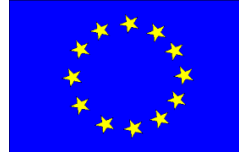




EUROPEAN
VENDING & COFFEE
SERVICE ASSOCIATION



EUROPE

The Vending Market in 2018

Published in September 2019





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The European Vending Market in 2018

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Appendices

Appendix 1

Machine Types and Definitions – Part 1

Hot Beverage - Vending

Free Standing
Fully automatic – including cup dispensing

Table Top
Fully automatic – including cup dispensing



HOT BEVERAGES
Coffee, tea, chocolate and soup

Appendix 1

Machine Types and Definitions – Part 2

Hot Beverage - OCS

Table Top

Semi Automatic – without cup dispensing

Beans / ground / instant



Capsules / sachets



Pour over



HOT BEVERAGES
Coffee, tea, chocolate

Hot Beverage – Coffee-to-Go

Free Standing & Table Top

Semi Automatic – without cup dispensing



HOT BEVERAGES
Coffee, tea, chocolate

Appendix 1 Machine Types and Definitions – Part 3

| | |
|--------------------------------|----------------------------|
| Free Standing - VENDING | Table Top - VENDING |
|--------------------------------|----------------------------|

| | | | | |
|--------------------------------------|------------------------------|-----------------------------|--------------|--------------|
| Cold Beverage (dedicated) | Snack (dedicated) | Food (dedicated) | Combi | Combi |
|--------------------------------------|------------------------------|-----------------------------|--------------|--------------|

| | | | | | |
|--------------|-------------|-------------|-------------|-------------|-------------|
| Closed front | Glass front | Glass front | Glass front | Glass front | Glass front |
|--------------|-------------|-------------|-------------|-------------|-------------|



| | | | | | |
|--|--|---|---|--|--|
| COLD BEVERAGE Carbonated soft drinks, Water and juice | SNACKS Confectionary, savoury snacks etc – shelf stable | FOOD Sandwiches, fruit & fresh food – short shelf-life | COLD BEVERAGE + SNACKS + FOOD Combination of 2 or 3 product categories | | |
|--|--|---|---|--|--|

Appendix 1

Definitions – part 4

| Terms used | Definition |
|---------------------------------|--|
| Hot Beverages | Mainly coffee, tea , chocolate, milk-based coffee specialties (like cappuccino and latte), hot water dispensed into a cup. |
| Table top hot beverage machines | All machines that are positioned on a work surface or a bespoke cabinet. This includes fully automatic, semi automatic and manual machines. - AUTOMATIC machines DO include cup and sugar dispensing; and usually have the option for payment systems. - SEMI AUTOMATIC machines do NOT dispense cups; and typically do NOT dispense sugar or toppings either. They generally do not have payment systems. |
| Hot Beverage - VENDING | Hot beverages dispensed from fully automatic machines which include cup dispensers. The consumer presses a button and the complete drinks, in a cup, is dispensed by the machine. Can be free standing or table top |
| Hot Beverage - OCS | OCS = Office Coffee Service Table top hot beverage (semi automatic / capsule / sachet / pour over) in the office environment with a small potential user group in the area of the machines, and where the machines are filled by the company where the machines are located, but maintained by the operator, and hot drinks ingredients supplied by the operator. OCS machines are designed without payment system, but a payment option can be offered via an add-in module. |
| Hot Beverage - Coffee-to-Go | Premium 'Coffee-to-Go' is an exciting and growing category in many countries. The machines have impactful branding, use large paper cups, are usually Bean-to-Cup, and often use fresh liquid milk for cappuccino and latte etc. They are found both in Public and in Workplace sites, and the price is always set at a premium to 'standard' offerings. |
| Instant / soluble coffee | The coffee is prepared mixing hot water with coffee powder, soluble or freeze dried, in special mixing bowls, or directly in the cup. |
| Freshbrew / Ground coffee | The coffee is prepared in a special brewer, where hot water passes through the ground fresh coffee with a pressure close to 0 bar (with the same system we can obtain tea from leaf tea). |
| Bean-to-Cup / Espresso coffee | Bean-to-Cup is in the vast majority related to the espresso brewing technology: coffee beans are ground in the machine and then a pump pushes hot water through the ground fresh coffee with a pressure between 4 and 10 bars. |

