



# The OCS & Vending Market 2023 EUROPE

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# OCS & Vending – European Overview and Key Themes



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# Data Sources

- **Leading Operators & OCS Companies**
  - Machine base insights:
  - Average Consumption by machine type:
  - Average Selling Price by product category:
  - Additional metrics:
- **European Vending Machine Manufacturers' Association**

# Geographical Scope

- **24 European countries**  
Austria, Belgium, Czechia, Denmark, Finland, France, Germany, Greece, Hungary, Republic of Ireland, Italy, Netherlands, Norway, Poland, Portugal, Romania, Russia, Slovakia, Spain, Sweden, Switzerland, Türkiye, Ukraine & the United Kingdom.



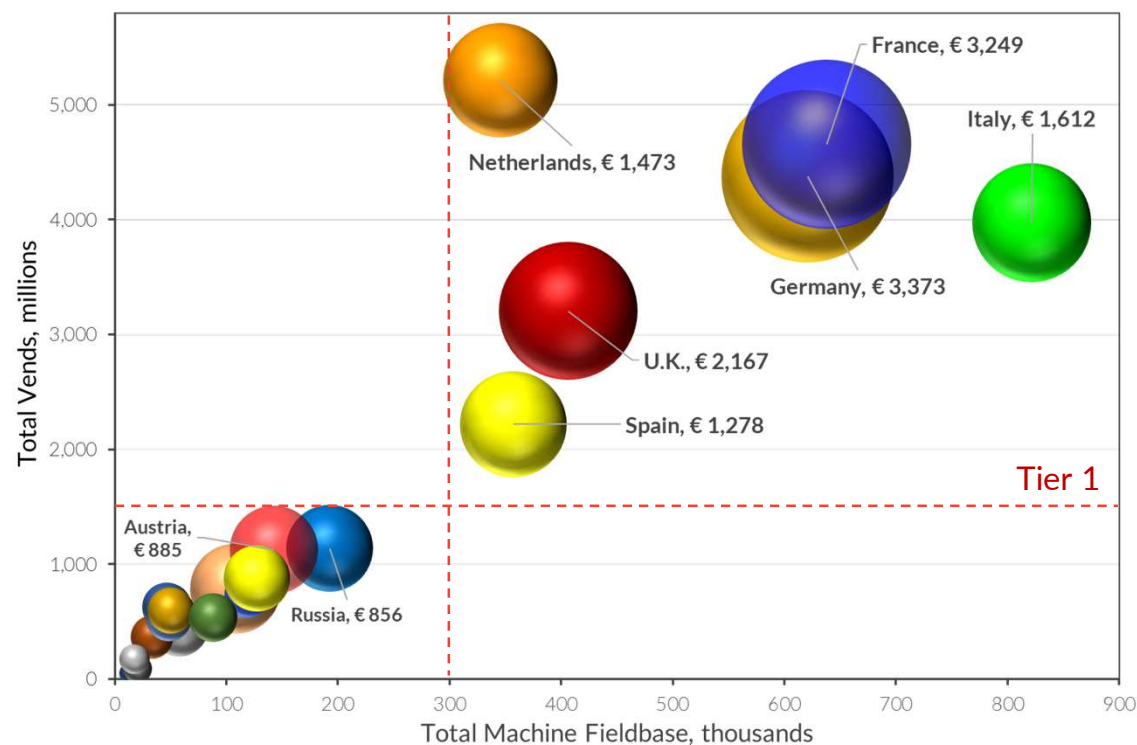
Map: [www.mapchart.net](http://www.mapchart.net)





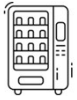
# Europe – Market Landscape, all countries

Landscape showing Total Vends, Total Machine Fieldbase and Total Product Revenue



- **The six 'Tier 1' countries dominate:**
  - France, Germany, Italy, Netherlands, Spain and the UK
  - 70% of machine base, number of vends & product revenue
- **The Netherlands has the highest total vends**
  - Largely 'free vend' so total revenue is relatively low
- **Italy has the largest machine fieldbase**
  - Relatively low consumption and pricing
- **Germany has the highest product revenue**
  - Germany has higher prices vs France

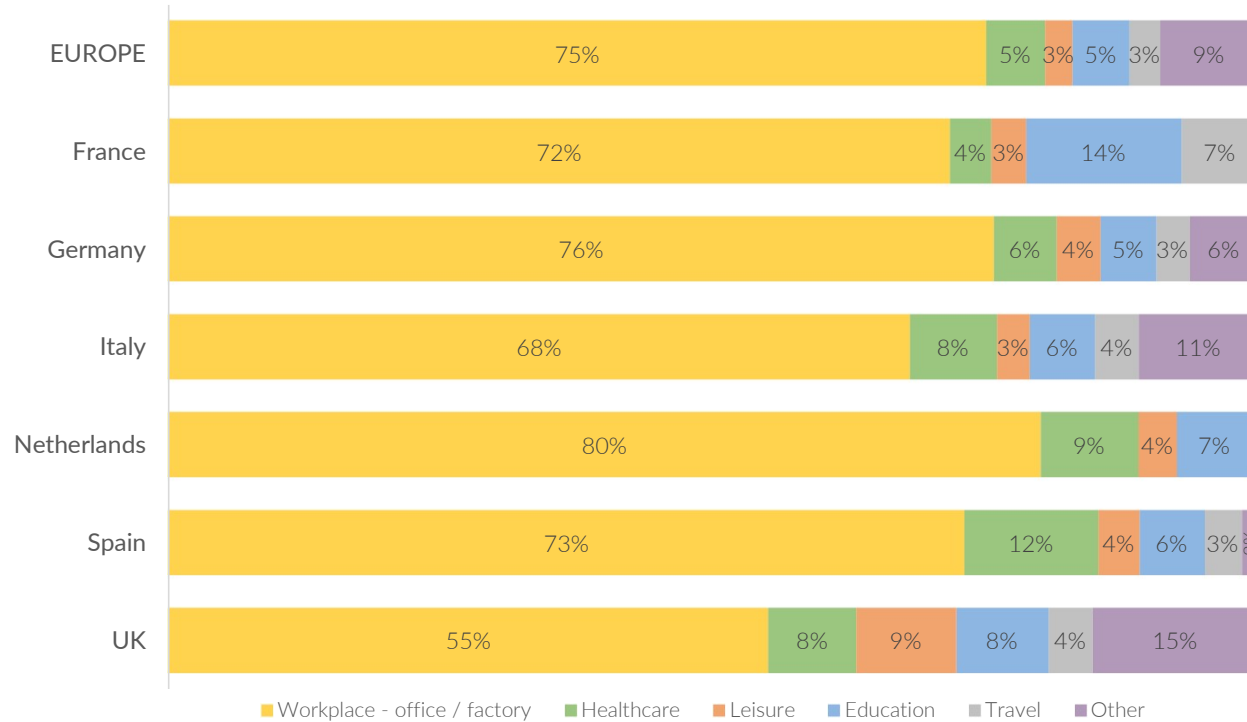
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# Additional Machine Insights

