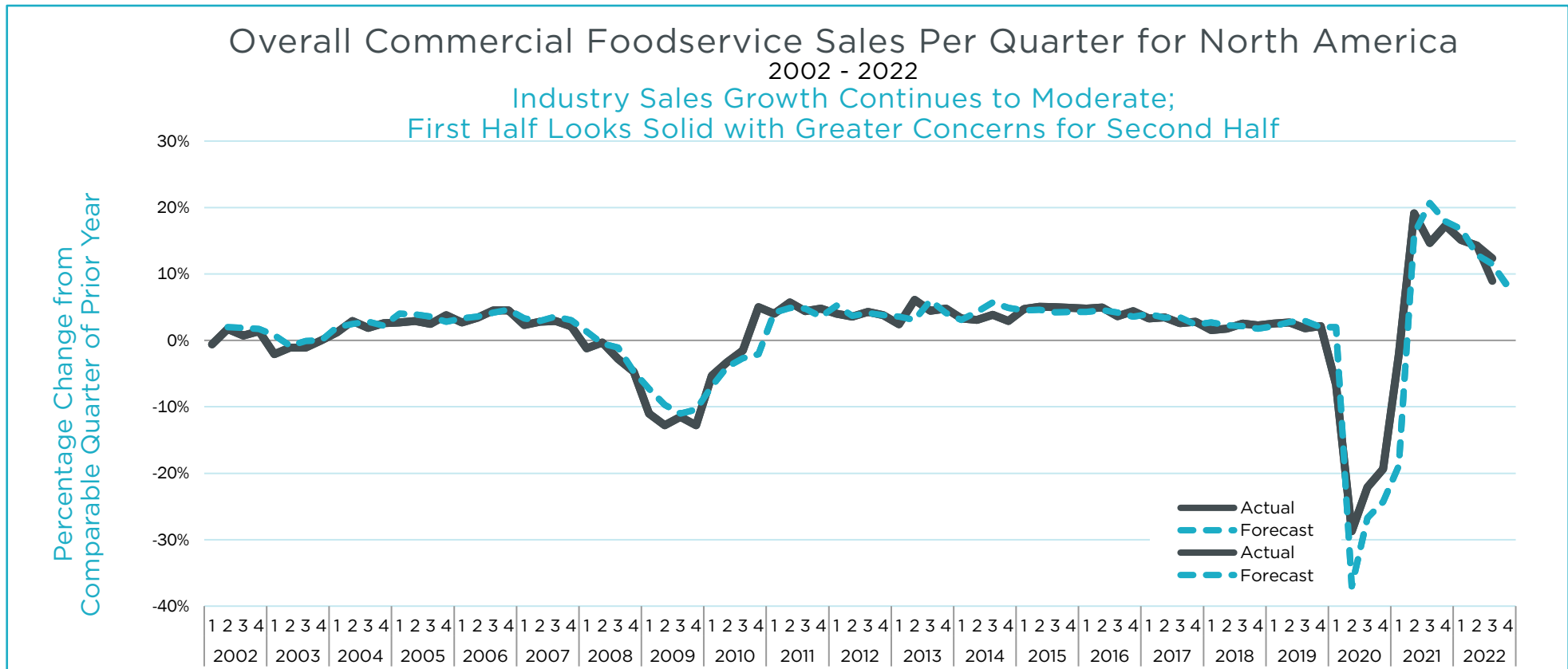




# Q4/2022 Foodservice Business Barometer Report

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



### Industry Sales Growth Continues to Moderate; First Half Looks Solid with Greater Concerns for Second Half

Overall, sales for Q4/22 slid to +8.7% from +9.0% of Q3/22. While still above the forecast of +8.0%, it nevertheless was a continuation of the slower growth trend since the peak of Q2/21.

The forecast for Q1/23 vs Q1/22 is +7.0%, down from +20.7%, +17.9%, +16.8%, +13.2%, +11.5%, and +8.0%, over the past 7 quarters. These numbers are still impressive as the comparables were very high in the early stages of the recovery.

Although most manufacturers are reporting smaller backlogs, this is largely attributable to shorter lead times, hence shorter order cycling as supply chain problems for the most part are resolved, and production is near peak levels. The business climate remains healthy as both Consultant Activity, at 30% more from 25% more last month, and Quoting Activity at +43% more from +29% more previously, have both advanced, certainly a positive sign of future prospects.

Sales growth in Q4/22 was highly variable, extending from +11.4% in the South, +9.9% in the West, +8.9% in the Midwest, +6.4% in Canada, and lastly, +6.2% in the Northeast, particularly in New York City where only 60% are back to work in the office.

Likely a healthy pipeline of projects will provide solid business in the first half, while rising interest rates and banking issues are apt to impact businesses more significantly in the second half.

