



**EUROPEAN
VENDING & COFFEE
SERVICE ASSOCIATION**

ESTABLISHED IN 1994,
THE EVA IS
THE PAN-EUROPEAN
ASSOCIATION FOR THE
COFFEE SERVICE AND
VENDING
INDUSTRY.



KEY DEFINITIONS

What is a Vending Machine?

A Vending Machine is an operational machine located at either a client site or in a public location designed specifically for the sale and dispensing of food, drinks, and other goods. This definition excludes cigarette and gaming machines.

What is Office Coffee Service (OCS)?

OCS is a specific part of vending and involves a hot drink table-top operation in the office environment, maintained and supplied with ingredients by the operator. OCS machines, however, are filled by the company where the machines are located, and these systems do not usually have coin/payment systems.

THE MARKET

Key Figures

- There are **295 million consumers** who use machines at least once a week
- There are approximately **4 million vending machines in Europe**
- **2.5 million machines (~62%)** are hot drinks machines; the majority of these being table-top vending or OCS machines
- This corresponds on average to **130 Europeans** for every vending machine
- The machines are run by some **10.000 companies**, mostly SMEs and family businesses
- The industry employs directly more than **85,000 people** and many more in supportive industries
- Vending across Europe has a turnover of **€15 billion** annually

The 6 biggest markets in Europe are Italy, France, United Kingdom, Germany, Spain and the Netherlands, which in total make up around 75% of the total European market.

Vending is a **European manufacturing** sector with plants principally in Italy, Germany, the Netherlands, Spain, and the United Kingdom. It is an **innovative** industry, designing and producing machines with the latest technological developments.

The industry employs a significant number of (mainly) blue-collar workers, thereby contributing to maintaining the job market in the EU's industrial sector. Vending across Europe employs people with low qualifications and provides them with **training on hygiene and/or technical issues**. This is a local industry, offering employment opportunities and serving customers, locally.

While the majority of vending machines serve hot drinks (particularly coffee), the remaining vend anything from sandwiches, cold drinks, hot meals and snacks, to hygiene products and electronic goods. The machines are a convenient point of sale equivalent in size to a shop of 1m². While most machines are located in companies and offices, the rest are placed in public locations such as transport hubs, hospitals and the leisure sector.



The below chart shows examples of the various types of machines used in the industry



Furthermore, **Coffee Service machines** are divided into **3 categories**:

- **"Instant"** – the coffee is prepared mixing hot water with coffee powder, soluble or freeze dried, in special mixing bowls, or directly in the cup.
- **"Freshbrew"** – the coffee is prepared in a special brewer, where hot water passes through the ground fresh coffee with a pressure close to 0 bar
- **"Espresso"** – the coffee is prepared in a special brewer, where a pump pushes hot water through the ground fresh coffee with a pressure between 4 and 10 bars.

THE KEY PLAYERS

Operators

- The coffee service and vending machines are managed by operators.
- They manage the machines as their core business.
- They are responsible for cleaning and filling the machines with products (be it coffee beans, drinks, snacks, cups, electronic goods etc.).

Machine manufacturers

- Machine manufacturers make the vending machines used by the operators. The machines exist in a wide range of different types and sizes (see earlier chart).
- The machines are very sophisticated and can sell almost any product, including hot and/or cold drinks, ambient or refrigerated foods, deep-frozen food and hot meals. Certain machines can even operate simultaneously at different temperature levels.
- Manufacturers also design machines to dispense non-food items such as hygiene products, electronic goods etc.
- New vending machines can be manufactured to connect to the internet, incorporate large touch screens for ease of use, or even to integrate cameras which sense the proximity of a customer in order to display targeted information.
- Most of the global vending machine manufacturers are located in Europe.
- Machine manufacturers sell their machines to the operators.

Water filter/dispenser manufacturers and operators

- These manufacturers make the water filters used in drinks machines.
- They also manufacture water dispensers which are commonplace in the office environment.
- Similar to coffee and vending machine operators, water dispensers and filters are maintained and serviced by specific operators.



Cup and disposable manufacturers

- Cup and disposable manufacturers produce the containers used to deliver drinks to the customer.
- They also produce the disposables commonly seen with vending machines, such as sugar and creamer sachets, plastic stirrers etc.
- Cup manufacturers can produce plastic, paper or even compostable hot drinks cups, as well as clear plastic glasses used for water dispensers.
- In line with the trend of “premiumisation” for coffee service delivery, cups are now often made of high quality paper, similar to those used in coffee shops.

Product suppliers

- Product suppliers provide the operators with items demanded by customers.
- They develop new products to follow consumers’ changing tastes and desires – this includes a more diverse and nutritious offering.
- As vending machines are very versatile, the range of items supplied to operators is consequently very diverse.

