

Connected Vending Machines

Connected Vending Machines is a comprehensive report from Berg Insight analysing the latest developments on the vending telemetry and cashless payments market worldwide.

This strategic research report from Berg Insight provides you with 55 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

Highlights from the first 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 2019.

2.7 million vending machines will be online by 2019

The first solutions for including connectivity in vending machines became commercially available already two decades ago. It has still taken years for the technology to gain the interest of mainstream vending operators. Today, global penetration is still modest and less than 7 percent of the world's 17 million vending machines are online today. The market has nevertheless gained momentum in recent years as more and more vending operators have started to deploy cashless payment systems and vending telemetry solutions at a larger scale. Demand for cashless payments is currently the main market driver. However, vending telemetry is forecasted to have a more transformational effect on the industry in the future as these solutions enable vending operators to substantially improve their operational efficiency.

The global installed base of connected vending machines grew by 18.4 percent to 1.16 million units in 2014. Around 0.56 million of these machines can be found in North America, whereas 0.15 million have been installed in Europe. The number of connected vending machines in other parts of the world totalled 0.45 million units at the end of the year, of which the vast majority were in Japan and Australia. Berg Insight forecasts that the number of connected

vending machines worldwide will grow at a CAGR of 18.5 percent to reach 2.7 million units by 2019. The penetration rate will then reach 15.3 percent at the end of the forecast period.

The global market for vending technology solutions is highly fragmented. Most of the companies that provide vending telemetry and cashless payment solutions are relatively small companies that specialize in these products. Examples include Cantaloupe Systems, USA Technologies, Vianet, Vendon and BITX. In addition to this, several participants are large companies from adjacent markets such as the POS Terminal vendor Ingenico, the telecom operator Deutsche Telekom and the IT service company Materna. Furthermore, there are several incumbents that develop proprietary solutions in-house, such as Jofemar, Rheavendors, Crane and Coca-Cola Amatil.

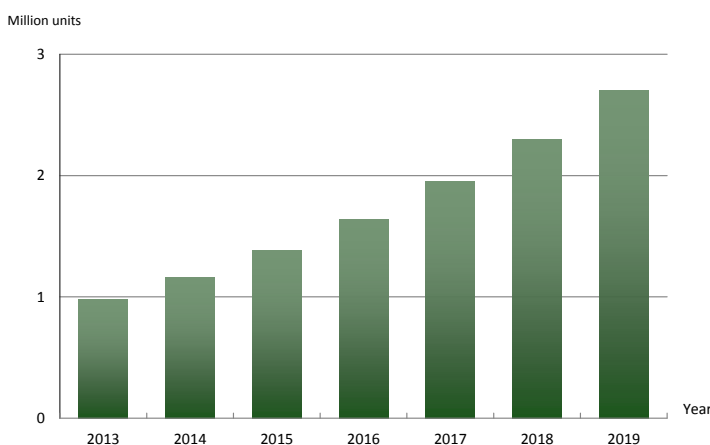


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This research report answers the following questions:

- ◆ 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?
- ◆ Who 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?



Installed base of connected vending machines (World 2013-2019)

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Who should buy this research report?

Connected Vending Machines is the foremost source of information about the adoption of wireless M2M solutions in the vending machine 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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Retail Applications and Wireless M2M
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