

WHO WE ARE & WHAT WE DO





Water
To Go

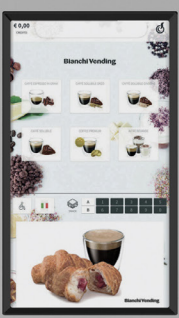
COLD FILTERED ECOLOGICAL



SELECT ON COFFEE
MACHINE

BWT

CONFIRM



DESIGN
YOUR BREAK

Bianchi Vending

EUROPEAN VENDING & COFFEE SERVICE ASSOCIATION

**ESTABLISHED IN 1994,
THE EVA IS THE
PAN-EUROPEAN
VOICE OF THE COFFEE
SERVICE AND VENDING
INDUSTRY.**



EUROPEAN VENDING & COFFEE SERVICE ASSOCIATION

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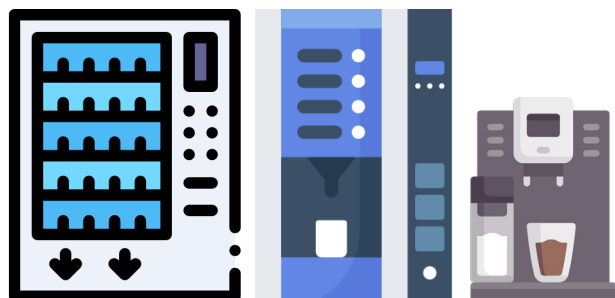


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THE VENDING & OFFICE COFFEE SERVICE INDUSTRY IN EUROPE

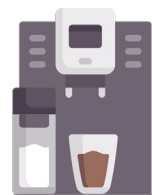
KEY FIGURES

- There are 295 million consumers who use machines at least once per week;
- There are approximately 4.5 million vending machines in Europe;
- 3 million machines (67%) are hot drinks machines - the majority of these being table-top vending or OCS machines;
- This corresponds on average to 175 Europeans for every vending machine;
- The machines are run by some 10,000 companies, mostly SMEs and family businesses;
- The industry employs directly 85,000 people and many more in supportive industries;
- Vending across Europe has a turnover of €20 billion.



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 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.



PROVIDING EUROPEAN MANUFACTURING JOBS

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.

The sector consists of more than just ingredient suppliers (like coffee roasters) and machine operators. Our industry relies on dedicated employees from a range of segments including machine and cup manufacturers, payment solution providers, vending telemetry suppliers, and water filter system suppliers. We offer diverse employment and training opportunities to a significant number of workers.

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.

Across Europe the industry employs more than 85,000 individuals directly within some 10,000 companies, mostly small and medium-sized enterprises (SMEs) and family businesses.

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. Significant growth potential is recently being demonstrated by newer vending markets, particularly in Eastern Europe.

From smart technology to healthier choices, the vending industry is continuously adapting to new consumer trends and demands. We have become an innovative industry, designing and producing machines in Europe using the latest technologies.

Our new machines use cutting edge technology, from internet connectivity to the use of large touchscreens to ensure a better customer experience. The companies operating the machines have also developed over recent years a very efficient fleet and route optimisation, making both the business more sustainable and ensuring high consumer satisfaction. We represent expert know-how on coffee brewing technologies and export European excellence worldwide through premium machines and technical expertise. In fact, out of the three key vending and coffee markets in the world (Japan, USA and Europe), Europe is the only region to export machines globally.

THE KEY PLAYERS

VENDING OPERATORS

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

Operators sign contracts with clients in order to place machines in their locations or workplaces. These contracts specify everything from filling and maintenance schedules to the types of products placed in the machines.

Operators purchase machines from machine manufacturers and ensure the machines are equipped with all the appropriate and required components for the location (such as payment systems, telemetry, branding and even provide machine furniture).



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.

WATER FILTER/DISPENSER MANUFACTURERS & OPERATORS

These manufacturers make the water filters used in drinks machines and/or manufacture point of use (POU) water dispensers which are commonplace in the office environment.

Similar to coffee and vending machine operators, water dispensers and filters are either maintained by specific operators or form part of the overall vending contract provision.



CUP & DISPOSABLE SUPPLIERS

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.

In line with the trend of 'premiumisation' for the coffee service delivery, cups are now often made of high quality paper, similar to those used in coffee shops. As vending is an 'out of home' industry, there are circumstances when a single use beverage cup is required to be used.



