

Q3 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.



Keeping an Eye Out for Emerging Markets

New segments within the food service industry, such as food trucks, pop-up restaurants, and ghost kitchens, are expected to present opportunities for manufacturers to innovate and develop compact, portable, and space-saving refrigeration solutions. These establishments often operate in non-traditional settings with limited space and infrastructure, requiring efficient, durable, and adaptable equipment for different environments. By addressing the specific needs of these emerging markets, manufacturers can expand their customer base and drive revenue growth.

Source: Grand View Research, North America Food Service Equipment Market (2025 - 2030)



How SCC Solves for It

Structural Concepts' new Autonomous Retail Merchandiser (ARM) Slim provides a streamlined design to deliver greater placement flexibility, preventing the need to transition equipment by delivering an "always on" selling opportunity.

The ARM SLIM turns overlooked or constrained footprints into productive sales generating environments by visually presenting fresh food selections via a cashier-less transaction.



Smart AI Sensing

Precision weight sensors and computer vision for 99.9% transaction accuracy.



Seamless Checkout

True grab-and-go experience that eliminates lines.



Real-Time Analytics

Cloud-connected insights, inventory management, and consumer insight tools.



Robust Security

Multi-layered theft prevention and secure payment processing.



Maintaining a Low Total Cost of Ownership

Installing kitchen equipment in commercial hotels and food chains requires a high capital investment. The growing popularity of self-service equipment is increasing the cost of these products. The investment cost, which includes purchase, installation, and accessories, is higher than that of conventional appliances, which may restrict consumers with a low budget from buying them. In addition, new appliances require more frequent maintenance and replacement of worn-out accessories. These factors are expected to restrain market demand, particularly in emerging economies, over the forecast period.

Source: Grand View Research, North America Food Service Equipment Market (2025 - 2030)



How SCC Solves for It

Structural Concepts can create a destination for fresh food by utilizing space-saving innovative display options to meet the needs of travelers in airports, hotels, and anywhere else where fresh food is sold.

Per independent tests, Structural Concepts has the lowest total costs associated with starting up the equipment, ongoing operation, and upkeep of the equipment, as well as safely displaying fresh food over extended periods – all critical factors in the total evaluation of the overall investment of a fresh food merchandiser. These factors are especially essential to consider after the first year of acquisition to ensure that profit expectations from the equipment are being met year after year.





Staying Ahead of Industry Regulations

Regulations play a significant role in shaping the North America food service equipment industry dynamics. Besides safety, these regulations encourage innovation and sustainability in the food service equipment market. Manufacturers must comply with energy-efficiency standards and environmental impact requirements, which drive the development of more sustainable and eco-friendly equipment. This not only helps businesses reduce operating costs but also aligns with global efforts to minimize the environmental footprint of the food service industry.

Source: Grand View Research, North America Food Service Equipment Market (2025 - 2030)

How SCC Solves for It

Structural Concepts' new common, now available R290 compliant designs and robust components provide further peace of mind that you'll experience consistent trouble-free operation – and our industry-best lead times will ensure immediate product availability and on-time delivery.

With the majority of cases transitioning to NSF Type II (operating in environments that don't exceed 80° F and 55% relative humidity), Structural Concepts' innovative Breeze-E refrigeration system, an easy-to-maintain, slide-out refrigeration system that's designed with a variable speed compressor, smart microprocessor, and an oversized condenser coil, ensures a longer life and stronger overall performance, providing the benefit of holding product-safe temperatures in warmer, more humid operating environments



Meeting Customers Wherever They Choose to Eat

Traditional dining spaces no longer define where eating happens. Remote work means desk dining is common, urban commuters eat in transit, cars function as mobile dining rooms and parks become impromptu restaurants. Consumers expect food and drink to be designed for these non-traditional contexts, not just adapted to them. This shift creates new revenue opportunities for operators who understand that portability isn't about convenience, it's about access. The question isn't whether customers will eat on the go, it's whether your menu works when they do.

