

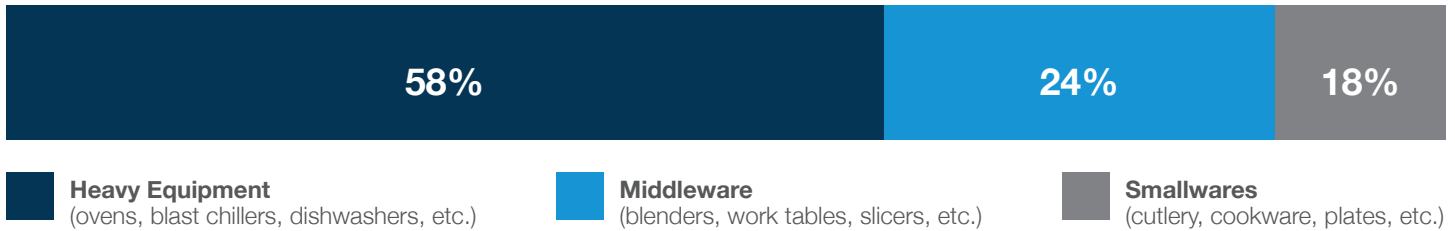
# NAFEM Overview

Founded in 1948, NAFEM is a trade association of 600+ commercial foodservice equipment and supplies (E&S) manufacturers – a \$13 billion industry\*. These businesses, their employees and the products they manufacture, support the food away from home market – which includes more than one million locations in the U.S. and countless more around the world.

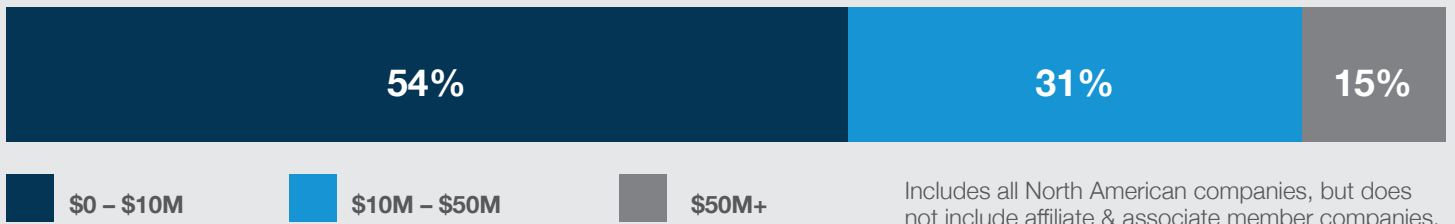
\*NAFEM 2018 Size & Shape of the Industry Study



## Types of equipment NAFEM members manufacture



## NAFEM member companies by sales volume



## Who NAFEM serves

NAFEM serves a vibrant mix of small, medium and large publicly and privately-owned manufacturing companies. In turn, NAFEM members serve the following foodservice industry segments and their approximate 2018 retail sales\*:



**Business & Industry**  
\$16 billion



**Colleges & Universities**  
\$18 billion



**Correctional Facilities**  
\$4 billion



**Healthcare & Senior Living**  
\$30 billion



**Military**  
\$5 billion



**Restaurants & Bars**  
\$606 billion



**Retailers, Supermarkets & Convenience Stores**  
\$70 billion



**Schools**  
\$22 billion



**Travel & Leisure**  
\$101 billion

\*Technomic, Inc.



## What NAFEM offers

NAFEM is dedicated to driving success and forward progress among our member companies, and satisfy the association's purpose: provide leadership to improve the global foodservice experience. Core offerings include:

### Advocacy

NAFEM's advocacy efforts provide members a unifying voice and industry leadership on the issues that matter most:



Energy



Environment



Materials & Handling



Regulations



Taxes, Tariffs & Trade

### Education & Certification



#### Certified Foodservice Professional (CFSP)

NAFEM's Certified Foodservice Professional (CFSP) designation is widely recognized. Earning the designation demonstrates comprehensive knowledge across all areas of the commercial foodservice E&S industry.



#### CIA Partnership

Through NAFEM's partnership with the Culinary Institute of America (CIA), the association keeps members close to future culinary trends – and the emerging professionals who will drive them.



#### E&S Industry Summit

NAFEM's biennial, three-day workshop offers valuable educational and networking opportunities for member company executives.



#### NAFEM Learning Center

NAFEM's Learning Center offers members and the industry a portfolio of online modules and tools for performance improvement.



The largest biennial foodservice equipment & supplies (E&S) tradeshow in North America – features products from 600+ of the world's leading equipment and supplies manufacturers. Attendees can meet and learn from leaders across all foodservice segments and see the latest cutting-edge trends.

**The NAFEM Show, Feb. 4 – 6, 2021, Ernest N. Morial Convention Center, New Orleans**

### Research

NAFEM's research assists members with business planning, product development, foodservice industry forecasting and benchmarking. This body of research includes the following biennial reports – **Size and Shape of the Industry Study**, which reports North American foodservice E&S data for domestic and international dollar sales, anticipated product-category sales and year-over-year sales change; **Business Planning Study**, which examines and makes comparative analysis of trends, workforce, customers and products, and operations and supply chain data; **Wage and Benefit Study**, which provides a benchmark analysis of foodservice manufacturers pay trends and talent acquisition and retention strategies. Quarterly, NAFEM releases the **ITR Economics Foodservice Industry Forecast**, providing members an economic overview of U.S. industrial production and U.S. personal consumption expenditures for foodservice and higher education meals.

