -19.4% from Q4/19. This reflects a bit of an improvement from the Q3/20 decline of -24.4% and the Q2/20 plunge of -30.4%.

By category, the breakdown is -39.5% Tabletop, -27.9% Furniture, -19.6% Supply, and -16.0% Equipment.

By Region, the declines vary as follows: Midwest -25.9%, Canada -25.0%, The West -24.7%, The South -13.6%, and the Northeast -10.6%.

For Q1/21, MAFSI Reps are forecasting a continuing decline of -18.9%, as Q1/20 was still predominately pre-Covid. For Calendar 2021, Reps are forecasting an increase of +6.0%, with the brunt of this gain largely achieved in the second half of the year, assuming Covid abatement and relative normalization of the Hospitality Industry.

Consultant Activity has slowed with 35% of Reps reporting less versus 22% more and 42% no change. This by itself, is a prediction of a slowdown as fewer projects were created and entered the pipeline during the Pandemic.

Given the volatility and uncertainty of these challenging times, the importance of the MAFSI Business Barometer has never been greater. With the exception of a couple of "outlier" quarters the MBB has been 98% accurate over the past 20 years in its forecasting ability.

Executive Summary written by Michael R. Posternak, PBAC and Associates, Eastchester, NY. Mp@pbacrep.com.

