

Industry Sales Growth for First Quarter Slim at 1.0%; Forecast for Q2/26 Still Muted with Slight Improvement

Overall sales for the 1st Quarter of 2026 increased by a slim margin of +1.0% vs. Q1/25. This result was well short of the mark of +3.5% that had been forecasted. For the past three years, the market has performed within a very narrow and stagnated range, between +2.4% on the upside to -1.0% on the downside.

By Product Category, sales ranged from -0.5% Tabletop, +0.6% Furniture, +0.9% Equipment, to +4.9% Supply.

By Region, sales shrank by -1.3% Midwest, and grew by 0.9% in the West, 1.3% South, 2.3% Canada, and 2.6% in the Northeast, reflective of regional variations.

Both Quoting and Consultant Activity demonstrated improvement in Q1/26 vs. Q4/25 which is consistent with MAFSI's SpecPath project data.

A closer look at SpecPath shows that the 1st Quarter has been the strongest Quarter for the past 4 years. Of concern, however, is that Q1/26 at 880 new projects was 13% below Q1/25's level of 1013 and 10% below Q1/24's data of 981.

MAFSI REPS are forecasting for Q2/26 modest growth of 1.5% led by the West at 4.3%, Northeast 4.0%, Canada at 2.1%, the South at zero, and the Midwest declining by -0.8%.

The foodservice equipment, supplies, tabletop and furniture market worries are led by inflationary pressures which dampen demand, including, food, gasoline, tariffs, and transportation, as well as concerns of the effects of the mid-term elections and the war with Iran.

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Qtrly Sales Forecast for North America
Q2/26 vs. Q2/25
1.5%