MACHINE MANUFACTURERS

Machine manufacturers make the vending machines used by the operators. The machines exist in a wide range of different types and sizes, from a small table top coffee machine to a full size refrigerated snack machine.

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.

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.

PAYMENT SYSTEMS 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 are always open.
- They are very versatile and can sell almost any product, from barista-quality coffee to electronic devices.
- New machines use cutting edge technology, including internet connectivity and the use of large touchscreens to provide a seamless consumer experience.
- Machines can employ a wide range of payment options, with significant growth in contactless and mobile payments.
- 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 & Development departments continuously develop new, tasty products with health benefits.
- The industry is committed to encouraging a more diverse product offering in Vending Machines and has supported healthy eating projects in different European countries.
- Machines offer social benefits as they are a natural place to meet with colleagues/friends - something often demanded by employees in the office.
- Machines provide hydration & energy – important for a competitive workforce. They encourage moderate coffee consumption, which brings many physical and mental benefits.



MORE SUSTAINABLE VENDING

The vending industry has been becoming more sustainable for years. A lot of initiatives, coupled with sector-endorsed measures and recent legislation are reshaping the environmental footprint of the sector.

- Vending Machines in Europe are fully compliant with the WEEE (Waste Electrical and Electronic Equipment) legislation, and machines and parts are re-used many times over. Through RoHS, machines restrict the use of hazardous substances.
- The EVA has developed a standardised method of measuring the energy consumption of hot drinks vending machines: the EVA EMP (Energy Measurement Protocol) 3.1b. This helps buyers benchmark the different machines and is cited in tenders and the EU Green Public Procurement (GPP) criteria. EVA expert members contributed significantly to developing EN 50597, the official European standard for the calculation of energy consumption of refrigerated vending machines.
- Ecodesign & Energy Labelling Regulations drive refrigerated vending machines to continue introducing and improving energy efficiency measures. An official Energy Label helps buyers understand and compare machine performance.
- Vending machines are built on a modular basis, allowing components to be replaced and switched which prolongs the lifespan of the machine considerably.
- Machine manufacturers have integrated natural and low global warming potential refrigerants into their vending machines which are better for the environment.
- Vending companies invest a lot in Research and Development (R&D) in the areas of energy-efficiency, insulation products and refrigeration.
- Use of traditional plastic cups is being significantly reduced with alternatives such as paper cups or even biodegradable cups being used. Soft drinks and bottled water are packaged with PET, which has a high recycling rate. Machines, depending on location, allow consumers to use their own reusable or ceramic cup with fully automatic machines capable of detecting this choice.
- 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 still ensure a safe temperature for perishable items is maintained.
- LED lights are fitted to new machines because they consume less energy.

- The National Vending Associations 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.



- Operators, in line with customer demands, are offering more and more sustainable and ethical products in machines, such as Fairly traded items. This trend is currently strongest in Northern Europe, but visible elsewhere. The EU Green Public Procurement (GPP) criteria provide a useful template to ensure a sustainable vending service for procurement requests.
- The European Vending Machine Manufacturers Association (EVMMA), a group within the EVA representing 20 machine manufacturers, unanimously decided in 2018 to set a zero-sugar level on hot drinks machines as standard. This now means that all hot drinks vending machines are configured as default in the factory with no added sugar, unless a specific request has been made otherwise. In practice, this means that consumers will no longer have to take action at a hot drinks machine to actually remove the sugar option if it is not desired and should help reduce unwarranted sugar intake.

EVA WORKING GROUPS & COMMITTEES

The EVA Committees and working groups 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 EVA committees sit under the following key activity areas:

- Market Information
- Payment (cash and cashless)
- Technical & Standards
- Sustainability
- Industry image

The EVA also has special committees to liaise with the National Vending Associations and for machine manufacturers.