Qtrly Sales Forecast for North America
Q1/21 vs. Q1/20
-18.9%

Yearly Sales Forecast for North America
2021 vs. 2020
6.0%

Quoting Activity for Q4/20 vs. Q3/20

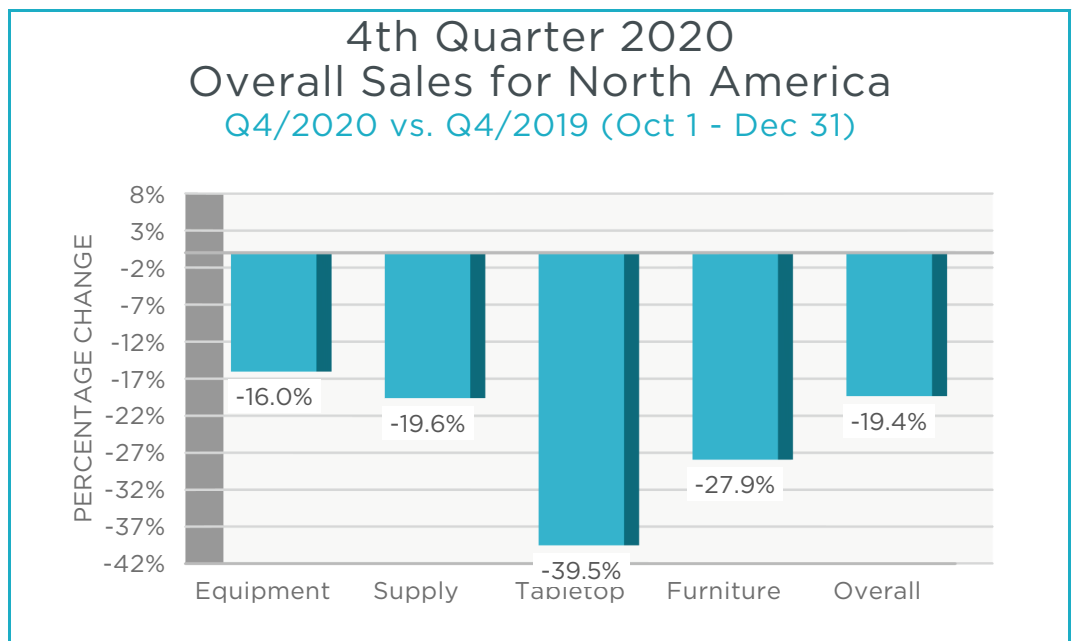
More	Less	No Change
38%	37%	25%

Consultant Activity for Q4/20 vs. Q3/20

More	Less	No Change
22%	35%	42%

Jan San Sales for Q4/20 vs. Q4/19

Equipment	Supplies	Disposables
-3.9%	1.6%	8.4%



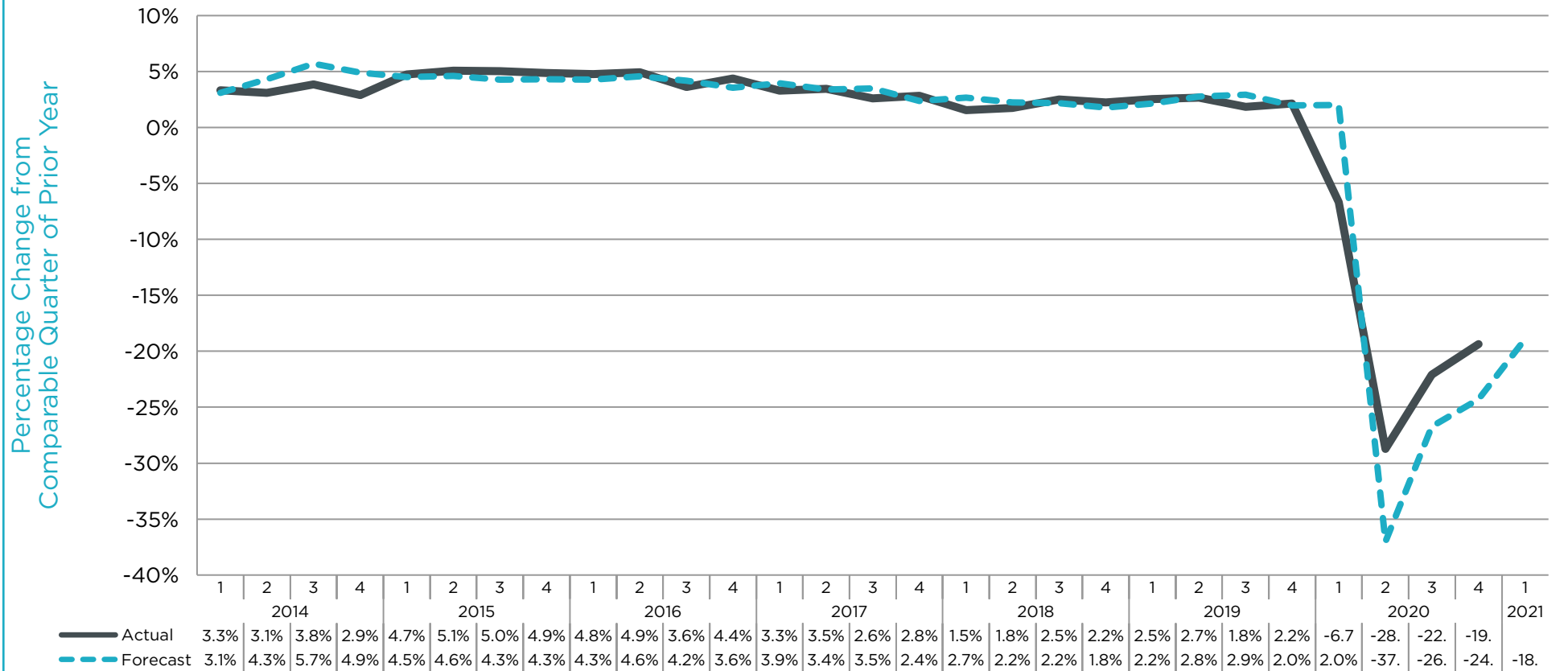
*The overall industry sales growth is calculated using a weighted average based on the percentage of the total sales volume for the overall industry represented by the various sales categories: Equipment (77%), Supplies (6%), Tabletop (11%), and Furnishings (6%). Market numbers are based on the North American Association of Food Equipment Manufacturers (NAFEM) biennial "Size & Shape of the Industry" study.



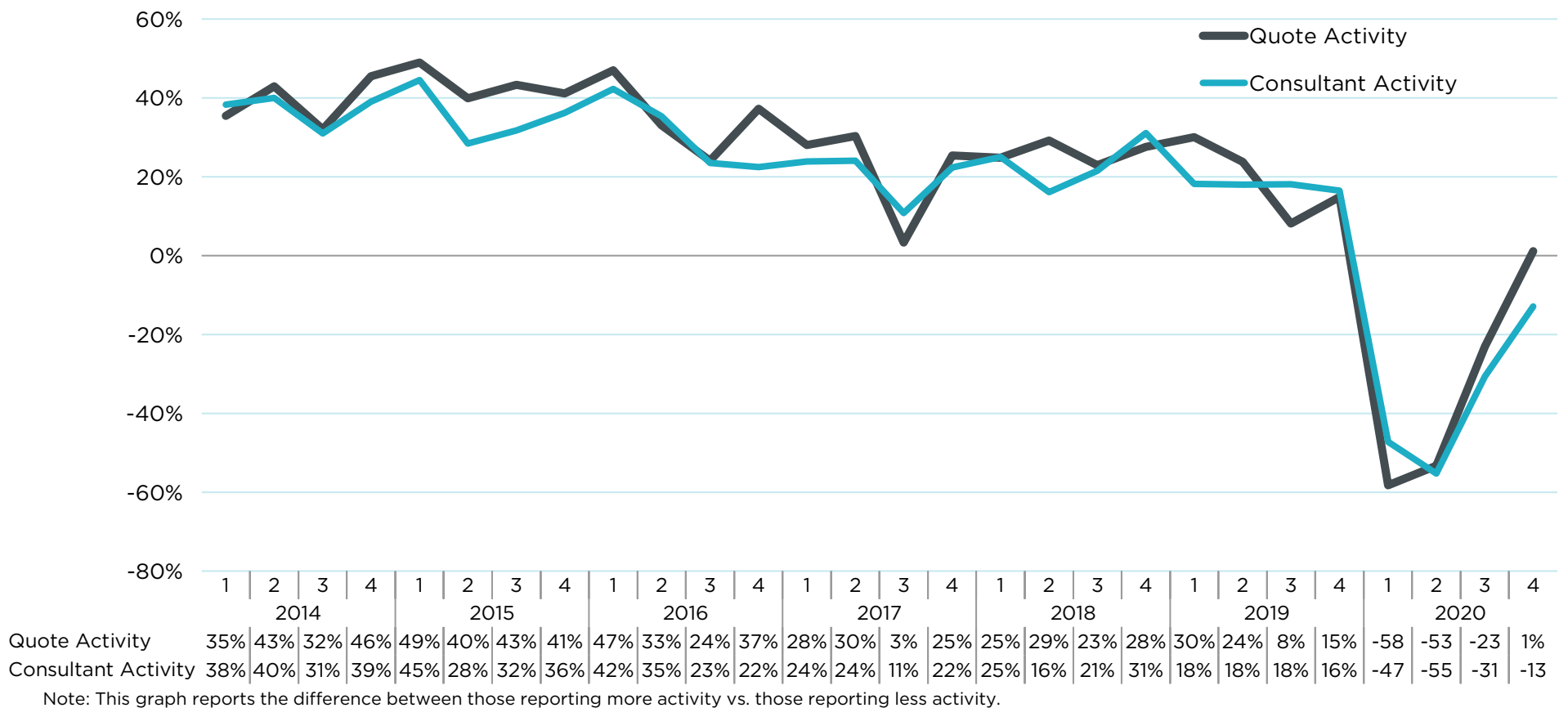
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Q4/2020 Foodservice Business Barometer Report