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

Quoting Activity for Q1/26 vs. Q4/25

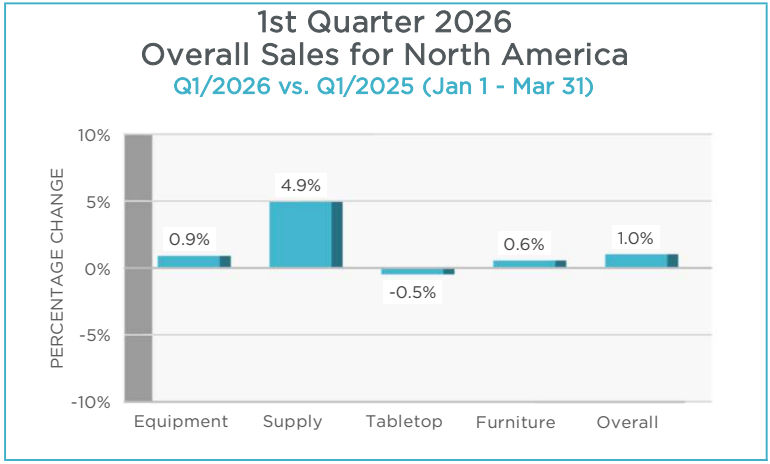
More	Less	No Change
44%	15%	41%

Consultant Activity for Q1/26 vs. Q4/25

More	Less	No Change
23%	17%	60%

Jan San Sales for Q1/26 vs. Q1/25

Equipment	Supplies	Disposables
2.0%	2.7%	2.4%

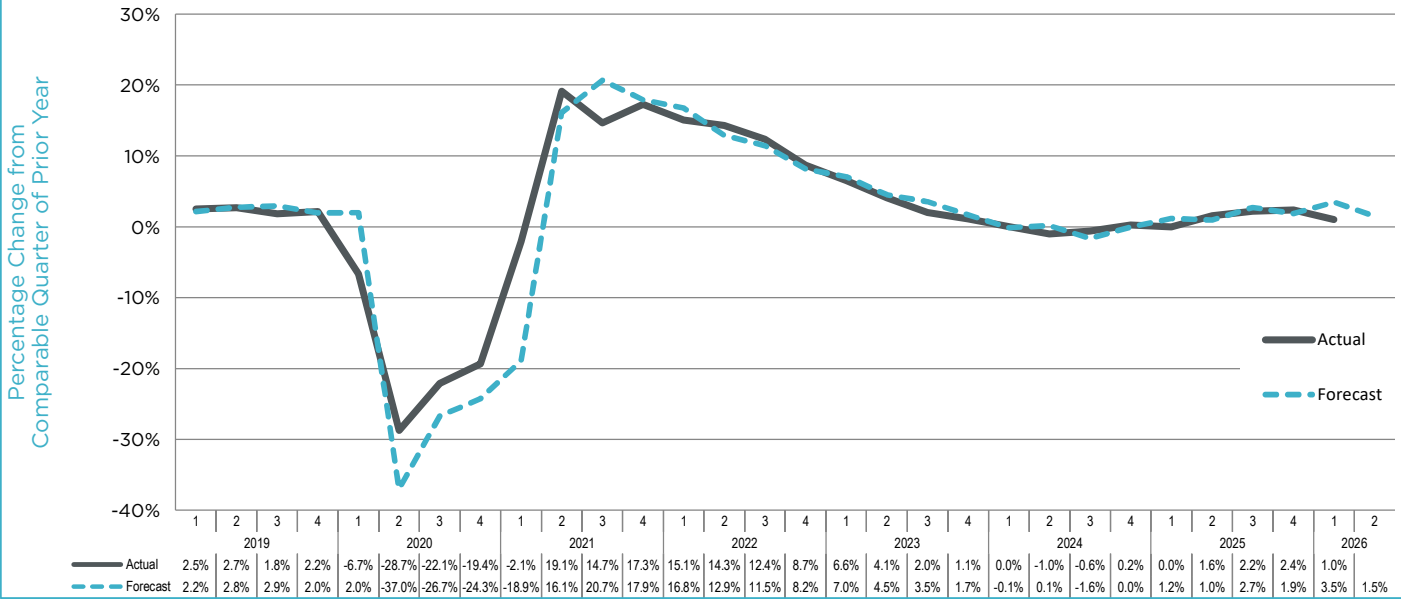


2026 vs. 2025 Sales Forecast by Product Category

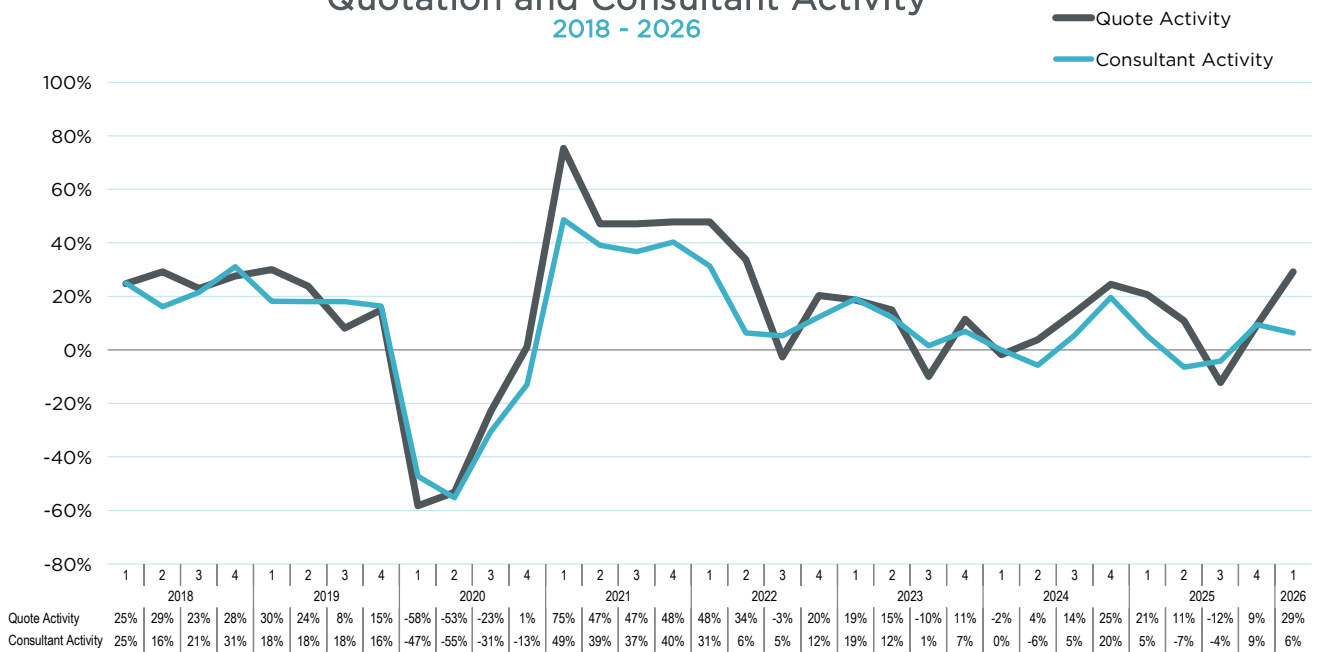
Equipment	Supply	Tabletop	Furniture
4.5%	5.0%	4.0%	1.9%

*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.

