2025 CENSUS & MARKET REPORT

for the UK Vending, Coffee Services & Automated Retail Industry

AVA
The Vending & Automated Retail Association

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2025 AVA Census
Contents

Introduction from AVA Chief Executive, David Llewellyn

Welcome to the 2025 AVA Census & Market Report – your definitive guide to the health, direction and opportunity within the UK's vending, coffee services and automated retail industry.

This year's report provides more than just data; it offers a clear line of sight into how our sector is adapting and evolving in real time. Built on robust research, industry insight and direct member input, it is designed to help you make confident, informed decisions in an increasingly complex operating environment. As always, it remains one of the most valuable benefits of AVA membership – supporting both strategic thinking and day-to-day performance.

The picture that emerges is one of an industry continuing to transform. Cashless payment is now firmly embedded as the dominant method of transaction, while traditional payment formats still retain a role in specific contexts. At the same time, the growing importance of vending management software reflects a shift towards smarter, more efficient and data-led operations.

We are also seeing a reshaping of demand. Hybrid working continues to impact traditional business and industry locations, while growth is accelerating in retail, hospitality and emerging formats such as micro markets and smart fridges. This diversification is opening new opportunities for Operators willing to adapt and innovate. Whilst navigating the ever-changing external pressures – with continuously increasing operational costs and price increases.

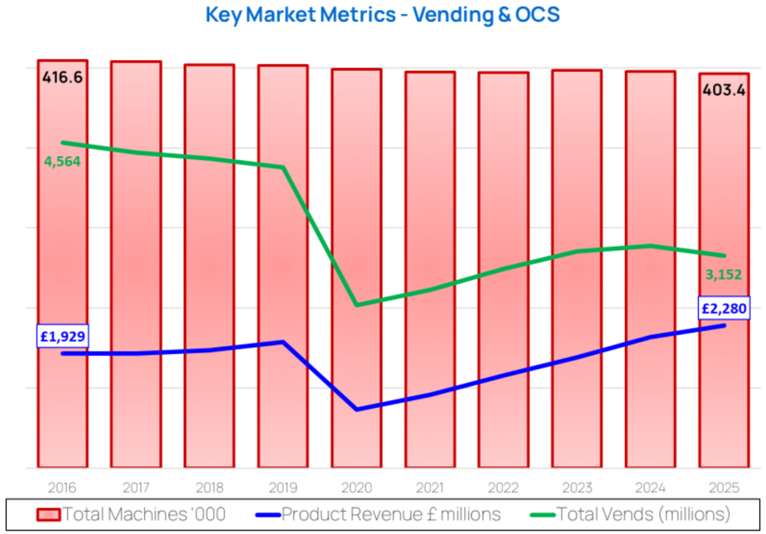
Alongside these changes, the regulatory landscape remains a critical and evolving factor. Ongoing developments – and, at times, delays – require careful navigation. The AVA continues to represent your interests at the highest levels, working closely with government and stakeholders to ensure the industry's voice is heard and its future supported.

As we look ahead, success will depend on how effectively we respond to these combined forces of change – balancing compliance, cost, innovation and consumer expectation. This report is here to help you do exactly that.

David Llewellyn,
May 2026

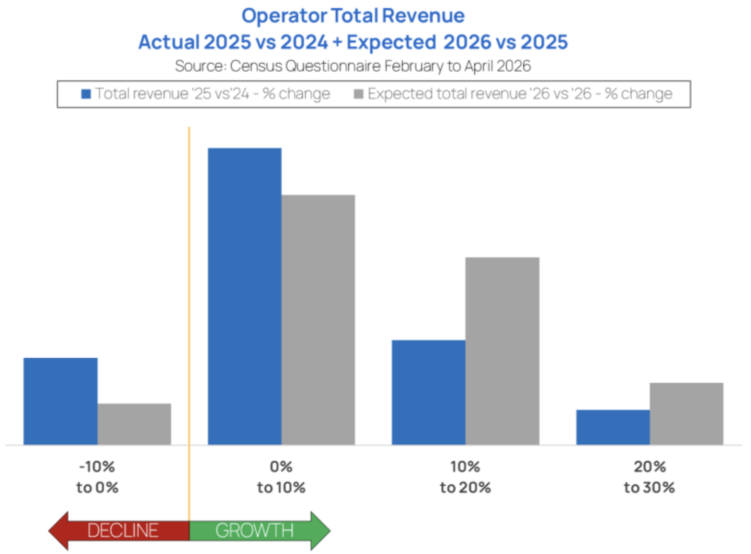
EXECUTIVE SUMMARY

UK Industry & Operator Snapshot
Based on Census Questionnaires



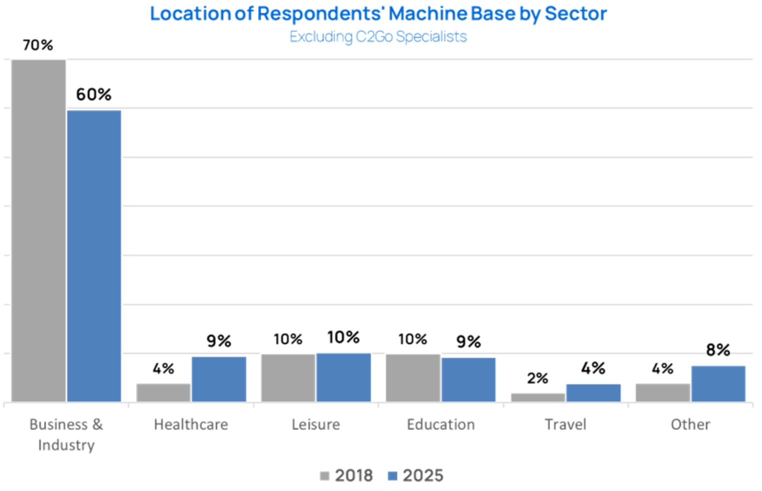
KEY METRICS

- Product revenue up 6.8%
- No. of vends down 3.7%
- Machine base down 0.5%



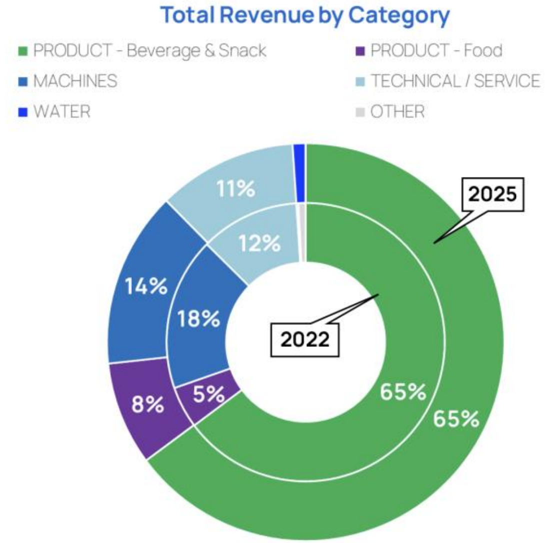
OPERATOR REVENUE

- Up 7% vs 2024
- Expect +7% in 2026



INDUSTRY BY SECTOR

- B&I has 60% share
- Leisure has 10% share
- Shift away from B&I to mitigate hybrid working
- 'Other' includes: convenience stores, retail, shopping malls, forecourts, hotels & apartments, restaurants, bakeries & cafés



TOTAL REVENUE SPLIT

- 65% Beverage & Snack
- 14% Machine sales
- 11% Technical Service
- 8% Food

Sources: Census questionnaires February to April 2026, EVMMA data on new machine sales, AVA Census history, inputs from operators and suppliers, CCL analysis

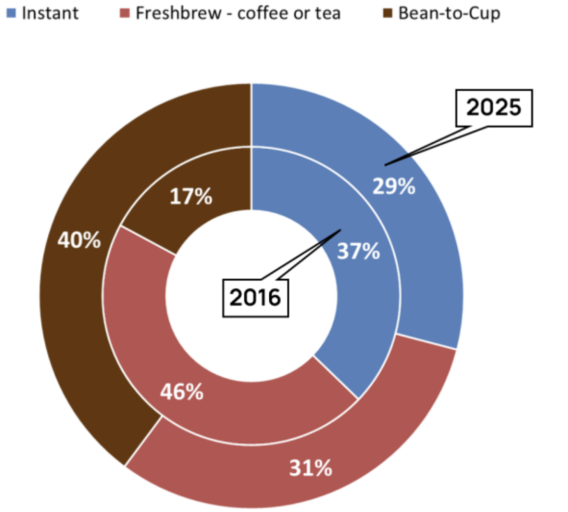
Key Industry Benchmarks – 1
Product Revenue by Machine Type in 2025

	Average Consumption (units / week)	Average Price (per unit)	Average Revenue (per year)	Revenue Change vs last year
Hot Beverage - Free Standing	272	£0.53	£7,499	5%
Hot Beverage - Table Top	122	£0.59	£3,774	5%
Coffee-to-Go	133	£2.89	£20,017	-8%
Cold Beverage - dedicated	65	£1.86	£6,323	12%
Snack - dedicated	81	£1.36	£5,700	11%
Combi	101	£1.63	£8,528	12%
Food (drum)	51	£3.12	£8,268	9%

Sources: Census questionnaires February to April 2026, EVMMA data on new machine sales, AVA Census history, inputs from operators and suppliers, CCL analysis