Overall Commercial Foodservice Sales Per Quarter for North America with Values 2014 - 2020



Quotation and Consultant Activity

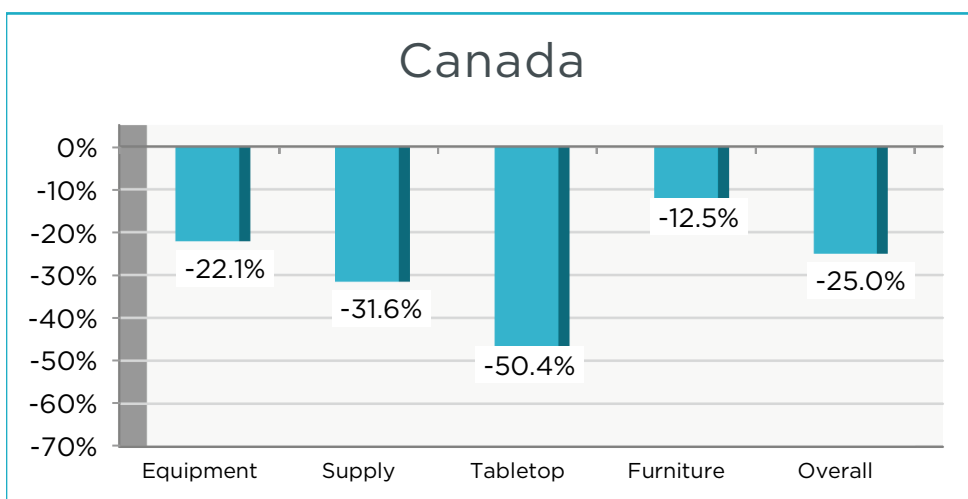
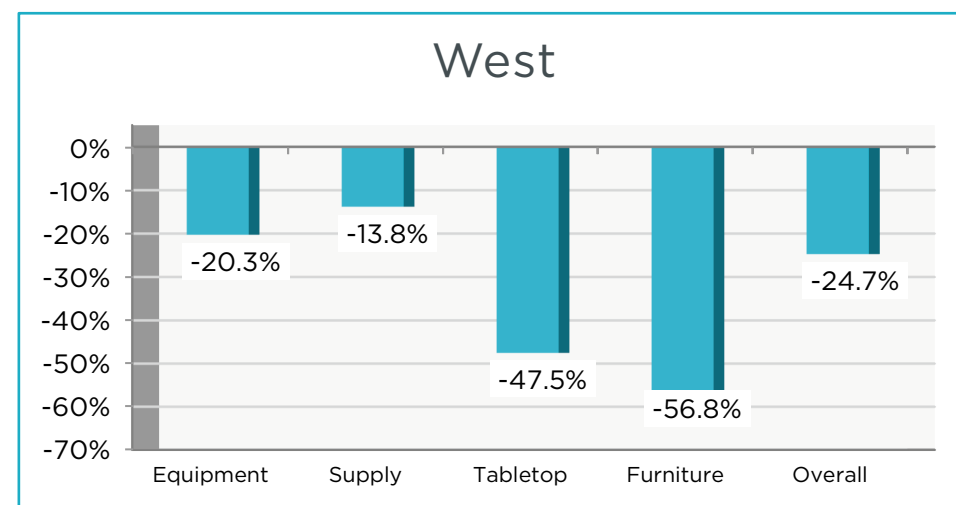
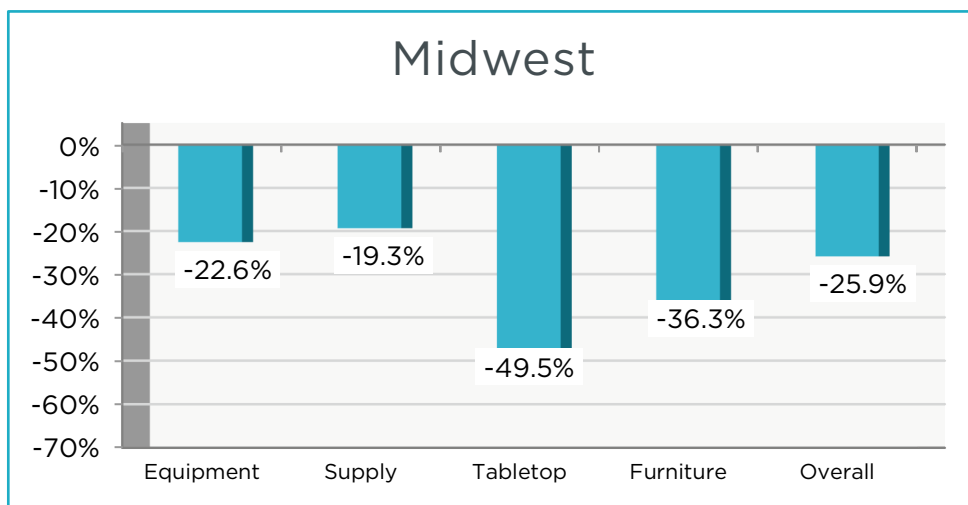
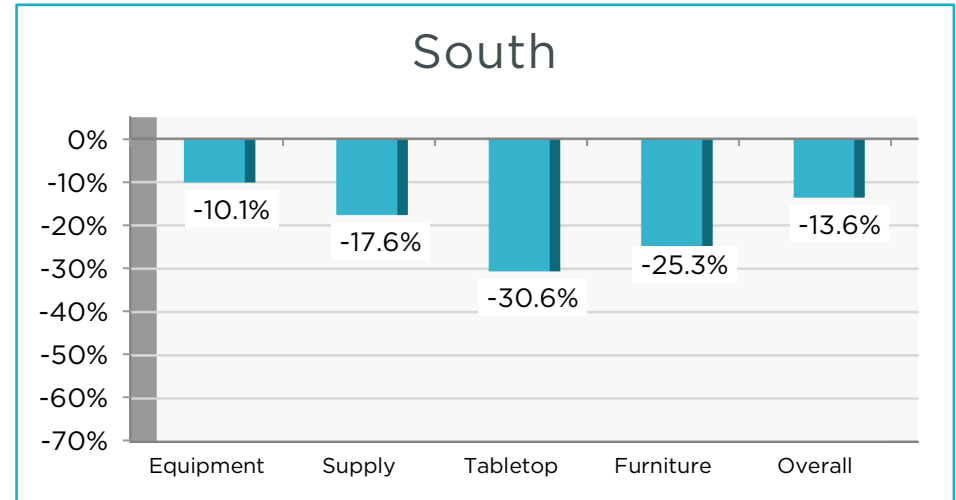
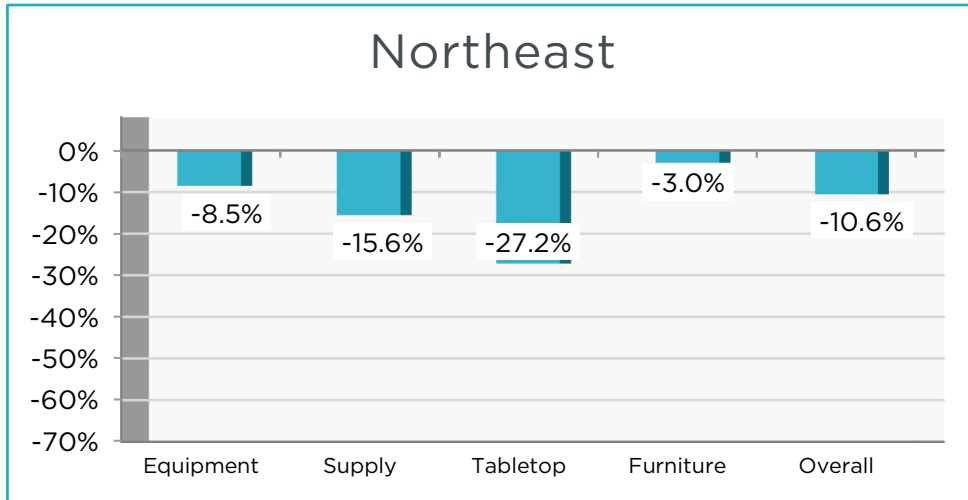