Each Committee is governed by a Chairperson, and overseen by a member of 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:

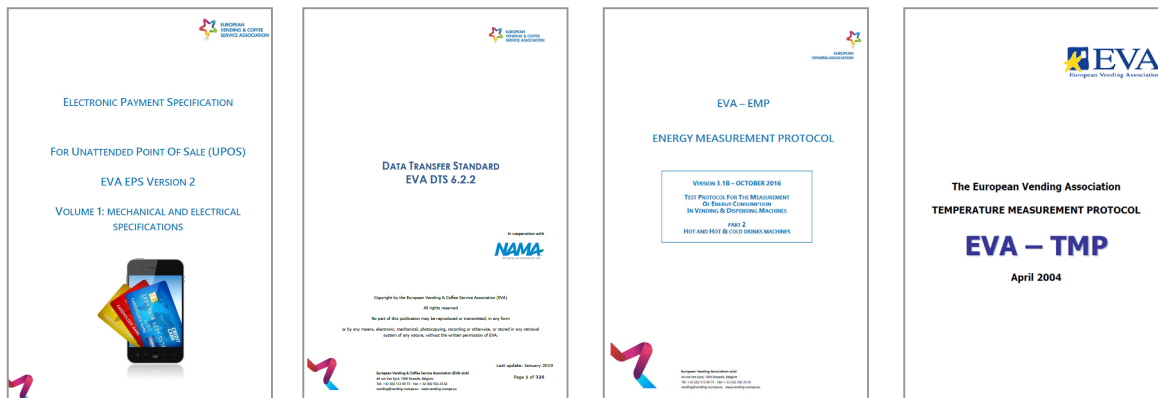
- **EVA EPS** – Electronic Payment Specification
- **EVA DTS** – Data Transfer Standard
- **EVA EMP** – Energy Measurement Protocol for hot drinks machines
- **EVA TMP** – Temperature Measurement Protocol

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

The EVA Standards Committee is working on developing a new vending protocol for the coming years which aims to enable a much more connected and integrated machine ecosystem.

Furthermore, all EVA standards are supported by NAMA, and marketed on the American continent by them.

Companies can self-certify their payment solutions as compliant with the Electronic Payment Specification, declaring that they follow all the measures and guidance outlined in the document, with the list of companies and devices shown on the following page. Devices listed here provide confidence to vending operators that they are designed to work seamlessly in the vending industry.



ELECTRONIC PAYMENT SPECIFICATION SELF CERTIFICATION REGISTER



COMPANY	PRODUCT	REGISTRATION NUMBER
CCV	CCV IM30 3 in1 Cashless Payment Terminal	02-2.0-007-P
	CCV InSync C Contactless Cashless payment terminal	02-2.0-008-P
	CCV InSync 3 in1 Cashless Payment Terminal	02-2.0-009-P
	OPM-C60, COR-A10	02-2.0-010-P
	OPM-C60, COR-A20	02-2.0-011-P
Nayax	Onyx Contactless unattended payment terminal	02-2.0-012-P
	VPOS Terminal All In One unattended payment terminal	02-2.0-013-P
ingenico	SELF/2000 All in one vending & self-service payment terminal	02-2.0-014-P
	SELF/4000 All in one vending & self-service payment terminal	02-2.0-015-P
	SELF/5000 All in one vending & self-service payment terminal	02-2.0-016-P
	Valina all in one payment terminal	02-2.0-006-P
oti	TRIO- IQ All in one payment terminal for the unattended market	02-2.0-017-P
	otiMetry TRIO kit (TeleBox & TRIO) Telemetry and payment platform for the unattended market	02-2.0-018-P
	otiMetry UNO kit (TeleBox & UNO) Telemetry and payment platform for the unattended market	02-2.0-019-P
cdgs	E.C.S. Dynamos Key System	02-2.0-020-P
	E.C.S. Dynamos MIFARE System	02-2.0-021-P
	E.C.S. Engine Base Key System	02-2.0-022-P
	E.C.S. Engine Base MIFARE System	02-2.0-023-P
	E.C.S. Engine Plus Key System	02-2.0-024-P
	E.C.S. Engine Plus LEGIC® System	02-2.0-025-P
	E.C.S. Engine Plus MIFARE System	02-2.0-026-P
	E.C.S. Engine Plus System equipped with PMT Nebular Pay Reader	02-2.0-027-P
VIANET	Smart Contact: Vitel™ Mk8 NANO + SATURN 6500 Contactless Only Unattended Payment & Telemetry Terminal	02-2.0-028-P
payter	P66 Contactless only terminal	02-2.0-029-P
	P66S Contactless only terminal front mounted	02-2.0-030-P
	P68 All in one payment terminal	02-2.0-031-P

Table correct as of December 2022. More product details on the Register can be viewed on the EVA website:
www.vending-europe.eu/activities/payment

EVA MARKET KNOWLEDGE

VENDING & OCS MARKET REPORT

On an annual basis, the EVA publishes its report on the coffee service and vending industry, which 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 both a combined report of the vending industry in 24 European markets, as well as providing a detailed analysis for each individual country.