Key Industry Benchmarks – 2
Long term premiumisation of Hot Beverages

Total Hot Bev Machine Base - Share by Brewing Technology

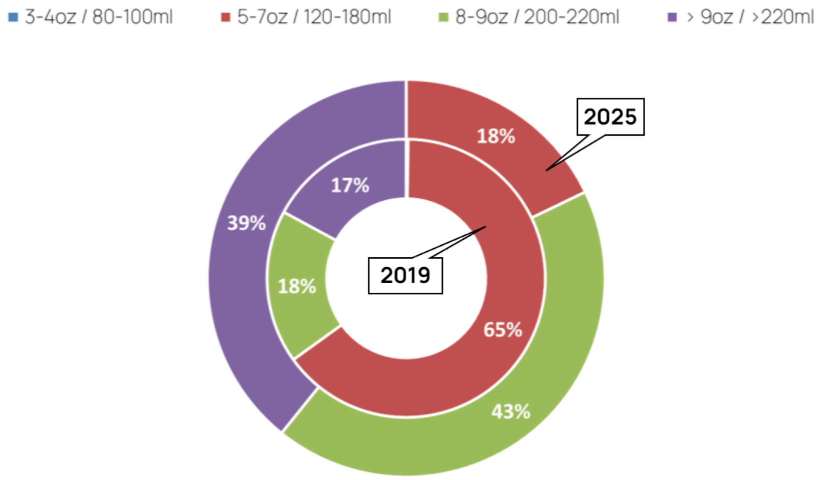


Bean-to-Cup

- rapid rise in share

Cup Size Distribution

Based on operator sample so around +/- 10% accuracy



Vending Cups

- 8-9oz most popular size

- almost 100% paper

Total Hot Beverage Base - Share by Machine Type

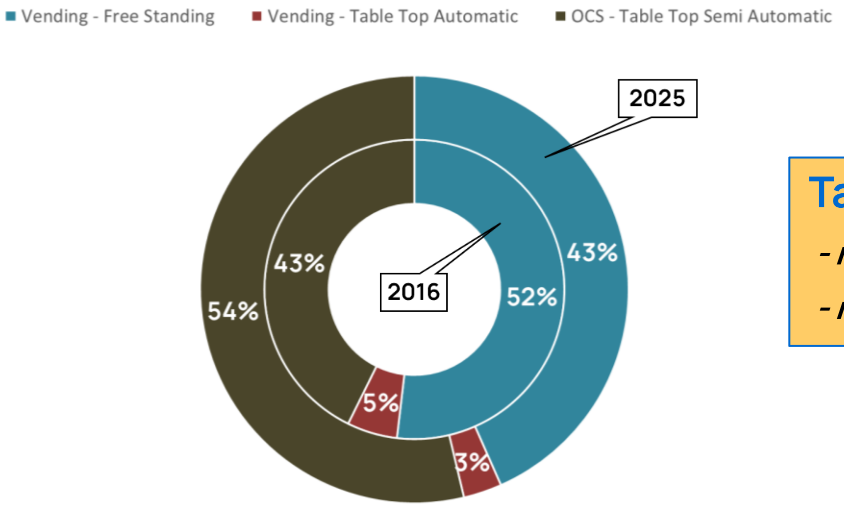


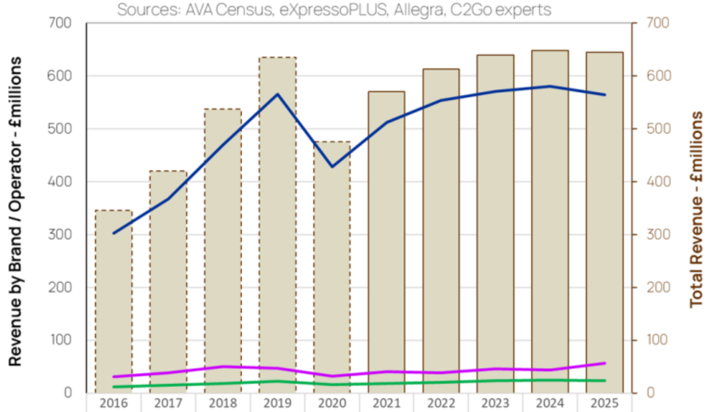
Table Top Semi Auto

- rising share

- more than Free Standing

Coffee-to-Go Product Revenue - £millions (incl VAT)

Sources: AVA Census, eXpressoPLUS, Allegra, C2Go experts



	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
TOTAL PRODUCT REVENUE	345	420	538	635	476	571	613	640	648	645
Major Brands incl Costa	303	367	469	566	428	512	554	571	581	564
Other brands	31	38	50	47	32	40	38	46	43	57
Vending Operators (incr)	12	15	18	22	16	18	21	23	24	24

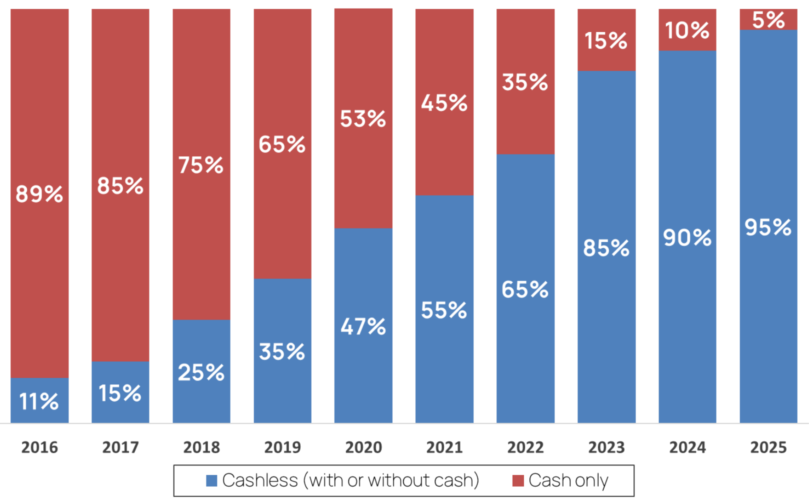
Coffee-to-Go

- £645 million product revenue

 Sources: Census questionnaires February to April 2026, EVMMA data on new machine sales, AVA Census history, inputs from operators and suppliers, CCL analysis

Key Industry Benchmarks – 3
Cashless, Micro-markets, Free Vend, New vs Refurb, and Healthier Vending

Share of Pay Vend Machines fitted with Cashless

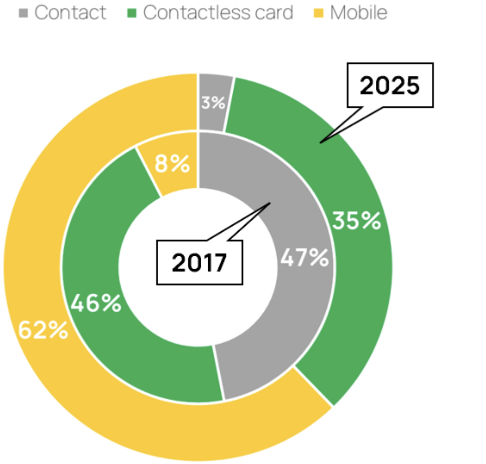


Cashless

- *fitted to 95% of pay vend machines*

Cashless Transactions by Type

Source: UK Unattended Retail (including Vending) fitted with Nayax readers

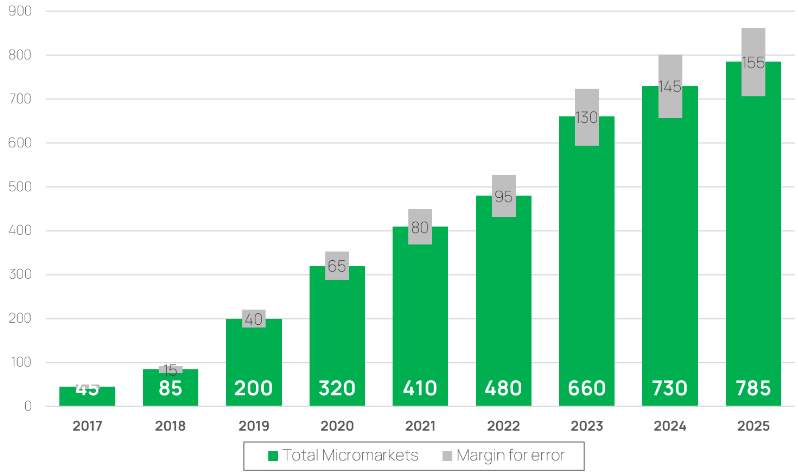


Open-site cashless

- *rapid rise in mobile phone payments: now 62% of cashless transactions*

Estimated Total Number of Micromarkets - UK

Sources: AVA Census Questionnaires, expert interviews



Micro-markets

- *785 now installed*

Smart Fridges

- *2,850 now installed*

Free Vend hot beverage

- *90% of table tops*
- *40% of free standing*

New machines vs refurbs

- *70% placed last year = new*

Healthier Vending: meeting CQUIN standards

- *80% of Cold Drinks*
- *75% of Confectionery*
- *40% of Savoury Snacks*
- *30% of Sandwiches*

Sources: Census questionnaires February to April 2026, EVMMA data on new machine sales, AVA Census history, inputs from operators and suppliers, CCL analysis

Biggest opportunities for 2026 and beyond

Based on feedback from operators, caterers, suppliers and industry experts

1. **Increase in self-serve fresh food and premium coffee: smart fridge & micro-market opportunity**
    - Mentioned by over one quarter of respondents
    - Ongoing hybrid working means preparing fresh meals on site and barista-served coffee is no longer be economically viable in many office locations. This results in a combination of:
        - food being prepared remotely and delivered to multiple sites for re-heating and self-service
        - more micro-markets / smart fridges with chilled / frozen meals and microwave ovens. Rise in share of frozen food – see page 40
        - Caterers have to adapt and are facing competition from operators with opportunities for micro-markets in more sites than before. Caterers are offering their own micro-markets / hybrid solution where the cash till is turned around after hours to become self-service.
    - New entrants have come in to supply either smart fridges or the food to go in them, or both.
    - Automated hot food preparation is starting to appear.

2. **New sectors**
    - Hybrid working patterns and the consequent reduction in consumption have led several operators to explore different sectors, notably hotels and apartments, convenience stores and cafés.

3. **More vending management systems**
    - Vending management systems are becoming more and more important to help drive efficiencies and maximise revenue through planogram optimisation etc. Integration with telemetry, cashless etc is all adding to the potential benefits.

4. **Unattended Retail & Coffee-to-Go**
    - More operators actively exploring unattended retail opportunities
    - Coffee-to-Go continues to grow, offer premium prices & high returns, but competition is intense and base growth coming from lower footfall sites – see page 32

5. **Other opportunities**
    - Cashless – lower on the priority list than in the past as so many machines are already equipped with cashless
    - Expanding wholesale business
    - Lower cost machines – especially table top bean-to-cup at the moment – from Chinese manufacturers
    - Reduced working from home with more companies requiring staff to be in the office more often
    - Acquisitions. 2025 was a big year for consolidation with Compass acquiring several operators now under the Amplifi umbrella, and 2468 and Liquidline also acquiring multiple operators.

Biggest challenges for 2026 and beyond
Based on feedback from operators, caterers, suppliers and industry experts

1. **Inflation and the cost of living**
   - Mentioned by almost every respondent
   - Increasing costs remains the biggest concern among operators:
     - War in Iran driving up fuel and energy costs
     - Rise is product costs
     - Employment – general cost increases:
       - The Employment Rights Act 2025
       - Living wage increase
       - National insurance increase
     - As a result, operators are raising their prices with the potential for this to adversely affect consumption

2. **Legislation impacts**
   - Concern about implementation of the Deposit Return Scheme (DRS)
   - Ongoing challenges and costs associated with Extended Producer responsibility (EPR)
   - Concern about the potential cup levy, despite EPR
   - The Employment Rights Act 2025 and implications for cost of employment
   - Potential ban of high caffeine energy drinks from vending

3. **Other challenges**
   - Ongoing prevalence of hybrid working, albeit this is reducing somewhat
   - The return of unsustainable pricing for more deals after more sensible practices prevailed post-Covid. Concern that the industry may move back to a race to the bottom.

UK Vending Industry Outlook
Long term themes

1. **Legislation:**
   - Packaging Extended Producer Responsibility (pEPR) – will add significant additional costs to industry, from manufacturers, wholesalers, Vending Operators and hence through to consumers.
   - Some of the Home Countries seem determined to add additional cost by driving forward with Single Use Cup levies despite pEPR being introduced to increase innovation and recycling
   - England, Scotland & Northern Ireland have declared a target date of October 2027 for the introduction of a unified Deposit Return Scheme for cans and PET bottles. Whilst Wales has yet to confirm whether their scheme will includes glass.
   - The Employment Right Act 2025 received Royal assent in December 2025 and will add further to the costs of employment
   - On behalf of Members, the AVA continues to work closely with legislators across the UK and Europe as new guidance and laws are developed.
2. **Premiumisation of hot beverages:**
   - The coffee shop boom continues to provide the platform for the Vending and OCS industry to further premiumise the hot beverage proposition.
   - The result has been the ongoing growth in bean-to-cup, larger cups, machines using fresh liquid milk and Coffee-to-Go.
   - The coffee shop brands are moving beyond the high street into traditional vending sectors like Health and B&I with their Coffee-to-Go propositions. This is increasing competition but also giving opportunities for caterers and operators to develop their own in-house branded alternatives.
3. **Convenience stores and discounters challenge vending prices for cold drinks, snacks and food**
   - The rise in convenience stores and discounters means more and more alternative sources of competitively priced cold drinks, snacks and food . This continues to impact vending consumption and limit the scope for price rises on many products.
   - More operators are offering less well-known, high-quality alternatives to the leading brands which are more difficult to compare in price with the high street.
4. **Healthier Products:**
   - Operators have demonstrated that whole propositions centred around healthier products can deliver the same, or even increased, consumption and revenue vs regular alternatives. Plus, more high quality, healthier alternatives are becoming available all the time.
5. **Additional growth trends:**
   - **Cashless payments** (page 30), **Coffee-to-Go** (page 32), and **Fresh Food** - micro-markets, smart fridges etc (page 40).