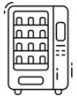
## Total Machine Fieldbase by Sector – Europe and Tier 1 Countries

Total Machine Fieldbase - Tier 1 Countries  
Location by Sector for our respondents (%)



- **Respondents' Vending & OCS machine base:**
  - **75%** in **Workplace** – offices and factories etc
  - **5%** in each of **Healthcare** and **Education**
  - **3%** each in **Leisure** and **Travel**
  - The rest cover **Hotels, Convenience Stores**, etc
- **Workplace Share:**
  - **Netherlands** has the highest
  - **UK** has the lowest.
- This is the first year we have had data on sectors for all the Tier 1 countries, and we plan to track the trends over the coming years.

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# Key Market Metrics

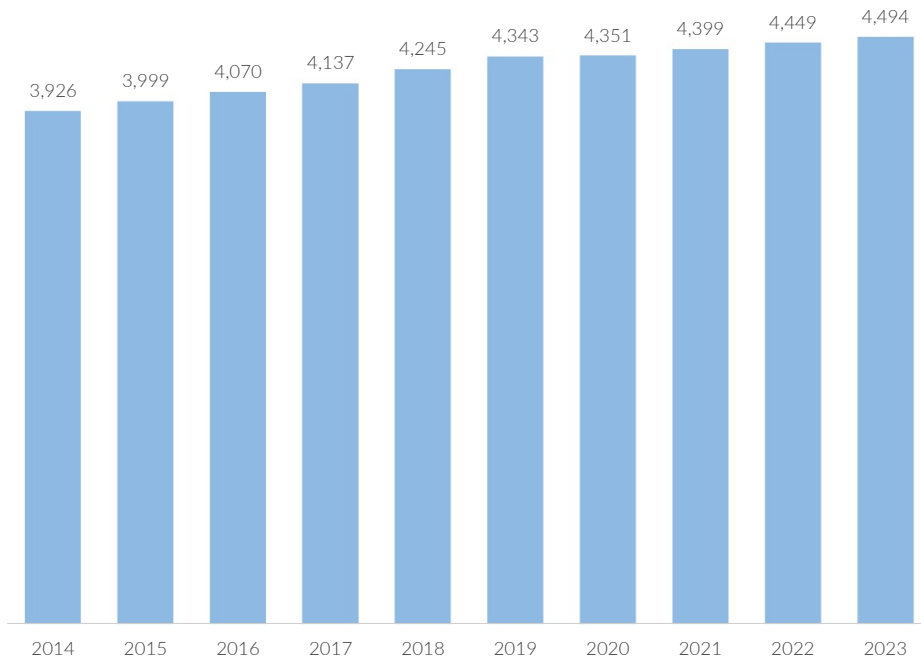


- **Product Revenue** growing rapidly and now **back above 2019, driven by pricing**
- **Machine Fieldbase** continues to grow steadily but slowly
- **Number of Vends** growing, but **still down 18% vs 2019**



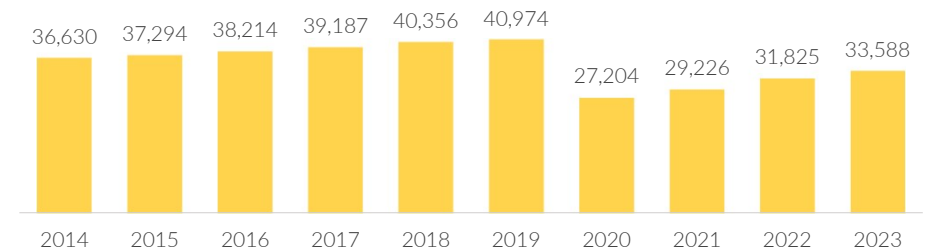
Total Machine Fieldbase - in thousands

3.5% vs 2019; 1.0% vs 2022



Total Number of Vends - in millions

-18.0% vs 2019; 5.5% vs 2022

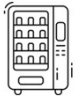


Total Product Revenue - in Euro millions

1.7% vs 2019; 16.1% vs 2022



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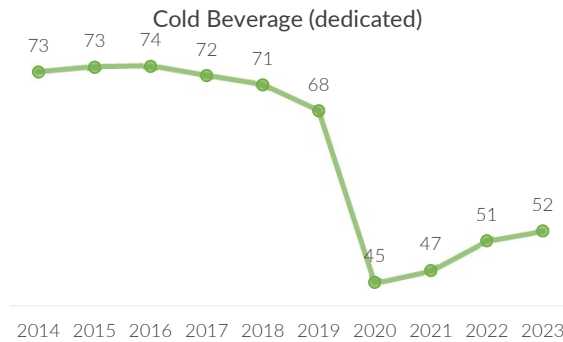
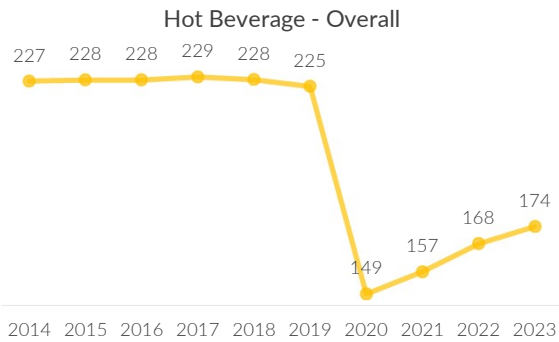