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

**Qtrly Sales Forecast for North America**  
**Q1/23 vs. Q1/22**  
**7.0%**

**Yearly Sales Forecast for North America**  
**2023 vs. 2022**                      **2022 vs. 2021**  
**5.9%**                                      **11.3%**

**Quoting Activity for Q4/22 vs. Q3/22**

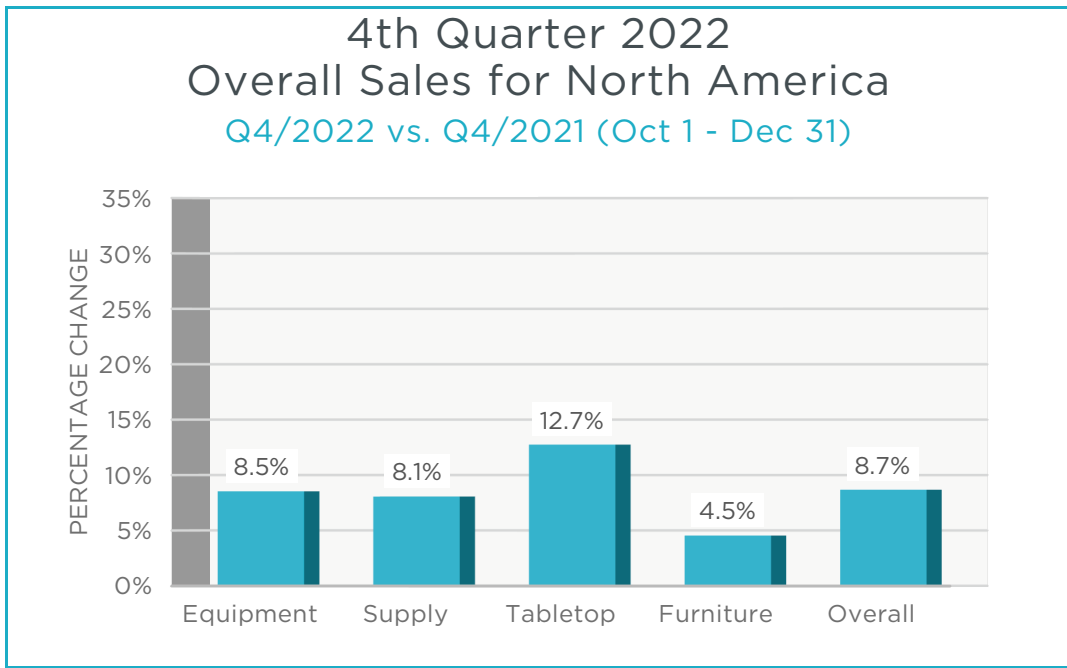
<b>More</b>	<b>Less</b>	<b>No Change</b>
<b>43%</b>	<b>23%</b>	<b>34%</b>

**Consultant Activity for Q4/22 vs. Q3/22**

<b>More</b>	<b>Less</b>	<b>No Change</b>
<b>30%</b>	<b>18%</b>	<b>52%</b>

**Jan San Sales for Q4/22 vs. Q4/21**

<b>Equipment</b>	<b>Supplies</b>	<b>Disposables</b>
<b>4.7%</b>	<b>6.3%</b>	<b>6.7%</b>



\*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.

