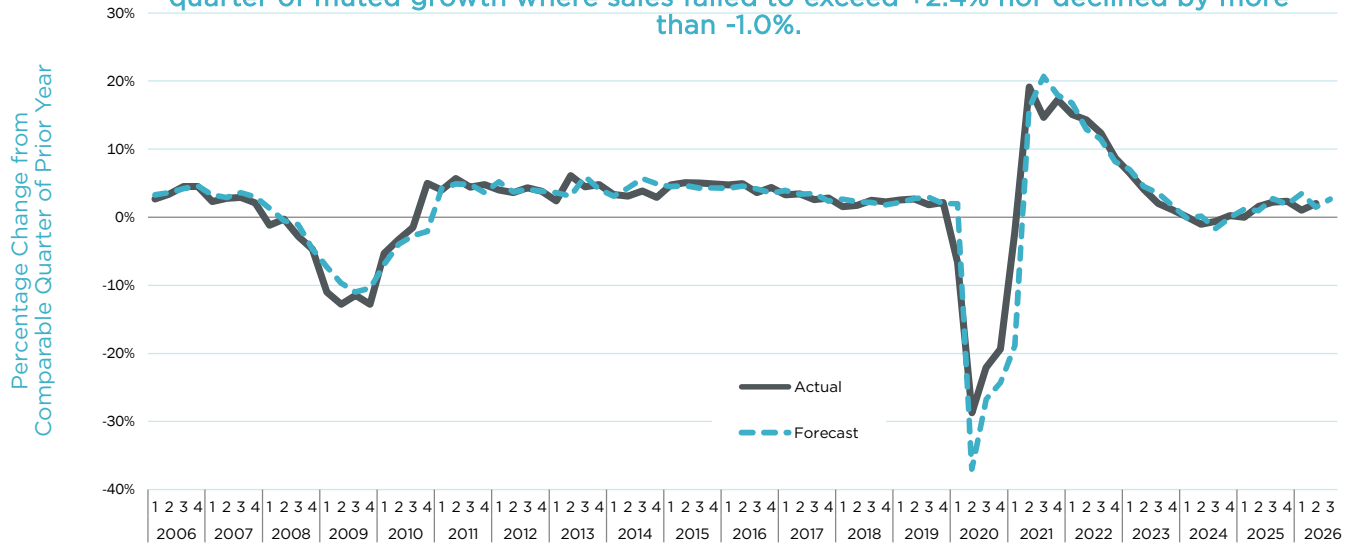


Overall Commercial Foodservice Sales Per Quarter for North America

Overall sales for the 2nd quarter of 2026 grew by +2.0% which was the 12th quarter of muted growth where sales failed to exceed +2.4% nor declined by more than -1.0%.



Market Continues in Its 3-Year, Slow Growth/No Growth Pattern; Slight Improvement Forecasted for Q3/26

Overall sales for the 2nd quarter of 2026 grew by +2.0% which was the 12th quarter of muted growth where sales failed to exceed +2.4% nor declined by more than -1.0%.

By Product Category, sales ranged from +5.2% Furniture, + 3.0% Supply, +1.8% Equipment, to + 0.6% Tabletop.

By Region, sales were +4.0% West, +2.5% South, +2.0% Midwest, +1.9% Canada, and -0.2% Northeast.

Quoting activity shrank from 44% More last quarter to 33% More this quarter while Consultant activity reduced from 23% More in Q1/26 to 17% More in Q2/26.

MAFSI's SpecPath construction projects total for Q2/26 were 785 versus 880 in Q1/26 for an 11% decline. For the past 12 months, 3272 projects were recorded versus 3698 for the prior 12-month period, representing a 12% year over year decline.

MAFSI reps are always a bit more upbeat, (as they should be as sales generators) while not supported by data, and forecasting a gain of 2.7% for Q3/26.