Payment system manufacturers

- Payment system manufacturers design and build coin and banknote validators.
- They also supply electronic payment systems, enabling customers to pay with their (contactless) credit or debit cards, or mobile device.
- The operator will decide which payment system they want and which is most suitable for that location.

THE BENEFITS

- Vending Machines offer **convenience, speed, and 24/7 opening**.
- They are **very versatile** and can sell almost any product.
- New machines use cutting edge technology, including **internet connectivity** and the use of **large touchscreens** to interact better with the consumer.
- Machines can employ a wide range of payment options, including mobile payment.
- Machines are cleaned and filled regularly by operators. It is a very **hygienic and safe** manner to deliver quality food and drinks, as the machine is always at the right temperature.
- Research and Development departments continuously develop new, tasty products with **health benefits**.
- **Fruits and Vegetables** are now more frequently on offer in vending machines.
- The industry is encouraging a **more nutritious and diverse offering** in Vending Machines through healthy eating projects in different European countries.
- Machines offer **social benefits** as they are a natural a place to meet with colleagues/friends.
- Machines provide **hydration & energy** – important for a competitive workforce.
- They encourage moderate coffee consumption, which brings many **physical and mental benefits**.
- Vending Machines provide refreshment and countless **moments of pleasure** for workers, travellers and those at leisure.

MORE SUSTAINABLE VENDING

The vending industry has been becoming more sustainable for years. A lot of initiatives, coupled with sector-endorsed measures, have reshaped the environmental footprint of the vending sector.



- Vending Machines in Europe are fully compliant with the **WEEE** (Waste Electrical and Electronic Equipment) legislation, and in fact machines and parts are re-used many times over.
- The machines comply with the **RoHS** (Restriction of the use of certain Hazardous Substances in electrical and electronic equipment) Directive.
- The EVA has developed a protocol to measure the energy consumption of vending machines: the **EVA EMP** (Energy Measurement Protocol). This helps buyers benchmark the different machines. EVA Members contributed significantly to developing EN 50597, the official European standard for refrigerated vending machines.
- Vending companies invest a lot in Research and Development (R&D) in the areas of **energy-efficiency, insulation products and refrigeration**.
- **Paper cups or biodegradable cups** are used as alternatives to traditional plastic cups. Soft drinks and bottled water are packaged with **PET**, which has a high recycling rate. Some companies have developed lighter packaging for their soft drinks.
- **Small devices** can also be installed on vending machines to turn off lights and cooling systems at certain less intensive periods, such as during the night. Machines however, still ensure a safe temperature for perishable items is maintained.
- LED lights are fitted to new machines because they consume **less energy**.

- Vending machines placed outdoors are made with a special glass and with an isolating structure, to limit the energy and heat generated by the sun.
- Operators, in line with customer demands, are offering more and more Fairtrade products in machines.
- Products that correspond to a healthier lifestyle as part of a balanced diet are being offered in Vending Machines in more and more European countries.
- More and more vending companies are devising schemes to encourage consumers to choose **healthier products**, such as the 'Feelgood' labelling scheme in France, where vending machines qualify as 'Feelgood' if they stock a certain range of nutritious items.
- The European Vending & Coffee Service Association is a founding member of the **EU Platform on Diet, Physical Activity and Health**, and is committed to encouraging more nutritious products in vending machines, coinciding with changing consumer demands.
- The National Vending Association's also **promote hygiene and quality through schemes and labels** for their operators. Examples include the certification labels: ANEDA Quality System (Spain), AVA Quality System Accreditation (UK), CONFIDA Top Quality Standard (Italy), and the BDV Seal (Germany). Each certification method can ensure that quality, hygiene and conformity requirements are met, and allows public bodies, private companies and the consumer recognise the quality of service offered through the vending machine. Regular audits ensure quality and conformity requirements are upheld.



TOP REASONS TO JOIN THE EVA

Lobby

1. Influence the EU decision-making process

Take advantage of the EVA team to link up with EU officials for specific issues facing the industry. The EVA is the pan-European representation of the coffee service and vending industry and is in regular contact with the EU institutions.

2. Assist your industry

Provide and equip the EVA with further expertise to secure even more lobbying success for the vending, coffee service, and water dispenser industry. You will know where your industry is going, and can help it embrace new technologies.



Information & interpretation

3. You get the right information first

Whenever a relevant EU decision is in the pipeline, the EVA informs and consults you from the outset, when the chances of influencing a Commission proposal are still very high.

4. Interpretation of the EU labyrinth

The EVA interprets and simplifies for you the often complex decision making process of the European Union, making it easier to understand. You will know the legislative agenda in order to anticipate it and gain a competitive advantage.

