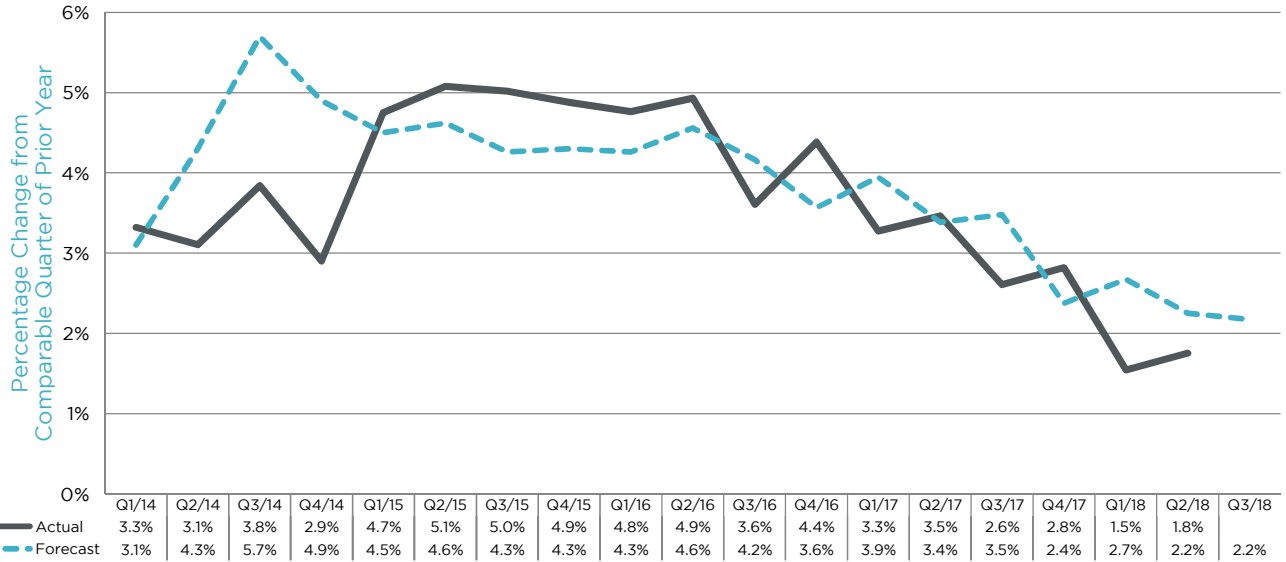
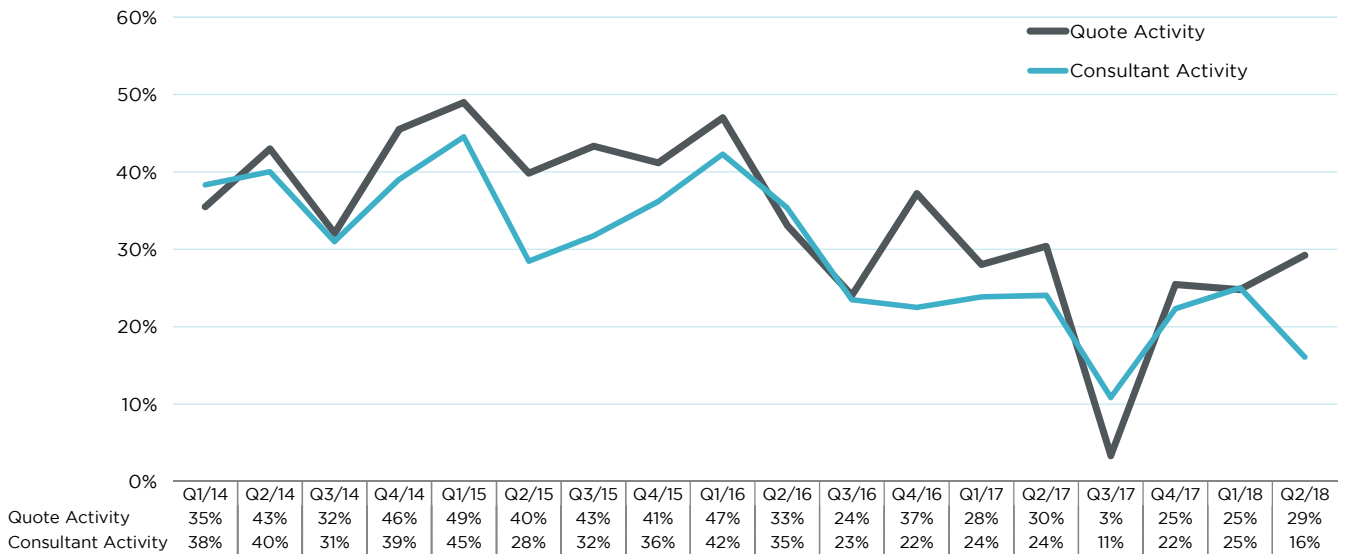