UK Vending, OCS & Coffee-to-Go
Industry Revenue

The industry revenue comprises the following:

- The product revenue from the sale of the food and beverage consumable items
- Additional revenue streams, primarily from machine rental / sale / lease, technical service, and the water dispenser business
- The total industry revenue is the product revenue plus the additional revenue streams

- **The PRODUCT REVENUE of the UK Vending & OCS was £2.28 billion in 2025, up 6.8% vs 2024**
  - This is the revenue from the products sold through the machines
  - This is now 9.7% above the 2019 pre-Covid level of £2.08 billion
  - See page 20 for details

- **The TOTAL REVENUE of the UK Vending & OCS was around £3.13 billion in 2025, up 3.9% vs 2023**
  - This is the product revenue plus revenue from machine sales, technical service, water dispensers, wholesale etc
  - This is now 1.4% above the 2019 pre-Covid level of £2.97 billion
  - Product Revenue accounts for around 70% of Total Revenue - see page 19 for explanation

- **The TOTAL REVENUE of the UK Vending, OCS & Coffee-to-Go was around £3.78 billion in 2025, up 3.3% vs 2024**
  - This is now 5.0% above the 2019 pre-Covid level of £3.60 billion
  - See page 39 for details on Coffee-to-Go incremental revenue

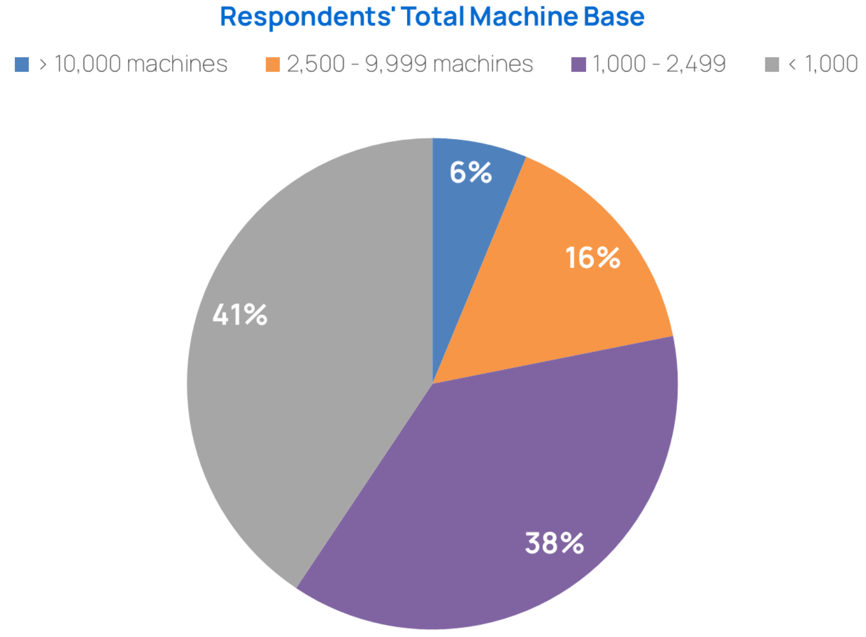
UK VENDING INDUSTRY

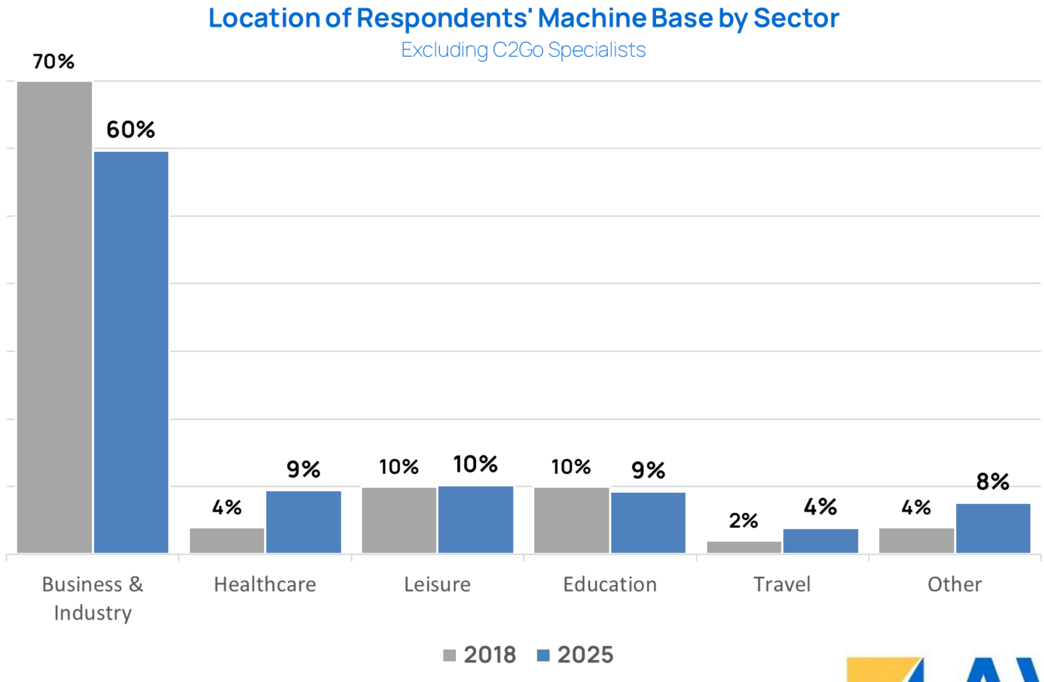
Traditional Vending
& Office Coffee Service

AVA Census Sample
Machine base and Sectors

- **The respondents to this year's Census questionnaire provide a robust, representative sample:**
  - The total machine base represented by operator respondents to the Census questionnaire is 125,000, or 31% of the total industry base
    - 6% of respondents each have a base > 10,000 machines,
    - 16% each have a base between 2,500 and 9,999 machines,
    - 38% each have a base between 1,000 and 2,499 machines,
    - 41% each have a base of < 1,000 machines

- **This year we have again asked operators (excl Coffee to Go specialists) to tell us where their machines are located:**
  - There has been a gradual move away from B&I especially post-Covid.
  - Business & Industry still dominates with 60%, followed by Leisure with 10%, Education and Healthcare both with 9%, Travel with 4%, and Other with 8%.
  - The following sectors are named by respondents within 'Other': convenience stores, retail, shopping malls, forecourts, airports, hotels & apartments, restaurants, bakeries and cafés



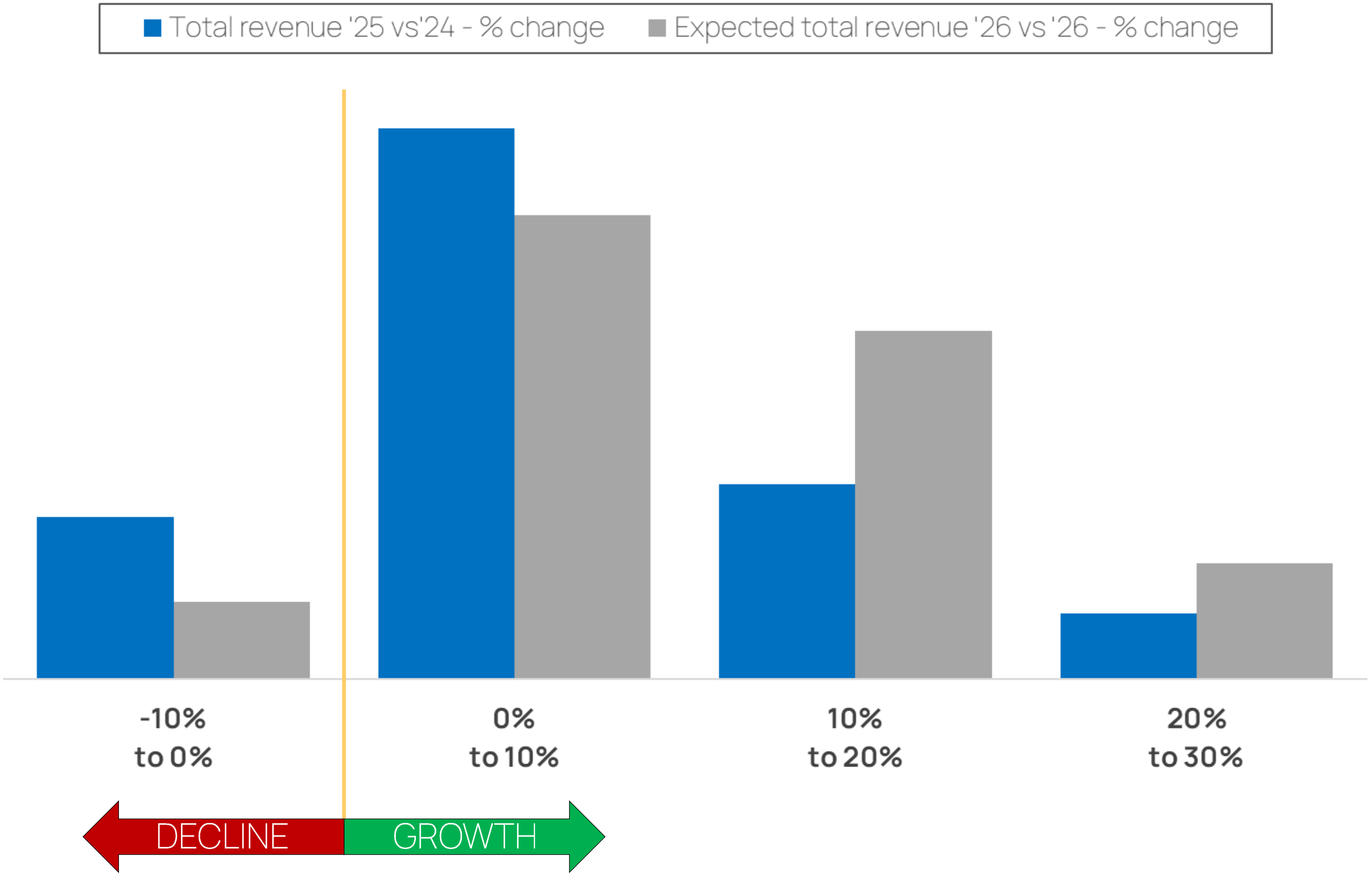


Sources: Census questionnaires February to April 2026, EVMMA data on new machine sales, AVA Census history, inputs from operators and suppliers, CCL analysis

UK Vending Industry Snapshot
Operators' 2025 Financial Performance and Hopes / Expectations for 2026

Operator Total Revenue
Actual 2025 vs 2024 + Expected 2026 vs 2025

Source: Census Questionnaire February to April 2026



- **Operators' revenue increased by an average of around 7% in 2025**
  - The revenue rise was a combination of:
    - ongoing reduction in the amount of working from home
    - significant price rises
- **Operators expect turnover to increase by around 7% in 2026**
  - Almost all operators (90%) are expecting growth in 2026.
  - This is tempered by turbulence in the UK economy, rises in costs, and global uncertainty due to the wars in Iran and Ukraine.
- **N.B. All averages above are weighted according to total machine base**

