

## Q2 2026 Report

Transforming the Idea of What is Possible,  
Totally Redefining the Experience in the Process



**Delivering Fresh. Always.** is our ongoing pursuit of better solutions that meet industry requirements, unarticulated needs, and existing market demands, as well as gauging what the future may hold.

We can see a problem and creatively solve it by taking a transformative approach that turns an opportunity into endless innovative possibilities.

Please refer to our Fresh Trends Market Report to learn more about how we can help make it easier and more profitable to display and sell fresh food.



# Supermarket Purchases Trending Up

Despite inflation, shoppers will spend more on food in 2026. Ibotta's third-annual State of the Spend report, based on responses from over **5,000** shoppers, projects that consumers will spend **18%** more on food and **12%** more on pet categories. Part of this is that people are willing to spend more on healthier items. **51%** of food shoppers and **46%** of beverage buyers plan to purchase more better-for-you products in **2026**, even at higher prices.

## Position for Growth with Structural Concepts

Structural Concepts places a premium on fresh food by offering a wide range of service and self-service merchandisers and display options that provide functionality and space optimization, seamlessly aligning with any store décor.

From service merchandisers lined up across multiple departments to single grab & go cases, the industry has relied on us for an enticing visual experience, a high-level of refrigeration and heating performance, and first-rate aftermarket support.





# Shoppers Are Relying on Impulse and Promotional Items

Shopping lists are becoming less common as shoppers offset inflation by being strategic and capitalizing on in-store sales, the tactic with the largest year-over-year increase in use. Nearly one-third of shoppers, **32%**, now shop with only a loose idea or no plan at all. Pre-trip list-making fell to **68%** from **75%** in **2023**.

Source: Ibotta State of Spend Report.

## Driving Foot Traffic and Engagement with Structural Concepts

We optimize the presentation of fresh food anywhere in the store, including in high traffic areas, while incorporating unique upsell and impulse-buying opportunities with flexible displays and merchandisers.

Behind building the most innovative, energy-saving merchandisers with the shortest lead times in the industry, our goal has been to continually help our customers capture the attention of their shoppers, connect with them through the presentation of the fresh food displayed inside, and convince them to purchase.





# Demographic and Social Shifts Are Impacting Food Buying Trends

More and more consumers are aged 65 plus, signaling a growing aging population whereas they are looking for smaller, customized food servings and options.

Younger consumers are also coming of age in more urban and multicultural settings than before, and solo, child-free living is the norm for a larger percentage of Americans meaning they are looking for convenient locations to attain fresh food.

Source: Innova Market Insights

## Provide Convenience and Proper Serving Amounts with Structural Concepts

We can help create a destination for fresh food by proactively delivering innovative display options that not only blend in with the store format but also offer cost-effective configurable turnkey solutions when merchandising strategies change over time.

We provide solutions aligned with the needs and interests of shoppers, ensures consistency in the fresh food product, and delivers an enhanced experience.



# Local Aesthetics is Driving Foodservice in Hospitality

According to *Booking.com's* travel report, **26%** of travelers say local food products help them relive the destination experience at home while supporting regional makers, sustainable sourcing, and traditional craft.

More than half (**55%**) say they'd even travel to a destination specifically known for its pantry locally made, artisan food products.

## Localize Your Offering with Structural Concepts

We can help hotels open up an entirely new shelf of opportunity with customized displays and merchandisers that accommodate curated, locally made food, snacks, spices, and small-batch goods for their cafes and food marketplaces that can give guests something that extends the stay experience — long after check-out.





# Razor Thin Profits a Concern for C-Stores

The average convenience store basket size in 2024 was **\$7.17**. After the cost of goods and operating expenses, the average convenience store transaction nets **-\$0.04**, not including fuel gross profit dollars.

Source: NACS



## Increase Share-of-Wallet and Profitability with Structural Concepts

By creating a showplace where your products will be seen, heard, and valued by your shoppers, our displays and visual merchandising expertise entice, excite, and enhance the buying experience resulting in driving more unplanned and incremental purchases and increased basket sizes.

Structural Concepts can help ensure that all elements of your fresh food and chilled beverage merchandising schematics, planograms, and merchandiser shelf-space plans are optimized.





# K-12 Cafeterias Continue to Host Challenges:

While cafeterias remain vital, their potential as dynamic, engaging spaces is far from being realized.

- **Limited Dining Time:** In the U.S., students often have just **25–30** minutes for lunch. Factor in waiting in line and finding a seat, and many end up with a mere **10** minutes to eat.
- **Quick Meals Over Quality:** Many cafeterias prioritize speed, focusing on calories rather than creating a pleasant dining experience.
- **Economic Hurdles:** Rising food and labor costs and supply chain issues have pushed school cafeteria workers to their limits.