The Market Report covers the following key indicators:

- Key Market Insights
- Key Market Metrics and Country Comparisons
- Vending Machine Fieldbase (number of machines) by Machine Category
- Average Consumption by Machine Category
- Number of Vends by Machine Category
- Average Vend Price by Machine Category
- Product Revenue by Machine Category
- Cups: type and size
- Payment Systems and Telemetry
- Open Site Cashless Vending Transactions
- The Major Operators

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.

REPORT ON CONSUMER BEHAVIOUR IN THE VENDING & OCS INDUSTRY

The report, carried out by GFK on behalf of the EVA, covers four of the main vending markets in Europe – namely France, Germany, Italy and Spain – as well as a short comparison of the key differences between the countries. The report focuses on the coffee and purchased food landscape from the working population, and covers consumption both at home as well as out of home, as well as a specific look into the behaviour with regards to vending machines.

The EVA invested in this report in order to understand more clearly the changes in consumer preferences since the start of the COVID-19 pandemic and how this has translated into the most relevant and useful purchasing behaviour in relation our sector. The report specifically provides findings on coffee preferences of workers at the workplace, at home and during the commute, as well as food purchases in the same environments.

Indeed the findings are particularly useful in understanding the latest trends in the context where that working from home has become much more prevalent. As such the EVA believes that the report could be particularly useful for companies seeking to invest in additional and/or innovative workplace solutions.

ANALYSIS ON THE USE OF BOTTLED WATER IN VENDING

This report draws on survey responses by bottlers and vending machine operators across Europe and demonstrates the situation regarding the provision of water in PET bottles, glass bottles, cans and carton (such as Tetra Pak) in the vending channel, and changes over the last 5 years. In addition the analysis looks at how requests from clients are changing, policy changes and how respondents expect the market developments in this area for the coming years.



EVENTS

EUROPEAN VENDING EXPERIENCE (EVEX)

The EVA organises annually the European Vending Experience (EVEX) in collaboration with a National Vending Association.

EVEX typically combines two days of conferences, networking, cultural activities and a small commercial exhibition. Since the first edition in 2015, EVEX has been held in Seville (Spain), Malaga (Spain), Cannes (France), Rome (Italy), Milan (Italy), Bonn (Germany) and Bucharest (Romania).

OTHER EVA EVENTS

The EVA also organises various other events, including our annual AGM, to present new developments and to help members network with each other. Over the last years, we have also organised online webinars, in particular a year-long Vending & Coffee Solutions Hub. This online Hub attracted more than 1,000 unique users where live events as well as continuous virtual booths were accessible during the 12 months. This allowed visitors to view the latest company innovations as well as leave their 'digital business cards' with the exhibitors.

VENDING EXHIBITIONS

The EVA also attends the 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 key main vending shows are:

- Aneda Expo Congress – Madrid, Spain
- Vending Show – Paris, France
- Venditalia – Milan, Italy

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.