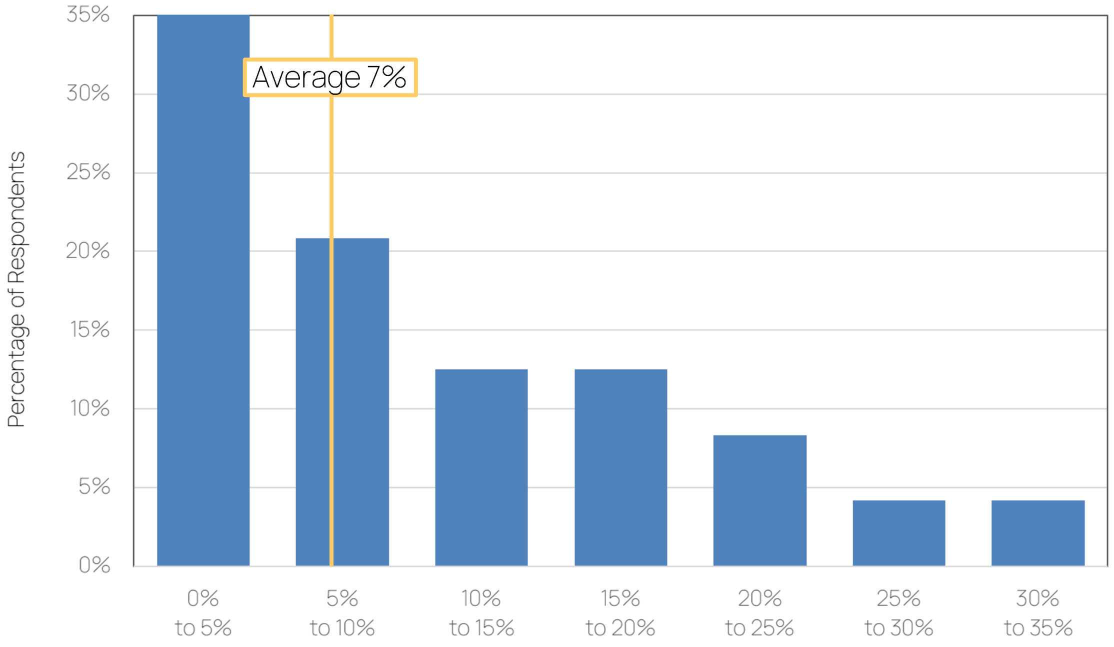
Sources: Census questionnaires February to April 2026, EVMMA data on new machine sales, AVA Census history, inputs from operators and suppliers, CCL analysis

Cost Increase in 2025 and Planned Price Increase in 2026

- **Operators reported an 7% increase in costs in 2025**
  - This is a slight reduction vs the 8% in 2024, but still relatively high
  - Driven by primarily by general inflation, rising employment costs and the ongoing increase in price for both green coffee and cocoa.
- **Operators plan a 6% price increase for 2025**
  - This is significant but still lower than the 10% average increase in 2023.
  - Further rises may become unavoidable if fuel costs in particular keep rising, and if the war in Iran doesn't get resolved soon.

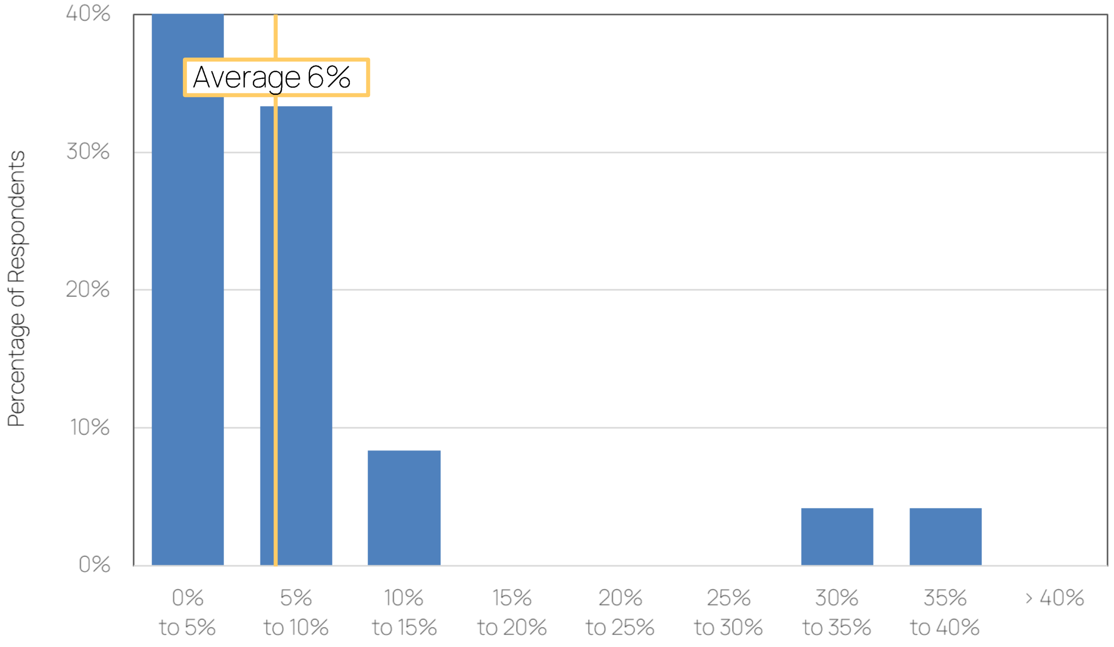
Approx cost increases in 2025 vs 2024

Census Questionnaires February to April 2026



Planned price increase in 2026

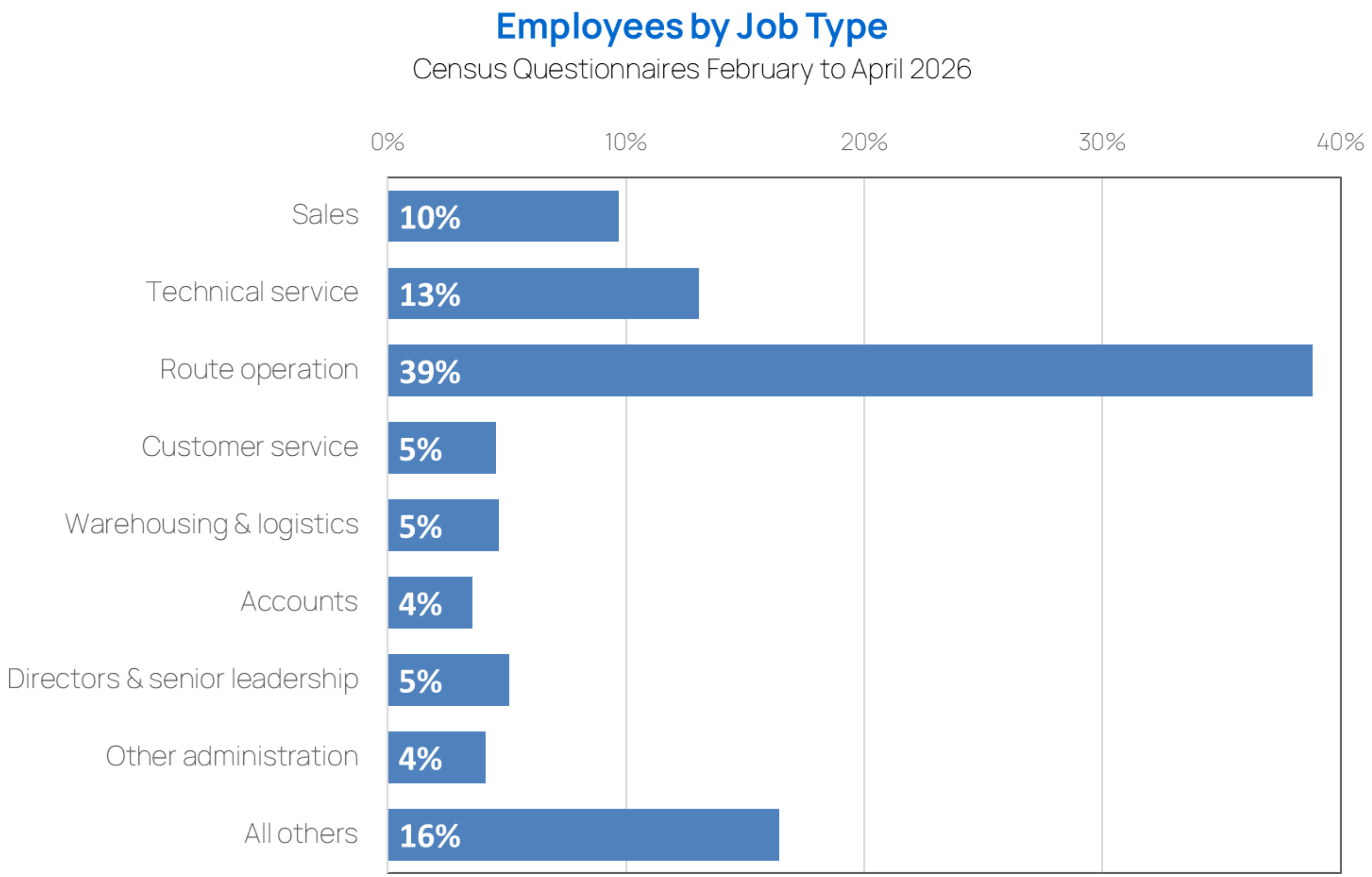
Census Questionnaires February to April 2026



Sources: Census questionnaires February to April 2026, EVMMA data on new machine sales, AVA Census history, inputs from operators and suppliers, CCL analysis

Employees by Job Type

Over one third of those employed by our respondents are in Route Operation.