# Consumption & Total Vends plus Price & Product Revenue

**Consumption & Total Vends: increases in all categories, but still well below 2019**

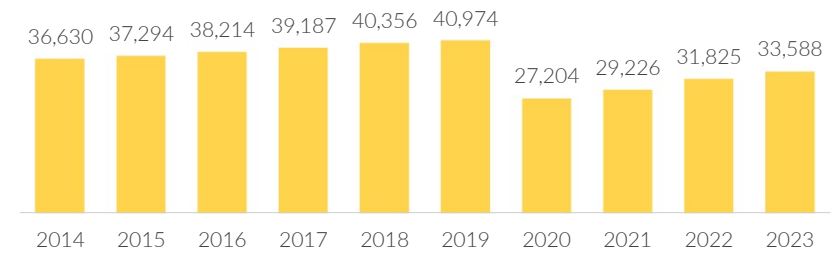
**Price & Product Revenue: significant increases in all categories, and now above 2019**

**Average Consumption – units per machine per week**

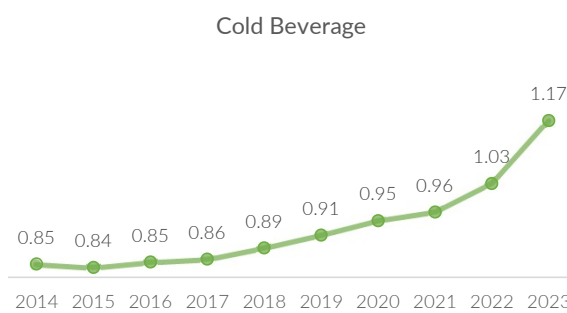
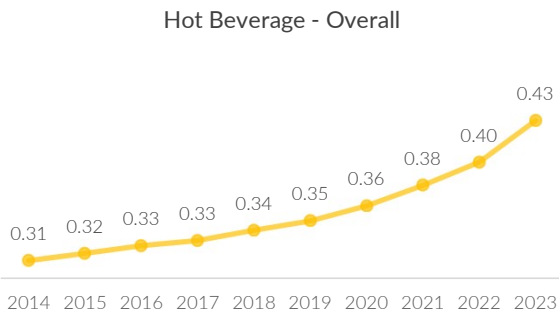


**Total Number of Vends - in millions**

-18.0% vs 2019; 5.5% vs 2022



**Average Vend Price (incl VAT) - Euro**

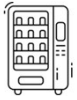


**Total Product Revenue - in Euro millions**

1.7% vs 2019; 16.1% vs 2022



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# Europe – Product Revenue

## Country ranking with Growth 2023 vs 2022

		2023 Total Product Revenue - € millions	Growth 2023 vs 2022
<b>EUROPE OVERALL</b>		<b>19,111</b>	<b>16.1%</b>
1st Quartile	Germany	3,373	18.7%
	France	3,249	17.6%
	United Kingdom	2,167	13.9%
	Italy	1,612	2.6%
	Netherlands	1,473	14.3%
2nd Quartile	Spain	1,278	15.6%
	Switzerland	921	9.4%
	Austria	885	8.4%
	Russia	856	24.9%
	Belgium	494	17.9%
3rd Quartile	Poland	421	23.6%
	Czech Republic	379	17.2%
	Romania	270	15.8%
	Türkiye	270	173.4%
	Sweden	242	21.1%
4th Quartile	Ukraine	240	35.0%
	Portugal	232	12.7%
	Hungary	206	21.8%
	Denmark	132	8.3%
	Norway	103	10.4%
4th Quartile	Slovakia	100	16.4%
	Republic of Ireland	91	17.0%
	Finland	59	14.1%
	Greece	57	30.6%

- Product revenue growth 2023 vs 2022 = 16.1%
  - 24 / 24 countries saw growth in total product revenue
- Product revenue is now back above 2019
  - 13 / 24 countries have product revenue above 2019

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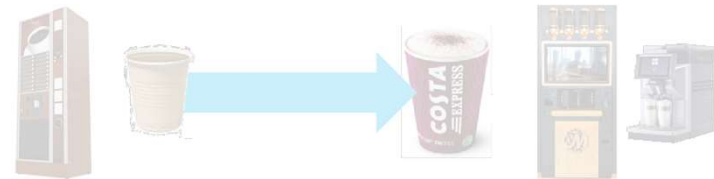
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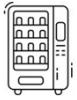


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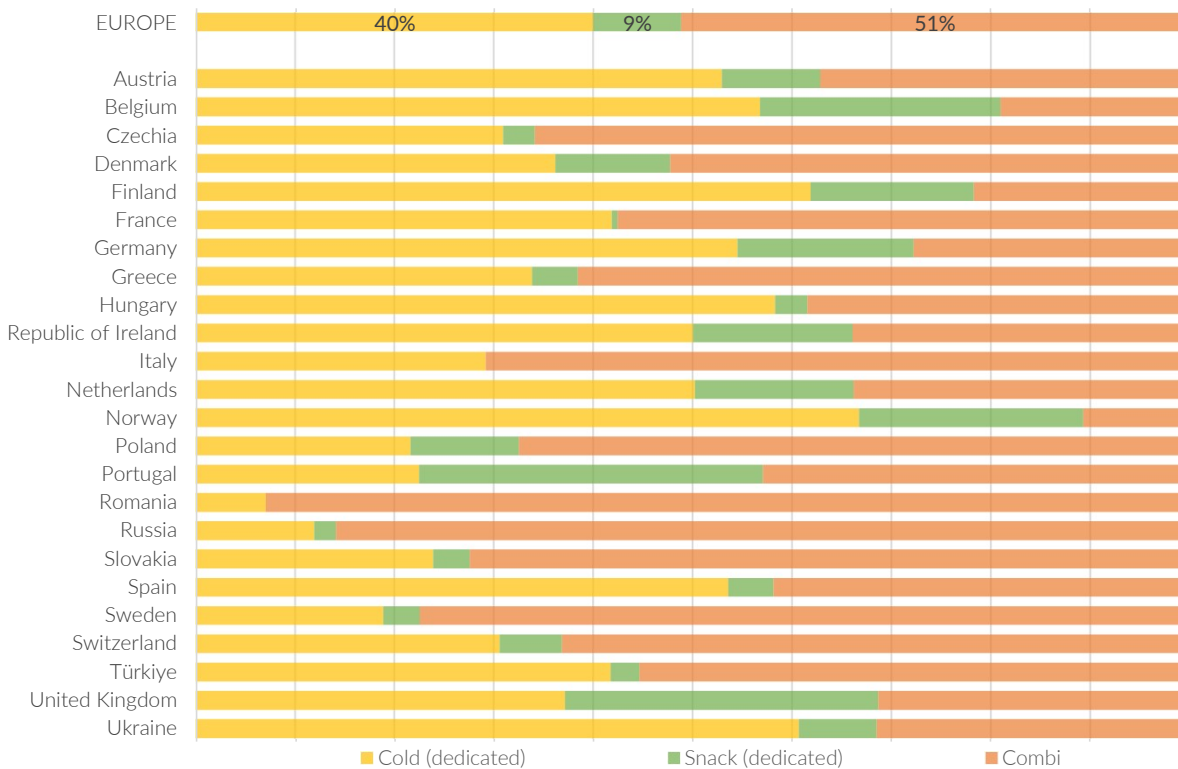




