

2024 - 2029 MANIFESTO

# Enhancing the European dimension of **vending & coffee** service

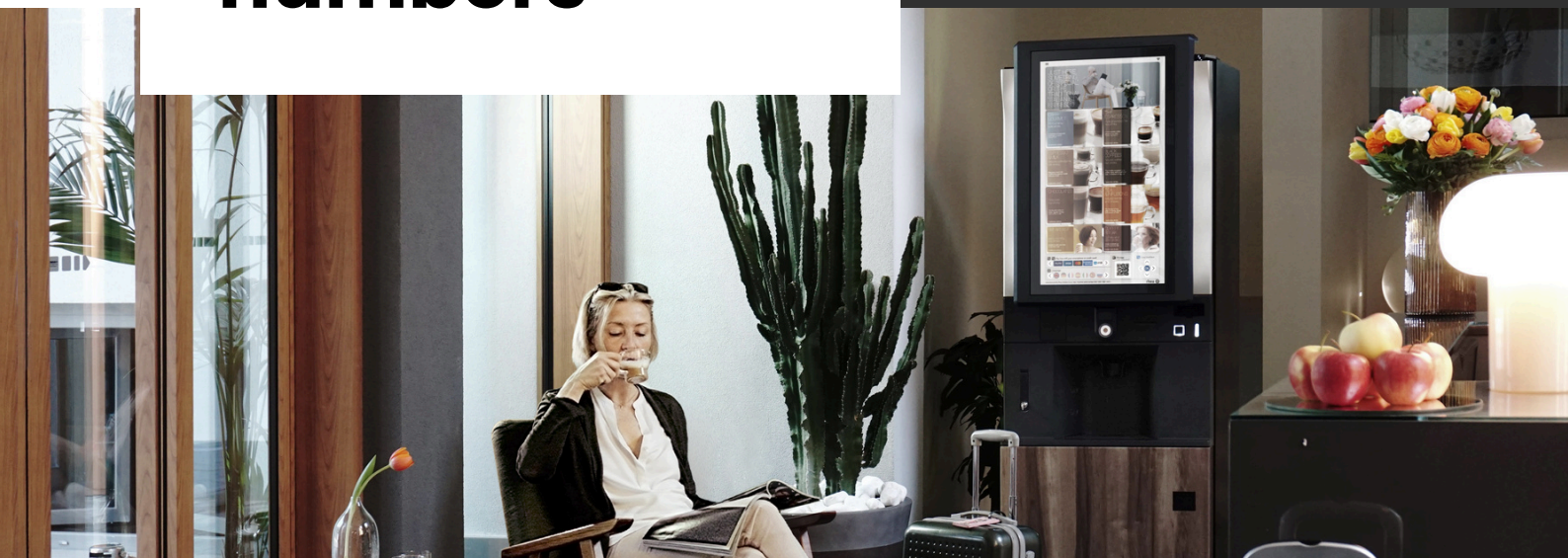


SUSTAINABILITY

INNOVATION

COMPETITIVENESS

# Our industry in numbers



**4.5**  
million  
machines  
across Europe



Total revenue  
**20**  
billion €



**87**  
million  
food and  
beverage items  
per day delivered



More than  
**80%**  
of our sales  
are coffee



**1 machine**  
for every  
**175**  
Europeans



**98%**  
of operators are  
SMEs and family-  
owned companies

## What's behind a vending machine?



**Machine  
manufacturers**

**10,000 Vending  
operators/technical  
assistance**



**Payment  
solutions**

**Ingredient  
suppliers**



**Telemetry**  
Connected  
machines

**Cups &  
accessories**



# About us

The vending sector is primarily a workplace-based sector, with around 80% of machines located in these environments. Due to its unattended nature, vending machines are crucial to the day to day lives of consumers. In the office, the professional coffee machine can play the important role of an always-available barista, while in other workplaces the vending machine may be the only source of refreshments and food for employees.