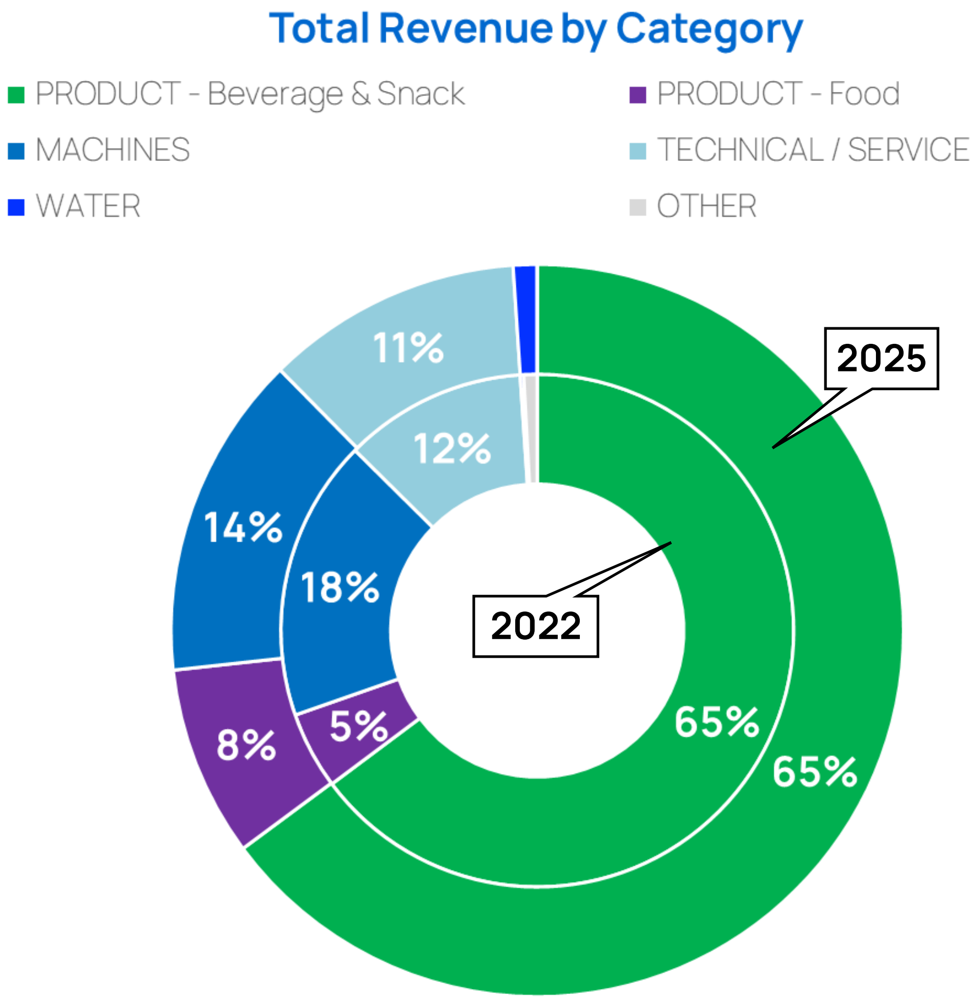


- **Route operation has the largest share of staff**
- **The split by job type varies quite significantly by operator, but has remained relatively stable since 2022.**
- **Within 'Other' the most prevalent job types are:**
  - Marketing
  - Food production

Sources: Census questionnaires February to April 2026, EVMMA data on new machine sales, AVA Census history, inputs from operators and suppliers, CCL analysis

Total Revenue of Operator & OCS companies – Share by Category

Product Revenue accounts for 72% of the total revenue reported by operators.



- **Total revenue for Operators and OCS was around £3.13 billion in 2025**
- **The split by type of revenue was broadly similar to 2022: with the main change being an increase in share from food:**
  - Product Revenue - Beverage & Snack accounted for 65% of total revenue
  - Product Revenue - Food accounted for 8% of total revenue
  - Machine sales / rental was 14% of total revenue
  - Technical / service was 11% of total revenue
- **The rest of this reports covers Product Revenue only**

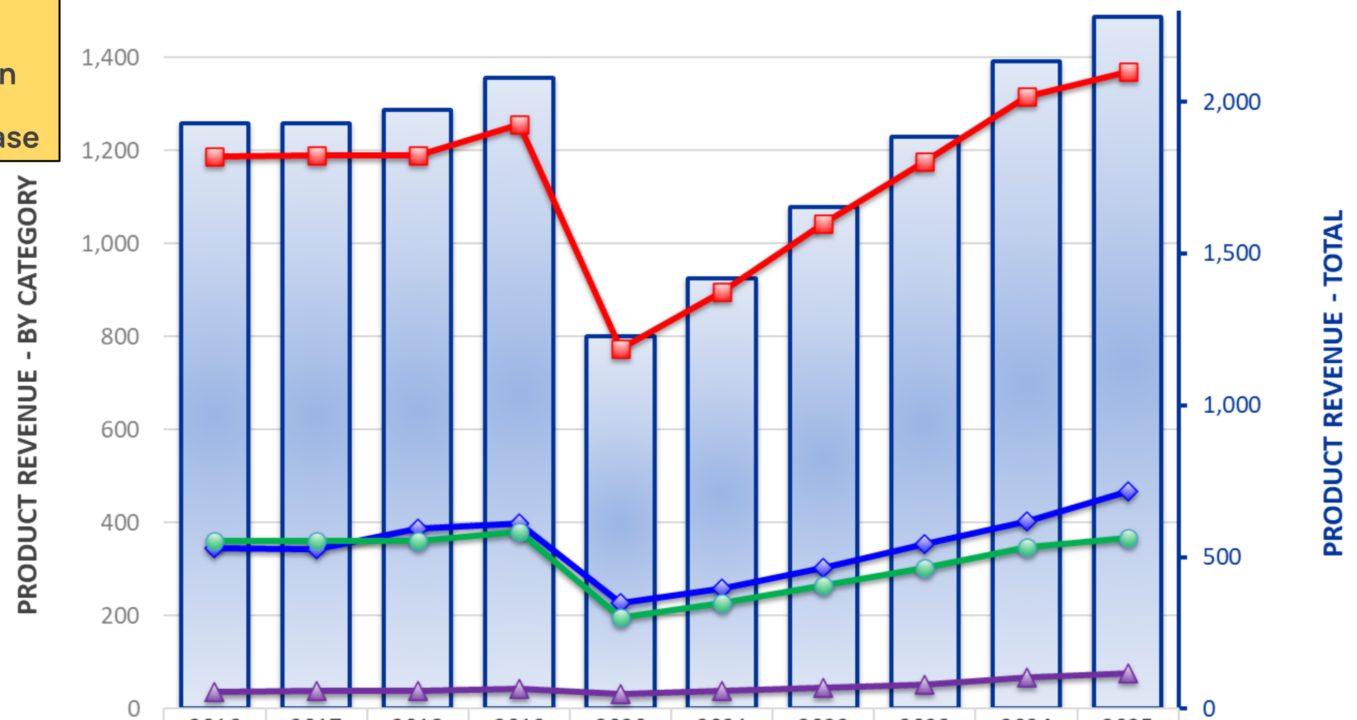
Sources: Census returns February to April 2026, EVMMA data on new machine sales, AVA Census history, inputs from operators and suppliers, CCL analysis

UK OCS & Vending Product Revenue – excluding Coffee-to-Go

Overall core vending and OCS product revenue increased by 6.8% to £2.28 billion in 2025.

OCS & Vending Product Revenue (incl VAT) - £GBP millions

REVENUE
=
Consumption
× Vend Price
× Machine Base



	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Product Revenue £ millions	1,929	1,929	1,975	2,078	1,229	1,418	1,655	1,885	2,135	2,280
Hot Beverage - total	1,188	1,189	1,190	1,255	773	895	1,042	1,177	1,317	1,370
Cold Beverage - total	344	343	388	399	228	258	304	353	404	466
Snack - total	360	360	360	381	196	226	264	302	347	367
Food - total	37	38	38	42	32	38	45	52	67	76

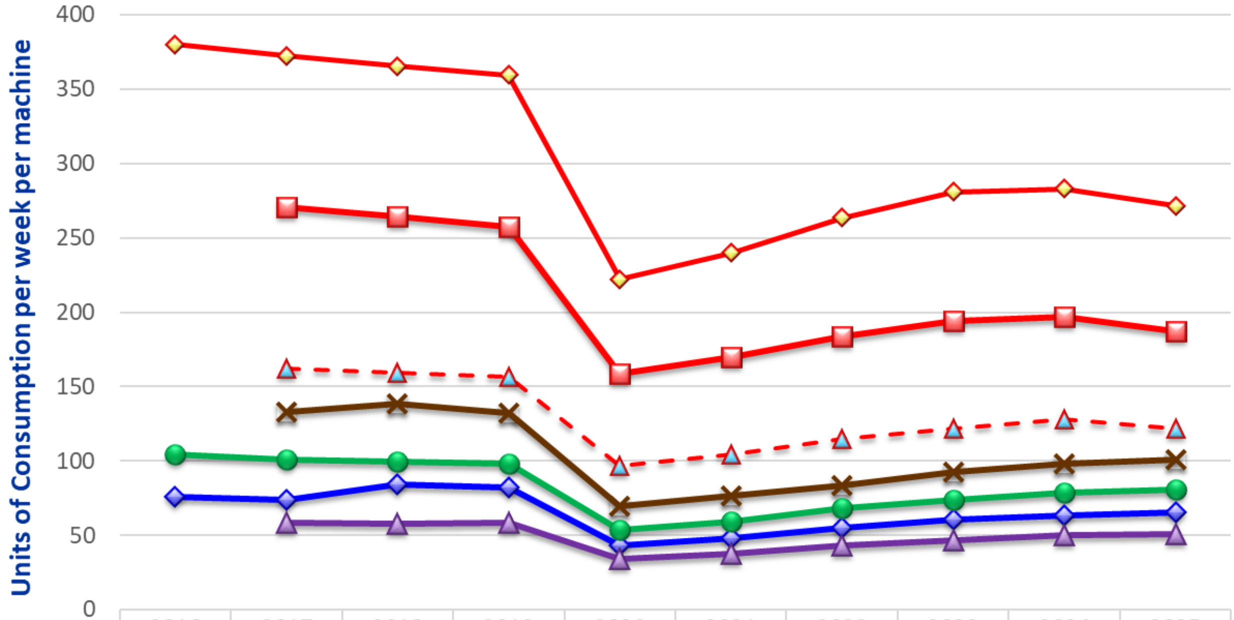
- **Product Revenue significantly above 2019 levels**
  - Driven largely by significant price increases since consumption remains well down on 2019 as a result mainly of hybrid working
- **Product Revenue increased by 6.8% vs 2024**
  - Hot Beverage revenue increased by 4.1%
  - Cold Beverage revenue increased by 15.4%
  - Snack revenue increased by 5.7%
  - Food revenue increased by 12.2% (from a low base)
- **A combination of a rise in prices and consumption drove the increase in product revenue**
  - Prices rose by around 9% while consumption declined for hot beverages by around 5% and increased by around 3% for the other categories
- **Coffee-to-Go**
  - Revenue for the Coffee-to-Go sector is not included here to allow ongoing comparisons with past AVA Census reports
  - Coffee-to-Go coverage starts on page 32.

Sources: Census questionnaires February to April 2026, EVMMA data on new machine sales, AVA Census history, inputs from operators and suppliers, CCL analysis

Consumption

Significantly down on 2019 levels in all categories.
First decline in hot beverage since 2019. Continued recovery in all other categories.