5. Members-only information

You gain access to documents and guides exclusively available to members, through the EVA's 'Members-only' webpage. Furthermore, the EVA issues several detailed publications solely for Members. Members can also access the valuable European vending market report free of charge.

Network

6. Network of Contacts

The EVA has a wide and varied network of contacts to draw on. Contacts include those in the vending, coffee and water dispenser industries, other trade sectors (retail, banking etc), those within in the EU Institutions as well as Member States (via the National Associations).

7. Participate at Events/EVEX

You can participate in targeted events designed to inform the industry and liaise with any relevant stakeholders (e.g. the EU Institutions, other industries). Network within the industry at EVA events like EVEX and capitalise on opportunities to establish and develop links with potential business partners.

8. Contribute to EVA Committees

The EVA Committees discuss and agree proposals to standardise and improve the European Coffee Service and Vending Industry. As a Member you can join and fully contribute to them.

Visibility

9. Website visibility and Sponsoring opportunities

The EVA will gladly share on our website corporate news and stories from our Members, which will increase your visibility and profile. There is also the opportunity to showcase and advertise your latest products and innovations on the EVA website.

10. A dedicated team at your service, permanently

A vibrant, enthusiastic and knowledgeable team is at your disposal with a wealth of experience of the vending industry and EU Affairs.

TYPES OF MEMBERSHIP

Full Membership (National Associations)

This form of Membership is reserved for National Associations from any European Country who represent coffee service and vending, and other related industries.

Direct Membership

Direct Membership is available to any company which is established and operating in at least two different European countries, and meets the required criteria.

Supportive Membership

Supportive Membership is available to Associations and single companies who are not eligible to become a Full or Direct Member, but support the aims and purpose of the EVA.

Associate Membership

Associate Membership is available for Trade Associations who represent vending and related industries outside Europe.

Please contact us for more information on the Membership package for you.



THE EVA COMMITTEES AND WORKING GROUPS

The **EVA Committees** allow **Members** to share their expertise and set the EVA agenda in their area of competence.

Committees meet regularly (and as required) to discuss the latest developments in the legislative, political, technical or economic field. They suggest the strategic direction to be taken by the whole industry.

The EVA Committees are set up and maintained to meet an industry or segment need, or as a consequence of the EU political agenda.

The current Committees are:

- National Associations' Managing Directors
- EVMMA (Machine Manufacturers)
- Electronic Payment
- Technical
- Standards
- Banknote Group
- Coin Group
- Cups
- Hygiene and Food Law
- Market Statistics
- POU Water Solutions
- Office Coffee Service (OCS)
- Communication and Marketing

Each Committee is governed by a Chairperson, and overseen by a specific sponsor in the Executive Committee Board. The Committees are regulated by guidelines that set out the rules of procedure, the responsibilities and the work ethics.

VENDING INDUSTRY STANDARDS & PROTOCOLS

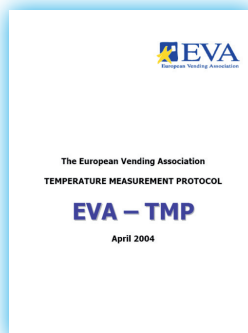
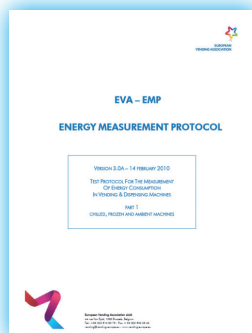
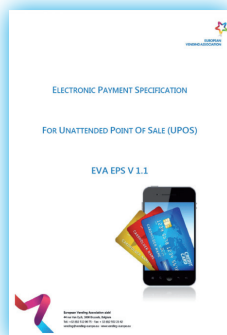
The EVA is a strong advocate of standards designed by (and for) the industry. This ensures that coffee service and vending is as harmonised as possible throughout Europe (and further afield) making it simpler for any new required measures to be adopted, and enables the EVA to best represent the collective industry.

The EVA maintains and updates **4 main industry standards**:

- **EVA EPS** – Electronic Payment Specification
- **EVA DTS** – Data Transfer Standard
- **EVA EMP** – Energy Measurement Protocol
- **EVA TMP** – Temperature Measurement Protocol

The EVA supports the EVA DTS as a data retrieval specification and Multi-Drop Bus/Internal Communication Protocol (MDB/ICP) as an interface and will reinforce promotion of these standards in the future. The EVA works in close cooperation with the US Vending Association (NAMA) on the MDB/ICP and EVA DTS.

Furthermore, all EVA standards are supported by NAMA, and marketed on the American continent by them. Close contact has also been established with the Japanese Vending Machine Manufacturers Association (JVMA), notably in the area of mobile phone applications/mobile payment.