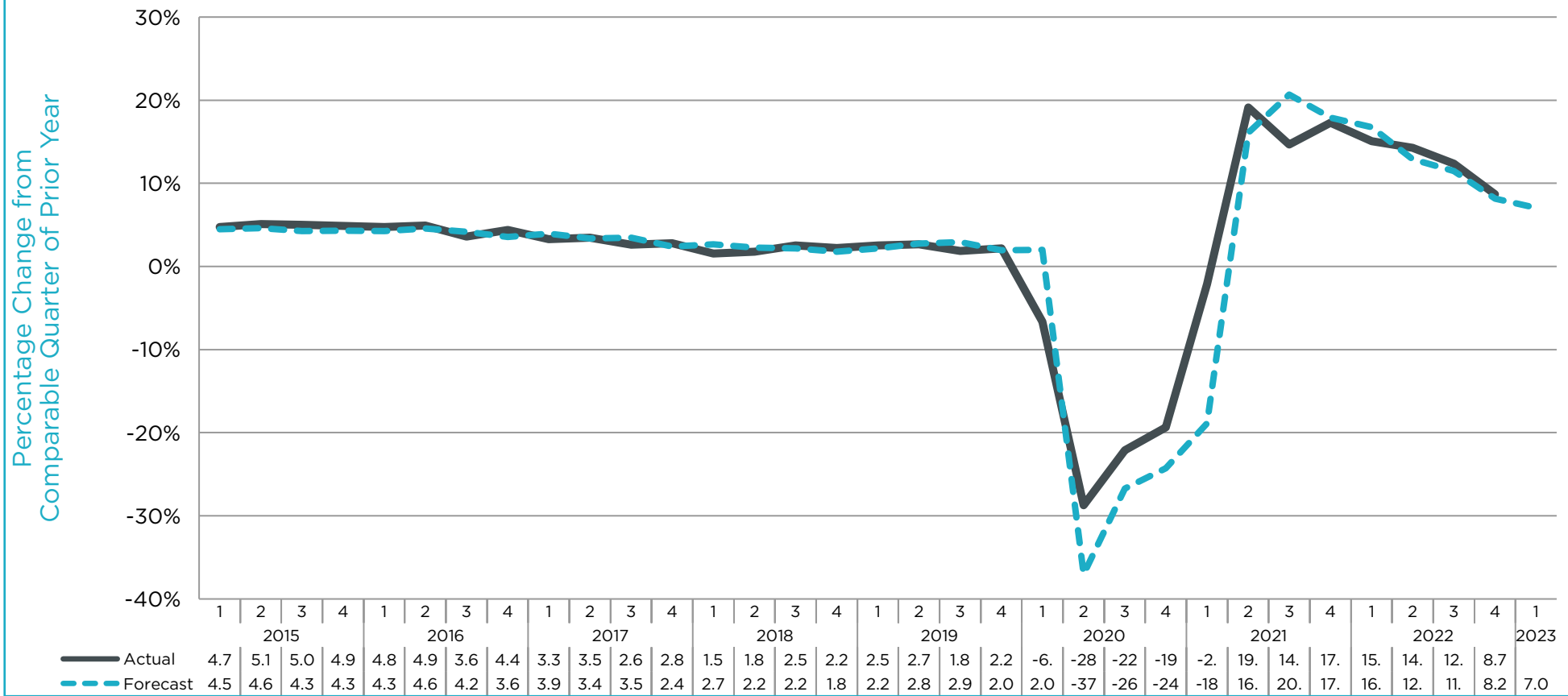




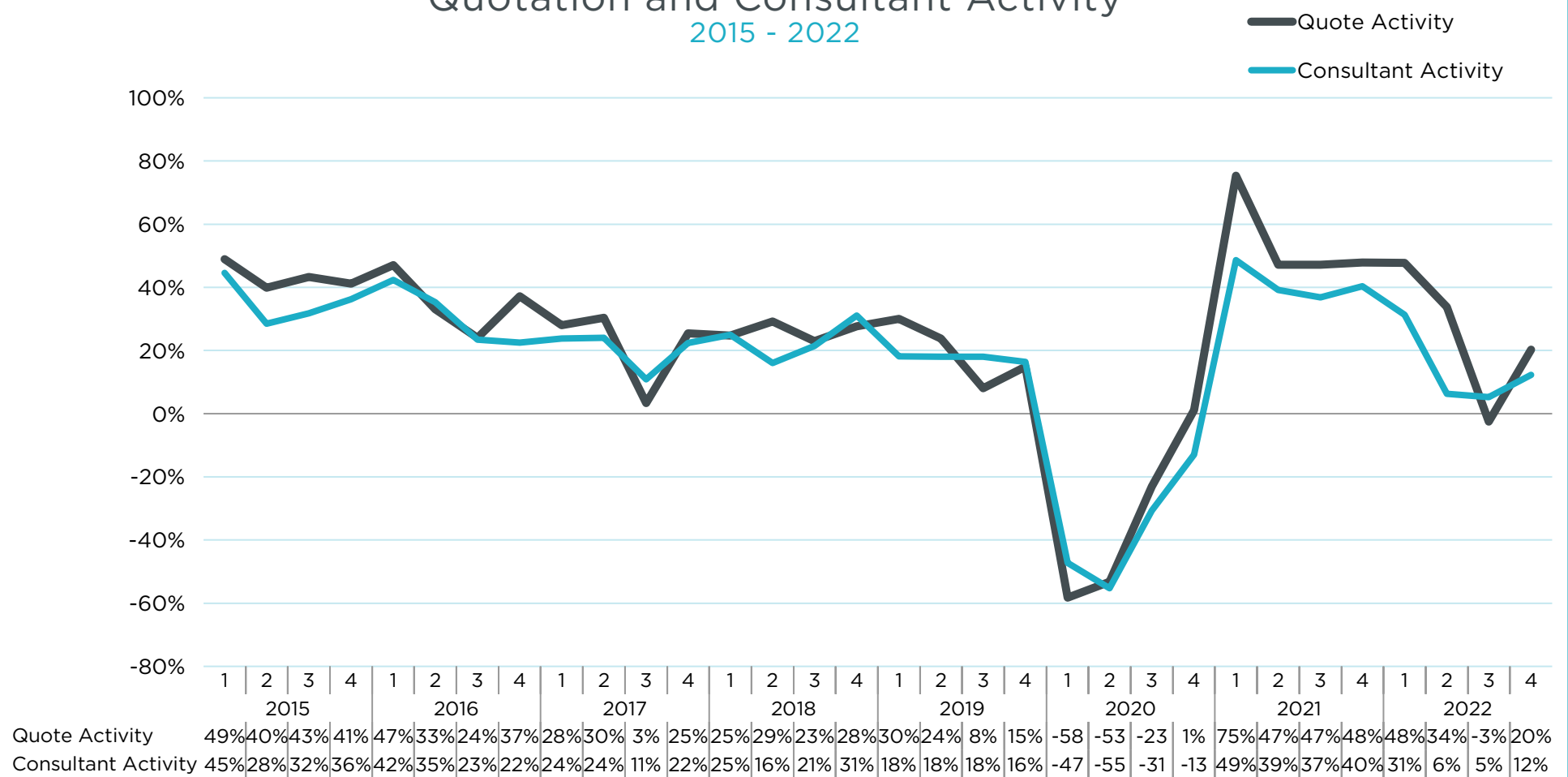
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## Overall Commercial Foodservice Sales Per Quarter for North America 2015 - 2022