Appendix 1

Definitions – part 5

| Terms used | Definition |
|---------------------------|--|
| Capsule | Single portion of ingredients (usually coffee), contained in a rigid capsule (or flexible sachet). The capsule is inserted into the machine which then brews the beverage using the ingredients in the capsule |
| Pour over | Machine which brews filter coffee into a glass pot or thermos flask. |
| Cold Beverage (dedicated) | Machines that only dispense packaged cold beverages: bottles, cans or cartons |
| Snack (dedicated) | Machines that only dispense packaged, shelf-stable snacks: confectionery or savoury |
| Food (dedicated) | Machines that only dispense short shelf-life food items: sandwiches, fruit, etc |
| Combi machines | <p>These are spiral / belt vendors used by the operators to sell more than one category of products – usually cold drinks as well as snacks, and sometimes also food products like sandwiches too. There are 3 types of Combi machine:</p> <ol style="list-style-type: none"> 1. Ambient machines which have no chilling 2. Chilled machines which can cool down to 5°C 3. Cold machines which cool below 5°C and have a health cut-out if the temperature rises above 5°C <p>For this report, the first 2 categories above have been combined and are called 'Ambient + Chilled'. The 3rd category above is called 'Cold ≤ 4°C'</p> |

Appendix 1

Definitions – part 6: Terminology

| Terms used | Definition |
|-----------------|--|
| Machine | An operational machine located at either a client site or in a public location designed specifically for the sale and dispensing of food and drinks. Covers all vending machines, OCS machines and Coffee-to-Go machines. It excludes all "stock" machines that are not in service in one of the channels detailed above. This excludes cigarette and gambling machines. |
| Consumption | The average number of units dispensed by a machine per week |
| Number of vends | The number of unique product units dispensed by a given vending machine e.g. one cup of coffee is equal to one vending transaction. Total number of vends in this report is calculated by multiplying the total machine base by the consumption. |
| Vend price | <ul style="list-style-type: none"> • PAY VEND: This is the price paid by the consumer at the machine at the point of purchase. • FREE VEND: Where the products are offered free of charge to the consumer by the site (typically OCS), then the invoice price of the product to the site is used instead. • The average vend prices in this report are a combination of the pay vend price and the free vend invoice price. |
| Revenue | Revenue generated by products dispensed from the machines. Sum from all cash and invoice income generated by the machine, including VAT. The total revenue in this report is calculated by multiplying the total number of vends by the average vend price. This excludes any impact from acquiring companies, and sales to other vending operators. |

Appendix 1

Definitions – part 7

| Terms used | Definition |
|----------------------|--|
| Vending Operator | A company, in which more than 50% of its turnover, is derived from operating, servicing or trading vending machines, both in B2C (direct to consumer) or B2B markets (corporate clients). It excludes companies with minor turnover shares on filling & cleaning machines such as FM companies, Catering companies, Gasoline retailers or other retailers. |
| Numbering Convention | <p>Commas: 1,234 = One thousand two hundred and thirty four</p> <p>Decimal point: 1.20 = One and two tenths</p> <p>Million: 1,000,000 = 1 million</p> <p>Billion: 1,000,000,000 = 1 billion</p> <p>Billion: 1,000 million = 1 billion</p> |
| Abbreviations | # - this is short for 'number', so '# vends' means 'number of vends' |



Appendix 2

Leading OCS Machine Types by Country

- The typical OCS customer is as follows:
 - Hot beverages available free to employees
 - Machines are table top, non automatic
 - Machines are non-operated
 - Lower number of employees than hot beverage vending
- The EVA defines OCS as the following machine types:
 - Table Top Semi Automatic machines
 - Table Top Capsule machines (plus sachet machines)
 - Pour Over filter machines
- The bases of the 3 OCS machine types are changing as follows:
 - Table Top Semi Automatic are growing strongly
 - Table Top Capsule (and Sachet) machines are growing
 - Pour Over filter machines are declining rapidly
- The primary OCS machine base varies by type across countries according to these main regional groupings:
 - **Central & Eastern Europe**
 - Table Top Semi Automatic
 - **Southern Europe**
 - Table Top Semi Automatic plus Table Top Capsule
 - **Northern Europe**
 - Table Top Semi Automatic plus Pour Over
 - **UK & RoI**
 - Table Top Semi Automatic plus sachet (a freshbrew variant of capsule)