UK: Average Consumption - units per machine per week



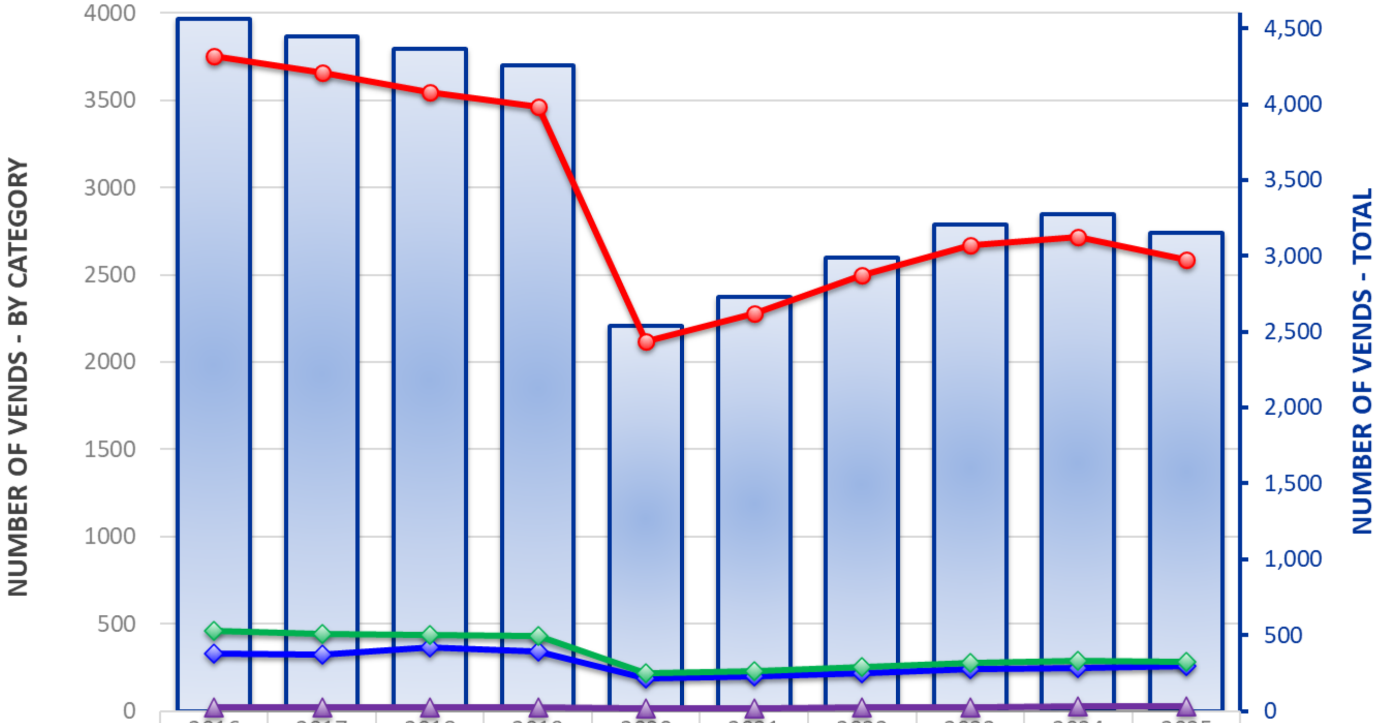
	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Hot Beverage - Overall		271	264	258	159	170	184	194	197	187
Hot Bev - Free Standing	380	373	365	360	222	240	263	281	283	272
Hot Bev - Table Top		162	159	157	97	105	114	122	128	122
Cold Beverage (dedicated)	76	74	84	82	43	48	55	61	63	65
Snack (dedicated)	104	101	100	98	54	59	68	74	79	81
Food (dedicated)		59	58	59	34	38	43	47	50	51
Combi (total Cold+Snack+Food)		133	138	132	70	77	84	92	98	101

- **Hot Beverage consumption:**
  - Free Standing fell by 4% to 272 drinks per week
    All past data has been Free Standing, and so that is the trend shown in the graph.
  - Table Top consumption fell by 5% to 122 drinks / week
  - Overall consumption (combined Free Standing and Table Top) fell 5% to 187 drinks per week.
- **Cold Beverage (dedicated) consumption:**
  - Grew 4% to 65 drinks / week
- **Snack (dedicated) consumption:**
  - Grew 3% to 81 units / week
- **Food (dedicated - drum) consumption:**
  - Grew 2% to 51 units / week
- **Combi machines consumption:**
  - Grew 3% to 101 units / week
    This is the combined total of Cold, Snack and Food items sold through the Combi machines

Sources: Census questionnaires February to April 2026, EVMMA data on new machine sales, AVA Census history, inputs from operators and suppliers, CCL analysis

Number of Vends
Growth across all product categories.

UK: Total Vends - in millions



	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Total Vends (millions)	4,564	4,443	4,366	4,257	2,536	2,727	2,988	3,205	3,274	3,152
Hot Beverage - total	3,755	3,657	3,548	3,466	2,119	2,280	2,496	2,670	2,717	2,586
Cold Beverage - total	330	323	365	340	187	198	218	239	246	260
Snack - total	458	442	433	431	215	231	254	275	287	280
Food - total	21	21	20	20	16	17	19	21	24	25

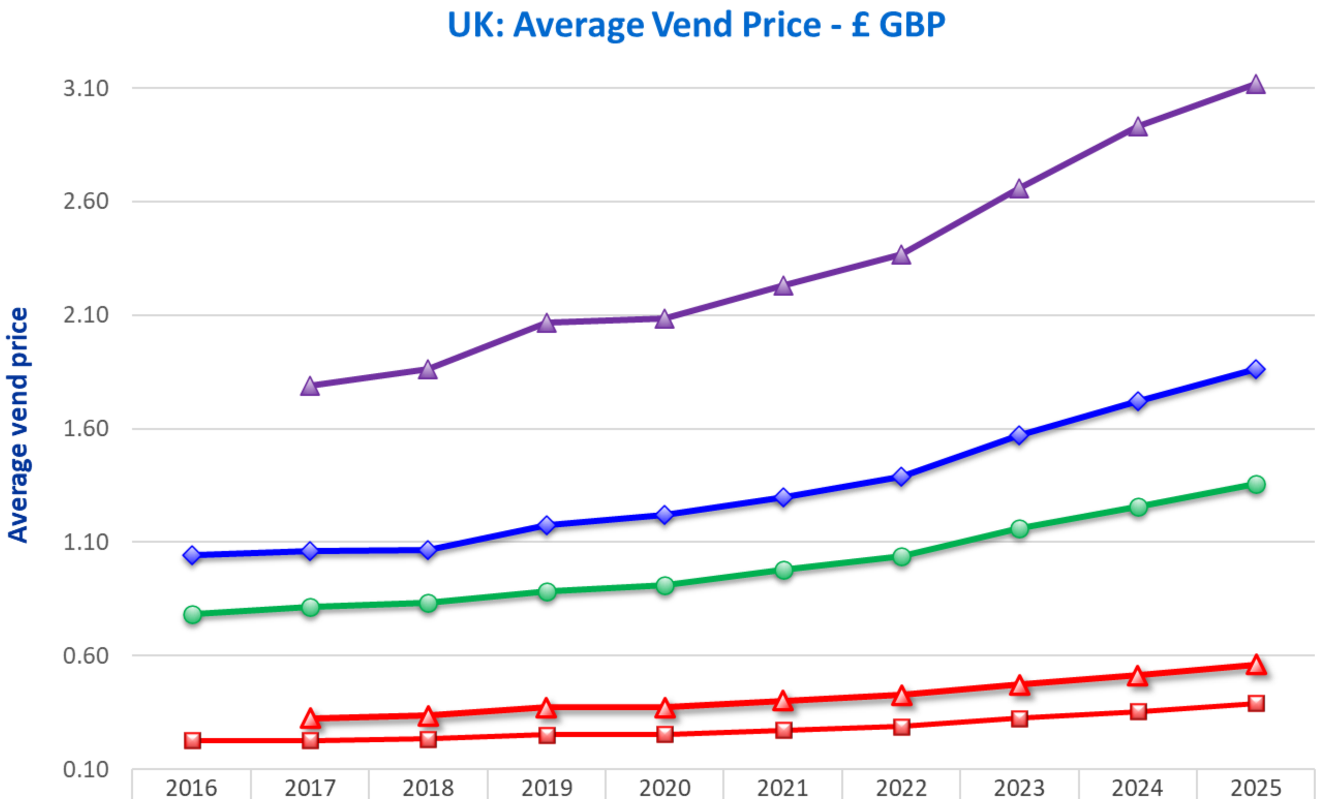
- **Number of vends is the combination of the machine base and the consumption**
- **Total number of vends was 3.15 billion, down 3.7%**
  - Hot Beverage was down 5%
  - Cold Beverage was up 6%
  - Snack was down 2%
  - Food was up 4%

  - More Snack machines set up to become Combis selling Cold Beverages which is why overall Cold Beverage is up and Snack is down.
  - Overall vends for each of the Cold Beverage, Snack and Food categories is the total of the vends through the dedicated machines and relevant share through Combi machines – see P28

Sources: Census questionnaires February to April 2026, EVMMA data on new machine sales, AVA Census history, inputs from operators and suppliers, CCL analysis

Vend Price Progression

Significant price increases across all categories.



	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Hot Beverage OVERALL		0.32	0.34	0.37	0.37	0.40	0.43	0.47	0.51	0.56
Hot Beverage - Workplace	0.23	0.23	0.23	0.25	0.25	0.27	0.29	0.32	0.36	0.39
Cold Beverage	1.05	1.06	1.06	1.17	1.22	1.30	1.39	1.57	1.72	1.86
Snack	0.79	0.81	0.83	0.88	0.91	0.98	1.04	1.16	1.26	1.36
Food		1.79	1.86	2.07	2.09	2.23	2.37	2.66	2.93	3.12

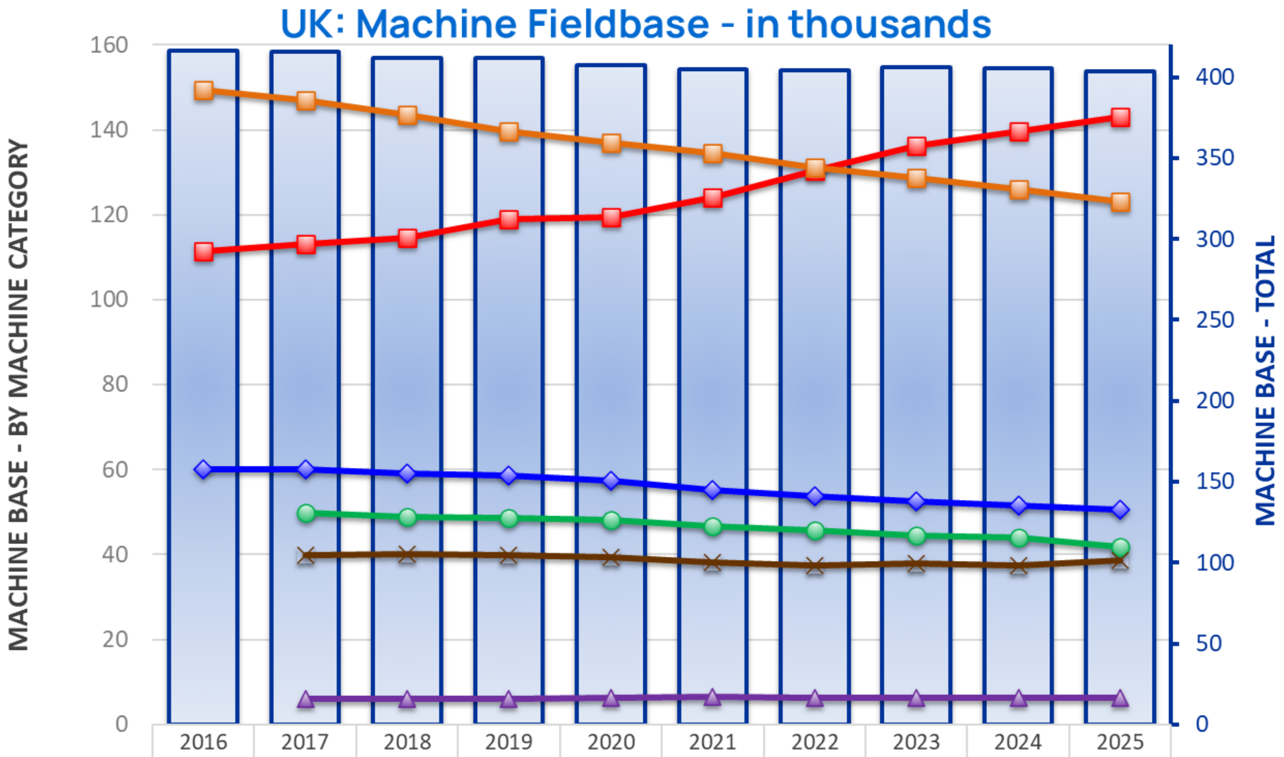
VEND PRICES - £ GBP	Average 2025	Year End 2025	Change vs 2024
Hot Beverage - overall	£0.56	£0.59	9.2%
Hot Beverage - workplace	£0.39	£0.42	12.9%
Cold Beverage	£1.86	£1.94	8.1%
Snack	£1.36	£1.42	7.8%
Food	£3.12	£3.19	6.3%

- **Year end price vs average price**
  - The price rises quoted above are the changes in price at year end 2025 vs year end 2024.
  - The total product revenue for the year is calculated using the average price for the year. The average price is shown in the chart.
- **Hot Beverage**
  - The overall hot beverage price is the weighted average of free standing and table top across both workplace and public sites, and including pay vend and free vend
  - The workplace price is the weighted average of the free standing price and the table top price, and takes free vend into account too.