### Overall Commercial Foodservice Sales Per Quarter for North America 2014 - 2018



### Quotation and Consultant Activity



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



The commercial foodservice industry's most definitive non-food sales/trend indicator

Q2/2018 Foodservice Business Barometer Report

Q3/18 vs. Q3/17 Sales Percentage Change Forecast by Region

3rd Quarter 2018 compared to 3rd Quarter 2017 (Jul 1 - Sep 30)

Northeast 1.7%	South 3.0%	Midwest 1.9%	West 2.6%	Canada 1.0%
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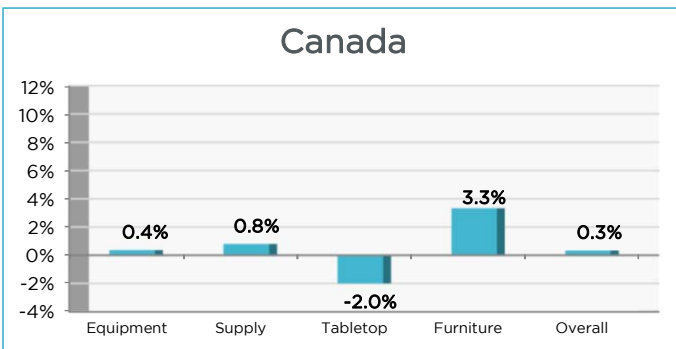
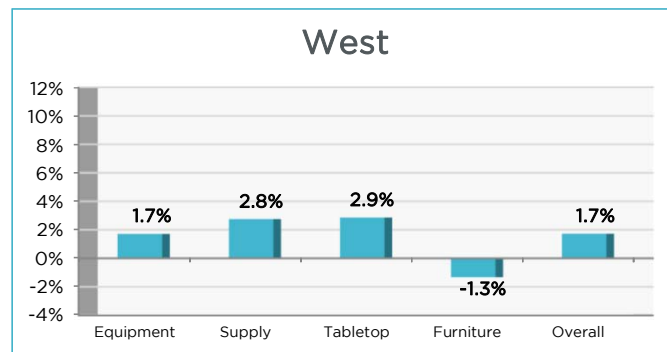
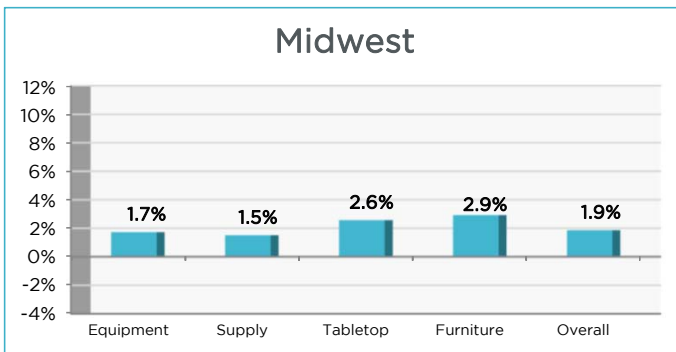
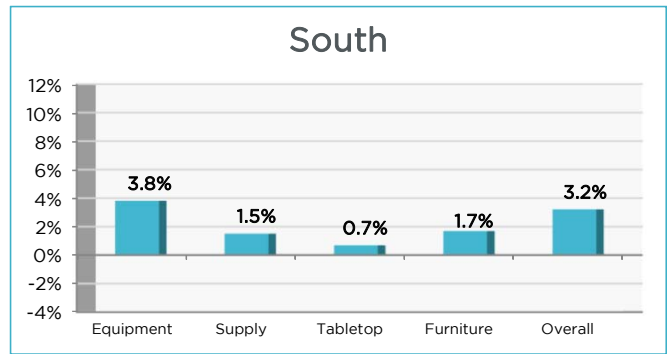
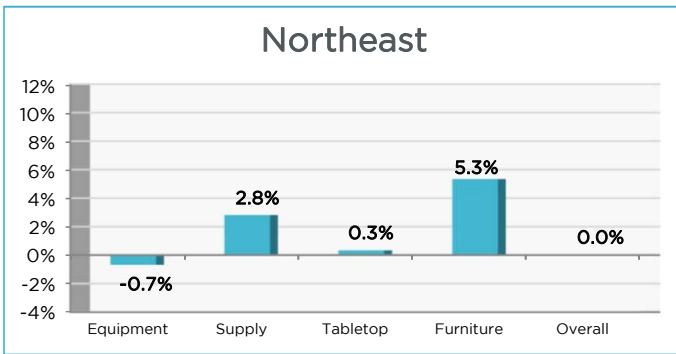
2018 vs. 2017 Overall Sales Forecast by Region