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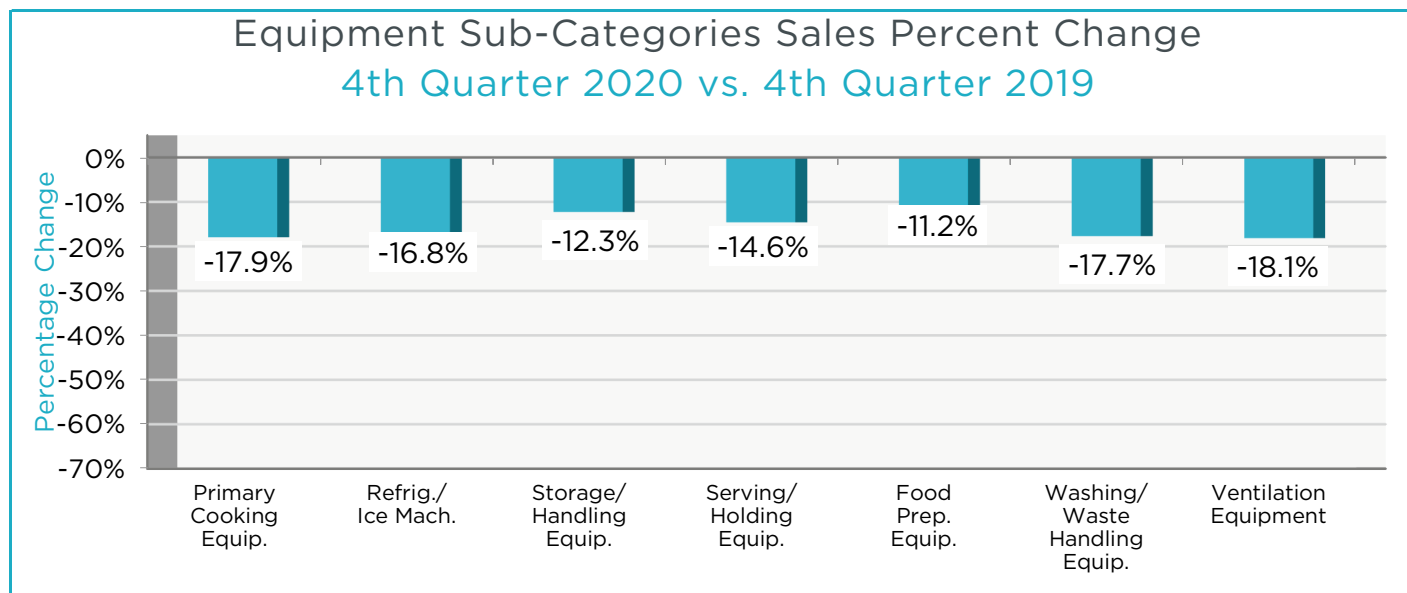
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4th Quarter 2020 Sales Percentage Change by Region
4th Quarter 2020 compared to 4th Quarter 2019 (Oct 1 - Dec 31)