COFFEE SERVICE AND VENDING MARKET REPORT

On an annual basis, the EVA publishes its report on the coffee service and vending industry, and has become an extremely desirable and valuable business insight into how the industry is evolving and what trends one should look out for.

The Market Report provides a summary of the vending industry in 22 European markets, while detailed analysis is provided for certain individual country profiles.

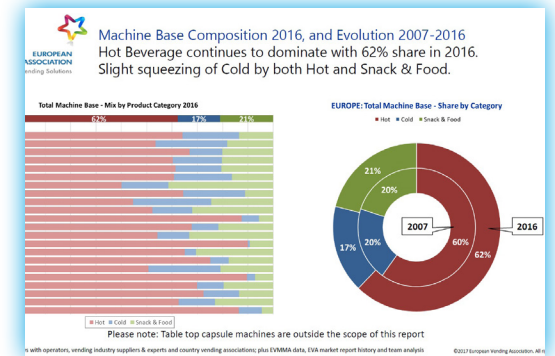
The Market Report covers the following key indicators:

- The number of machines (Field base);
- Field base by type of machine and type of coffee;
- Sales trends;
- Vends (i.e. number of transactions);
- Price trends;
- Top operators;
- Key insights.

The Report also summarises how the industry has developed over the last decade, which enables an easy comparison to be made in trends in differing European markets.

Some key trends

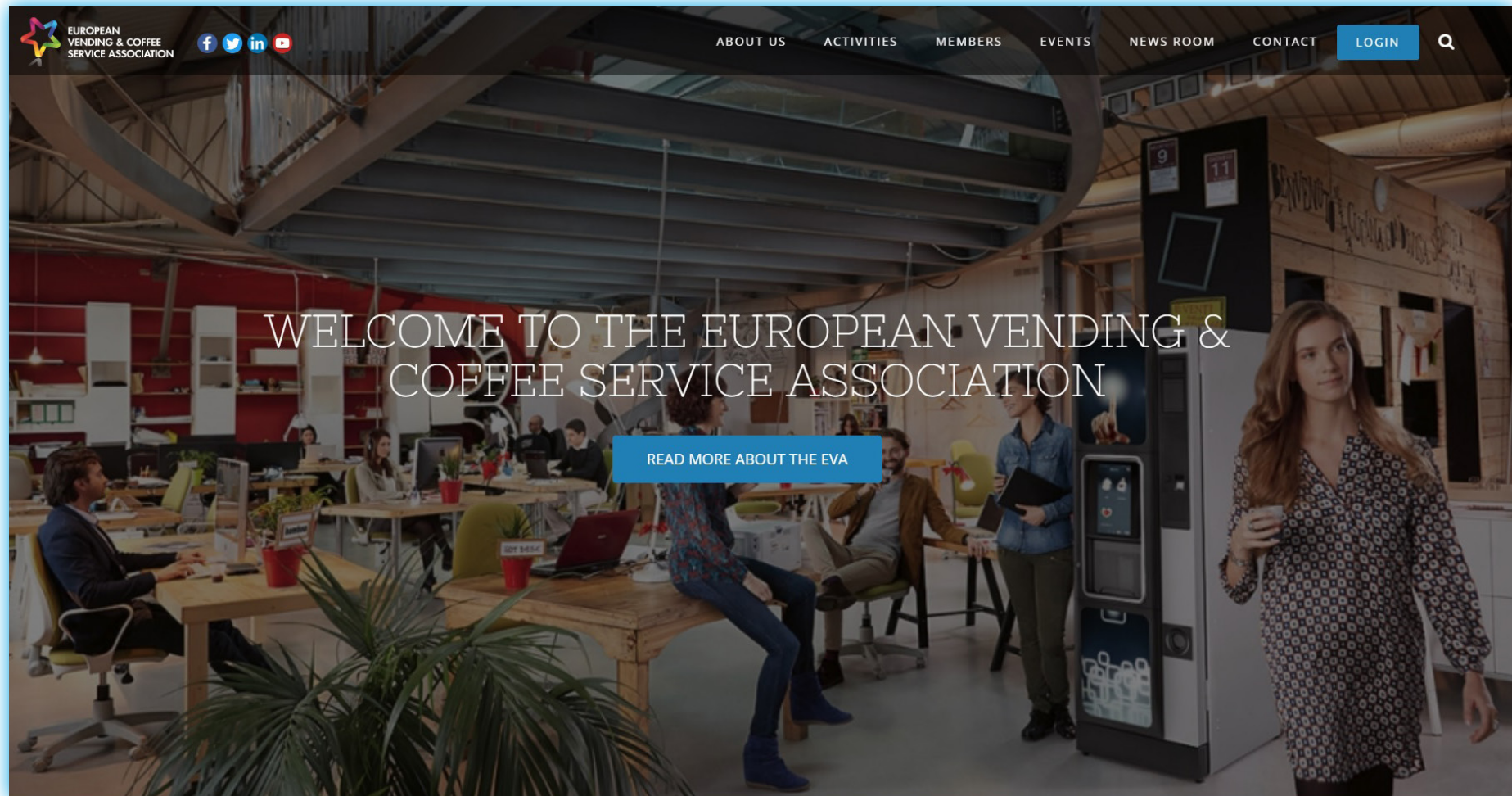
- Increasing busy lifestyles are driving the need for **eating and drinking on the go**.
- Increasing **quality of coffee** and **associated products** (now comparable to coffee shops) in line with '**Premiumisation.**'