## Quotation and Consultant Activity 2015 - 2022



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





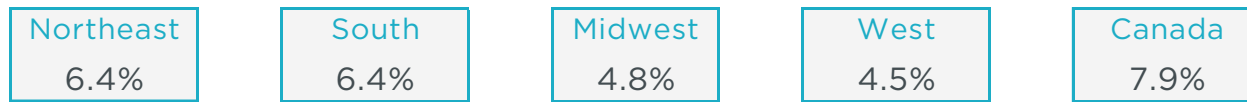
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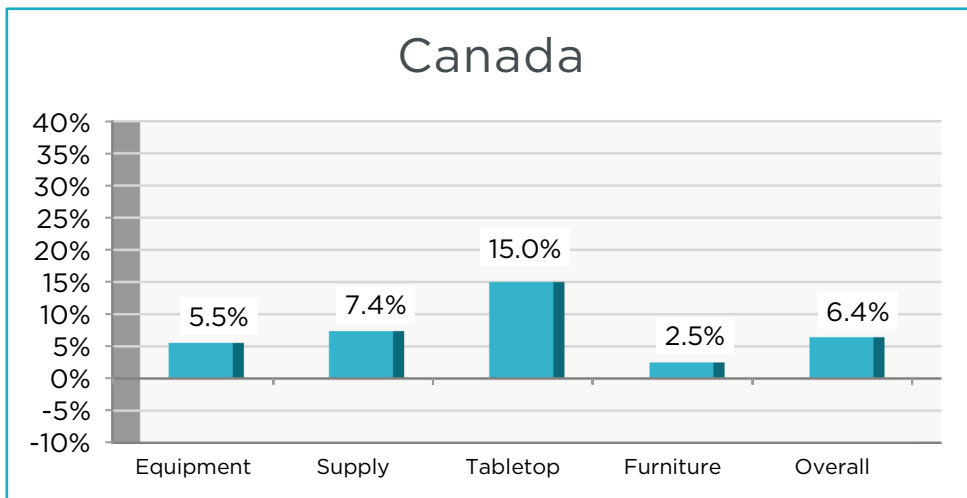
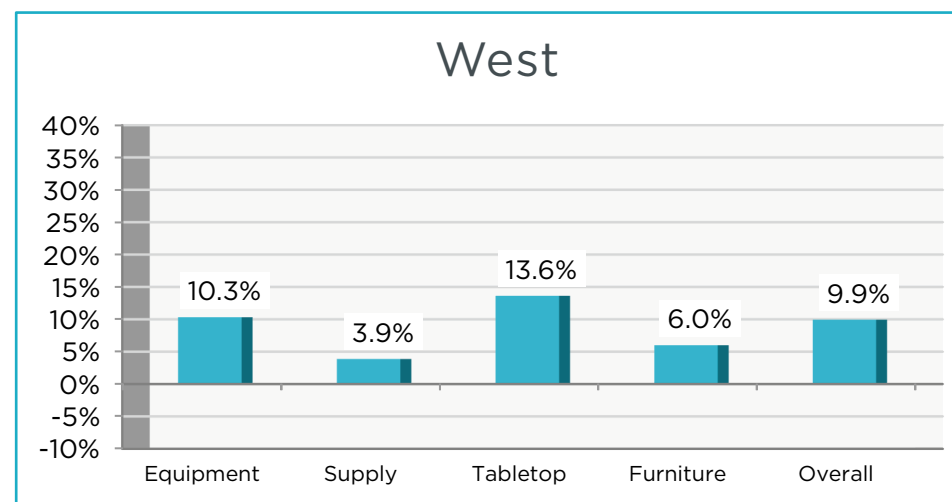
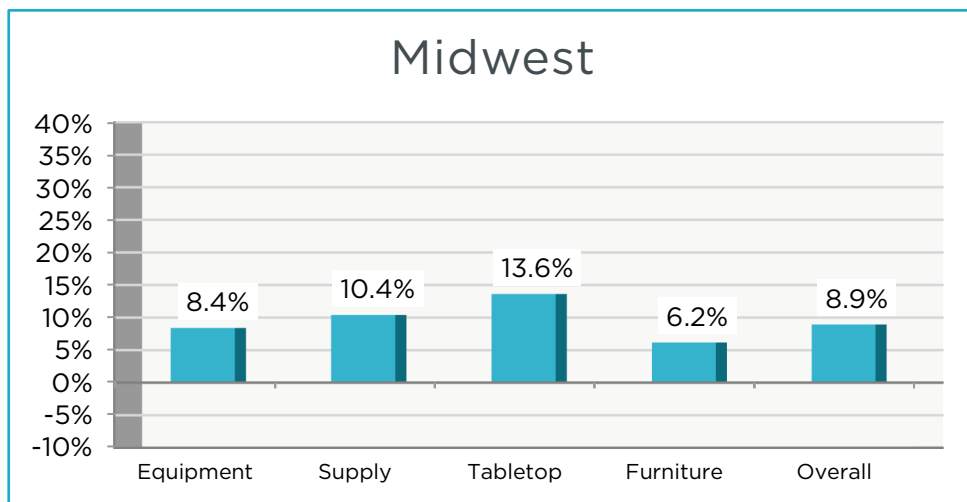
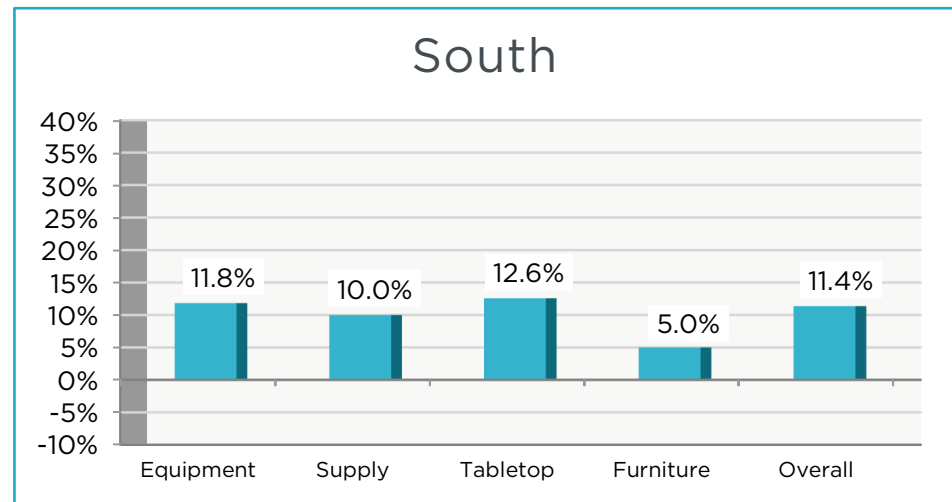
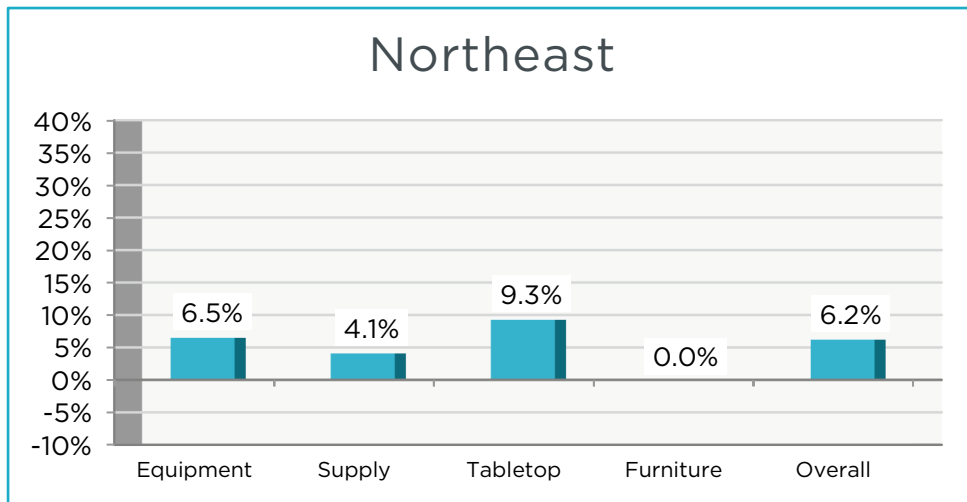
## Q1/23 vs. Q1/22 Sales Percentage Change Forecast by Region 1st Quarter 2023 compared to 1st Quarter 2022 (Jan 1 - Mar 31)



## 2023 vs. 2022 Overall Sales Forecast by Region Compared to Overall Sales for 2022



## 4th Quarter 2022 Sales Percentage Change by Region 4th Quarter 2022 compared to 4th Quarter 2021 (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.

