

Index

Table of Contents

Table of Contents.....	i
List of Figures.....	iv
Executive summary.....	1
1 Introduction.....	2
1.1 Overview of the vending machine industry	2
1.2 Vending industry players.....	3
1.2.1 Vending technology providers	3
1.2.2 Vending machine manufacturers	4
1.2.3 Product suppliers	6
1.2.4 Vending operators.....	8
2 Vending telemetry and cashless payments.....	9
2.1 Vending telemetry and software.....	9
2.1.1 Remote monitoring of vending machines	9
2.1.2 Vending management systems	11
2.2 Payment systems	11
2.2.1 Coin mechanisms and bill validators	12
2.2.2 Cashless payments	13
2.2.3 Mobile phone payments and NFC	14
2.3 Regional overview	16
2.3.1 Europe.....	16
2.3.2 North America	18
2.3.3 Rest of World.....	18
3 Vendor profiles and strategies.....	21
3.1 Vending telemetry and cashless payment solution providers	21
3.1.1 BiTX (Your Voice)	22
3.1.2 Cantaloupe Systems	23
3.1.3 Connected Molecules	24
3.1.4 Deutsche Telekom	25

3.1.5 DISTRILOG 26

3.1.6 Ingenico Group 26

3.1.7 Materna 28

3.1.8 Mecsel 29

3.1.9 Nayax..... 30

3.1.10 On Track Innovations 32

3.1.11 Prosa 33

3.1.12 Silkron 34

3.1.13 Smarcom 35

3.1.14 Televend (INTIS)..... 36

3.1.15 USA Technologies..... 38

3.1.16 Vendon 39

3.1.17 Vendwatch Telematics 42

3.1.18 Vianet Group 42

3.2 Vending machine manufacturers 43

3.2.1 Automated Merchandising Systems 45

3.2.2 Azkoyen Group 45

3.2.3 Bianchi Vending Group 46

3.2.4 Crane 46

3.2.5 Deutsche Wurlitzer 49

3.2.6 FAS International 50

3.2.7 Fastcorp Vending 50

3.2.8 Fuji Electric 51

3.2.9 Jofemar 51

3.2.10 N&W Global Vending 52

3.2.11 Rheavendors Group 53

3.2.12 Royal Vendors (Coinco) 54

3.2.13 SandenVendo..... 55

3.2.14 Seaga 56

3.2.15 Sielaff..... 57

3.2.16 Westomatic..... 57

3.2.17 Wittern Group 58

- 3.3 Vending operators 59
 - 3.3.1 Aramark 59
 - 3.3.2 Canteen 60
 - 3.3.3 Coca-Cola Amatil 61
 - 3.3.4 Pelican Rouge Group 62
 - 3.3.5 Selecta 63
 - 3.3.6 Sodexo 65
- 4 Forecasts and conclusions 66
 - 4.1 Market trends and drivers 66
 - 4.1.1 The business case for vending telemetry continues to improve 66
 - 4.1.2 Cashless payments is a strong driver for adding connectivity in vending 67
 - 4.1.3 Mobile wallet services enable new opportunities 67
 - 4.1.4 Micro markets cannibalise on vending machines & open up for diversification 68
 - 4.2 Market forecasts 69
 - 4.2.1 North American connected vending machine market forecast 69
 - 4.2.2 European connected vending machine market forecast 70
 - 4.2.3 Rest of World connected vending machine market forecast 71
- Glossary 73

Index

List of Figures

Figure 1.1: Vending machine density by region (World 2015)	2
Figure 1.2: Examples of vending machines	4
Figure 1.3: Installed base of vending machines by country (EU 28+2 2015).....	5
Figure 1.4: Examples of product suppliers and brands	7
Figure 2.1: Bill validator and coin mechanism examples	12
Figure 2.2: Examples of cashless payment devices for open and closed systems.....	13
Figure 2.3: ePort G9 from USA Technologies supporting NFC-based mobile payments	15
Figure 2.4: Installed base of connected vending machines by vendor (World 2015).....	16
Figure 2.5: Connected vending machine vendor market shares (Europe 2015)	17
Figure 2.6: Connected vending machine vendor market shares (North America 2015).....	18
Figure 3.1: Connected Molecules Gateway for vending machines.....	24
Figure 3.2: Nayax's AMIT 3.0 telemetry device	30
Figure 3.3: OTI's Saturn 6500 TRIO 3-in-1 contactless, chip and magstripe reader.....	32
Figure 3.4: Silkron's Vendron Box ^{3c} for smart vending functionality	35
Figure 3.5: INTIS' Televend Box telemetry device, Service Mobile app & web application.....	37
Figure 3.6: Vendon's vBox 2 vending telemetry device	40
Figure 3.7: Product portfolios of vending machine manufacturers (2016).....	44
Figure 3.8: The Coges Comunica Module 2.....	45
Figure 3.9: Crane Navigator and MEI Easitrax Advance 5000 telemetry devices	48
Figure 3.10: CashFlow 5in1 eCash terminal from Crane Payment Innovations.....	49
Figure 3.11: Coca-Cola Amatil's QuickTap cashless payment solution.....	62
Figure 4.1: Installed base of connected vending machines (World 2015–2020)	69
Figure 4.2: Connected vending machine market forecast (North America 2015–2020)	70
Figure 4.3: Connected vending machine market forecast (Europe 2015–2020)	71
Figure 4.4: Connected vending machine market forecast (Rest of World 2015–2020)	72