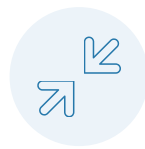
Source: Nestle, Foodservice Trends for 2026

How SCC Solves for It

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

Structural Concepts solves for food deserts by delivering convenience and immediate access with cashier-less automated merchandisers, reduces the need for additional staffing with convenient self-serve displays, and creates new spaces with mobile, flexible merchandisers that drive incremental sales.





Reshaping Foodservice Operations at Scale

Artificial intelligence is moving from experimental novelty to operational necessity in foodservice. The technology has matured beyond chatbots and gimmicks into tools that genuinely improve efficiency and personalization. Menu engineering, predictive analytics, inventory optimization, and labor management now rely on AI-driven insights. Digital personalization at scale is now more affordable through kiosks, apps and drive-thru systems that remember preferences.

Source: Nestle, Foodservice Trends for 2026



How SCC Solves for It

The Structural Concepts ARM (Autonomous Retail Merchandiser) platform delivers intelligent, frictionless merchandising for fresh food vending and smart retail environments, with two purpose-built configurations—ARM XL for high-volume environments and ARM SLIM for compact spaces. Operating seamlessly 24/7 with secure transactions, ARM provides real-time inventory control and data-driven insights that help drive up to 30% more recurring revenue.

The ARM platform delivers a seamless, frictionless grab-and-go checkout experience—eliminating lines and the need for manual scanning. Often associated with smart fridge vending, the system is powered by precise load cell (weight-based) sensing to accurately track product selection in real time while enabling robust inventory management and analytics.

Secure, multi-layer transactions and access controls protect every interaction, and flexible payment options—including card, mobile, and credential-based access—support a wide range of environments.



Retail and Restaurants Are Colliding

Grocery stores, convenience chains, and clubs are rapidly upgrading their prepared food offerings. In many cases, they are capturing everyday meal occasions that restaurants once did. The competitive set for restaurants is expanding. Operators are now competing not only with other restaurants, but with retail food ecosystems designed for convenience and speed.

Source: Kantar Retail IQ

How SCC Solves for It

Structural Concepts places a premium on prepared meals 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, that can help operators keep food longer, rotate their offerings seamlessly, create different methods to serve customers, and position them better to increase sales over time.





Health, Balance, and Trust are Reshaping Convenience

The rise of GLP-1 medications, growth of protein-forward snacks, and increased demand for smaller portions are changing how customers shop c-stores. 30% of customers have increased their preference for high-protein options or smaller, portion-controlled packaging.

Trust is also becoming a competitive differentiator. Fresh food programs can only succeed if customers believe the store is clean, safe, and well-run. Expect reimaged weight loss-friendly offerings for a growing customer base with fundamentally changing appetites and consumption patterns. Smaller portions, snacks, and shareables will become more prevalent on menus, along with craveable fare with healthful additions like protein, fiber and functionality.

Source: Technomic

How SCC Solves for It

Behind building the most innovative, energy-saving merchandisers with the shortest lead times in the industry, Structural Concepts' 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.

By creating a flexible showplace where specialized products and packaging will be seen, heard, and valued by 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.

Connecting with consumers across categories within every market channel where fresh food is sold, Structural Concepts can help create a distinct selling environment that is flawlessly executed, both seamlessly and consistently.

Foodservice Keeps Raising the Bar

C-stores are no longer just taking cues from QSRs. They are becoming serious made-to-order food competitors in their own right.

Nearly 60% of c-stores are serving made-to-order food, and 58% of consumers said they are likely to choose a brand over a closer competitor because of exclusive food items. Signature menu items, global flavors, and culturally diverse food profiles are turning foodservice into a loyalty engine—not just an add-on category.

Source: Intouch Insight



How SCC Solves for It

Providing solutions aligned with the needs and interests of shoppers, ensuring consistency in the fresh food product, and delivering an enhanced experience, Structural Concepts can help stimulate sales with grab & go options, meeting the needs of modern consumers' desire to make speedy selections and transactions by optimizing floor space with multiple display areas, providing flexibility to offer a variety of fresh foods to align faster with shopping trends with mobile and modular applications.