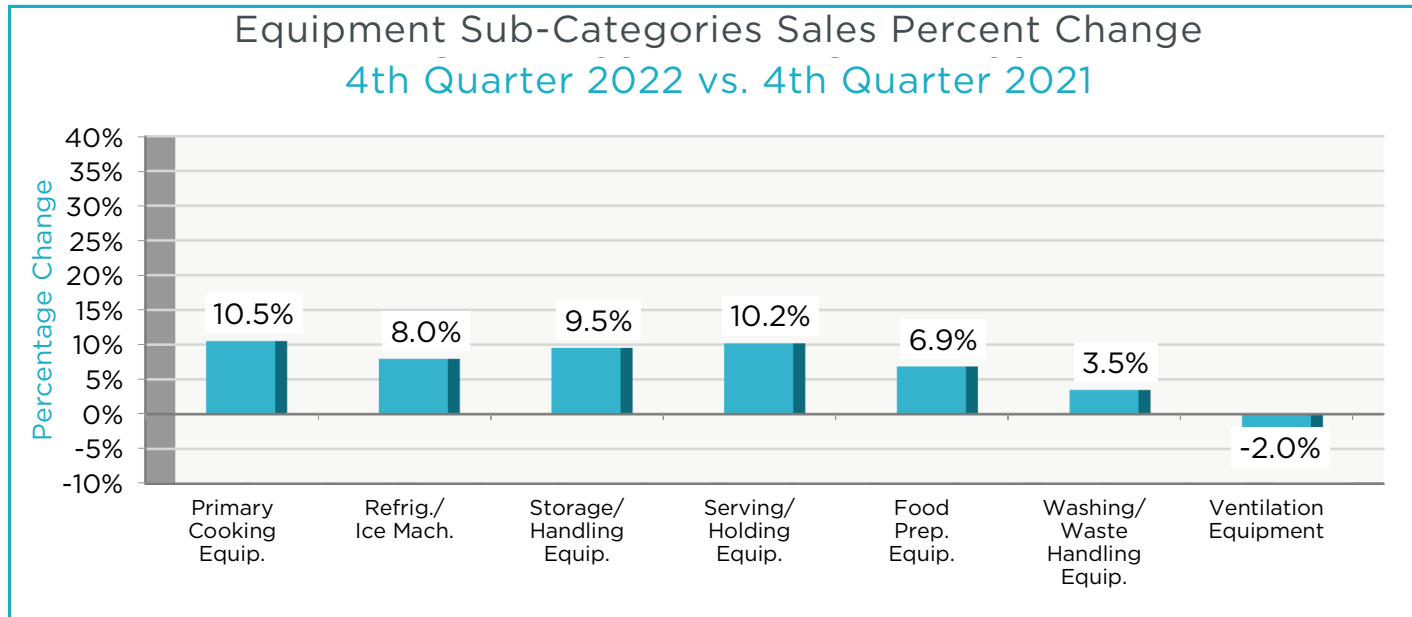
\*The overall industry sales growth is calculated using a weighted average based on the percentage of the total sales volume for the overall industry represented by the various sales categories: Equipment (77%), Supplies (7%), Tabletop (10%), and Furnishings (6%). Market numbers are based on the North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