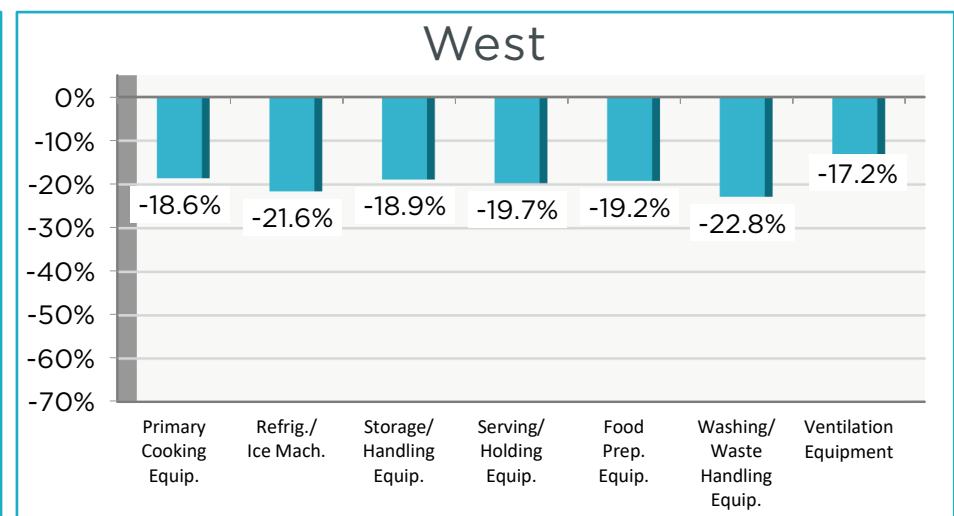
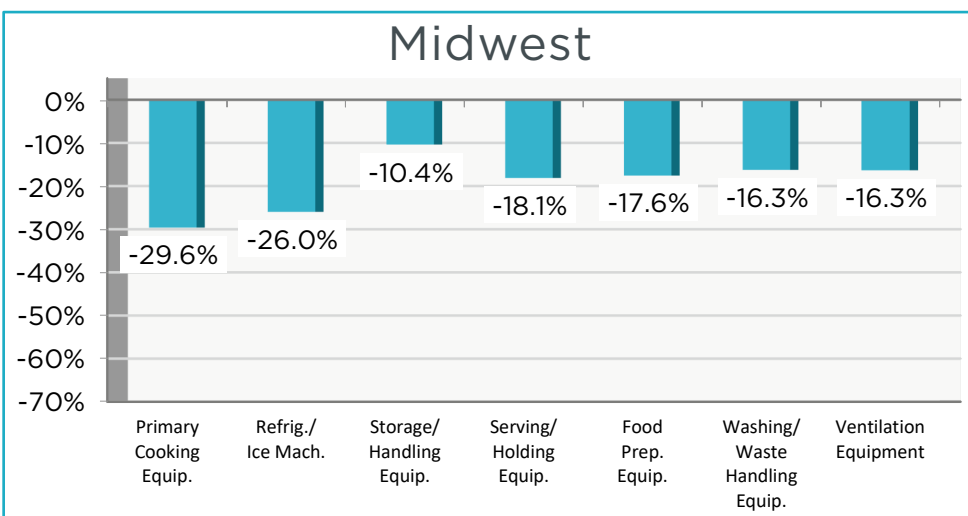
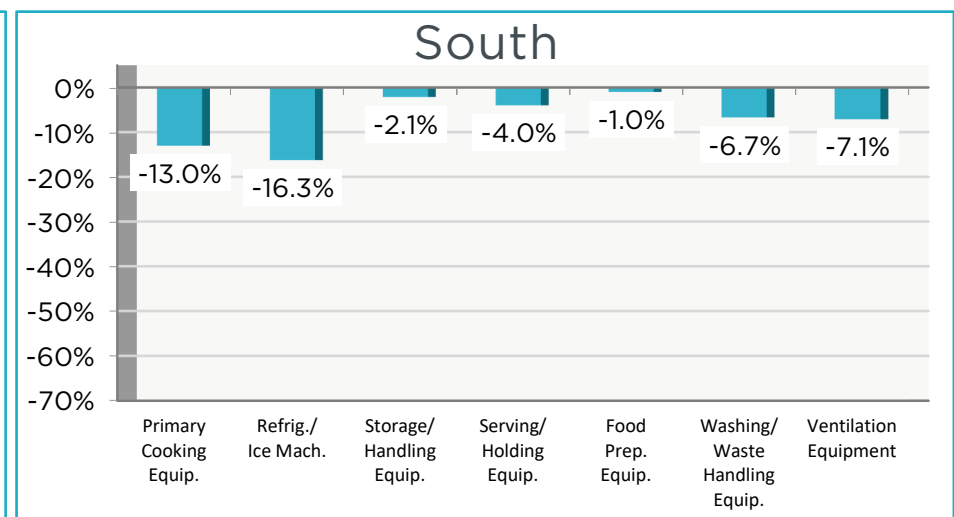
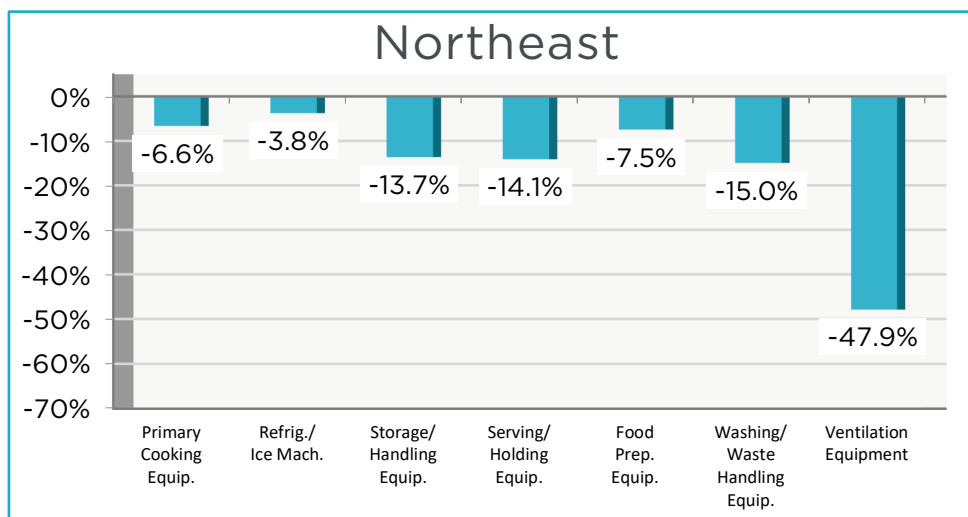