The growing gap between Wall Street and Main Street is indicative of the bifurcation of the current economy. Main Street is being hard hit by fuel prices, vegetable contamination, overall inflation, the return of the tariff scare, the impact of GLP-1 weight loss drugs, saturation of some markets, and changing food trends. Restaurants are shortening their operating hours and reducing their menu options.

The Wall Street end of the market is a bit better with regard to B&I and high-end restaurants.

The war with Iran, the US/Canadian tariff showdown and the mid-term elections are all considerations to be closely watched.

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

Qtrly Sales Forecast for North America Q3/26 vs. Q3/25 2.7%

Yearly Sales Forecast for North America 2026 vs. 2025 2025 vs. 2024 4.3% 2.7%

Quoting Activity for Q2/26 vs. Q1/26 More Less No Change 33% 28% 39%

Consultant Activity for Q2/26 vs. Q1/26 More Less No Change 17% 14% 69%

Jan San Sales for Q2/26 vs. Q2/25 Equipment Supplies Disposables 1.8% 3.2% 3.6%

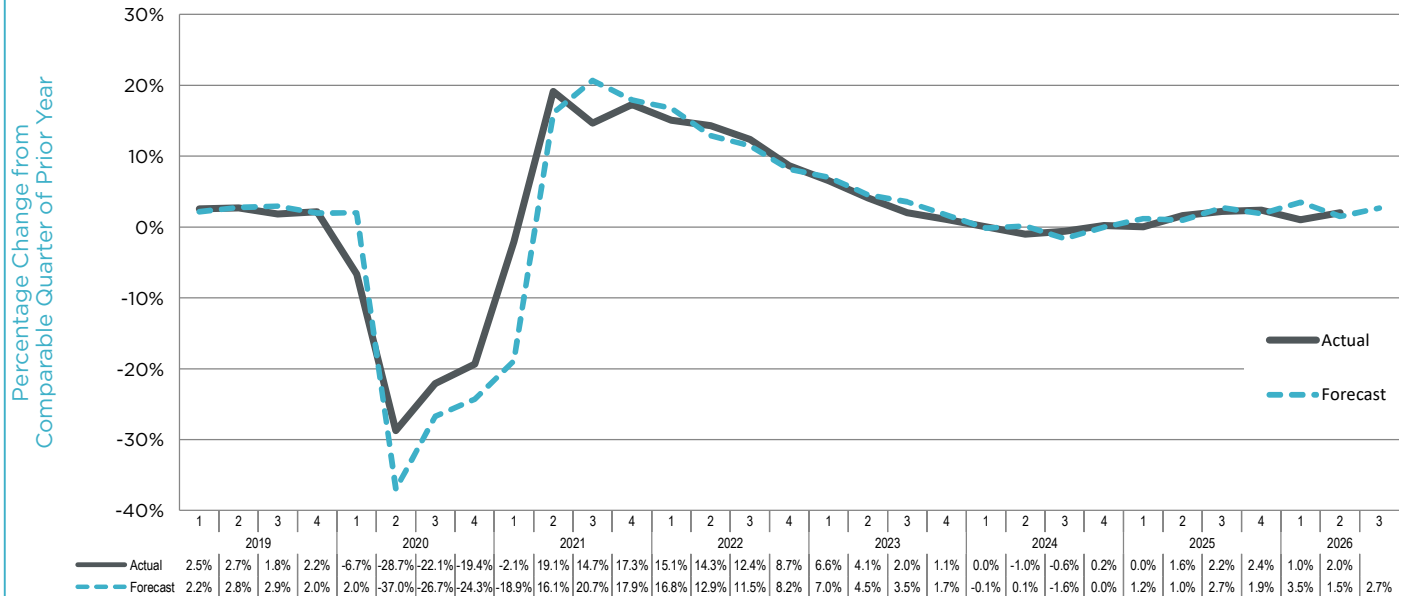
2nd Quarter 2026 Overall Sales for North America Q2/2026 vs. Q2/2025 (Apr 1 - Jun 30)