Compared to Overall Sales for 2017

Northeast 4.3%	South 3.6%	Midwest 3.5%	West 3.4%	Canada 4.6%
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2nd Quarter 2018 Sales Percentage Change by Region

2nd Quarter 2018 compared to 2nd Quarter 2017 (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

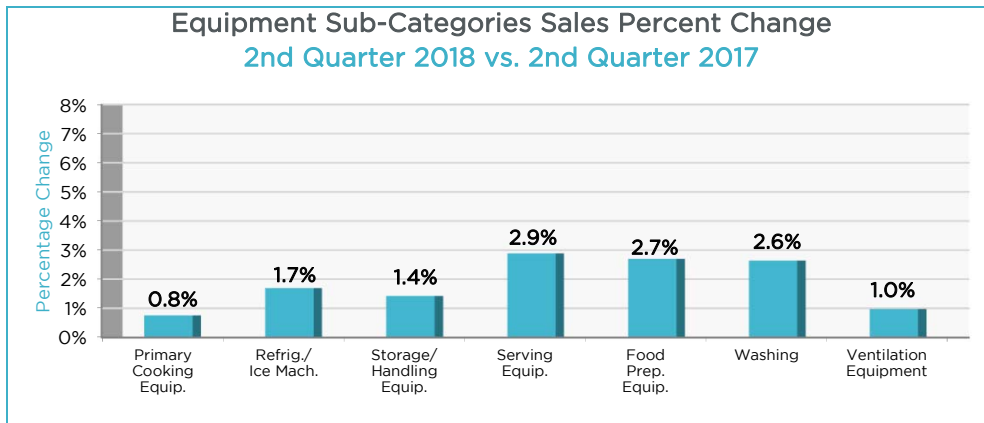
**WEST includes the states:**

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

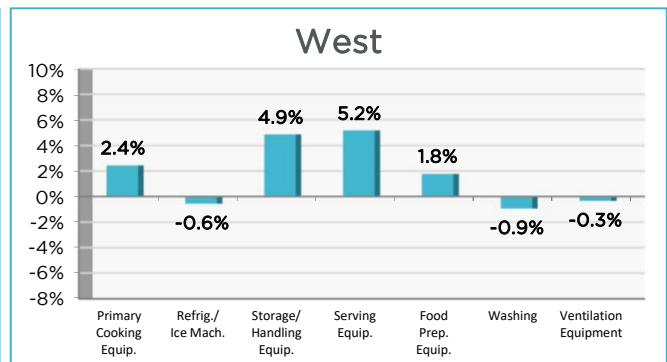
