

Connected Vending Machines

Connected Vending Machines is the third consecutive report from Berg Insight analysing the latest developments on the vending telemetry and cashless payment market worldwide.

This strategic research report from Berg Insight provides you with 90 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

Highlights from the third edition of the report:

- ◆ **Detailed** analysis of the vending industry.
- ◆ **Summary** of the latest industry trends and developments.
- ◆ **Updated** in-depth profiles of key players in the vending telemetry and cashless payment markets.
- ◆ **Reviews** of vendor market shares and competitive dynamics.
- ◆ **Perspectives** on the impact of mobile wallet services.
- ◆ **Extensive** global and regional market forecasts lasting until 2022.

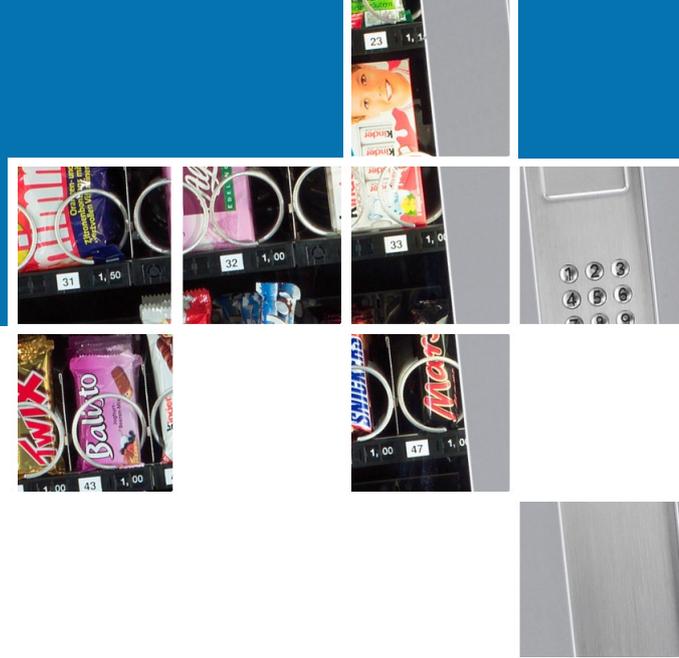
A total of 5.4 million vending machines will be online by 2022

The first solutions for including connectivity in vending machines became commercially available more than two decades ago. It has however taken years for the technology to gain the interest of mainstream vending operators. Berg Insight estimates that around 16 percent of the world's 16 million vending machines are connected. The market has gained momentum in recent years as vending operators have started to deploy solutions at a larger scale. Demand for cashless payments has so far been a main driver. Vending telemetry is however anticipated to have a more transformational effect on the industry as these solutions enable vending operators to substantially improve their operational efficiency.

The global installed base of connected vending machines reached an estimated 2.6 million units in 2017. North America is estimated to represent the largest share of around 1.3 million of these machines, whereas the corresponding number for the European market is 0.6 million. The number of connected vending machines in other parts of the world totalled an estimated 0.7 million units at the end of 2017, mainly in Japan and Australia. Berg Insight forecasts that the number of connected vending machines worldwide will grow at a

compound annual growth rate (CAGR) of 16.2 percent to reach 5.4 million units by 2022. As a result, the global penetration rate will reach 32.2 percent at the end of the forecast period.

The global market for connected vending solutions is served by a variety of players. Many of the leading providers are specialised technology companies. USA Technologies is following the acquisition of Cantaloupe Systems in 2017 clearly established as the largest provider in terms of installed base. Other notable technology suppliers include Ingenico Group, Nayax and Televend (INTIS). Numerous vending machine manufacturers are also active in the connected vending space, either directly by developing proprietary solutions in-house, or by partnering with established vending telemetry and cashless payment solution providers. The manufacturer Crane even holds one of the leading positions from a global perspective through Crane Connectivity Solutions with a total of 400,000 connected machines. Vending operators active in the field of connected vending machines most often work with third-party technology providers, while some even have in-house solutions e.g. from M&As.

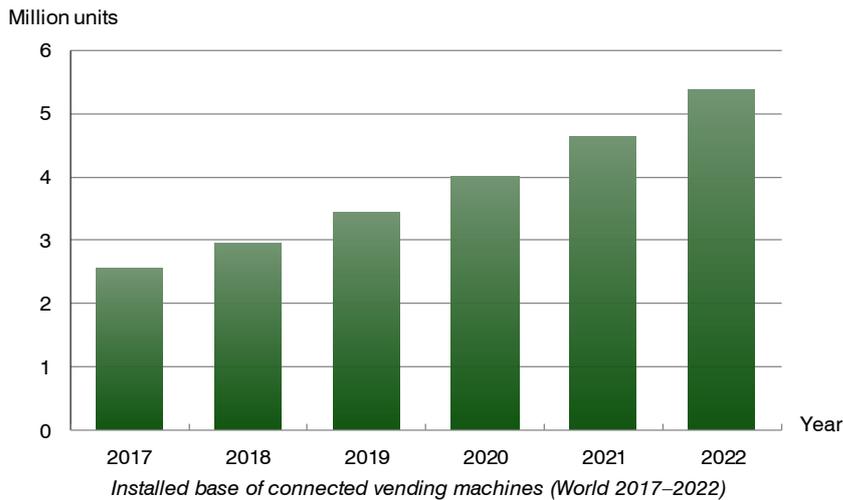


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This research report answers the following questions:

- ◆ How many of the world's vending machines are online today?
- ◆ What is the potential market size for vending telemetry solutions?
- ◆ Which trends and developments are shaping the market?
- ◆ Which are the leading vending telemetry and cashless payment system vendors?
- ◆ When will cashless payments be commonplace in the vending industry?
- ◆ How will emerging mobile wallet services affect the market?



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Connected Vending Machines is the foremost source of information about the adoption of wireless M2M solutions in the vending industry. Whether you are a device vendor, service provider, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

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