NORTHEAST includes the states:
CT, DC, DE, MA, MD, ME, NH, NJ, NY, PA, RI, VA, VT
SOUTH includes the states:
AL, AR, FL, GA, LA, MS, NC, OK, SC, TN, TX
MIDWEST includes the states:
IA, IL, IN, KS, KY, MI, MN, MO, ND, NE, OH, W. PA, SD, WI, WV
WEST includes the states:
AK, AZ, CA, CO, HI, ID, MT, OR, NM, NV, UT, WA, WY
CANADA includes all provinces and territories in Canada.

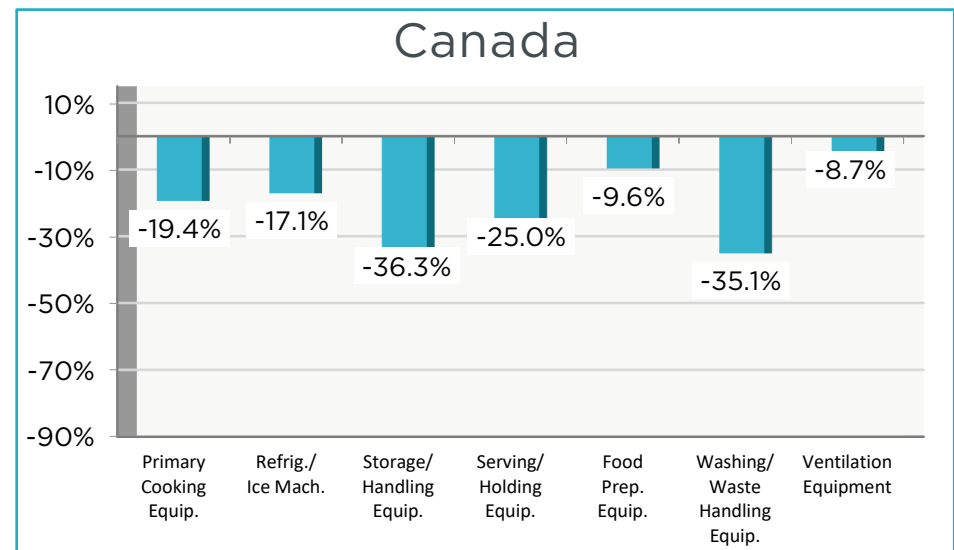
*The overall industry sales growth is calculated using a weighted average based on the percentage of the total sales volume for the overall industry represented by the various sales categories: Equipment (77%), Supplies (7%), Tabletop (10%), and Furnishings (6%). Market numbers are based on the North American Association of Food Equipment Manufacturers (NAFEM) biennial "Size & Shape of the Industry" study.