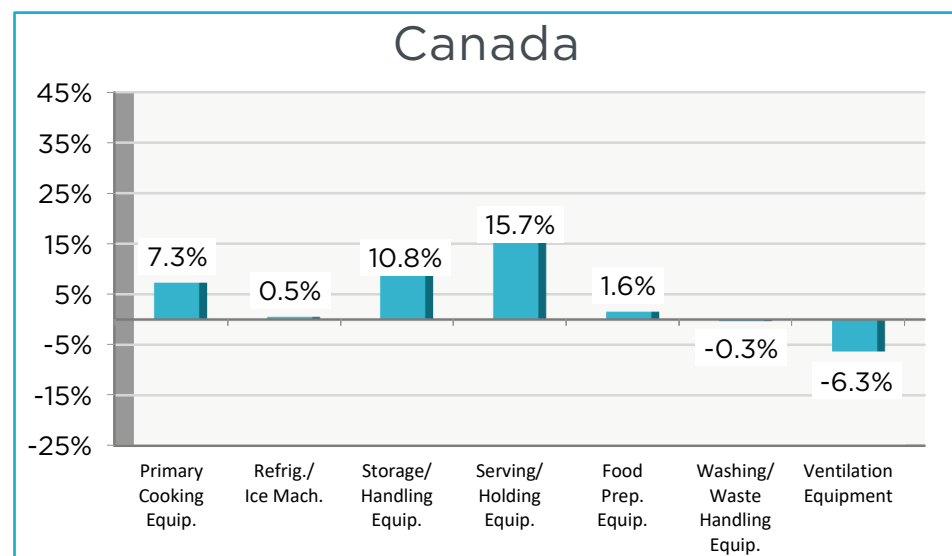
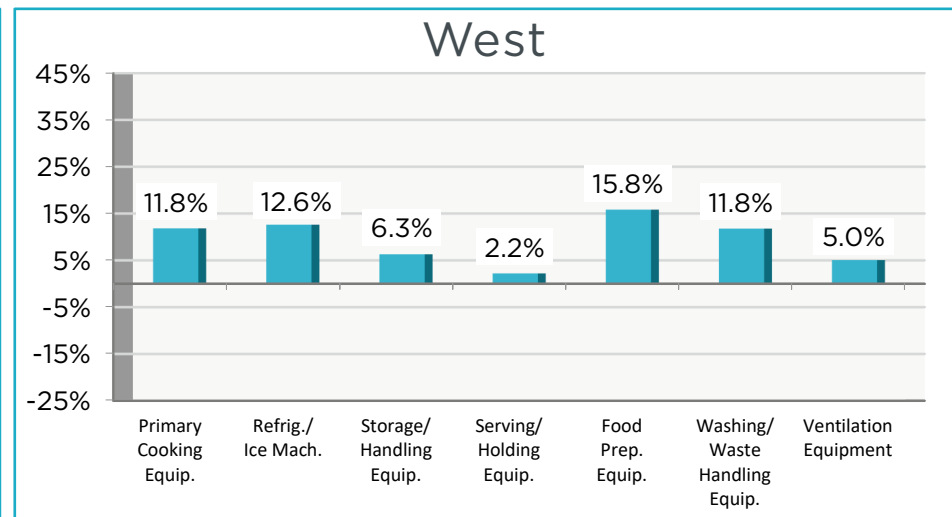
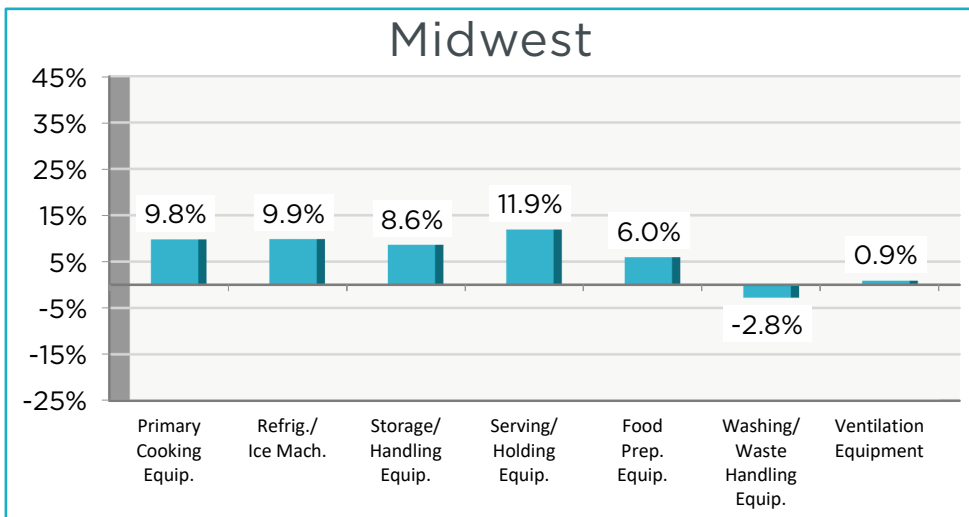
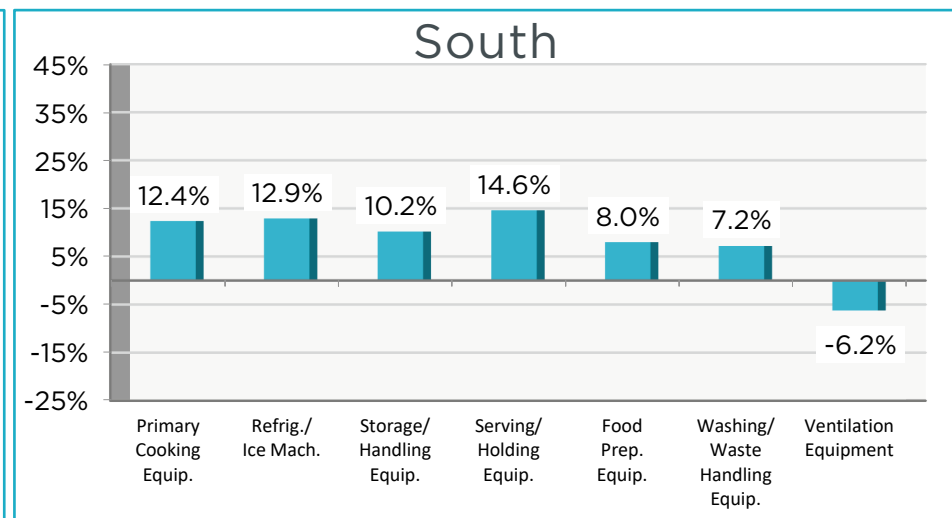
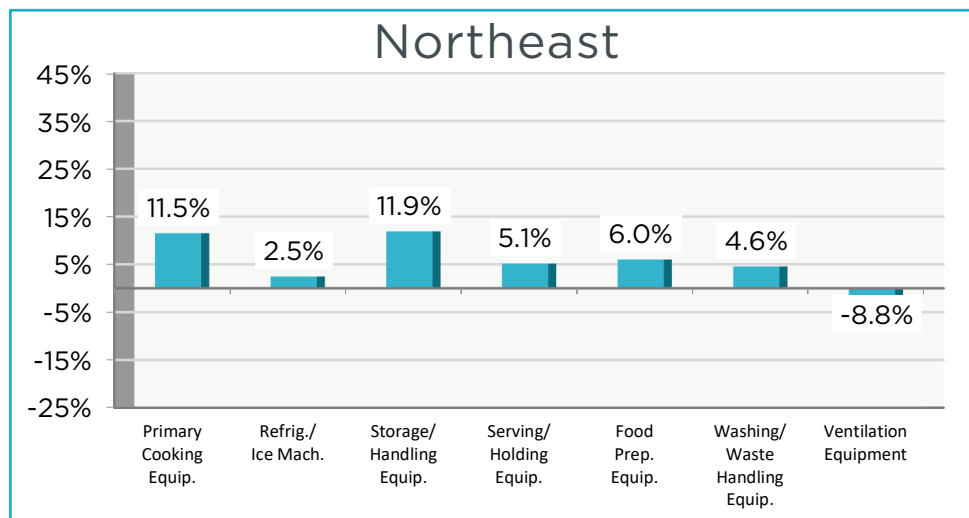
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## Equipment Sub-Categories Sales Percent Change by Region

