



Connected Vending Machines

7th Edition

Connected Vending Machines is the seventh consecutive report from Berg Insight analysing the latest developments on the vending telemetry and cashless payment market worldwide. This strategic research report from Berg Insight provides you with 150 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

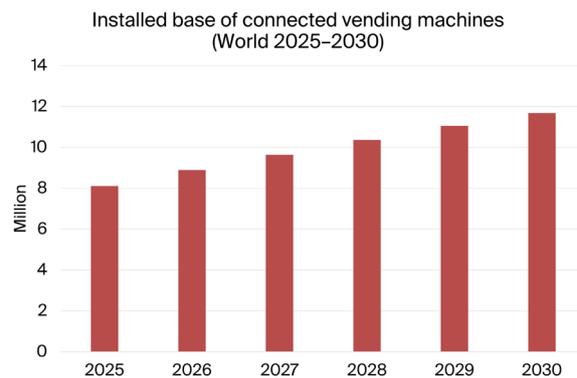
A total of 11.7 million vending machines will be online by 2030

The first solutions for including connectivity in vending machines became commercially available more than two decades ago. It has however taken years for the technology to gain the interest of mainstream vending operators. Connectivity penetration has nonetheless crossed the halfway mark, with an estimated 58.1 percent of the world's 14 million vending machines being connected at the end of 2025. The market continues to gain momentum, mainly driven by the growing demand for cashless payments. Vending telemetry is however anticipated to have a more transformational effect on the industry as these solutions enable operators to improve their operational efficiency.

The global installed base of connected vending machines reached an estimated 8.1 million units in 2025. The Rest of the World markets are estimated to represent the largest share of these machines with an installed base of around 3.3 million units. The growth in the Rest of the World markets is primarily driven by the increasing number of connected machines in China and Japan. North America is the second largest market with an estimated installed base of 2.6 million connected vending machines. In Europe, the installed base of connected vending machines is believed to have reached around 2.2 million units. Berg Insight forecasts that the number of connected vending machines worldwide will grow at a compound annual growth rate (CAGR) of 7.6 percent to reach nearly 11.7 million units by 2030. As a result, the global penetration rate will reach 77.5 percent at the end of the forecast period.

The global market for connected vending solutions is served by various players. Many of the leading providers are specialised technology companies. Cantaloupe and Nayax

are the largest providers in terms of installed base, each having more than 900,000 connected vending machines. Other major suppliers include Televend (INTIS) and Ingenico. Televend is the clear leader in the European market and is now expanding its presence in North America. Other suppliers with notable installed bases include Vendon and Coges (Azkoyen Group), MatiPay, and InHand Networks. Numerous vending machine manufacturers are also active in the connected vending space. The manufacturer Crane Payment Innovations (CPI) holds one of the leading positions from a global perspective while TCN Group and LE Vending are important players in China. Vending operators active in the field of connected vending machines most often work with third-party providers and some even have various in-house solutions. Examples of such vending operators include Chinese UBOX and Italian IVS Group, the latter through its subsidiary N-and Group.



Highlights from 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 2030.

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Glossary

This 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?
- Which are the leading vending telemetry, VMS and cashless payment system vendors?
- How will emerging mobile wallet services affect the market?
- How will the rise of grab-and-go machines affect the connected vending machine industry?
- What are the driving forces behind the consolidation trend in this industry?



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Who should read this report?

Connected Vending Machines is the foremost source of information about the adoption of wireless IoT solutions in the vending industry. Whether you are a device vendor, service provider, vending machine manufacturer, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

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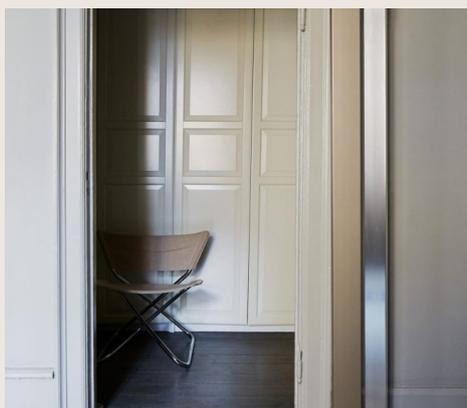


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