Equipment Sub-Categories Sales Percent Change by Region 4th Quarter 2020 compared to 4th Quarter 2019 (Oct 1 - Dec 31)



NORTHEAST includes the states:
 CT, DC, DE, MA, MD, ME, NH, NJ, NY, PA, RI, VA, VT
 SOUTH includes the states:
 AL, AR, FL, GA, LA, MS, NC, OK, SC, TN, TX
 MIDWEST includes the states:
 IA, IL, IN, KS, KY, MI, MN, MO, ND, NE, OH, W. PA, SD, WI, WV
 WEST includes the states:
 AK, AZ, CA, CO, HI, ID, MT, OR, NM, NV, UT, WA, WY
 CANADA includes all provinces and territories in Canada.
 *The equipment sub-category sales growth is calculated using a weighted average based on the percentage of the equipment sub-category sales volume represented by the various sales categories: Primary Cooking (25%), Refrigeration/Ice Machines (32%), Storage/Handling (9%), Serving (16%), Food Prep (7%), Warewashing (11%) from the (NAFEM) biennial "Size & Shape of the Industry" study. Ventilation not weighted.



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MAIN CATEGORIES	
Equipment <i>Please note:</i> as of Q315, "Thermometers and Temperature Monitoring Devices" (previously in Food Preparation Equipment) are now in Supplies.	Food Preparation Equipment, Janitorial & Sanitation Equipment, Primary Cooking Equipment, Refrigeration & Ice Machines, Serving & Holding Equipment, Storage & Handling Equipment, Ventilation, Warewashing, Waste Handling Equipment
Supplies <i>Please note:</i> as of Q315, "Menu and Message Boards" (previously calculated in Supplies) are now in Furniture.	Barware, Bakeware, Bins, Bus/Tote Boxes, Buckets (Ice & Wine), Buffetware, Can Openers, Chef Apparel/Shoes, Cleaning Tools, Colanders, Cookware/Pans/Pots, Cutting Boards, Knives/Cutlery Blocks/Sharpeners, Mixing Bowls, Storage Containers, Thermometers/Temperature Measurement/Food Safety, Textiles (Kitchen), Utensils/Tools (Kitchen)
Tabletop	Baskets, Beverage Pitchers/Servers, Candle Holders/Lamps, Candle & Chafing Fuel, Carafes/Decanters, Chafers, Covers, Dinnerware, Drinkware, Flatware, Glassware/Stemware, Linens (Napkins & Tablecloths/Covers), Menu Covers, Salt & Pepper Shakers, Serving Bowls/Plates, Serveware, Trays, Tray Stands
Furniture	Bars (Stationary & Mobile), Benches, Booths, Cabinets (Decor), Chairs, Coat Racks, Drive -Thru/Pass-Thru Windows, Heaters (Patio/Outdoor), Hostess Stands, Menu/Message Boards, Railings & Railings Fittings, Signs/Signage, Stools, Tables, Table Bases, Table Tops, Umbrellas
SUB-CATEGORIES	
Primary Cooking Equipment	Braising Pans, Broilers, Charbroilers, Cook-Chill Systems, Fryers, Griddles, Grills, Hot Dog Grills/Rollers, Microwaves, Oil Filtration Systems, Ovens, Panini Grills, Pasta Cookers, Ranges, Rice Cookers, Smokers, Steam Jacketed Kettles, Steamers, Tilting Skillets, Toasters, Waffle Bakers/Crepe Equipment
Refrigeration & Ice Machines	Air Curtains, Blast Chillers, Compressors, Condensers & Evaporators, Coolers, Doors (Walk-In/Insulated), Drop-In Pan Chillers, Freezers, Ice Cream Cabinets, Ice Machines, Refrigeration, Slush/Smoothie Machines, Soft-Serve Ice Cream/Yogurt Machines, Water Filter Systems
Storage & Handling Equipment	Cabinets, Carts, Conveyor Systems, Covers, Dispensers (non-food), Dollies (Can, Dish, Rack), Food & Ingredient Canisters & Containers, Hand Trucks/Utility Trucks, Meal Delivery Systems, Racks, Receiving Scales, Shelving, Work Tables (Bakers, Cooks, Makeup, Prep, etc.)
Serving & Holding Equipment	Beer Systems, Beverage Dispensers, Carving Stations, Coffee Equipment, Display/Merchandisers, Food Dispensers, Food Shields, Heat Lamps, Kiosks/Mobile Serving Units, Salad/Food Bars, Serving/Buffer Lines, Serving Carts, Soda Fountains, Soup Kettles/Servers, Steam Tables/Hot-Food Tables/Bain Marie, Tea Brewers, Warmers
Food Preparation Equipment	Blenders, Breaders, Bread Slicers, Choppers (Dicers, Graters, Peelers, Non-Bread Slicers), Dough Preparation Equipment, Food Processors, Juice Extractors/Juicing Equipment, Meat Saws, Meat Tenderizers/Marinators, Mixers, Mixer Stands & Tables, Pasta Makers, Popcorn Carts/Machines, Salad/Vegetable Washers & Dryers, Scales, Slicers, Timers, Vacuum-Pack Machines
Warewashing & Waste Handling Equipment <i>Please Note,</i> as of Q416, Sanitation Equipment is included under Janitorial and Sanitation Equipment.	Booster Heaters, Can & Bottle Crushers, Can Washers, Drainboards, Faucets/Spray Units/Washers/Hoses, Flatware-Handling/Recovery Systems, Floor Troughs & Drains, Mats (Anti-Fatigues, Bar, Rubber, etc.), Pulpers & De-Water Equipment, Racks (Warewashing/Dishwashing Racks), Sinks, Tables (Dish), Warewashing/Dishwashing Machines, Waste Bins/Recycling, Waste Compactors, Waste Disposal Systems
Ventilation	Appliance Connectors, Grease/Exhaust Filters, Grease Interceptors, Fire Suppression Systems/Fire Extinguishers, HVAC - Exhaust Systems, Fans, Utility Distribution Systems, Ventilation & Hoods
Janitorial & Sanitation Lines	
New! Janitorial & Sanitation Equipment	Air Blowers/Carpet Dryers, Air Filtration Equipment, Bathroom Faucets and Faucet Systems, Bathroom Stall Doors, Dehumidifying Equipment, Eye Wash Stations, Pressure Washing Systems, Restroom Partitions/Stalls, Floor Scrubbers, Sinks, Toilets, Toilet Flushing Systems, Urinals
New! Janitorial & Sanitation Supplies	Baby Changing Stations, Brooms, Dusts Mops, etc., Brushes (Equipment Cleaning Brushes, Scouring Pads, etc.), Carpet Sweepers, Vacuums, Floor & Carpet Care Products, Carts (Janitorial), Cloths Microfiber, Hand Dryers, Mops, Buckets & Pails, Odor Control Chemicals & Devices, Paper Towel Dispensers, Soaps and Hand Sanitizers, Soap Dispensers, Stall Storage Systems, Toilet Paper and Sanitary Dispensers
New! Disposables	Disposable: Catering Trays and Serving Ware, Cloths Non-Woven, Concession Food Bags, Eco-Friendly Cups, Bowls, Flatware, Lids and Plates, Deli Food Safety Labels, Food Trays & Lids, Foam Food Cups, Bowls and Plates, Gloves, Garbage Bags, Paper Napkins, Paper Cups, Lids and Plates, Placemats (Disposable), Plastic Barware, Plastic Cups, Plates and Lids, Plastic Flatware, Take-Out Containers, Trash Can Liners