COMMUNICATION

The EVA uses a range of communication tools to best serve its Members, and to promote a positive image of the industry to the general public.

Website



News




Vendies 2018
FOREST OF ARDEN MARRIOTT HOTEL & COUNTRY CLUB
BIRMINGHAM 2 DE TOUS LES ANS

Vendies and RIDWCA Business Day - 2 October 2018

The Forest of Arden Hotel & Country Club in Birmingham will be awash with lights [...]


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Automatspec joins the EVA

Automatspec is a Polish vending machine operator. The company, active since 2000, operates right across [...]


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CloudNine bvba joins the EVA

CloudNine is a consultancy set up to support companies to enter the vending market, and/or [...]

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Reducing marine litter: Action on single use plastics and fishing gear - EVA Position

Position papers

EU Commission proposal for a Directive on the reduction of the impact of certain plastic [...]

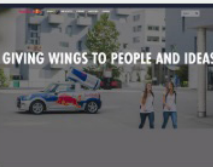
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New DTS Version 6.2.1 published

The fundamental protocols of the EVA-DTS standard have been preserved but minor changes have been [...]

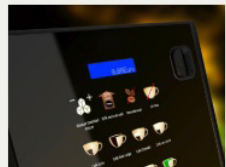
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Red bull GmbH joins the EVA

Dietrich Mateschitz founded the now well-known Red Bull in the mid 1980's after inspiration by [...]


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European vending machine manufacturers to implement a default zero sugar level on hot drinks machines

Press release


EVMA made the collective and voluntary decision at their last meeting, with the



Smartcom joins the EVA

Smartcom develops, integrates and operates mobile payment services mainly for the vending industry, together with [...]

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Mikrolab GmbH joins the EVA

mikrolab was founded in 1978 as a development company for electronic systems, and since then [...]

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EU Newsletter



EU Newsletter

EUROPEAN VENDING ASSOCIATION

N° 52 / February 2017

www.vending-europe.eu

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FOOD CONTACT MATERIALS
EVA contributed to the results of the latest JRC study

JRC, the Joint Research Center of the European Commission has produced a report to study national measures for food contact materials for which there are no specific measures at EU level, such as adhesives, coatings, glass, waxes, metals, wood, silicones, rubber or textiles.

Some shortcomings were identified, such as the lack of common guidelines across Member States or the lack of compliance and enforcement of testing methods, which makes it more difficult to demonstrate that food safety is consistently ensured.

The Commission is now expected to evaluate the findings of the study and to determine what possible steps should be taken. It will also present a separate initiative on printed food contact materials, since certain constituents of printing inks used may endanger human health.

The Commission has been looking for many years to regulate food contact materials other than plastics. The EVA and many other trade associations representing raw materials will participate in legislative process if any actions are taken.

On a related note, the EVA has learned that the Commission is currently preparing a draft measure which would amend Regulation 10/2011 setting migration limits for plastic food contact materials, and will follow developments closely.

HEALTHIER VENDING
EVA publishes report outlining legislation and guidance encouraging healthier vending

As part of its participation in the EU Platform for action on diet, nutrition and physical activity, the EVA has researched, collated and published requirements from national governments and institutions for vending operators which can encourage 'healthier vending.'

The report outlines markets and locations where vending machines are banned (e.g. schools in France), markets and environments with product restrictions (e.g. Health Service in Portugal), and markets which make recommendations for vending machines (e.g. workplaces in Estonia).

The purpose of the report is to inform vending operators of existing restrictions on product or machine placement across Europe, highlight initiatives in this area, and to encourage a diversification of product provision where possible. The report can also inform the EU Commission and national policy makers of the barriers faced by the vending industry.