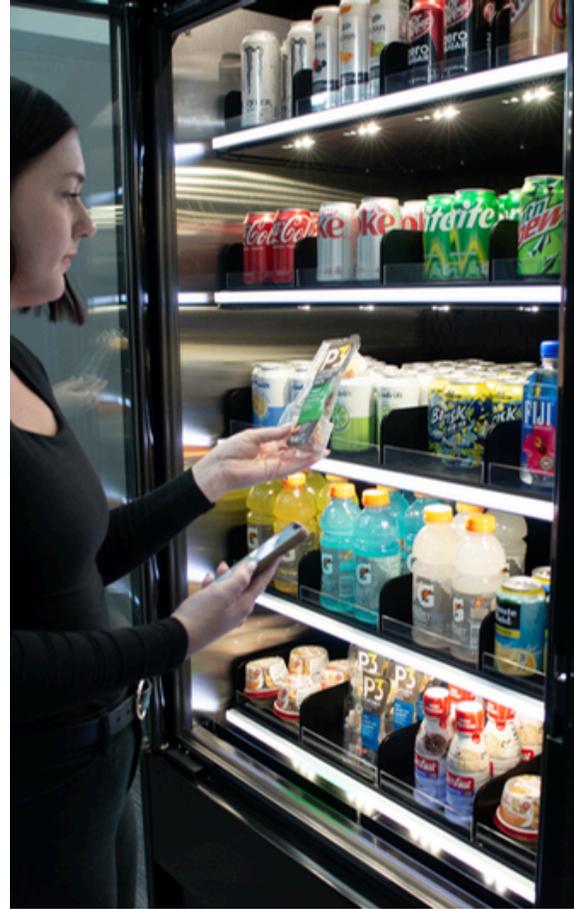
Source: Education Insider



## Structural Concepts Can Provide Several Solutions to Enhance the Cafeteria Experience

We can help schools rethink their operational strategies by offering more proper hot and cold holdings and batch-food safety, quickly adapt to menu changes, and improve the sustainability of dining halls.

- **Autonomous Retail Merchandiser (ARM) Cashless Systems:** Many schools now use debit-style cards or student IDs for payments.
- **Energy-Efficient Equipment:** These upgrades save money and improve sustainability.
- **Remote Merchandisers:** Create efficient cafeteria layouts using scattered layouts can increase efficiency, and by placing food stations around the cafeteria rather than a single serving line, students can get their meals faster without waiting in long lines.



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# Corporate Cafeterias Not Making Mealtime Seamless in the Eyes of Employees

For many employees, any form of convenience breaks down in the rush of the workday. Among workers with access to an on-site cafeteria, more than a third (**38%**) say they can't order what they truly want because they know it will take too long. And even when employees do make the time, options can still fall short, with many reporting difficulties finding meals that fit their dietary preferences.

*Source: 2026 The Workplace Cafeteria Report, EZcater*

## Structural Concepts Can Help Businesses Rethink Their Onsite Foodservice Programs

From the corporate cafeteria to areas with limited space, Structural Concepts provides adaptable, multi-purpose options ranging from full service to grab & go to micromarkets that fit any space and safety requirements – and accommodates several menu options – to visually present fresh food selections and drive sales.

We can also minimize the total cost of ownership associated with the ongoing operation and upkeep of displays and merchandisers, as well as safely displaying fresh food over extended periods.

# Food Vending Machines are Among the Fastest-Growing Segments

Driven by demand for convenience and automation in food service, today's vending machines are becoming miniature automated restaurants, capable of storing, refrigeration, and delivering complete meals in seconds. This evolution reflects broader consumer trends: people want quick access to real food, not just snacks.

The overall vending machine industry is already large and expanding. The global market was estimated at about \$23 billion in 2025 and is projected to reach roughly \$48 billion by 2035, growing at a CAGR of around 7.6%.



## Structural Concepts Makes Autonomous Retail Smart, Efficient, And Profitable

Offsetting labor challenges, an appealing refrigerated or dry merchandising format with increased capacity, a cashier-less transactional system, and the ability to streamline inventory management, this single solution provides a quick payback turning into increased profitability.

Automated Checkout allows shoppers to browse products directly on the shelf, have their selections automatically added to the cart, and pay with credit/debit and mobile payment for faster transactions. For the operator, the autonomous solution tracks inventory and requires less labor, resulting in increased productivity.