

Q4 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.



The Biggest Tech Opportunities in Foodservice

44%

POS system integration

40%

Temperature and food safety monitoring equipment

39%

Customer ordering and payment

Source: National Restaurant Association

Automating to Enhance the Operator and Customer Experience

The Structural Concepts' ARM (Autonomous Retail Merchandiser) XL and Slim models deliver advanced, frictionless retail experience engineered to effectively sell on a 24/7 basis while ensuring food safety and consistency, giving shoppers confidence in every transaction.

The ARM delivers real-time insights that allow operators to optimize assortment, reduce out-of-stocks, and make data-driven merchandising decisions across locations.

The ARM supports a wide range of payment methods and access types—including credit/debit, mobile, and credential-based options like employee IDs, student IDs, and membership accounts—making it easy to adapt to both open retail environments and controlled-access settings.





Rising Consumer Expectations for Food Quality and Safety

Consumers are increasingly demanding freshly prepared, safe, and visually appealing food. Food holding equipment that maintains optimal temperature and presentation directly impacts customer satisfaction and brand reputation. This trend encourages foodservice operators to invest in high-quality holding solutions that ensures food remains fresh and safe for longer durations.

Source: LinkedIn, Key Factors Supporting Growth in the Food Holding Equipment Market

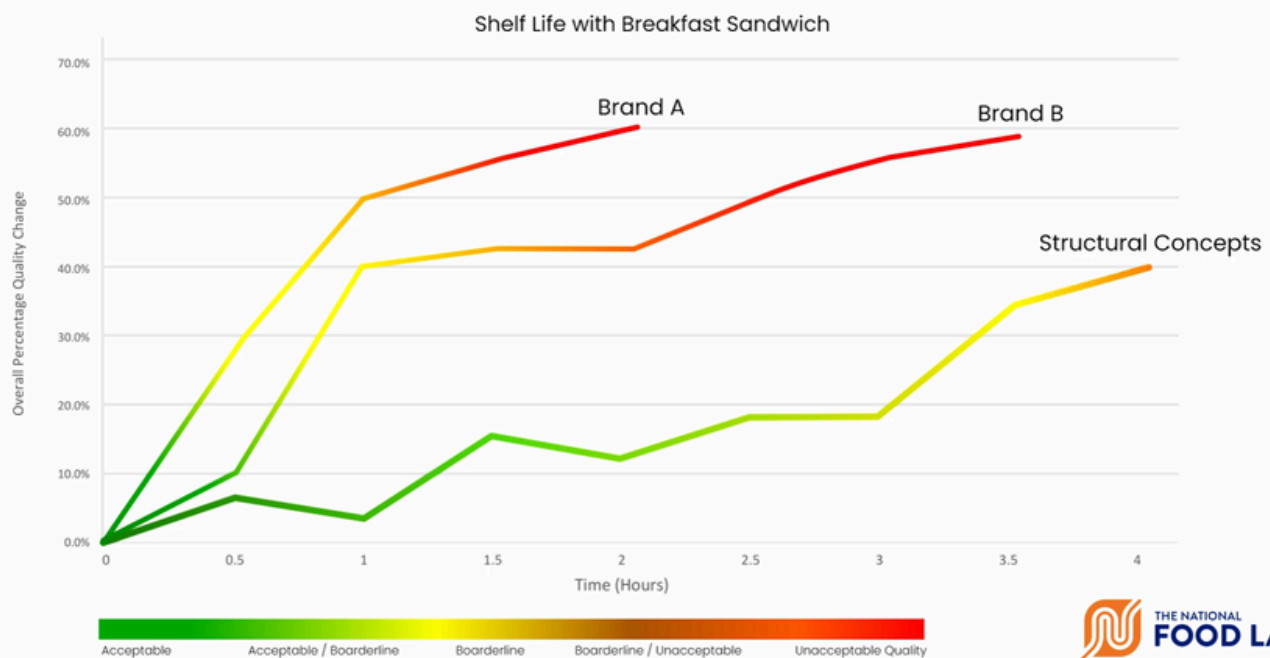
Keeping Food Fresh Longer

In independent tests conducted by the National Food Lab, Structural Concepts displays and merchandisers not only had the longest shelf life for most food products evaluated, but its units also saw the lowest overall percentage of change in the quality of food over time.

The study also established that Structural Concepts refrigerated merchandisers allow store operators to safely display food products through the recommended shelf life.

Cost scenarios related to the quality and safety of the food products assessed beyond waste and loss included the longer-term labor expenses involved in restocking the merchandiser.