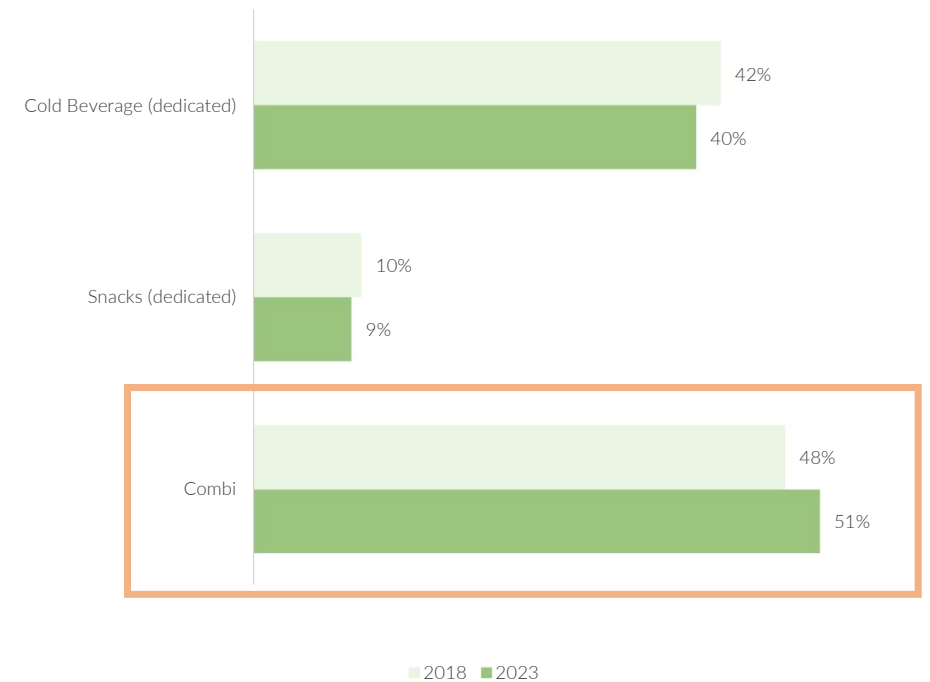
# Cold, Snack & Combi Fieldbase - Machine Category Composition and Evolution

**Combi machines account for 51% of the non-hot machine base, and are taking share from both Cold Beverage (dedicated) and Snack (dedicated).**

Cold, Snack & Combi Fieldbase Composition by Country



Cold, Snack & Combi Fieldbase Evolution

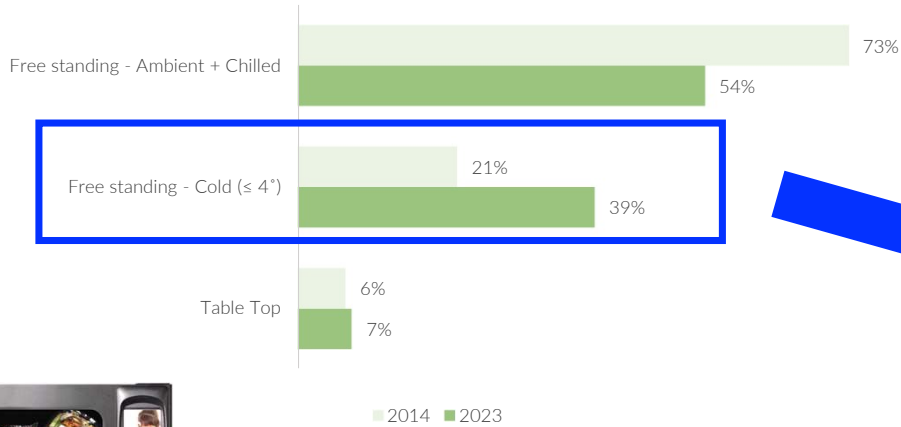


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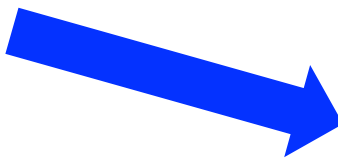
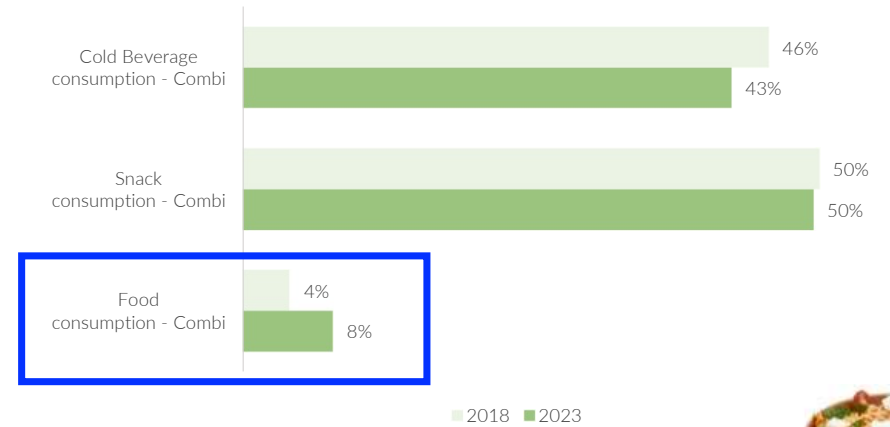