Q2/26 vs. Q2/25 Sales Percentage Change Forecast by Region

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

Northeast 4.0%	South 0.0%	Midwest -0.8%	West 4.3%	Canada 2.1%
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2026 vs. 2025 Overall Sales Forecast by Region

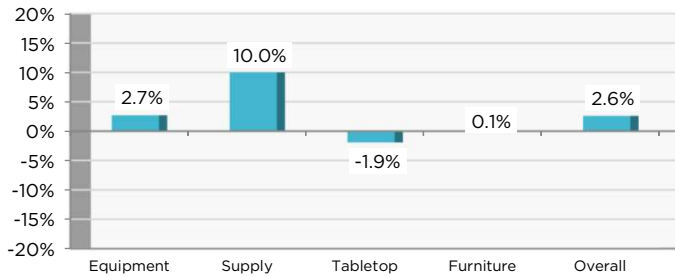
Compared to Overall Sales for 2025

Northeast 5.0%	South 1.3%	Midwest 5.3%	West 2.6%	Canada 6.4%
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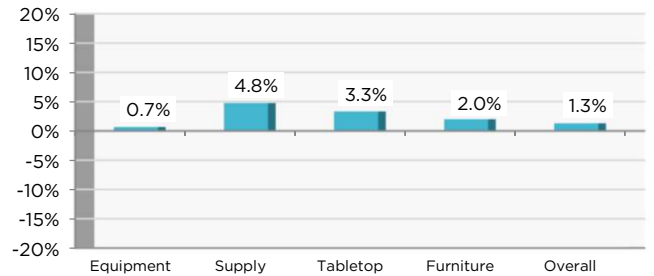
1st Quarter 2026 Sales Percentage Change by Region

1st Quarter 2026 compared to 1st Quarter 2025 (Jan 1 - Mar 31)

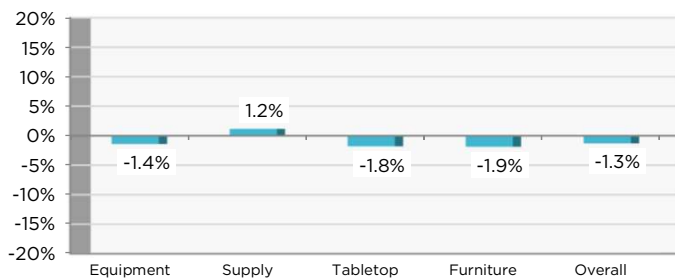
Northeast



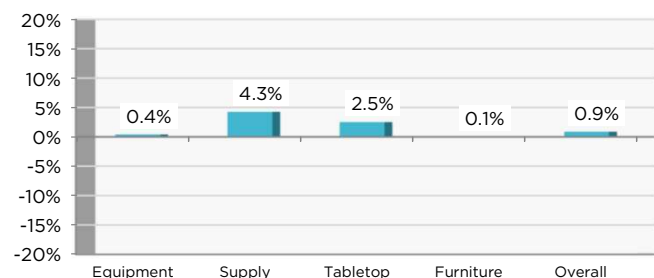
South



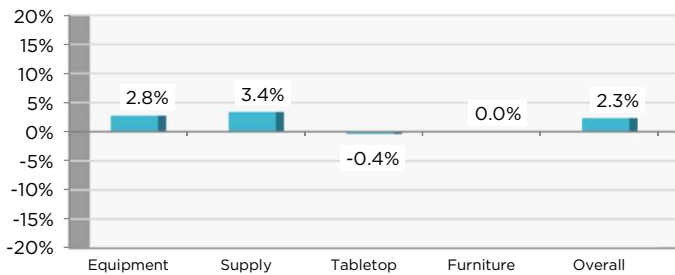
Midwest



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:

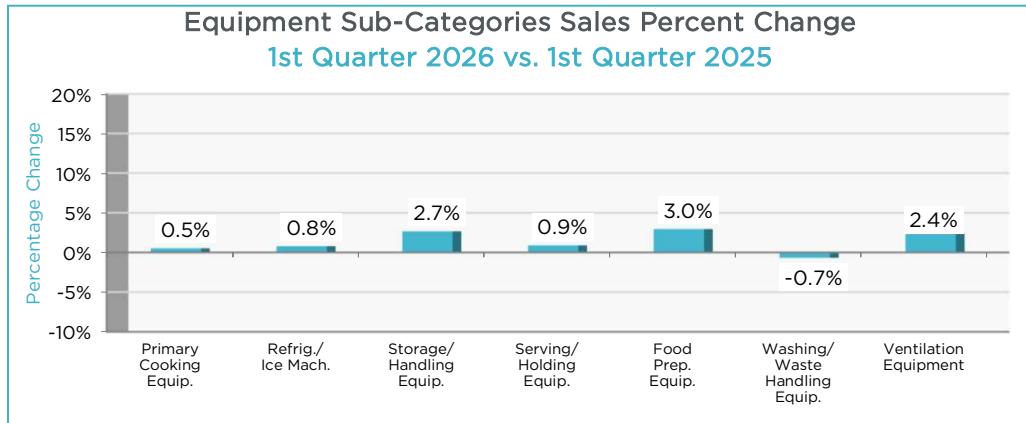
IA, IL, IN, KS, KY, MI, MN, MO, ND, NE, OH, W. PA, SD, WI, WV