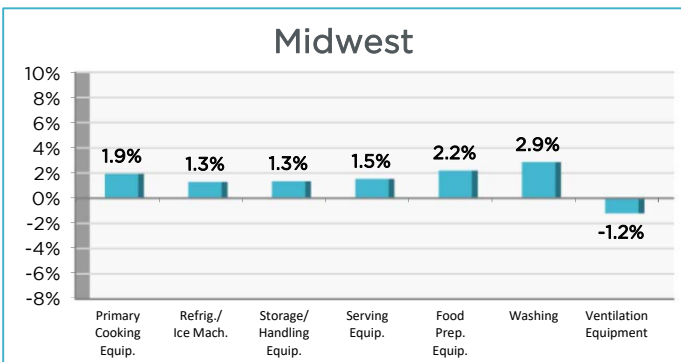
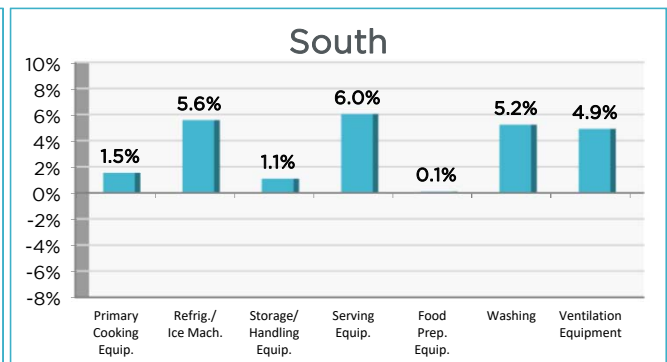
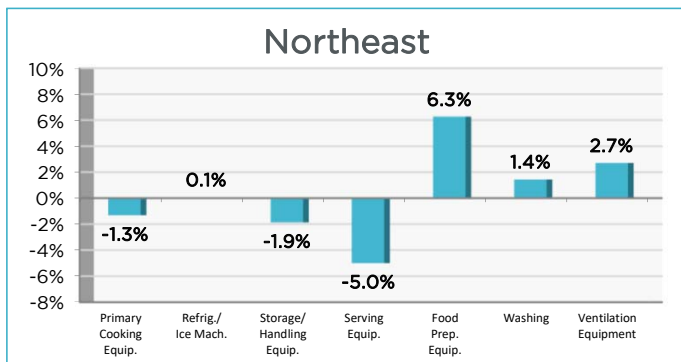
**CANADA includes all provinces and territories in Canada.**

\*The 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 2018 compared to 2nd Quarter 2017 (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:**

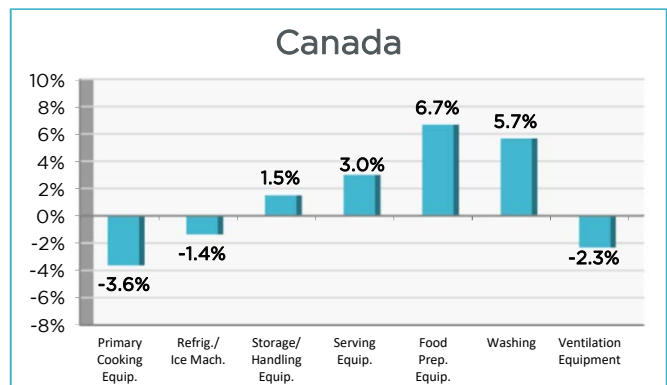
IA, IL, IN, KS, KY, MI, MN, MO, ND, NE, OH, W. PA, SD, WI, WV