- Across Europe the industry employs more than **85,000 individuals** directly within some **10,000 companies** across the value chain, mostly small and medium-sized enterprises (SMEs) and family businesses.
- 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 solutions providers, and water filter system suppliers. We offer diverse employment and training opportunities to a significant number of workers and support the EU's industrial sector job market.
- Vending machines are increasingly supporting local economies by selling locally made/produced products. For example, small farmers can sell their fresh products directly to consumers, without the expense of running a shop.

## Our vision

- Our sector is committed to becoming more environmentally **sustainable** and has made significant progress in recent years. We are continuously working to minimise the impact of our vending and professional coffee machines and their products on the environment by using the latest technologies and best packaging alternatives available.
- From smart technology to healthier choices, the vending & coffee service 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 and introducing new machine concepts to fulfill changing consumer demand.
- The know-how and engineering competences are world leading within the European vending sector. As an industry we strive to ensure and enhance **competitiveness** in the years ahead, particularly as the industry faces threats on various fronts including increasing administrative burdens, lack of harmonisation, an aggressive drive for lower prices as well as lower quality and non-secure imports.



# Policy considerations and asks

The European vending and coffee services industry has distinguishing characteristics, which are important to take into account in the policy-making process.

- The vending machines are **unattended in nature**. Introduction of new legislation should provide predictability and clarity, and careful consideration for unintended consequences on our points of sale.
- We are a unique retail sector and **do not form part of the wider HORECA** channel.

## Contributing to the European sustainable transition

### Our actions

- Vending machines are increasingly energy-efficient, demonstrated by the ongoing energy class improvements for refrigerated machines.
- Machines are designed on a modular basis, which means machine operators easily replace parts independently ensuring long lifespan. With this business model, the average lifespan of a refrigerated vending machine for example is between 8-12 years.
- Reverse vending machines can foster collection and recycling of packaging. Industry-led projects like RiVending in Italy, specifically collects single use cups used at vending machines, helping to create a streamlined recycling process.
- 70% of machines placed in the market in 2023 were refurbished.
- The industry is in the process of developing a reliable and harmonised model for calculating the lifecycle Assessments, with the aim of helping manufacturers understand precisely the impact of their machines and to ultimately help drive initiatives to reduce this impact.

## Our asks

- In view of the next legislative mandate, we urge for the continuous ambition of the sustainability agenda, underpinned by science-driven decision-making, which considers the views of the value chain.
- Within this context, it is important to consider the need for long-term clarity and predictability on policy areas to ensure smart and timely investments.
- We would welcome consistent guidance for industry stakeholders, especially SMEs, in the implementation of already agreed on legislative acts. An example of this is the implementation of the Ecodesign for Sustainable Products Regulation (ESPR). As already envisioned under the legislative text, it would be critical for SMEs to have access to guidance, especially in relation to the upcoming secondary legislation. In addition, within the ESPR implementation process, the specificities of the different product groups should be carefully considered.
- Within the next legislative mandate, we would welcome the prioritisation of enforcement of existing legislation. This is especially relevant in the context of ensuring greater surveillance of imports and their compliance with the European legislative framework. We would like to highlight the importance of robust checks by the European Commission and national authorities on compliance with, for example, the F-gases Regulation to ensure a level-playing field within the European market.
- Initiatives to introduce potential mandatory green public procurement criteria should consider the specific needs and feasibilities of each impacted sector.
- Vending machines are by nature modular, so parts are changed and the machine is reconfigured regularly by operators depending on the need. Clarity for example on what is considered refurbished from a technical level would provide certainty, ensure harmonisation across the market, as well as maintain the highest level of security for machines



# Stimulating innovation

## Our actions

- The industry is committed to enhancing the consumer experience through the integration of technologies, such as touch screens. In addition, the changing dynamics in payment preferences are reflected in the industry with machines increasingly accepting contactless and particularly mobile payments.
- Brand new unattended retail concepts are becoming increasingly attractive as solutions, including smart fridges and micromarkets.
- Vending is well suited to promote and establish greater local purchases ('local distribution channels'), helping farmers and local businesses sell produce directly to the consumer, limiting costly transportation and packaging as well as cutting out the middle-man.
- The industry is in the process of developing a common protocol that will allow all components of the vending machine to seemingly interact with each other, saving time as well as valuable resources, and will furthermore provide a solid foundation to ensure the industry is ready to integrate all future technologies.