WEST includes the states:

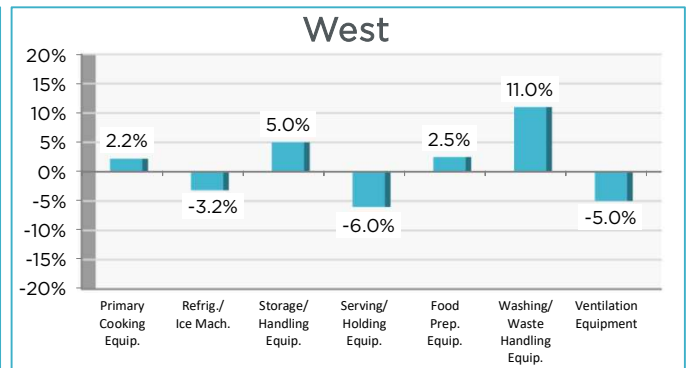
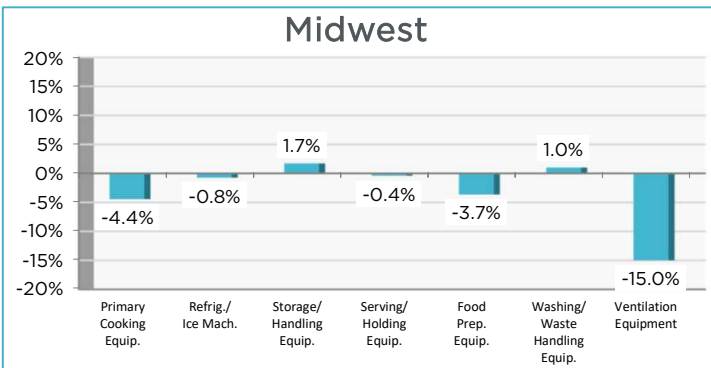
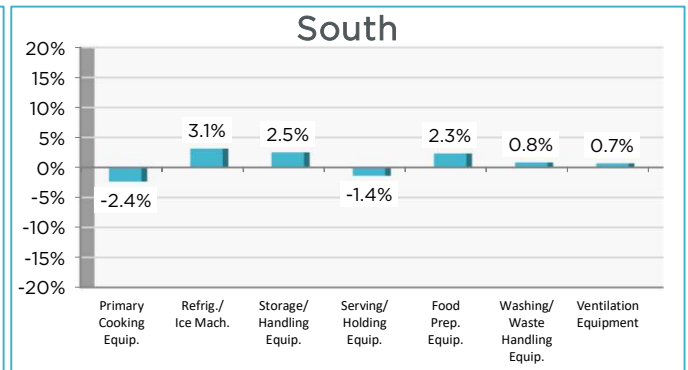
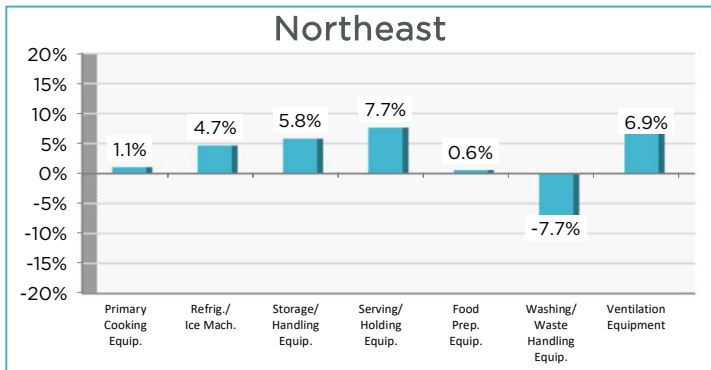
AK, AZ, CA, CO, HI, ID, MT, OR, NM, NV, UT, WA, WY

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 1st Quarter 2026 compared to 1st Quarter 2025 (Jan 1 - Mar 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:

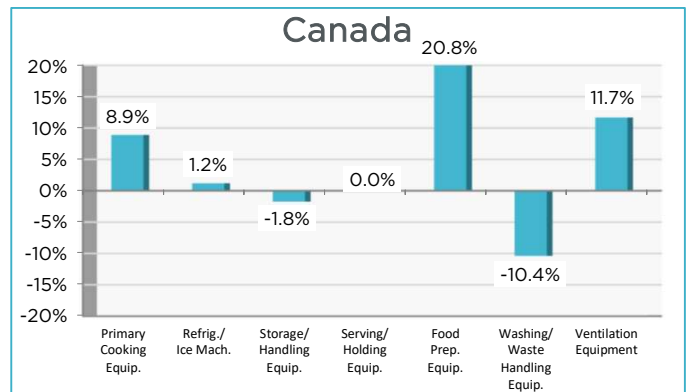
IA, IL, IN, KS, KY, MI, MN, MO, ND, NE, OH, W. PA, SD, WI, WV

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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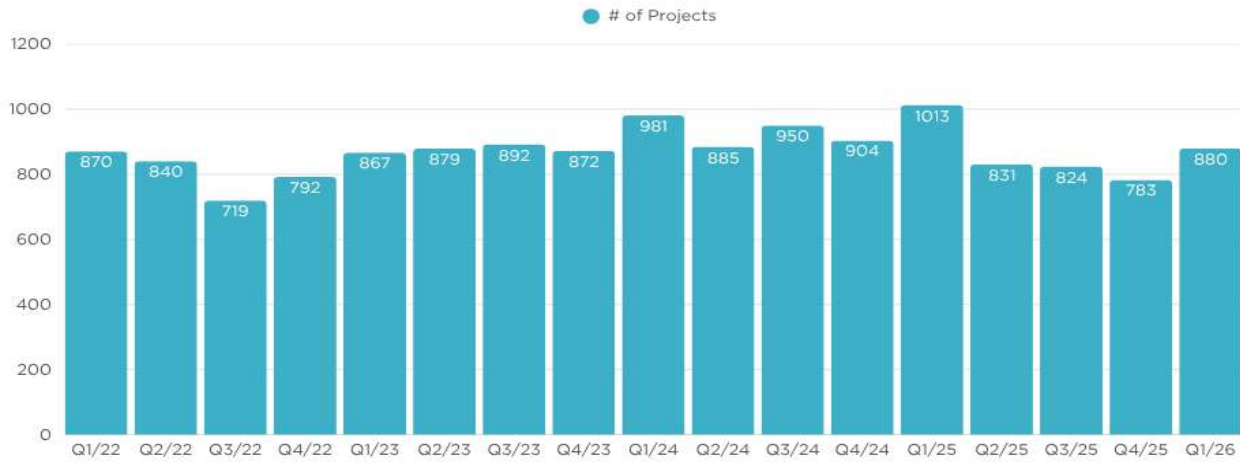
SPECPATH CONSTRUCTION PROJECTS

Q1/2022 to Q1/2026

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.	HRI, Inc.	Premier Marketing Group, Inc.
AFS Anderson Foodservice Solutions	Kain McArthur	Professional Manufacturers Representatives, Inc. (PMR)
Agences Hamilton Agencies	KBC Specialty Products, Inc.	Professional Reps
Allied Technologies Food Equipment	Kelly-Mincks	R. Henry & Associates
Bob Waite & Associates	Kitchen Resource Group	Schmid-Dewland Associates
Celco Inc.	Link2 Hospitality Solutions	Specialty Equipment Sales Company (SESCO)
Chernoff Sales, Inc.	MAC Sales & Marketing LTD.	The Daly & DeRoma Group, Inc.
Collis Group, Inc.	MarkeTeam Foodservice	The Pantano and Pinilla Agency, Inc.
Copperfield Agencies Limited	MarkeTeam Foodservice West	Thormann Associates
DJ Marketing & Associates	ONE SOURCE REPS	Total Tabletop Plus
Elevate Foodservice Group	PB & J Commercial Agents	Tri-State Marketing Associates
Equipment Preference, Inc. (E.P.I.)	PBAC & Associates LTD	Vader & Landgraf, Inc.
Food Equipment Representatives	Performance Reps Northwest, Inc.	W. D. Colledge Co., Ltd.
Gabriel Group LLC	Permul Ltd.	Wyllie Marketing
Greenwald Sales & Marketing, LLC	Preferred Marketing Agents, Inc.	Zink Foodservice
Hollander Company	Premier Foodservice Solutions	



Business Barometer Category Product List

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, 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 <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	
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