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Q4/2020 Foodservice Business Barometer Report

Many thanks to the firms that participated in this quarter's MAFSI Business Barometer:

2Equip	Kain-McArthur Inc.	Robert Emig & Associates, Inc.
AFS Anderson Foodservice Solutions	Kaufmann & Associates	Schmid-Dewland Associates
Agences Hamilton Agencies	KBC Specialty Products, Inc.	Shamrock Foodservice Equipment Reps. Inc
Allied Technologies Food Equipment	Kelly-Mincks	Sharkey & Associates
Apex Commercial Kitchen Co. - Region 16	Ken W. Thomson Associates Ltd.	Specialized
Apex Commercial Kitchen Co. - Region 19	KLH Marketing, Inc.	Spence Wells Associates
Apex Marketing	Lake Effect Sales & Marketing	stage KOLSTAD associates
B Square Enterprises	Lund-Iorio, Inc.	TD Marketing Company, Inc.
Beacon Sales Group LLC	M2 Foodservice Representatives LLC	The 2Market Group, Inc.
Burlis-Lawson Group	MAC Sales & Marketing LTD.	The Daly & DeRoma Group, Inc.
Butkevich Associates	Marjon & Associates, Inc.	The Fischer Group
Cannon Marketing	Master Marketing	The Pantano and Pinilla Agency
Celco Inc.	Midwest Professional Reps, Inc.	The Waite Group. DBA-Bob Waite & Associates
Chrane Foodservice Solutions	Nick Mavro & Associates, LLC	The YES Group - Region 18
CLV Marketing	ONE SOURCE REPS	The YES Group - Region 19
Collis Group, Inc.	Paglio & Associates, Inc.	Thormann Associates
Copperfield Agencies Limited	PB & J Commercial Agents	TLC Marketing Inc.
Davis & Associates, Inc.	PBAC & Associates LTD	Total Tabletop Plus
DJ Marketing & Associates	PBAC & Associates LTD - Region 02	Tri-State Marketing Associates
DRC Marketing Group	Pecinka Ferri Associates	Vader & Landgraf, Inc.
E. Ruff & Associates, Inc.	Performance Reps Northwest, Inc.	Viola Group
Equipment Preference, Inc. (E.P.I.) - Region 14	Permul Ltd.	Voeller & Associates, Inc.
Equipment Preference, Inc. (E.P.I.) - Region 15	Preferred Marketing Group - Region 22	W. D. Colledge Co., Ltd.
Ettinger-Rosini / Waypoint	Preferred Marketing Group - Region 24	Wallin Foodservice Resources
FOCUS Hospitality Sales LLC	Premier Foodservice Group	Walter Zebrowski Associates
Food Equipment Sales & Marketing Agents, Inc. (FESMA)	Premier Foodservice Group - Carolinas	Wyllie Marketing
Food Service Solutions Inc.	Premier Marketing Group, Inc.	YBR Marketing, Inc.
Forbes, Hever & Wallace, Inc.	Professional Manufacturers Representatives, Inc. (PMR) - Region 12	Zink Foodservice - Region 6
Gabriel Group LLC	Professional Manufacturers Representatives, Inc. (PMR) - Region 14	Zink Foodservice - Region 18
Greenwald Sales & Marketing, LLC	Pro-Quip Foodservice Equipment & Supplies Incorporated	Zink Foodservice - Region 17
Heartland Reps, LLC	R. Henry & Associates	Zink Foodservice - Region 18
Hollander Company	Redco Foodservice Equipment, LLC - Region 17	
HRI, Inc.	Redco Foodservice Equipment, LLC - Region 18	
Johnson Pike & Associates, Inc.	Redco Foodservice Equipment, LLC - Region 19	