# Combi base & consumption changes drive Food vends

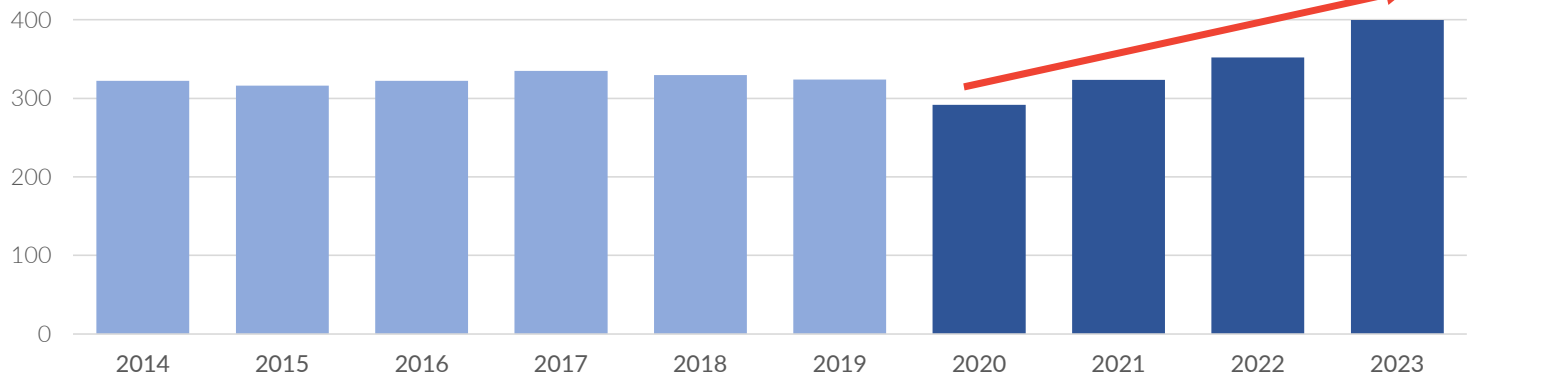
### Snack & Combi Fieldbase Evolution



### Share of Combi Consumption by Category - Evolution



### Food Vends (millions)



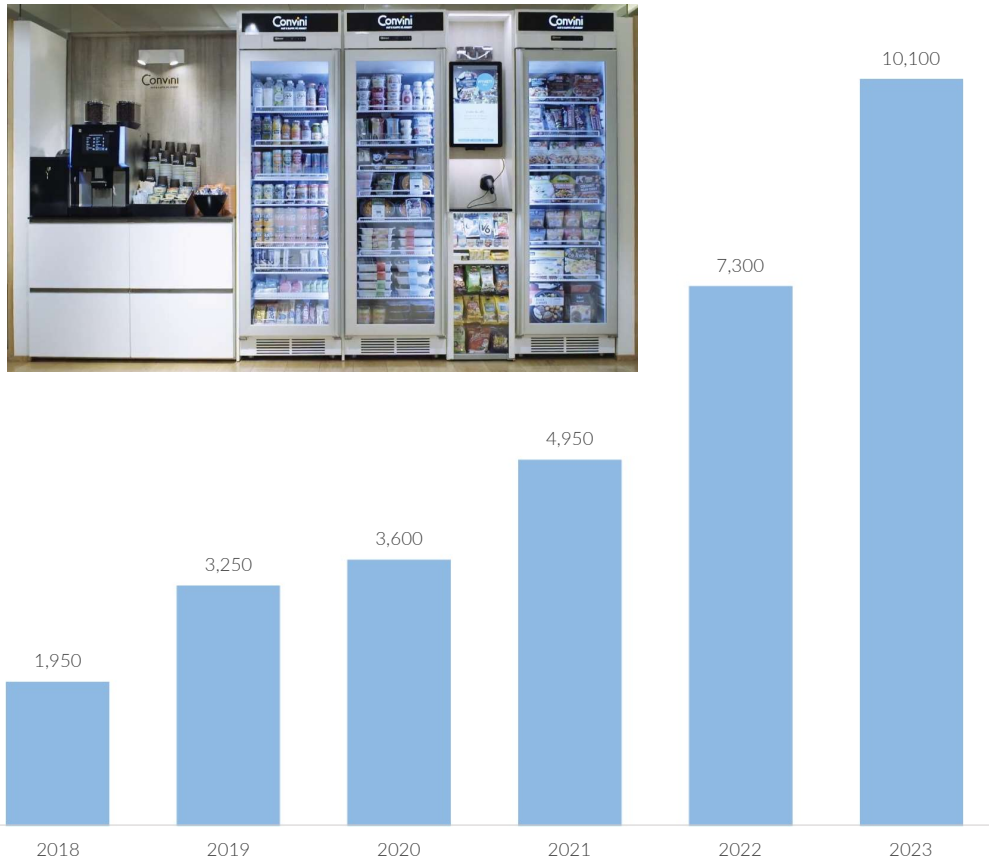
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# Micro-Market Fieldbase Development

Estimated Total Micro-Market Fieldbase across Europe

210.8% vs 2019; 38.4% vs 2022



Estimated Total Micro-Market Fieldbase by Country

Based on respondent feedback only so accuracy +/- 10%

Micro-Markets	None reported	< 5	5 to 49	50 to 249	250 to 999	1,000 to 1,999	2,000 to 4,999
Russia							
Sweden							
Switzerland							
Germany							
United Kingdom							
Spain							
Italy							
Türkiye							
Ukraine							
Norway							
France							
Belgium							
Austria							
Republic of Ireland							
Portugal							
Romania							
Czechia							
Denmark							
Finland							
Greece							
Hungary							
Netherlands							
Poland							
Slovakia							