COMMUNICATION

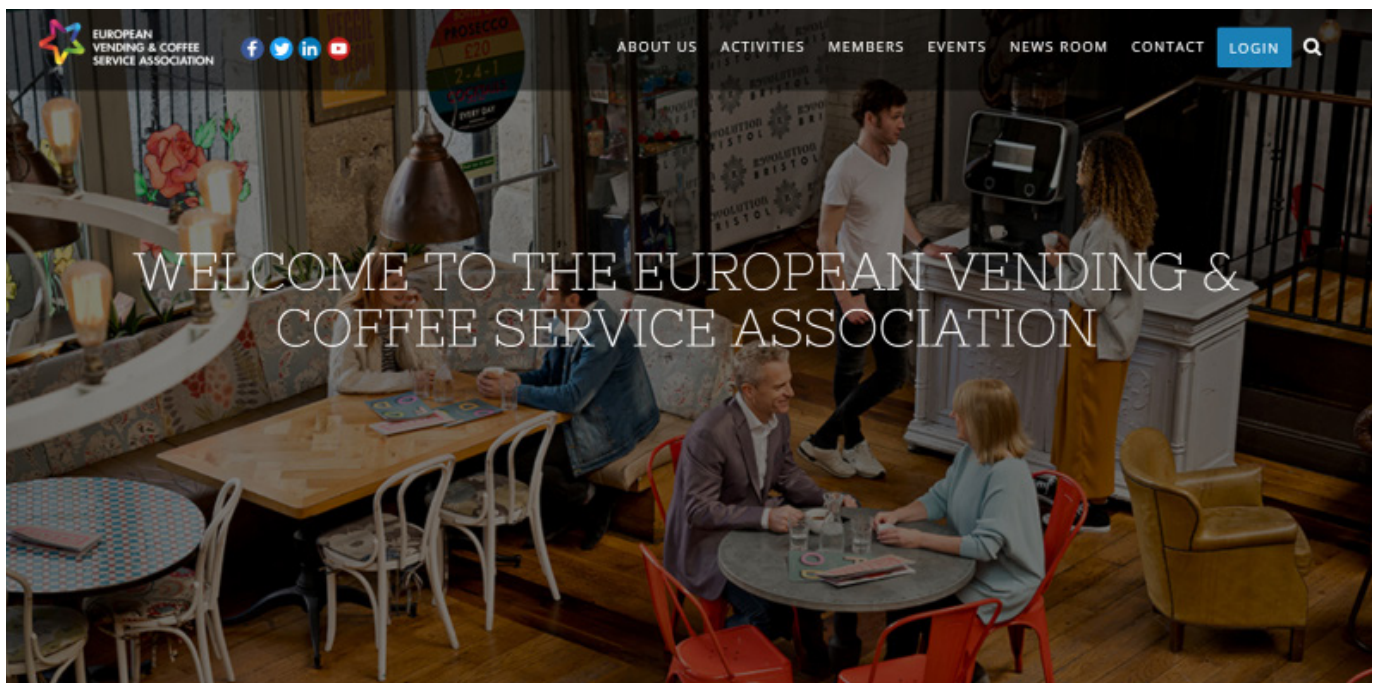
The EVA uses a range of communication tools to best serve and promote its Members, and to show a positive image of the industry to the general public.

The EVA publishes two regular newsletters for members:

- The **EU Newsletter** provides monthly detailed information on European legislative or technical developments. This Newsletter is vital in helping to understand upcoming issues and to be the best equipped to make timely business preparations as a company.
- The **EVA To Go** is a bimonthly newsletter sent to members and the EVA Media Partners. It provides details on both EVA and industry developments and links to articles published on our website.

The European Vending & Coffee Service Association has taken steps to strengthen its relationship with the main publications that report on the vending and coffee service industry. As such the EVA currently has a 'media partnership' with 16 main publications on the industry, who may publish EVA news and from time to time our Media Partners may request interviews with some of our Members depending on the topic.

The EVA is also active on Twitter, Facebook and LinkedIn so members and other industry professionals can keep up to date with our latest positions and messages.



@EuropeanVendingCoffeeServiceAssociation



@VendingEurope



@EuropeanVending&CoffeeServiceAssociation

TOP REASONS TO JOIN THE EVA

LOBBY

Influence the EU decision-making process and assist your industry

The EVA is the pan-European representation of the coffee service and vending industry and is in regular contact with the EU institutions. Provide and equip the EVA with further expertise to secure even more lobbying success for the vending, coffee service, and water dispenser industry. You know where the industry is going, and can help it embrace new technologies.

THE RIGHT INFORMATION FIRST

Key market developments and members-only information

The EVA publishes annually a detailed market report covering 24 countries across Europe. Outlining the latest information as well as longer term trends, this report can help you make evidence-based business investments. In addition to the market report, the EVA regularly publishes other valuable reports and analysis.

Furthermore, you gain access to documents, guides and detailed information exclusively available to members through the EVA's Members-only webpage.

NETWORKING & VISIBILITY

Participate at EVEX and take advantage of the EVA's 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).

Network within the industry at EVA events like EVEX and capitalise on opportunities to establish and develop links with potential business partners. There is also the opportunity to showcase your latest products and innovations via a wide range of sponsorship possibilities for EVA events.

KNOWLEDGE AND SUPPORT

Benefit from a dedicated permanent team and contribute to EVA Committees

The EVA Committees and working groups 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.

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



EVA MEMBERSHIP CATEGORIES

FULL MEMBERS ASSOCIATIONS (NATIONAL VENDING ASSOCIATIONS)

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

FULL MEMBERS COMPANIES

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

SUPPORTIVE MEMBERS

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

PARTNERS

Partners are Trade Associations who represent vending and related industries outside Europe.

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



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