The EVA is also aware of other markets where further or new requirements are being currently considered. The report, covering 22 EU Member States can be freely downloaded here: <http://www.vending-europe.eu/subject-areas/diet-and-nutrition/european-initiatives-to-encourage-a-wider-choice-of-products-in-vending-machines.pdf>

ECODESIGN
EU Commission appoints new Policy Officer to finalise Ecodesign & Energy labelling Regulations

The European Commission has now appointed the new Policy Officer responsible for finalising the draft Ecodesign and Energy Labelling Regulations for Commercial Refrigeration.

The proposed Regulations will impact on refrigerated vending machines, and while the Policy Officer will need some time to understand the intricacies of the relevant machines, detailed dialogue on certain technical aspects is expected to take place between the EVA and the Commission in the coming months.


The Commission fully expects that the inter service consultation (where all Commission Departments) will begin in the summer, meaning we should therefore see the final draft version at that time. The EVA estimates that the Regulations will consequently only enter into force in 2018.

BISPHENOL A
EU Commission delays its measure on BPA


The European Commission has postponed the adoption of its measure on BPA as it wants to align its approval with other measures on endocrine disruptors. As reported last year, the measure is expected to lower the BPA migration limit to 0.05 mg/kg of food.

The adoption of the Regulation is nevertheless still expected in 2017.

EVA Flash



EVAFlash



EUROPEAN
VENDING ASSOCIATION

February 2017 [EVA 24/7 blog](#) | www.vending-europe.eu

TOP STORY

EVA publishes report highlighting healthier vending requirements across the European Union.

Vending machine operators have over a number of years been making meaningful efforts to provide a wider choice of products in their machines in order to play their part in reducing stubbornly upward trends in obesity and overweight rates in Europe.

However there has been, until now, a lack of cohesive and detailed information from across the continent into how European Union (EU) member states are viewing and tackling the vending industry – to encourage an expansion and diversification of the selection of products provided in their machines.

The EVA has now published a summary report outlining specific legislation, guidelines and best practices for vending operators, called '[European Initiatives to encourage a wider choice of products in vending machines](#)' as part of its commitment as a member of the EU Platform for action on Diet, Nutrition and Physical Activity.

The overall objective of the study is to ensure operators are as informed as possible on what products can or should be offered in which environments, and can provide a helpful basis to encourage more and more 'healthier' products appearing in European vending machines.

[-> More](#)

EVA & VENDING NEWS


EVEX 2017 - 23 & 24 November - SAVE THE DATE

The European vending and OCS industry will convene for two days in Rome, Italy for EVEX 2017 on 23 & 24 November.




[-> More](#)

SOCIAL MEDIA

LinkedIn



European Vending & Coffee Service Association
Government Relations • Brussels • 361 followers

 +2 **5 connections** work here. [See all 9 employees on LinkedIn](#) →

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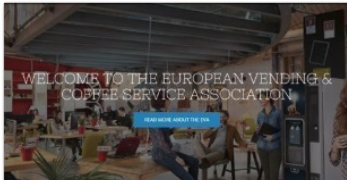
About us

The European Vending & Coffee Service Association (EVA) is a not-for-profit organisation established and situated in Brussels since 1994.

It represents the interests of the European coffee service and vending industry vis-à-vis the European Institutions and other relevant authorities or bodies. Its membership is composed of national associations and individual companies across Europe.

The EVA represents all segments of the coffee service, water dispenser and vending industry machine and component

Recent update




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The Vending Group
Unlisted • 2,428 members


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 **David Irvine** • [Group Owner](#)
Communication and Public Affairs Manager at the European Vending & ... 1w


EU Action on single use plastics – EVA Position and response


<https://www.vending-europe.eu/reducing-marine-litter-action-on-single-use-plastics-and-fishing-gear-eva-position/>



Reducing marine litter: Action on single use plastics and fishing gear – EVA Position
EU Commission proposal for a Directive on the reduction of the impact of certain plastic products on the environment released on...

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 **David Irvine** • [Group Owner](#)
Communication and Public Affairs Manager at the European Vending & ... 1mo

CoolingEU putting sustainable vending machines on the agenda

The EVA is helping to promote sustainable cooling in European vending machines. Join the debate with our CoolingEU partners during a World Café in Brussels on 6 June, 9.30-12.30
<https://www.eventbrite.com/e/sustainable-cooling-for-europe-world-cafe-ti...> [Show more](#)