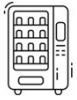


# Smart Fridges



- **2,700 Smart Fridges reported by our respondents** independent of micro-markets.
- **3,500 - 4,000 estimated total across Europe**
- **More Operators are now using Smart Fridges than Micro-Markets.**
  - Smart Fridges are closer in concept to vending machines and so more Operators currently feel comfortable placing them.
- **Three main technologies** used in Smart Fridges:
  - RFID tags on each item
  - Weight sensing
  - Vision systems





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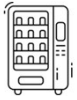


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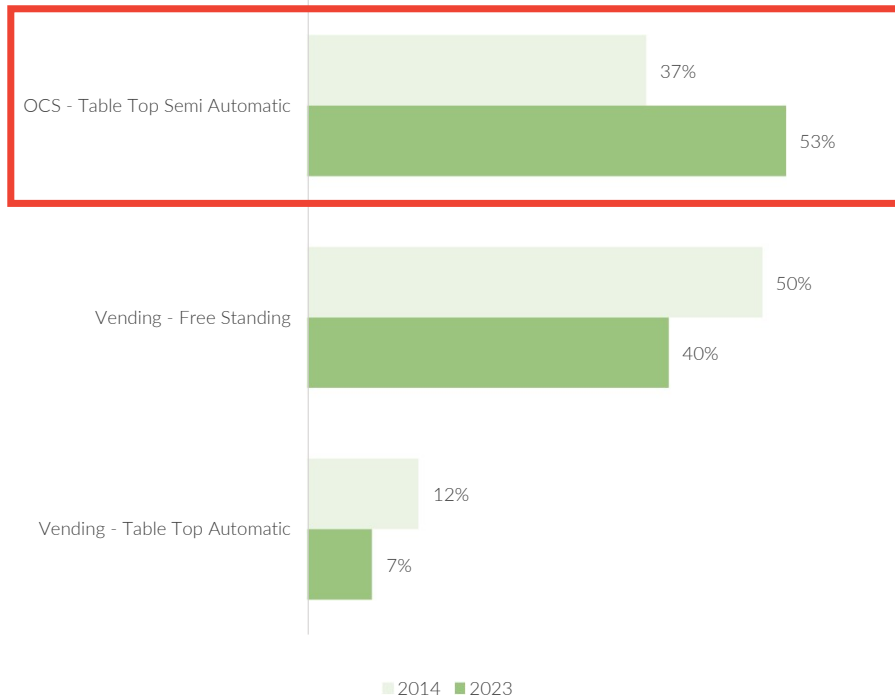




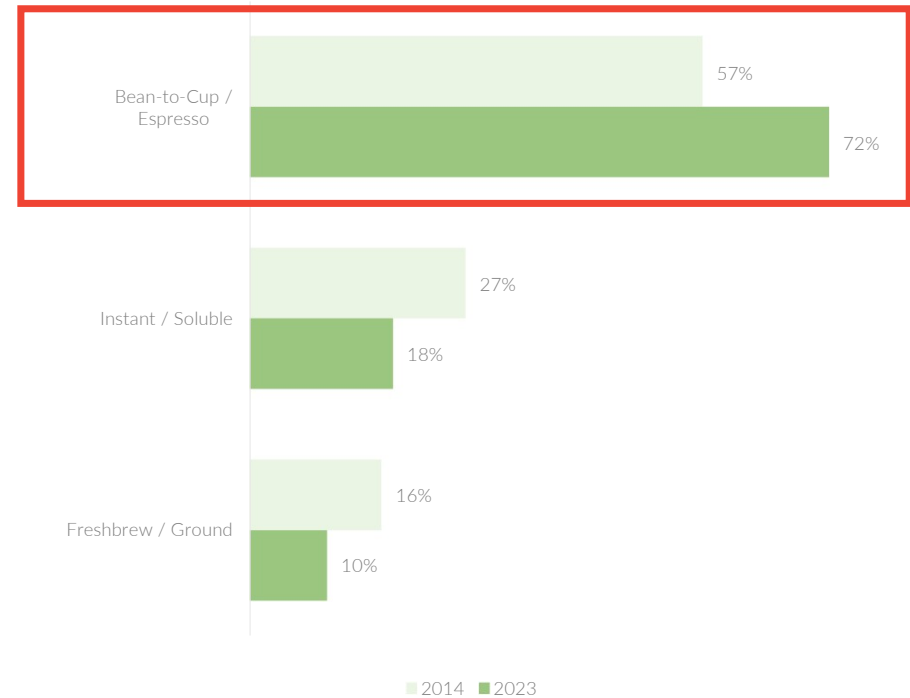
# Hot Beverage Fieldbase - Coffee Type Composition and Evolution

**OCS - Table Top Semi Automatic has 53% share, more than Free Standing Vending.**  
**Bean-to-Cup has the biggest share of the Hot Beverage machine base with 72%.**