4th Quarter 2022 compared to 4th Quarter 2021 (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.

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.





# Q4/2022 Foodservice Business Barometer Report

REP FIRM PARTICIPANTS

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

4 Star Reps, Inc.	Gabriel Group LLC	Pro Reps West
AFS Anderson Foodservice Solutions	Greenwald Sales & Marketing, LLC	Professional Manufacturers Representatives, Inc. (PMR)
Agences Hamilton Agencies	Hanna-Young & Associates - Region 18	Pro-Quip Foodservice Equipment & Supplies Incorporated
Allied Technologies Food Equipment	Hollander Company	R. Henry & Associates
B Square Enterprises	HRI, Inc.	Raleigh W. Johnson & Company
Beacon Sales Group LLC	Inform Foodservice Solutions	Schmid-Dewland Associates
Bob Waite & Associates	Kain McArthur	Sharkey & Associates
Celco Inc.	Kaufmann & Associates	Southwest Foodservice Equipment Marketing
Chernoff Sales, Inc.	KBC Specialty Products, Inc.	Specialized
Chrane Foodservice Solutions	Kelly-Mincks	stage KOLSTAD associates
CMA Foodservice Solutions	KLH Marketing, Inc.	The 2Market Group, Inc.
Collis Group, Inc.	MAC Sales & Marketing LTD.	The Fischer Group
Copperfield Agencies Limited	Mid-West Associates	The Pantano and Pinilla Agency, Inc.
Cowan Associates	Midwest Professional Reps, Inc.	Thormann Associates
Davis & Associates, Inc.	Mirk Group	TLC Marketing Inc.
Dedicated Foodservice Solutions LLC	ONE SOURCE REPS	Total Tabletop Plus
DJ Marketing & Associates	P3Reps-NNY/Lake Effect	Vader & Landgraf, Inc.
DRC Marketing Group	Paglio & Associates, Inc.	Viola Group
DSA REPS, LLC.	PB & J Commercial Agents	Voeller & Associates, Inc.
Equipment Preference, Inc. (E.P.I.)	PBAC & Associates LTD	W. D. Colledge Co., Ltd.
Ettinger-Rosini / Waypoint	Pecinka Ferri Associates	Walter Zebrowski Associates
Florida Agents, Inc.	Permul Ltd.	Wyllie Marketing
FOCUS Hospitality Sales	Preferred Marketing Agents, Inc.	YBR Marketing, Inc.
Food Service Solutions Inc.	Preferred Marketing Group	YES Group, Inc
Forbes, Hever & Wallace, Inc.	Premier Foodservice Solutions	Zink Foodservice



## 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, Janitorial & Sanitation Equipment, Primary Cooking Equipment, Refrigeration & Ice Machines, Serving & Holding Equipment, Storage & Handling Equipment, Ventilation, Warewashing, Waste Handling Equipment
<b>Supplies</b> <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)
<b>Tabletop</b>	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
<b>Furniture</b>	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

<b>Primary Cooking Equipment</b>	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
<b>Refrigeration &amp; Ice Machines</b>	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
<b>Storage &amp; Handling Equipment</b>	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.)
<b>Serving &amp; Holding Equipment</b>	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
<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, Pasta Makers, Popcorn Carts/Machines, Salad/Vegetable Washers & Dryers, Scales, Slicers, Timers, Vacuum-Pack Machines
<b>Warewashing &amp; Waste Handling Equipment</b> <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
<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 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
<b>New!</b> <b>Janitorial &amp; Sanitation Supplies</b>	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
<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