Sources: Census returns February to April 2026, EVMMA data on new machine sales, AVA Census history, inputs from operators and suppliers, CCL analysis

Machine Base Progression

The total machine base declined by 0.5% in 2025.



	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Total Machines '000	416.6	415.7	412.2	411.7	407.5	405.1	404.5	406.4	405.4	403.4
Hot Beverage OCS (excl capsules)	111.4	113.1	114.6	119.0	119.4	124.0	130.4	136.2	139.8	143.0
Hot Beverage Vending	149.4	146.8	143.6	139.6	137.1	134.5	131.1	128.8	126.0	123.2
Cold Beverage (dedicated)	60.0	60.0	59.0	58.5	57.3	55.3	53.6	52.5	51.6	50.5
Snack (dedicated)		49.8	48.9	48.6	48.0	46.7	45.7	44.6	44.1	41.8
Food (dedicated)		6.0	6.1	6.1	6.4	6.4	6.3	6.3	6.4	6.4
Combi		39.8	40.0	39.8	39.3	38.2	37.4	38.0	37.5	38.6

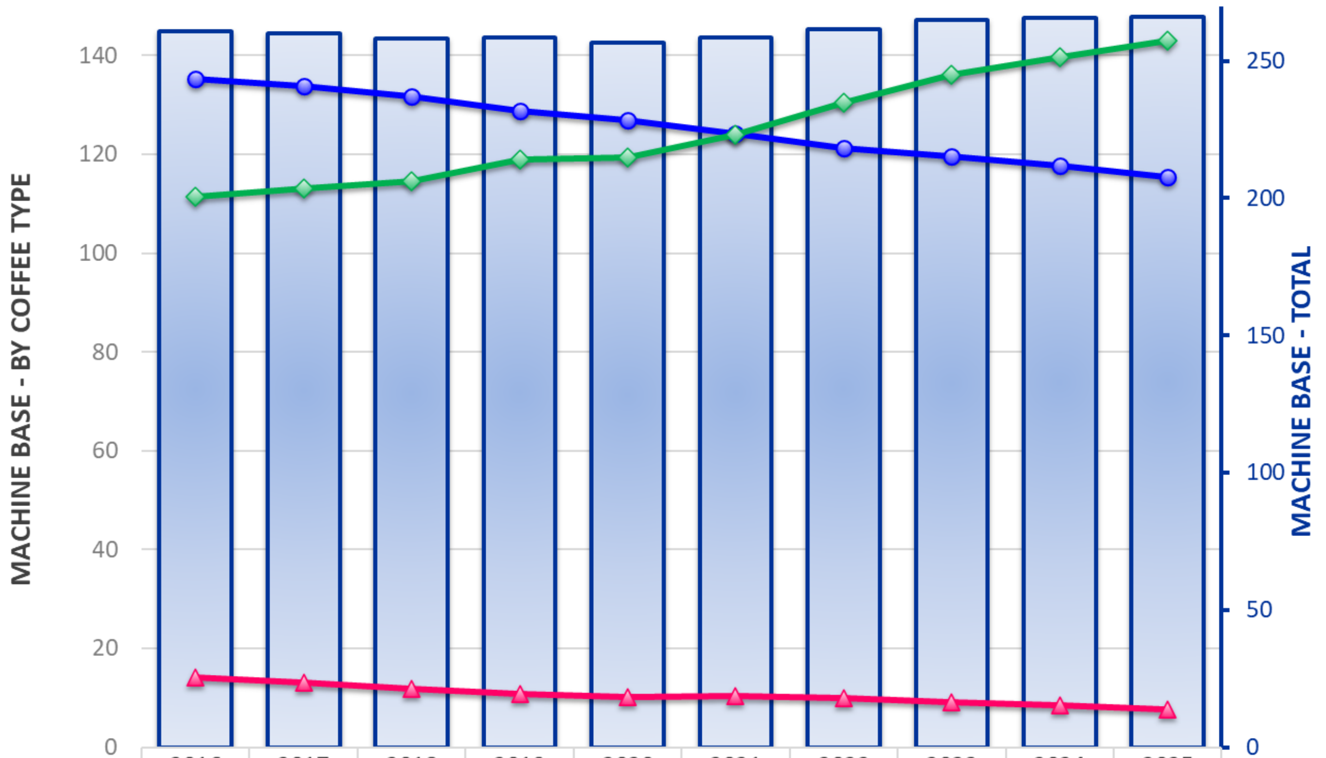
- **The total machine base declined by 0.5% overall vs 2024**
- **Hot Beverage OCS continued to grow**
  - table top semi automatics continue to replace free standing which helps drive premiumisation
- **All other machine categories except Combi and Food (drum) saw a small declines**

Sources: Census questionnaires February to April 2026, EVMMA data on new machine sales, AVA Census history, inputs from operators and suppliers, CCL analysis

Hot Beverage Base – overall summary

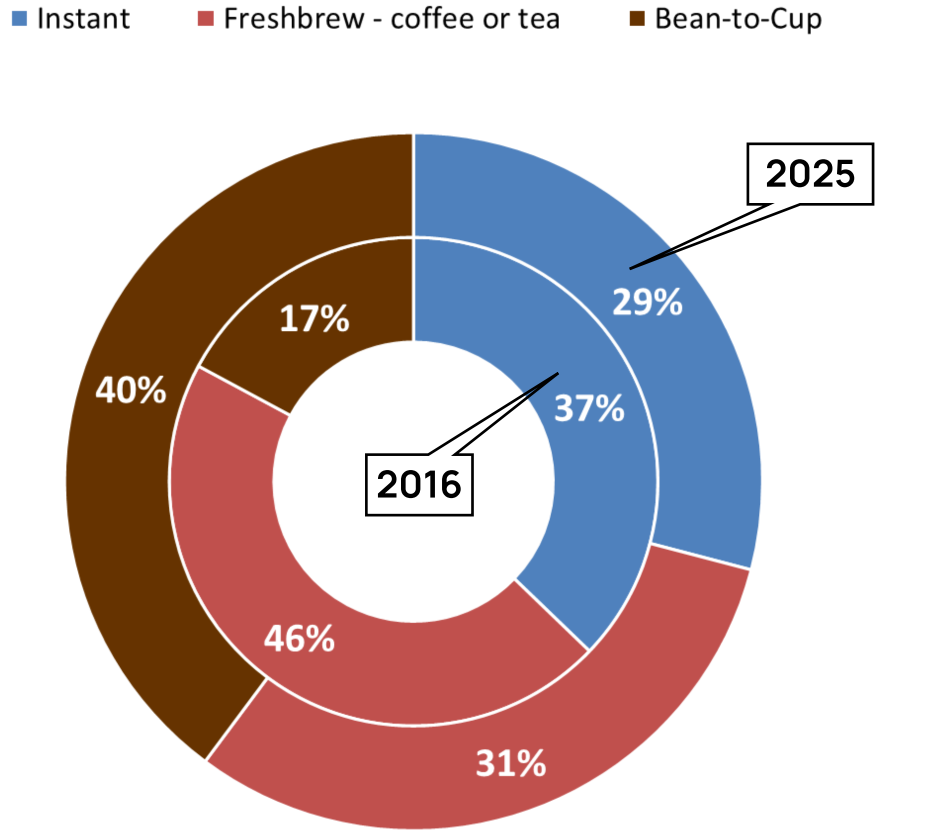
The base of both Free Standing and Table Top Automatics are in long term decline. The base of Table Top Semi Automatics continues to grow and has long overtaken Free Standing. Bean-to-Cup continues to grow share at the expense of both instant and freshbrew.

UK: Hot Bev Base by Machine Type - in thousands



	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Hot Beverage - total	260.7	260.0	258.2	258.6	256.5	258.5	261.6	265.0	265.8	266.2
Free Standing	135.2	133.8	131.6	128.7	127.0	124.2	121.3	119.7	117.6	115.5
Table Top Automatic	14.1	13.1	11.9	10.9	10.1	10.4	9.8	9.2	8.4	7.7
Table top Semi Automatic	111.4	113.1	114.6	119.0	119.4	124.0	130.4	136.2	139.8	143.0

Total Hot Bev Machine Base - Share by Brewing Technology

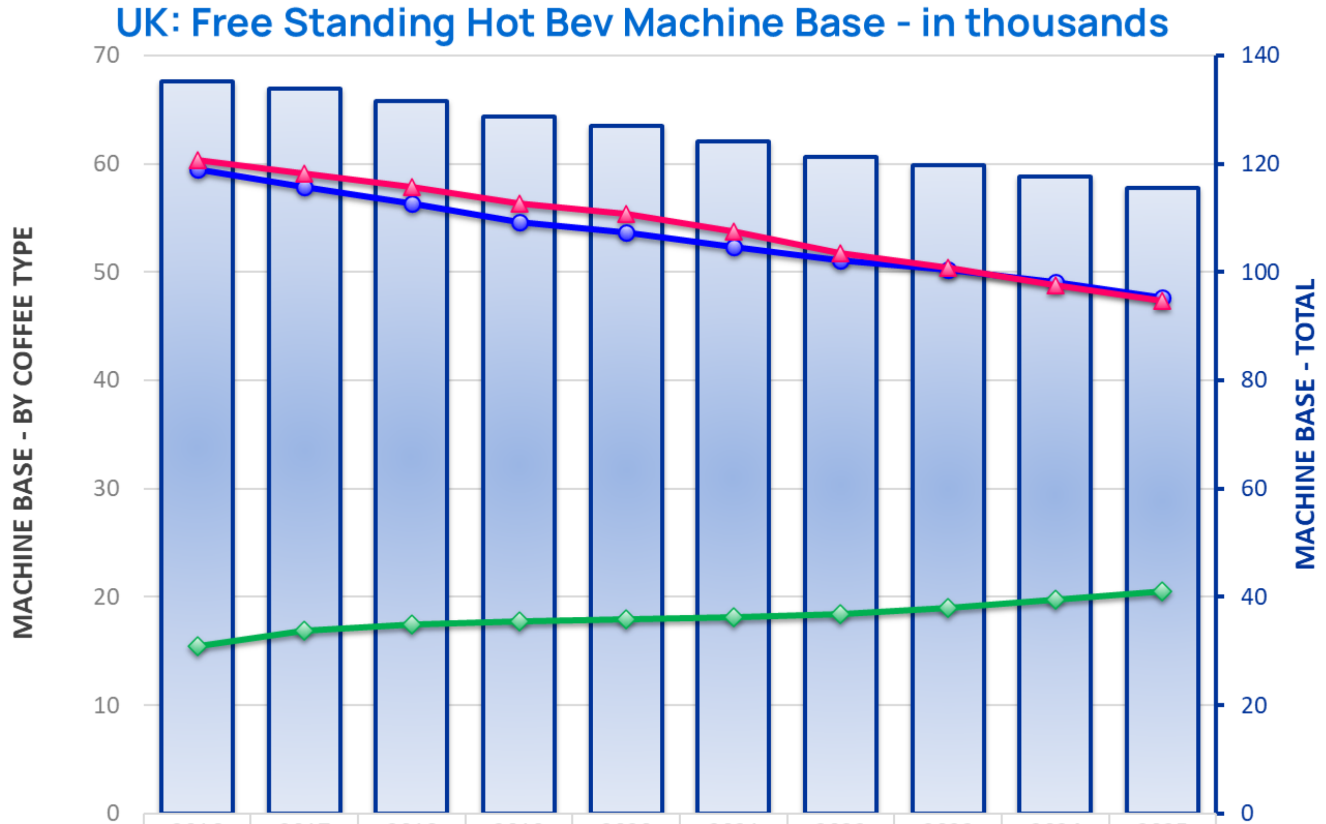


The UK tea culture means that freshbrew technology is often used to brew tea rather than coffee.
This is unique in Europe.