Overall Hot Beverage Fieldbase Evolution



Overall Hot Beverage Fieldbase Evolution



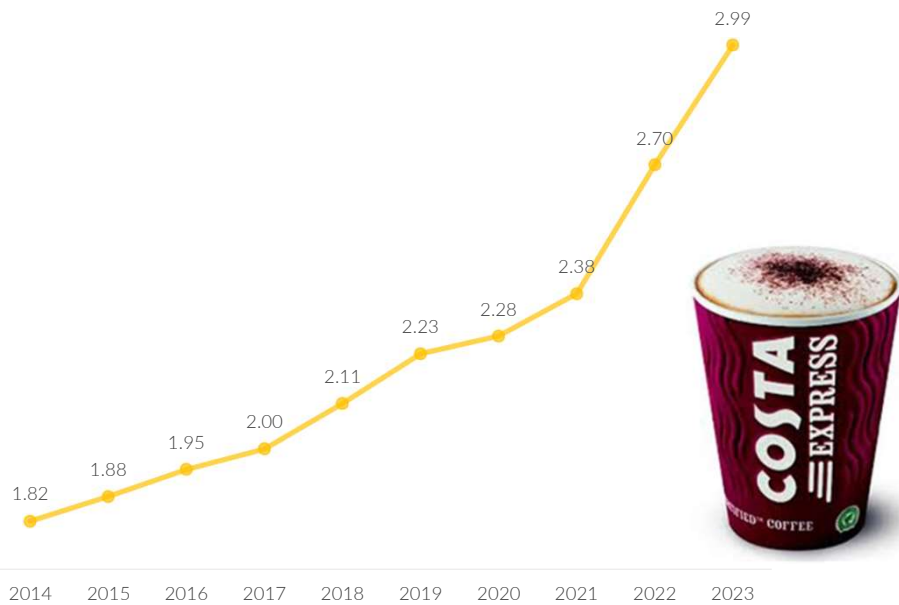
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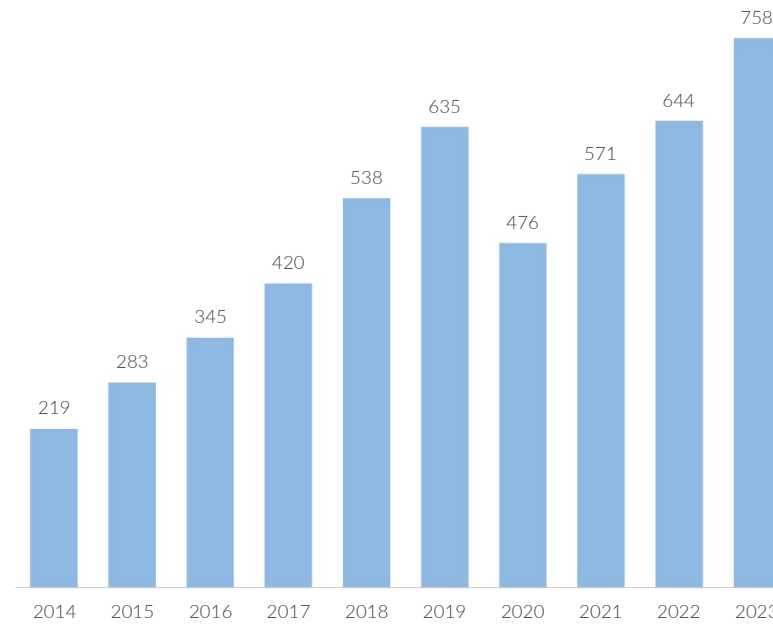
# Coffee-to-Go – UK Summary

- **Costa Express leads the way**, with other major brands growing quickly.
- **Vending operators are growing in significance**, and have more focus on workplaces.
- **Around 15,000 Coffee-to-Go systems reported outside the UK in 2023.**

Coffee-to-Go - Average Price £ GBP (inc VAT)



Coffee-to-Go Product Revenue (inc VAT) - £ GBP millions



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# Coffee-to-Go





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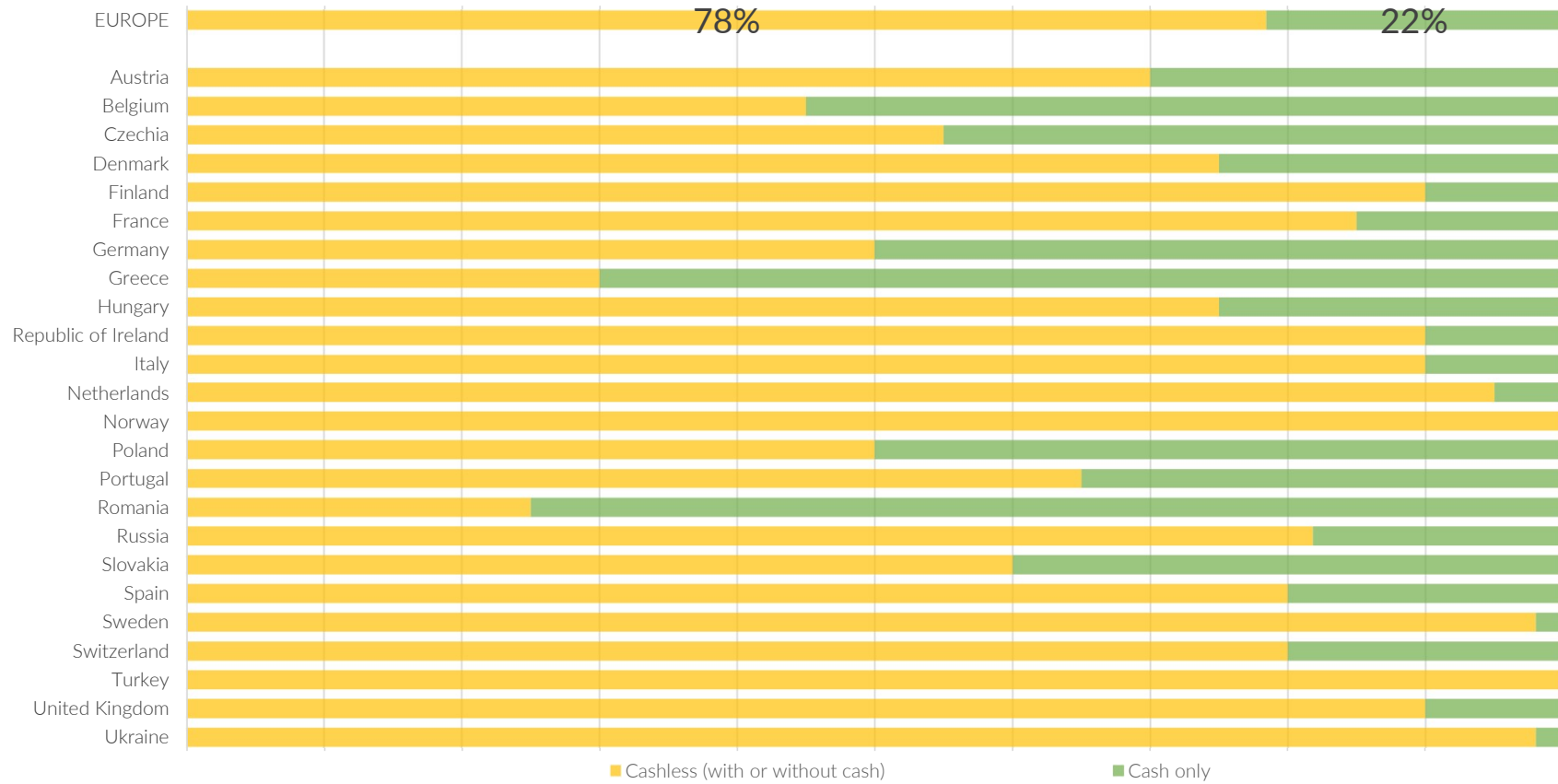




# Payment Systems



Across Europe cashless payment systems are fitted to almost 80% of the pay vend fieldbase.