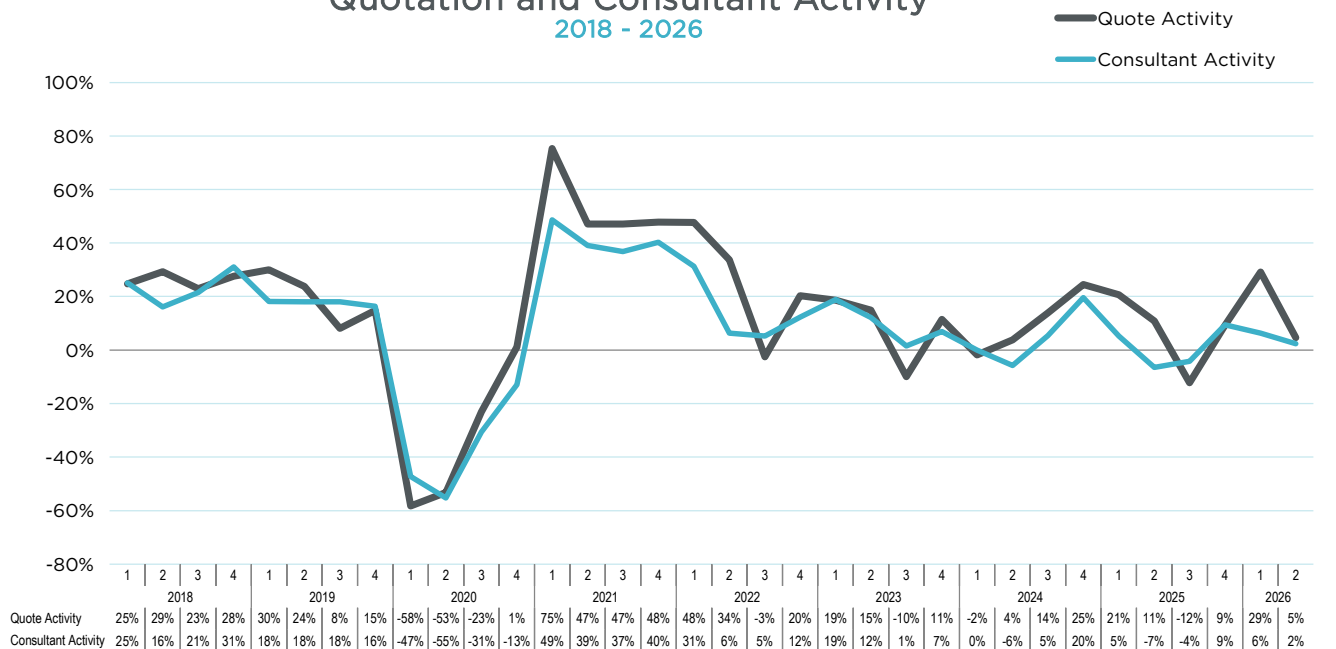
2026 vs. 2025 Sales Forecast by Product Category Equipment Supply Tabletop Furniture 4.5% 5.0% 4.0% 1.9%

*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.

Overall Commercial Foodservice Sales Per Quarter for North America 2019 - 2026



Quotation and Consultant Activity 2018 - 2026



Note: This graph reports the difference between those reporting more activity vs. those reporting less activity.

Q3/26 vs. Q3/25 Sales Percentage Change Forecast by Region

3rd Quarter 2026 compared to 3rd Quarter 2025 (Jul 1 - Sep 30)

Northeast 3.1%	South 6.2%	Midwest 1.1%	West 0.4%	Canada 2.1%
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2026 vs. 2025 Overall Sales Forecast by Region