PERCENT QUALITY CHANGE OVER TIME: BREAKFAST SANDWICH





Foodservice Equipment Cost Challenges Companies Need to Consider

Regulations play a significant role in shaping the North American 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.

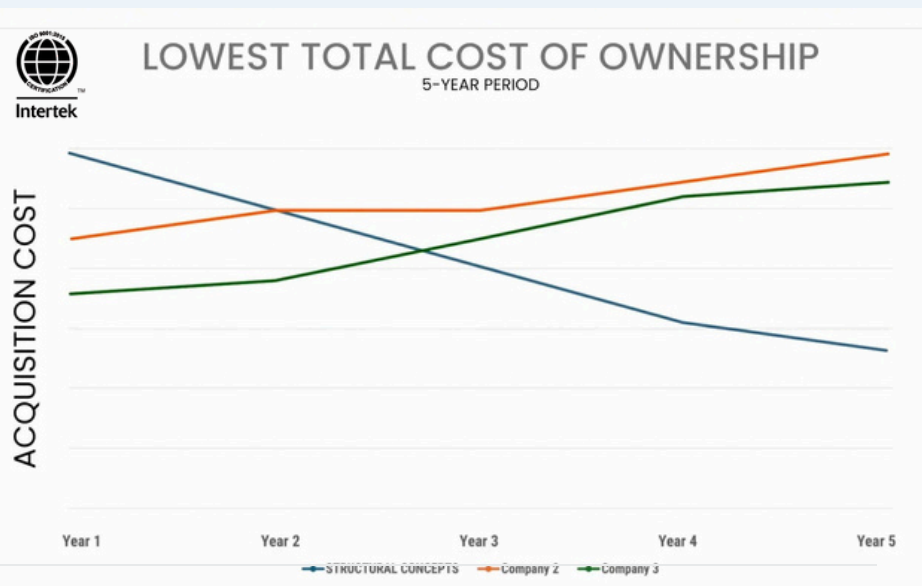
Source: LinkedIn, Key Factors Supporting Growth in the Food Holding Equipment Market

Lowering the Total Cost of Ownership

Intertek Laboratories evaluated Structural Concepts to have the lowest total cost of ownership over a 5-year period.

The study also indicated that an initial acquisition price comparison doesn't provide a full cost of ownership narrative as some models with the lowest acquisition price experienced the highest or near the highest total cost of ownership.

Structural Concepts had the lowest costs associated with starting up the equipment, ongoing operation, energy consumption, and overall upkeep of the equipment, as well as safely displaying fresh food over extended periods of time, which are all critical considerations in the total evaluation of the overall lifespan of a fresh food merchandiser.





Solo Dining and the Rise of the “Me-First” Experience

Dining is becoming increasingly individual, shaped by shifting lifestyles, flexible work schedules, and changing social habits. More guests are choosing to dine alone, customize their meals, and prioritize experiences built entirely around their personal preferences. Collider Lab reports that solo dining has grown by 52% since 2021, signaling that this behavior is no longer occasional, but a lasting shift in how and why people dine out.

Source: Tastewise



Taking Advantage of Thrifty and Time-Crunched Meal Goers' Desire for Fresh Food Convenience

Structural Concepts has a deep portfolio of refrigerated and heated grab & go merchandisers and prepared meal displays allowing foodservice operators to rethink portion sizes, menu design, and service formats to better support solo guests that support a broader move toward autonomy and personalization.

These multi-purpose options 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.



Consumers are Changing When and How They Eat

The three-meal-a-day framework is breaking down. Consumers eat when hungry and blur lines between meals. Remote work and changing lifestyles mean operators can no longer rely on predictable daypart traffic. Operators who cling to rigid structures miss opportunities across non-traditional hours.

Source: Nestle Professional



Flexing with Flexibility and Functionality

Structural Concepts can help reduce overhead and increase fixed capacity by turning over more customers by providing foodservice operators with self-service displays and service merchandisers where diners can immediately access selected menu items.

These innovative display options not only blend in with the store format but also offer cost-effective configurable turnkey solutions when fresh food merchandising strategies change over time, thus creating incremental sales opportunities by meeting the needs of modern consumers' desire to make speedy selections and transactions.





Food Quality is Driving Consumers to Alternative Outlets

Quality is the major reason why convenience stores have grown or maintained their food sales, with 49% of operators crediting their prepared-food assortment, optimized for freshness and diversity, for this high performance.

