

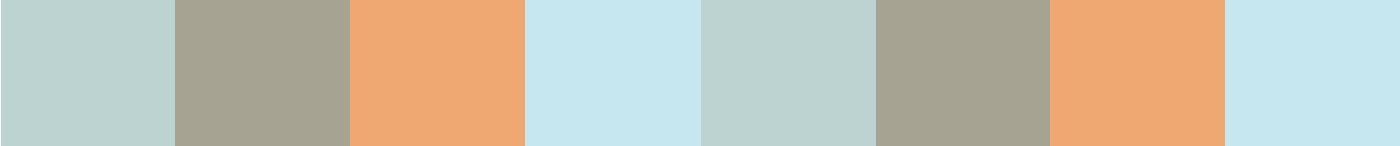


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A stylized map of the United States is the background for the central section. The map is composed of various shades of teal, blue, and orange. Overlaid on the map are several vertical bars of varying heights and colors, including teal, orange, and grey. The year "2024" is written in large, white, bold, sans-serif font across the center of the map.

2024

MAFSI **FOODSERVICE INDUSTRY MARKET FORECAST REPORT**



MAFSI Foodservice Industry Market Forecast Report for 2024

All numbers reported are for North America



Overall Sales Forecast 2024 vs. 2023	
Equipment	3.5%
Supplies	3.8%
Tabletop	3.5%
Furniture	4.3%
Overall Sales	3.6%

Equipment Sub-Categories Sales Forecast 2024 vs. 2023	
Primary Cooking Equipment	3.6%
Refrigeration & Ice Machines	3.9%
Storage & Handling Equipment	2.8%
Serving Equipment	3.1%
Food Preparation Equipment	3.8%
Warewashing	3.4%
Ventilation	2.5%

Jan/San Sales Forecast 2024 vs. 2023	
Janitorial & Sanitation Equipment	1.0%
Janitorial & Sanitation Supplies	3.5%
Disposables	1.2%

Quoting Forecast 2024 vs. 2023	
More activity	52.4%
No change	26.2%
Less activity	21.4%

Consultant Forecast 2024 vs. 2023	
More activity	41.5%
No change	41.5%
Less activity	17.1%

Rep Firm Lines Increase or Decrease in the last 12 Months	
More lines	52.5%
No change	25.0%
Less Lines	22.5%

2024 Fastest Growing Segments ranking order of most growth to least growth	
Schools (K-12)	1
Chain Accounts	2
Healthcare	3
Convenience Stores	4
Hotel/Motel	5
Business and Industry	6
Colleges and Universities	7
Independent Operators	8
Supermarkets	9
Casinos/Gaming	10
Commissaries/Food Process	11
Contract Feeders	12
Sports Venues	13
Country Clubs	14
Fine Dining	15
Corrections	16
Theme Parks	17
Military	18
Cruise Ships	19
Bakeries	20
International/Export	21

Rep Firm Staff Change Actual 2023	
Added staff in 2020	61.9%
No staff change in 2020	33.3%
Decreased staff in 2020	4.8%

Rep Firm Staff Change Forecast 2024	
Adding staff in 2023	75.0%
No staff change in 2023	22.5%
Decrease in staff in 2023	2.5%

MAFSI is a 77 year-old non-profit trade association comprised of 240+ independent manufacturers' representative sales companies and 200+ manufacturing companies in North America selling, marketing, and producing commercial foodservice equipment, supplies, tabletop, and furnishings.

Representing over 2,400 sales and marketing professionals and manufacturing executives across North America; MAFSI provides market forecasting, networking and partnership opportunities, industry stewardship, education and resources, and member advocacy for the \$14.5 billion commercial non-foods industry. MAFSI is everywhere food is. And everywhere you are. Spanning North America, feeding 300 million people and changing an industry.

We thank our representative members not only for their contributions to this report, but for the hard work and pride they bring to this industry each and every day.