## Our asks

- European legislation should foster a favourable environment and encourage the further innovation of the sector. Greater funding for research & development projects is welcome.
- Regulatory actions impacting the industry should reflect its unique realities. For example, under the ongoing legislative process of the Payment Services Regulation, decision-makers should take into account a suitable balance between the low fraud risk for extremely low value transactions versus the consumer experience especially in view of Strong Customer Authentication (SCA) rules.
- In relation to the realities of the sector, there should be a recognition that unattended retail is open 24/7 and should not be restricted at night and/or weekends as, for example, large supermarkets.



Micromarkets are unattended convenience stores in workplaces and other closed locations, where consumers scan the products themselves.



Smart fridges feature a payment system that unlocks the door. The consumer can take items from the fridge, and the machine calculates the products removed once the door is closed.



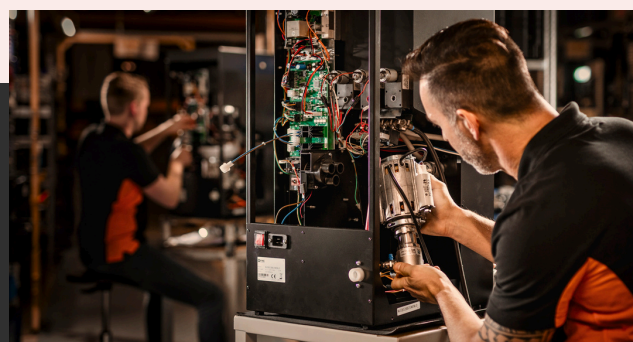
# Fostering competitiveness and modernising the European Single Market

## Our actions

- Looking ahead at the European objectives for a continuous transition to a sustainable and digitalised economy, the European vending and coffee services industry, as many others, will have to maintain its competitive edge.
- It is important to ensure a common European direction for cross-industrial competitiveness.
- European professional coffee machine manufacturers represent more than 80% of world production. This expertise and quality engineering jobs should be protected and cherished.

## Our asks

- The modernisation of the European Single Market should be prioritised to ensure harmonised implementation of EU legislation, and a level-playing field, especially for SMEs.
- Fair competition rules should be established and enforced that rewards good players and adequately punishes companies that break the rules.
- In addition, we call on policy makers to minimise regulatory and administrative burdens on SMEs.
- Barriers to the EU single market should not be created through new legislation.
- The EU should take steps to ensure strategic independence, protect supply chain fluctuations and consider strategies for reliable long term cocoa and coffee provision.



# Conclusion

The vending & coffee service sector has many distinguishing characteristics, and it requires policies to be tailored to its unique needs. Companies active in vending ensure the seamless unattended provision of food, drinks and snacks to meet the changing demands of consumers, and are primarily SMEs and family-owned businesses.

The vending & coffee service industry is:

## SUSTAINABLE

shown by the modular design of vending machines, a potential best practice example for European product repairability

## INNOVATIVE

demonstrated by the development and integration of key new technologies.

## COMPETITIVE

a dominant player in global production of high-quality professional coffee machines.



The European Vending & Coffee Service Association (EVA) calls on the policy makers to publish consistent guidance for industry stakeholders, especially SMEs, in the implementation of already agreed on legislative acts, as well as greater enforcement of existing texts to maintain a level playing field.

The EVA also calls for new EU legislation to reflect the realities for the vending business model, where consumers interact with machines on an unattended basis, and where generic policies are not always appropriate.

Finally, the EVA would welcome greater funding initiatives to enable further creative sustainable solutions to be developed. This would help maintain the competitiveness for European vending companies, support the innovation and know-how of the European sector, and help drive the transition to a more connected and ever more sustainable vending and professional coffee industry, able to contribute strongly to the European Union's own key objectives.