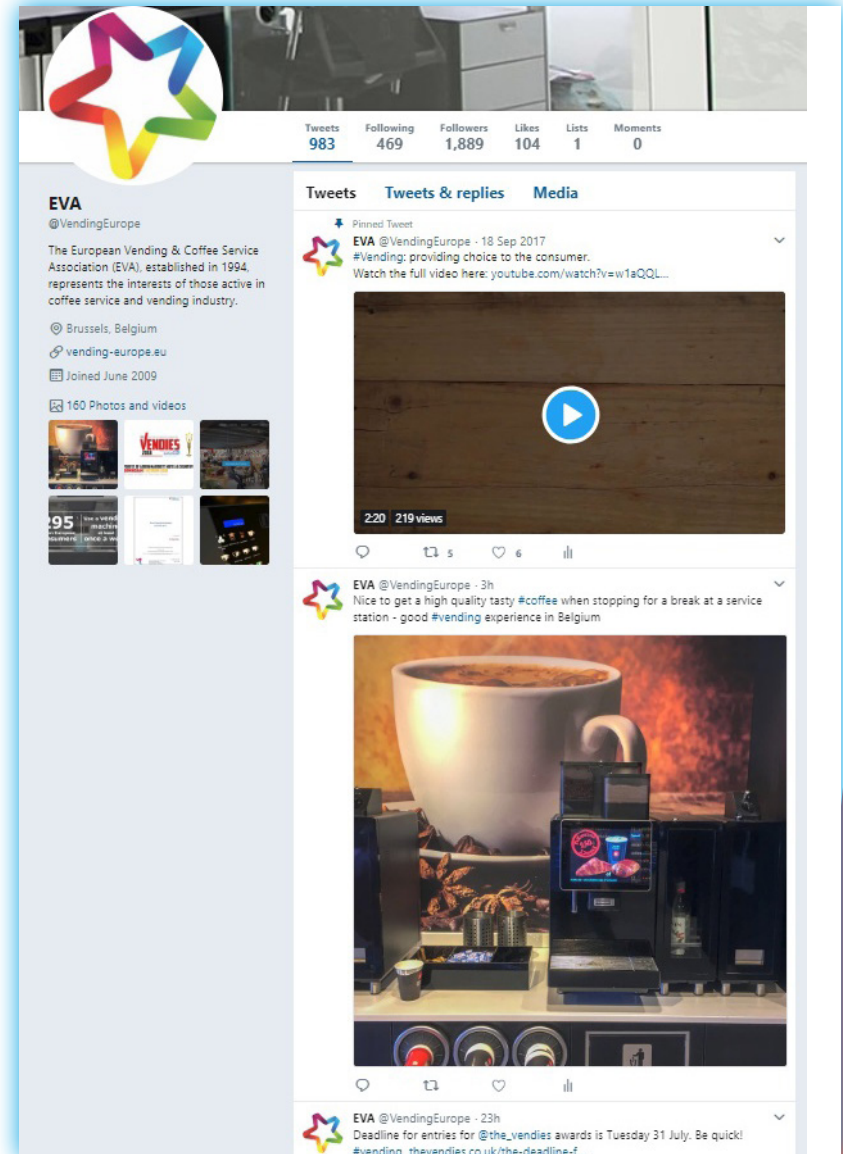
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Facebook



The Facebook profile for the European Vending & Coffee Service Association (EVA) is displayed. The cover photo shows a modern interior with a white sofa and a vending machine. The profile picture is a colorful star logo. The page name is "European Vending & Coffee Service Association" with the handle "@EuropeanVendingCoffeeServiceAssociation". The bio states: "The European Vending & Coffee Service Association (EVA), established in 1994, represents the interests of those active in coffee service and vending industry." The location is "Brussels, Belgium" and the website is "vending-europe.eu". The page was joined in June 2009 and has 160 photos and videos. A recent post from 2 hours ago says: "With the current heatwave across Europe, remember to stay hydrated with a bottle of water from your closest vending machine 😊 #goodadvice". The post includes a photo of a vending machine with a person standing next to it. The caption below the photo reads: "Water is the #1 item sold in chilled vending machines".

Twitter



The Twitter profile for EVA (@VendingEurope) is shown. The profile picture is the same colorful star logo. The bio states: "The European Vending & Coffee Service Association (EVA), established in 1994, represents the interests of those active in coffee service and vending industry." The location is "Brussels, Belgium" and the website is "vending-europe.eu". The page was joined in June 2009 and has 160 photos and videos. The profile statistics are: 983 Tweets, 469 Following, 1,889 Followers, 104 Likes, 1 List, and 0 Moments. A pinned tweet from 18 Sep 2017 says: "EVA @VendingEurope · 18 Sep 2017 #Vending: providing choice to the consumer. Watch the full video here: youtube.com/watch?v=w1aQQL...". The tweet includes a video player showing a close-up of a vending machine. Another tweet from 3h ago says: "Nice to get a high quality tasty #coffee when stopping for a break at a service station - good #vending experience in Belgium". The tweet includes a photo of a large cup of coffee next to a vending machine. A third tweet from 23h ago says: "Deadline for entries for @the_vendies awards is Tuesday 31 July. Be quick! #vending thevendies.co.uk/the-deadline-f...".