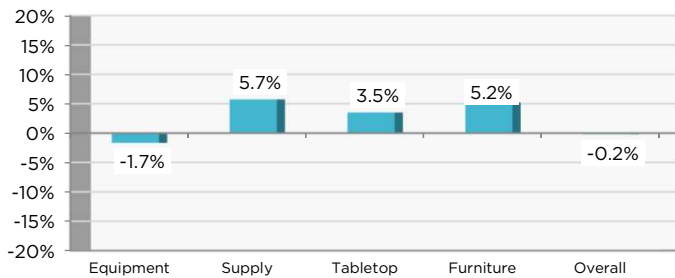
Compared to Overall Sales for 2025

Northeast 5.0%	South 1.3%	Midwest 5.3%	West 2.6%	Canada 6.4%
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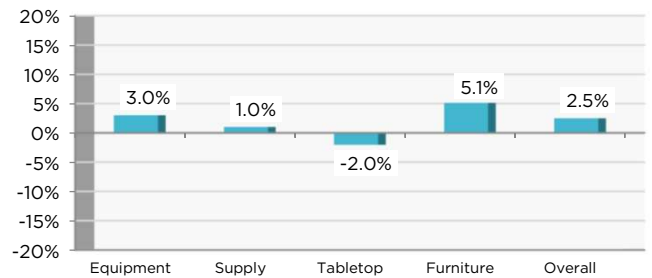
2nd Quarter 2026 Sales Percentage Change by Region

2nd Quarter 2026 compared to 2nd Quarter 2025 (Apr 1 - Jun 30)

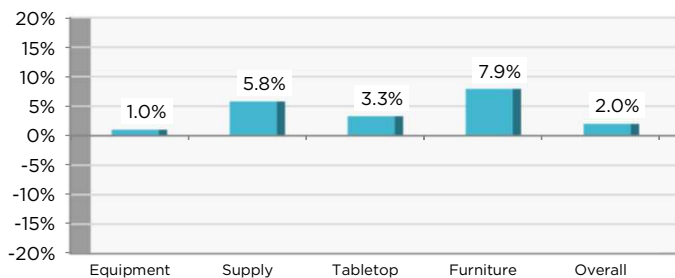
Northeast



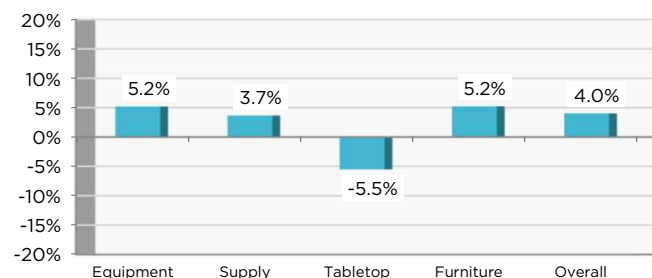
South



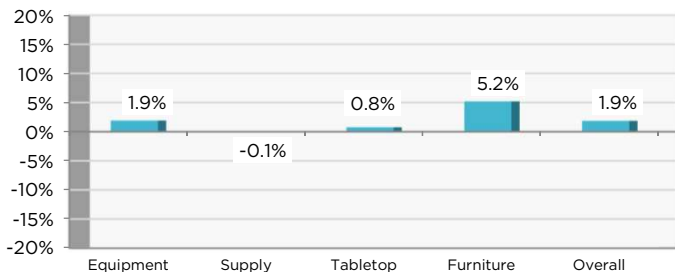
Midwest



West



Canada



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:

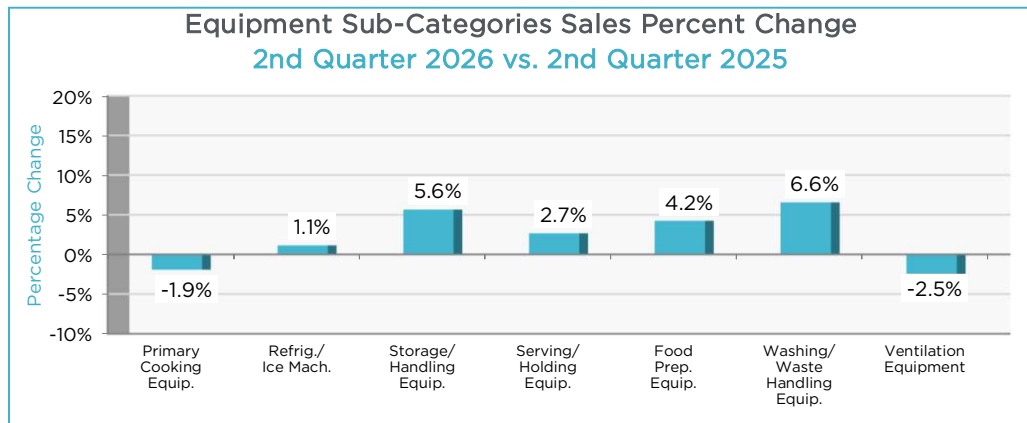
IA, IL, IN, KS, KY, MI, MN, MO, ND, NE, OH, W. PA, SD, WI, WV

WEST includes the states:

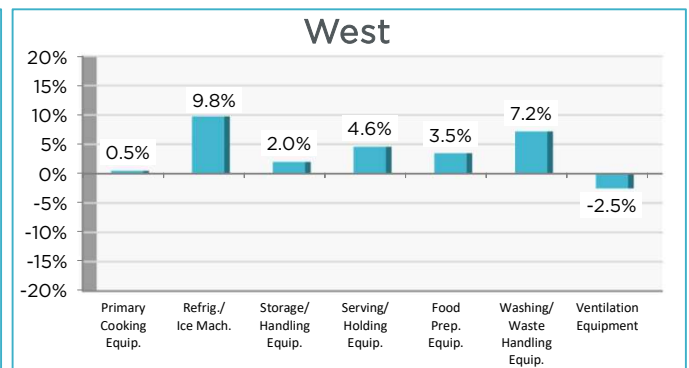
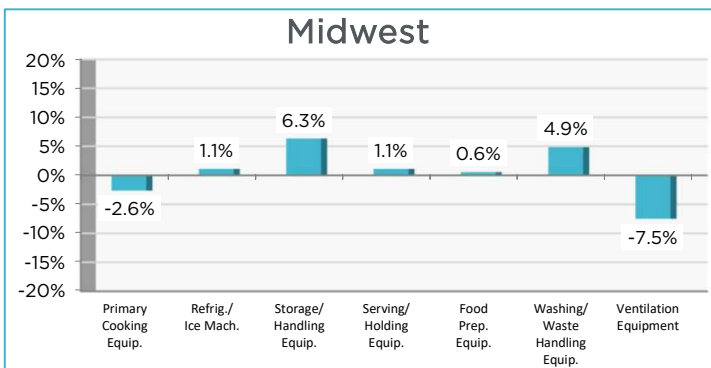
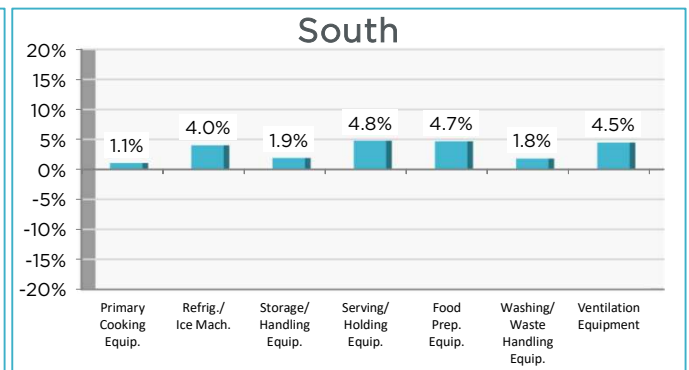
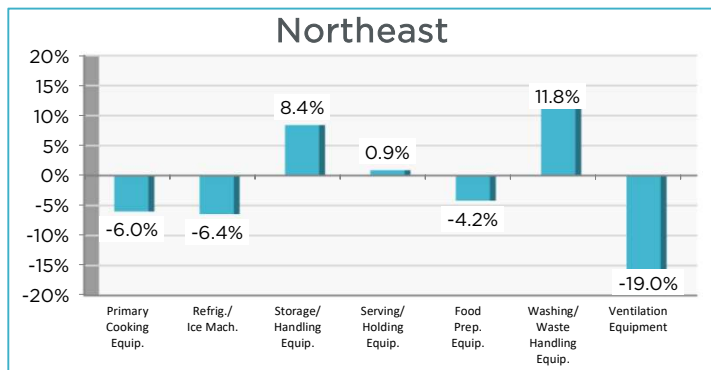
AK, AZ, CA, CO, HI, ID, MT, OR, NM, NV, UT, WA, WY