**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.



MAIN CATEGORIES	
<b>Equipment</b> <i>Please note:</i> as of Q315, "Thermometers and Temperature Monitoring Devices" (previously in Food Preparation Equipment) are now in Supplies.	Food Preparation Equipment, Primary Cooking Equipment, Refrigeration & Ice Machines, Serving Equipment, Storage & Handling Equipment, Ventilation, Warewashing & Sanitation Equipment
<b>Supplies</b> <i>Please note:</i> as of Q315, "Menu and Message Boards" (previously calculated in Supplies) are now in Tabletop.	Bar Supplies, Buffetware, Can Openers, Cleaning Tools, Colanders, Cookware, Cutting Boards, Knives/Cutlery Blocks/Sharpeners, Mixing Bowls, Pans, Storage, Thermometers/Temperature Monitoring, Textiles (Kitchen), Utensils (Kitchen)
<b>Tabletop</b>	Baskets, Beverage Pitchers/Servers, Buckets (Ice & Wine), Candle Holders/Lamps, Candle & Chafing Fuel, Carafes/Decanters, Chafers, Covers, Dinnerware, Flatware, Glassware/Stemware, Menu Covers, Menu/Message Boards, Salt & Pepper Shakers, Serving Bowls/Plates, Servingware, Trays, Tray Stands
<b>Furniture</b>	Baby-Changing Stations, Bars (Stationary & Mobile), Benches, Booths, Cabinets, Chairs, Coat Racks, Drive Through Windows, Lamps (Dining/Table), Signs, Patio/Outdoor Heaters, Railings & Railings Fittings, Stools, Tables, Table Bases, Table Cloths, Umbrellas
SUB-CATEGORIES	
<b>Primary Cooking Equipment</b>	Braising Pans, Broilers, Charbroilers, Cook-Chill Systems, Fryers, Griddles, Grills, Oil Filtration Systems, Ovens, Panini Grills, Pasta Cookers, Ranges, Rice Cookers, Smokers, Steamers, Tilting Skillets, Toasters
<b>Refrigeration &amp; Ice Machines</b>	Air Curtains, Blast Chillers, Coolers, Doors, Drop-In Pan Chillers, Freezers, Ice Cream Cabinets, Ice Machines, Refrigeration, Refrigeration Compressors, Condensers & Evaporators, Slush/Smoothie Machines, Soft-Serve Ice Cream/Yogurt Machines, Water Filter Systems
<b>Storage &amp; Handling Equipment</b>	Bins, Bus/Tote Boxes, Cabinets, Carts, Conveyor Systems, Covers, Dispensers (non-food), Dollies, Food & Ingredient Canisters & Containers, Hand Trucks/Utility Trucks, Racks, Receiving Scales, Shelving, Tables (Standard Work Tables not Custom Fabricated) (Bakers, Cooks, Makeup, Prep, Etc.)
<b>Serving Equipment</b>	Beverage Dispensers, Carving Stations, Coffee Equipment, Food Dispensers, Food Shields, Merchandisers, Salad Bars/Tabletop Food Bars, Serving/Buffer Lines, Serving Carts, Soup Kettles/Servers, Steam Tables/Hot-Food Tables/Bain Marie, Tea Brewers, Warmers
<b>Food Preparation Equipment</b>	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, Popcorn Carts/Machines, Salad/Vegetable Washers & Dryers, Scales, Slicers, Timers
<b>Warewashing Equipment</b> <i>Please Note,</i> as of Q416, Sanitation Equipment is included under Janitorial and Sanitation Equipment.	Booster Heaters, Can Washers, Faucets/Spray Units/Washers/Hoses, Flatware-Handling/Recovery Systems, Floor Troughs & Drains, Pulpers & De-Water Equipment, Racks (Warewashing/Dishwashing Racks), Sinks, Tables (Dish), Warewashing/Dishwashing Machines
<b>Ventilation</b>	Appliance Connectors, Grease/Exhaust Filters, Grease Interceptors, Fire Suppression Systems/Fire Extinguishers, HVAC - Exhaust Systems, Fans, Utility Distribution Systems, Ventilation & Hoods
Janitorial & Sanitation Lines	
<b>New!</b> <b>Janitorial &amp; Sanitation Equipment</b>	Air Blowers/Carpet Dryers, Air Filtration Equipment, Bathroom Stall Doors, Cabinet Bases, Dehumidifying Equipment, Drain Pipes, Eye Wash Stations, Faucets and Faucet Systems, Pressure Washing Systems, Restroom Partitions/Stalls, Floor Scrubbers, Sinks, Toilets, Toilet Flushing Systems, Urinals, Waste Compactors, Waste Disposal Systems
<b>New!</b> <b>Janitorial &amp; Sanitation Supplies</b>	Baby Changing Stations, Brooms, Dusts Mops, etc., Brushes (Equipment Cleaning Brushes, Scouring Pads, etc.), Can & Bottle Crushers, Carpet Sweepers, Vacuums, Floor & Carpet Care Products, Carts (Janitorial), Cloths Microfiber, Drainboards, Hand Dryers, Mats (Anti-Fatigues, Bar, Rubber, etc.), Mops, Buckets & Pails, Odor Control Chemicals & Devices, Paper Towel Dispensers, Soaps and Hand Sanitizers, Soap Dispensers, Stall Storage Systems, Toilet Paper and Sanitary Dispensers, Waste Bins & Recycling Containers
<b>New!</b> <b>Disposables</b>	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