45%

FOOD QUALITY

44%

CONVENIENCE

34%

SPEED

Source: National Restaurant Association



Increase Sales by Offering Shoppers Healthy, Fresh Food Selections On-the-Go

Structural Concepts can help c-stores maximize their foodservice business

by providing merchandising and display solutions that are aligned with the needs and interests of shoppers, ensures consistency in the fresh food product, and delivers an enhanced experience.

With a wide array of grab & go options such as endcaps, islands, counter, and wall box merchandisers, Structural Concepts can optimize floor space within multiple display areas, providing flexibility to offer a variety of fresh foods, and help operators adapt faster to shopping trends with mobile and modular applications.





Labor x Food Waste Remains a Concern

Operators navigating mid-2026 labor cost and availability pressures should evaluate their operations through two lenses: where the highest labor-hours-per-revenue-dollar stations are, and where is food waste the highest.

For foodservice operators managing multiple locations, the labor challenge multiplies. Staffing variability between sites creates inconsistent service quality, and the management time required to address staffing gaps at individual locations diverts attention from strategic priorities.

Source: National Restaurant Association

Providing 24/7 Monitoring to Reduce Operational Costs

Structural Concepts is helping multi-location operators address labor and waste costs with its soon-to-be-released FreshWatch technology, an advanced, cloud-based system that collects critical performance data and shares it with the operator's enterprise monitoring system, for a worry-free operation.

FreshWatch offers an unparalleled level of control and real time insights to proactively identify and quickly resolve equipment issues and costly disruptions. Multiple sensors record performance data and shares this data with the operator's enterprise monitoring system for a single source view of all equipment in their operation, eliminating the need to have individual staff members monitor each location on a regular basis.

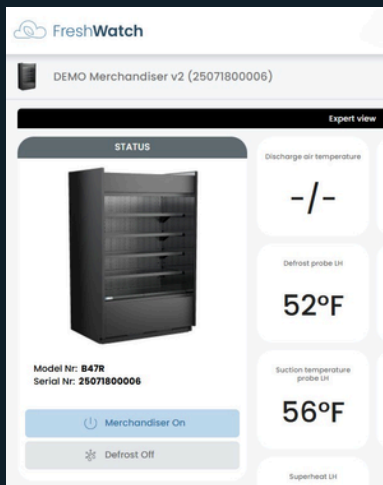


How Technology Is Changing Demand for Food Holding Equipment

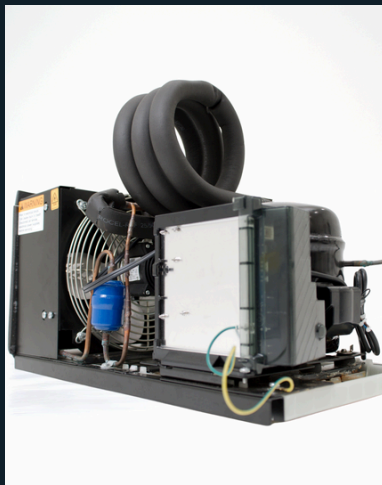
Automation and digital integration are reshaping the food holding equipment market. For example, temperature sensors linked to centralized management systems allow operators to maintain precise control over food safety parameters.

Energy-efficient heating and cooling technologies reduce operational costs and environmental impact, aligning with sustainability goals. Moreover, modular and ergonomic designs improve workflow and ease of cleaning, addressing hygiene concerns and labor efficiency.

Source: LinkedIn, Key Factors Supporting Growth in the Food Holding Equipment Market



FRESHWATCH



BREEZE/BREEZE-E REFRIGERATION



CLEAN SWEEP



REVEAL

Pursuing Better Solutions that Meet Industry Requirements, Unarticulated Needs, and Existing Market Demands

In addition to the cashier-less technology of its Autonomous Retail Merchandiser and temperature remote monitoring FreshWatch system, Structural Concepts continues to lead the way in ensuring the optimum, efficient performance of its family of displays and merchandisers.

The exclusive Breeze and Breeze-E slide-out refrigeration systems, designed with rugged reliability, ease of service, and superior consistency, provide a better operational experience and performance and has one of the highest rated reliable refrigeration performance ratings (RRP) on the market.

Clean Sweep, the award-winning technology, solves the problem of dirty, clogged condenser coils that typically result in costly breakdowns, higher energy consumption, and expensive service calls.

The Reveal refrigerated service merchandisers have been awarded the Energy Star rating for having met the stringent energy savings standards from the EPA becoming the only manufacturer in the Service Over the Counter category that meets these requirements for energy conservation.