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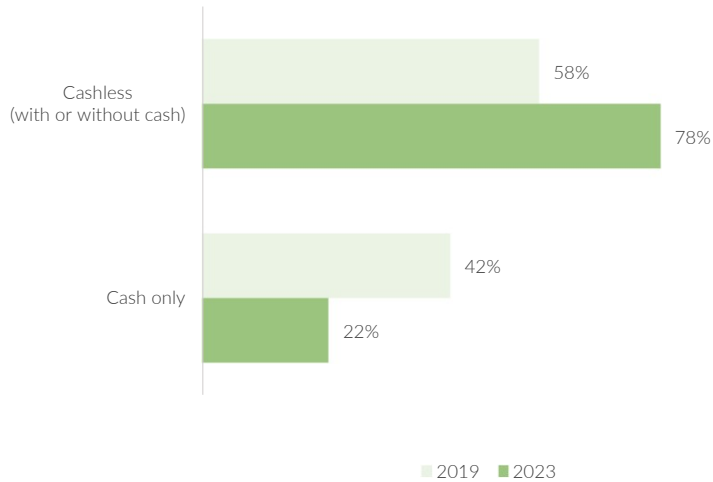
# Payment Systems



**Around 70% of cashless systems are closed-site<sup>1</sup>**

**There is sustained significant ongoing investment in open-site systems<sup>2</sup>.**

Payment System Type - Evolution



**~ 70%**

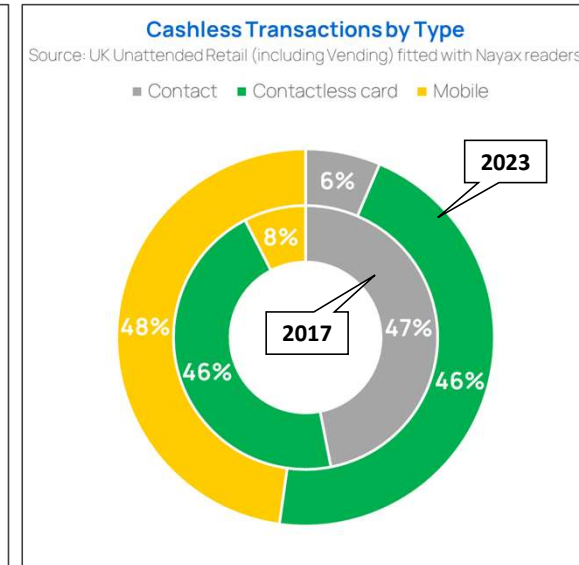
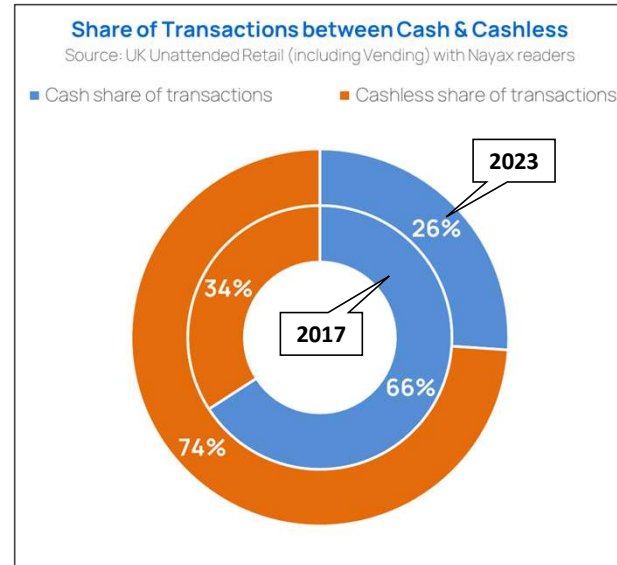
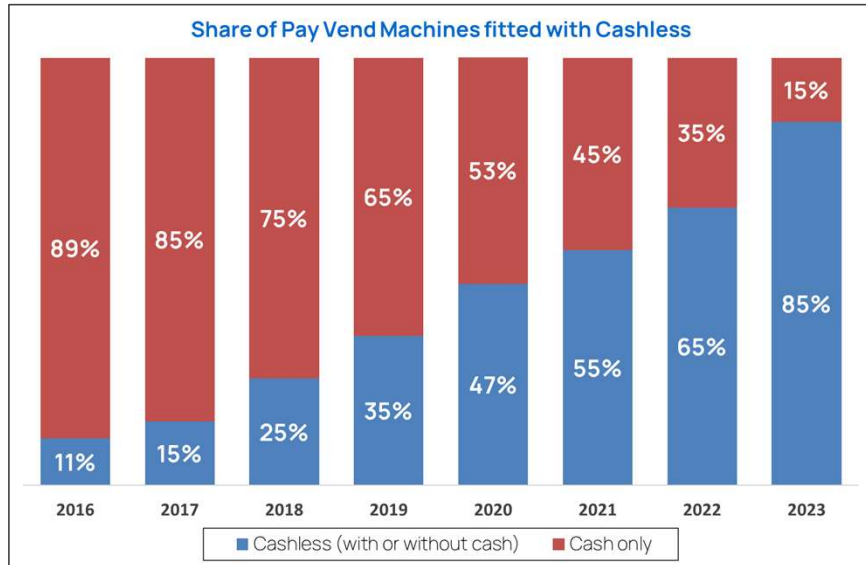


**~ 30%**

<sup>1</sup> Closed-site systems only accept dedicated keys or company access cards.

<sup>2</sup> Open-site systems accept credit/debit cards, mobile phone payments & pay-by-app.

# Cashless Payment Case Study - UK



- > 90% now open-site cashless
- Around 15% of the pay vend base is now cashless only.

- 74% of transactions were cashless, up from 34% in 2017
- 48% of cashless transactions were Mobile, higher than contactless card
- Cashless transactions were 93% higher in value vs cash

N.B. This data comes only from machines fitted with Nayax readers





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