*The commercial foodservice industry's  
most definitive non-food sales/trend indicator*

Q2/2018 Foodservice Business Barometer Report

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

Adams Marketing & Sales	Forbes, Hever & Wallace, Inc.	Premier Equipment Group, Inc.
Advantage Marketing Group	Gabriel Group, Inc.	Premier Marketing Group
Agences Hamilton Agencies	Gibbs & Associates, Inc.	Premier Marketing Group, Inc.
Anderson Foodservice Solutions	GMV Sales	Pro/Line Marketing, Inc.
Apex Commercial Kitchen Co.	Greenwald Sales & Marketing	Pro-Quip Foodservice Equipment & Supplies Incorporated
Apex Marketing	Griffin Marketing Group, Inc.	R. Henry & Associates
ARB Sales and Marketing	Hanna-Young & Assoc., Inc.	Raleigh W. Johnson & Company
B Square Enterprises	Heartland Reps, LLC	Redco Foodservice Equipment, LLC
Barringer Marketing, Inc.	High Sabatino Associates	Schmid-Dewland Associates
Beacon Sales Group LLC	Hollander Company	Shamrock Foodservice Equipment Reps. Inc
Bob Waite & Associates	HRI, Inc.	Sharkey & Associates
Brittan Associates	Johnson Pike & Associates, Inc.	Simpson-Wilson, Ltd.
Carman-Girard Associates	Kain-McArthur Inc.	Southwest Foodservice Equipment Marketing
Celco Inc.	KBC Specialty Products, Inc.	Specialized
Charles L. Burton Associates	Kelly-Mincks	stage KOLSTAD associates
Chernoff Sales, Inc.	Ken W. Thomson Associates Ltd.	Stiefel Associates, Inc.
Chrane Foodservice Solutions	KLH Marketing, Inc.	TD Marketing Company, Inc.
Claes & Greenoe Marketing Group	Koehler-Borden & Associates, Inc.	The 2Market Group, Inc.
Clements-Stella-Gallagher Marketing	Lake Effect Sales & Marketing	The Fischer Group
Collis Group, Inc.	Lehr McKeown Marketing, Inc.	The Hansen Group
Commercial Kitchen Reps, Inc.	Link2 Hospitality Solutions	The Pantano and Pinilla Agency, Inc.
Copperfield Agencies Limited	Lund-lorio, Inc.	The Wallin Group, Inc.
Courtney Marketing, Inc.	M2 Foodservice Representatives LLC	The Yes Group
Cowan Associates	MAC Sales & Marketing LTD.	Thormann Associates
Davis & Associates, Inc.	Marjon & Associates, Inc.	TLC Marketing Inc.
Desert Peak Marketing	Master Marketing	Total Tabletop Plus
Downing Management	Midwest Professional Reps, Inc.	Tri-State Marketing Associates
DRC Marketing Group	Mirkovich - Casper	Veitch Group
E. Ruff & Associates, Inc.	Nick Mavro & Associates, LLC	Viola Group
Eaton Marketing Associates, Inc.	ONE SOURCE	Voeller & Associates, Inc.
Equipment Preference, Inc. (E.P.I.)	Paglio & Associates, Inc.	W. D. Colledge Co., Ltd.
E-Source, Inc.	PB & J Commercial Agents	Walter Zebrowski Associates
Ettinger-Rosini & Associates, Inc.	PBAC & Associates LTD	Waypoint Commercial Solutions
Florida Agents, Inc.	Pecinka Ferri Associates	West Coast Food Service Marketing
FOCUS Hospitality Sales	Performance Reps Northwest, Inc.	Wyllie Marketing
Food Equipment Sales & Marketing Agents, Inc. (FESMA)	Permul Ltd.	YBR Marketing, Inc.
Food Service Applications, Inc.	PMR	Young Equipment Solutions, Inc.
Foodservice Equipment Agents, LLC	Preferred Marketing Group	Zink Foodservice