EVENTS

European Vending Experience

The EVA organises annually the European Vending Experience (EVEX) in collaboration with a national vending association. EVEX combines two days of Conferences, networking, cultural activities and a small commercial exhibition. Since the first edition in 2015, EVEX has been held in Malaga (Spain), Cannes (France) and Rome (Italy).

The EVA also attends the four main international vending exhibitions in order to discuss topics and liaise with Members, meet potential new Members, and to keep up-to-date with the latest trends in the industry.

The **four main vending shows** are:

- **Vending Paris** – France
- **Venditalia** – Milan, Italy
- **Avex** – Birmingham/Manchester, United Kingdom
- **EU'Vend** – Cologne, Germany

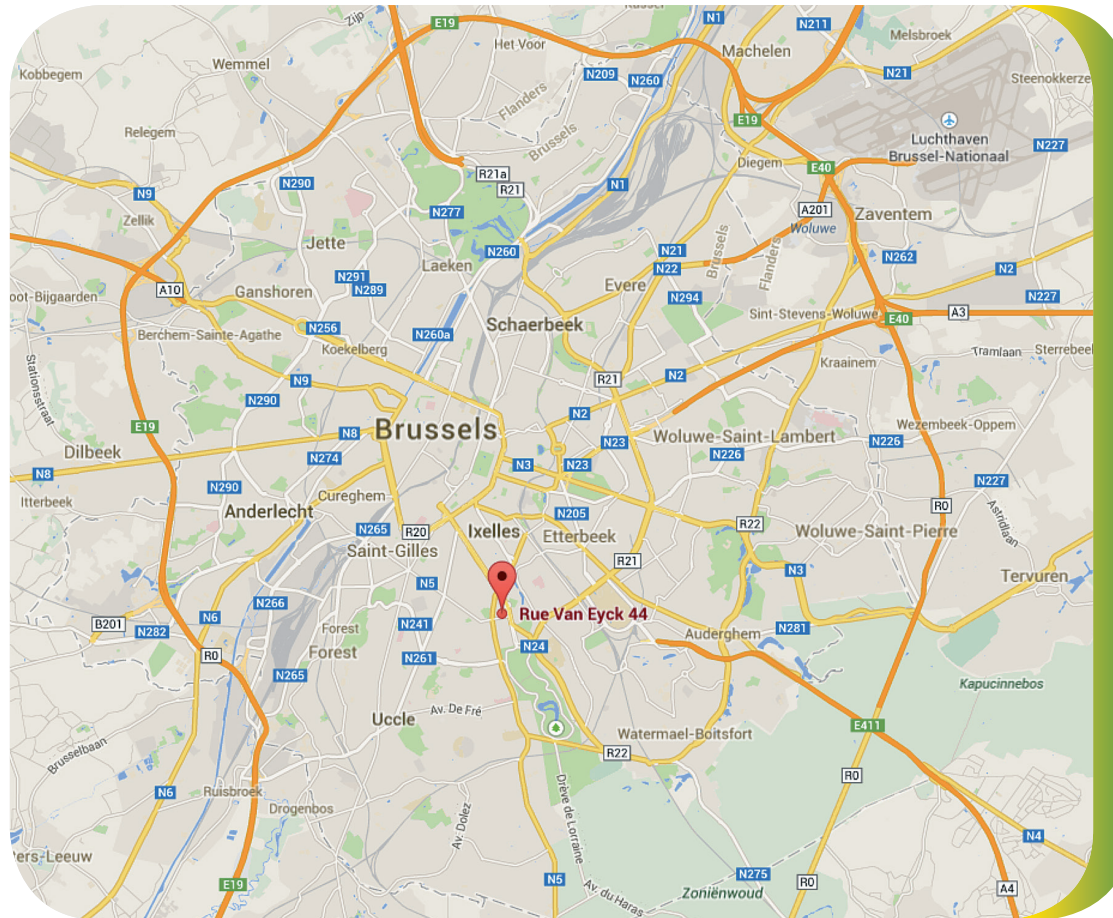
The EVA takes the opportunity at these shows to regularly make presentations on new developments in European legislation, market statistics and trends, and on many other topics.

The EVA also attends and supports exhibitions and events organised by its National Association Members, and it also provides a coherent and unified voice on European Vending to relevant organisations and events outside Europe.




WHERE TO FIND US

The European Vending & Coffee Service Association is located in the heart of Brussels, within easy reach of the European Institutions.



It is easy to reach our offices from both Brussels Airport and by public transportation.



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