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 2nd Quarter 2026 compared to 2nd Quarter 2025 (Apr 1 - Jun 30)



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:

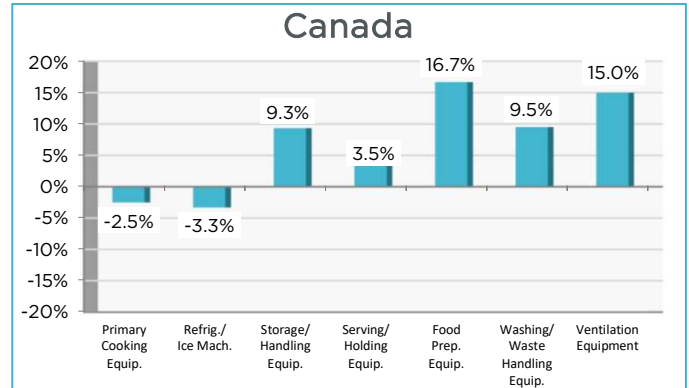
IA, IL, IN, KS, KY, MI, MN, MO, ND, NE, OH, W. PA, SD, WI, WV

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.



PLEASE NOTE: The Business Barometer Report is compiled for the exclusive use of the participating companies and MAFSI members. Oral or written disclosure or publication of the confidential aggregate report, in whole or in part, by the participating companies or MAFSI staff to anyone other than authorized participating companies is expressly prohibited.

SPECPATH CONSTRUCTION PROJECTS

Q1/2022 to Q2/2026

mafsi.org/specpath



of Specified Projects by Quarter
2022-2026



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

4 Star Reps, Inc.	Hollander Company	Premier Foodservice Group
AFS Anderson Foodservice Solutions	HRI, Inc.	Premier Marketing Group, Inc.
Agences Hamilton Agencies	Kain McArthur	Professional Reps
Allied Technologies Food Equipment	Kaufmann & Associates	R. Henry & Associates
B Square Enterprises	KBC Specialty Products, Inc.	Schmid-Dewland Associates
Bob Waite & Associates	Kelly-Mincks	Specialty Equipment Sales Company (SESCO)
Celco Inc.	MAC Sales & Marketing LTD.	Swanson-Girard & Associates
Chernoff Sales, Inc.	MarkeTeam Foodservice	The Daly & DeRoma Group, Inc.
Chrane Foodservice Solutions	ONE SOURCE REPS	The Pantano and Pinilla Agency, Inc.
Collis Group, Inc.	PB & J Commercial Agents	Thormann Associates
DJ Marketing & Associates	PBAC & Associates LTD	Total Tabletop Plus
Equipment Preference, Inc. (E.P.I.)	Performance Reps Northwest, Inc.	Vader & Landgraf, Inc.
Food Equipment Representatives	Permul Ltd.	W. D. Colledge Co., Ltd.
Gabriel Group LLC	Preferred Marketing Agents, Inc.	Wyllie Marketing
Greenwald Sales & Marketing, LLC		

MAIN CATEGORIES	
Equipment Please note: 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 Please note: 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, Servingware, 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 Please Note, 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	
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
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
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