Sources: Census returns February to April 2026, EVMMA data on new machine sales, AVA Census history, inputs from operators and suppliers, CCL analysis

Hot Beverage Base – Free Standing

The Free Standing base continues to decline overall, but has been gradually premiumising through the growth of Bean-to-Cup.



	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Free Standing - Total '000	135.2	133.8	131.6	128.7	127.0	124.2	121.3	119.7	117.6	115.5
Instant / soluble	59.5	57.8	56.3	54.7	53.7	52.3	51.1	50.2	49.0	47.7
Freshbrew / Ground	60.3	59.1	57.8	56.3	55.4	53.7	51.7	50.4	48.8	47.3
Bean-to-Cup / Espresso	15.4	16.9	17.5	17.8	17.9	18.1	18.4	19.0	19.8	20.5

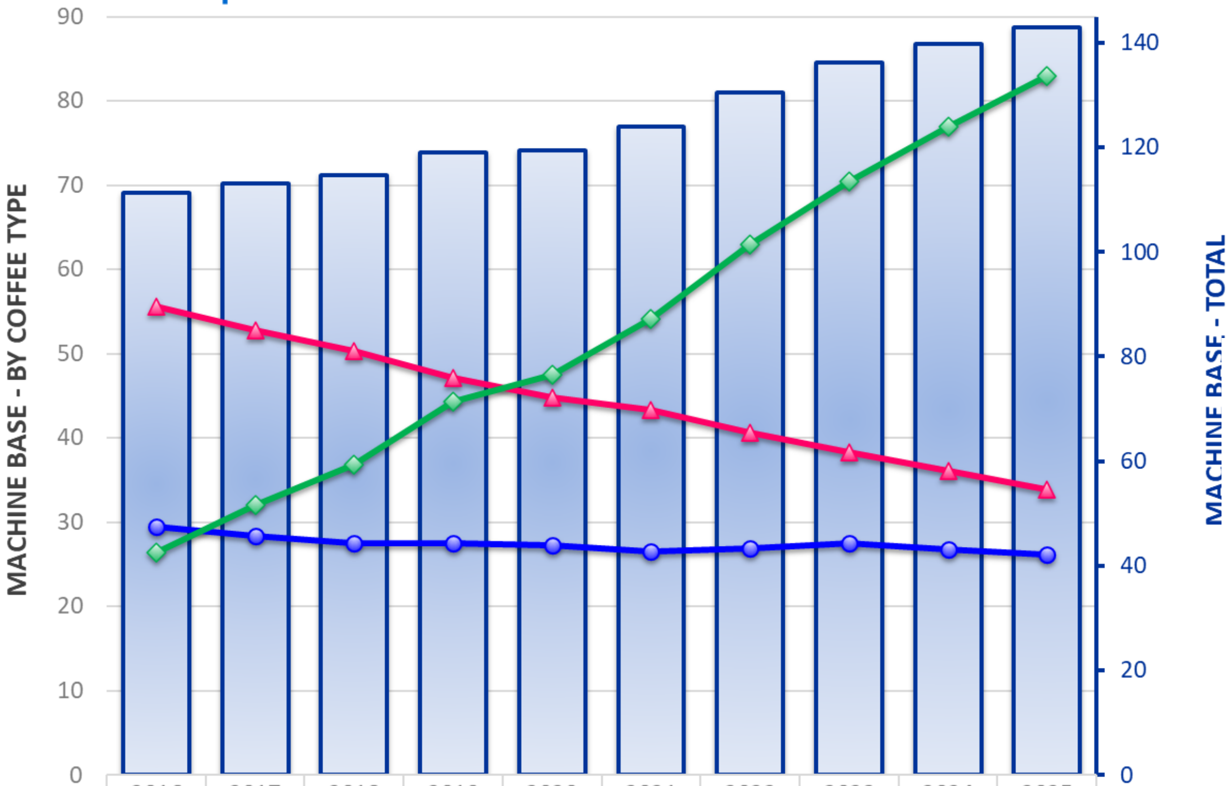
- Free standing machines, making drinks using either freshbrew technology (for ground coffee or tea) or instant coffee, are both continuing their decline
- Free standing machines using bean-to-cup for coffee are continuing their long-term slow growth.

Sources: Census questionnaires February to April 2026, EVMMA data on new machine sales, AVA Census history, inputs from operators and suppliers, CCL analysis

Hot Beverage Base – Table Top Semi Automatics

The strong growth in the base of Table Top Semi Automatics machines continues. Share of new machines fitted with liquid milk modules is over 40%.

Table Top Semi Automatic Hot Bev Base - in thousands

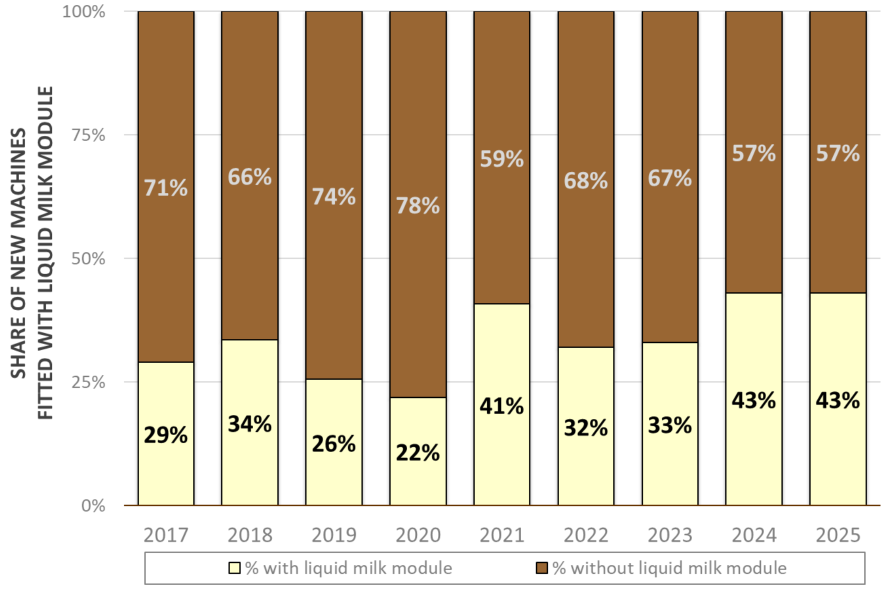


	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Table Top Semi-Auto - Total '000	111.4	113.1	114.6	119.0	119.4	124.0	130.4	136.2	139.8	143.0
Instant / soluble	29.4	28.3	27.5	27.5	27.2	26.6	26.9	27.5	26.8	26.1
Freshbrew / Ground	55.6	52.8	50.4	47.2	44.7	43.3	40.7	38.3	36.1	33.9
Bean-to-Cup / Espresso	26.4	32.1	36.8	44.3	47.5	54.1	62.9	70.4	76.9	83.0

- Within table top semi automatics, bean-to-cup is growing share significantly, which more than off-sets the ongoing decline in both instant and freshbrew - clear evidence of premiumisation
- The numbers of table top semi automatic bean-to-cup machines with a fresh liquid milk module is growing fast
  - The majority of these are self-operated by the end user or caterer, but an increasing number are operated with at least one visit / day

Table Top Semi Automatic Hot Bev Base

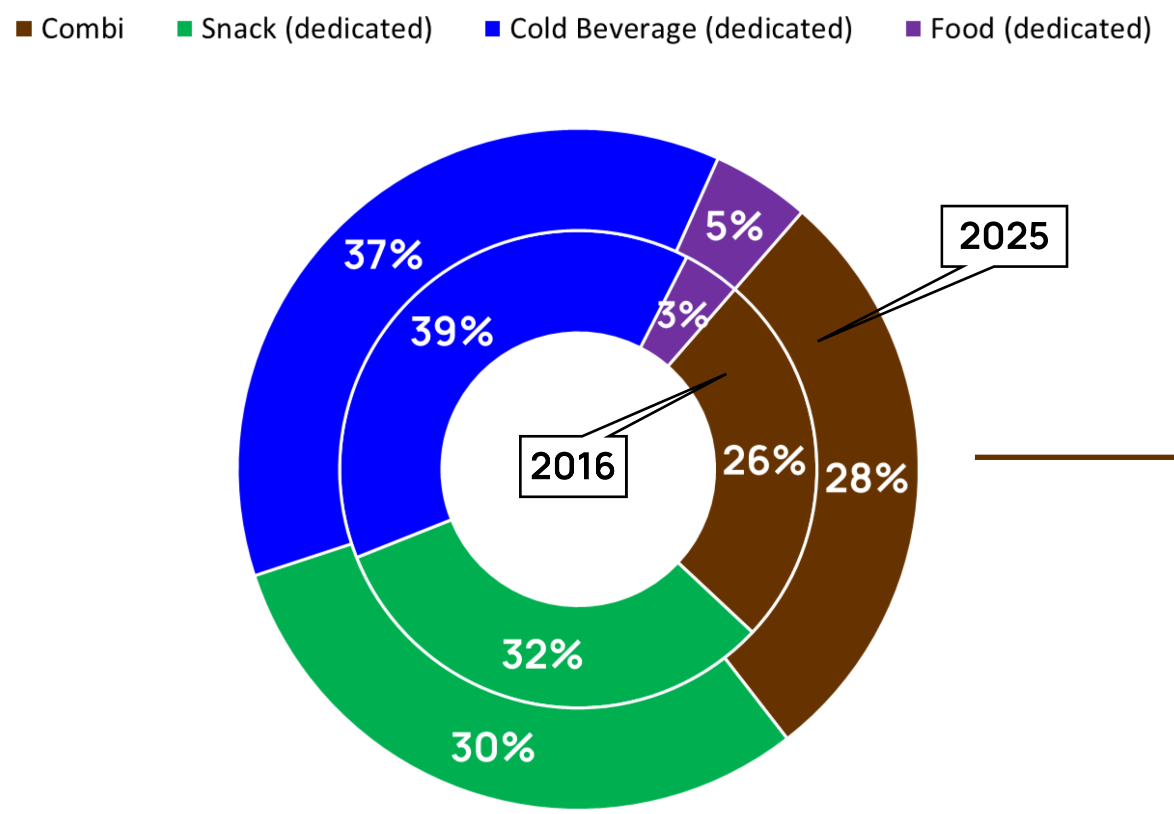
Share of new* machines fitted with liquid milk module

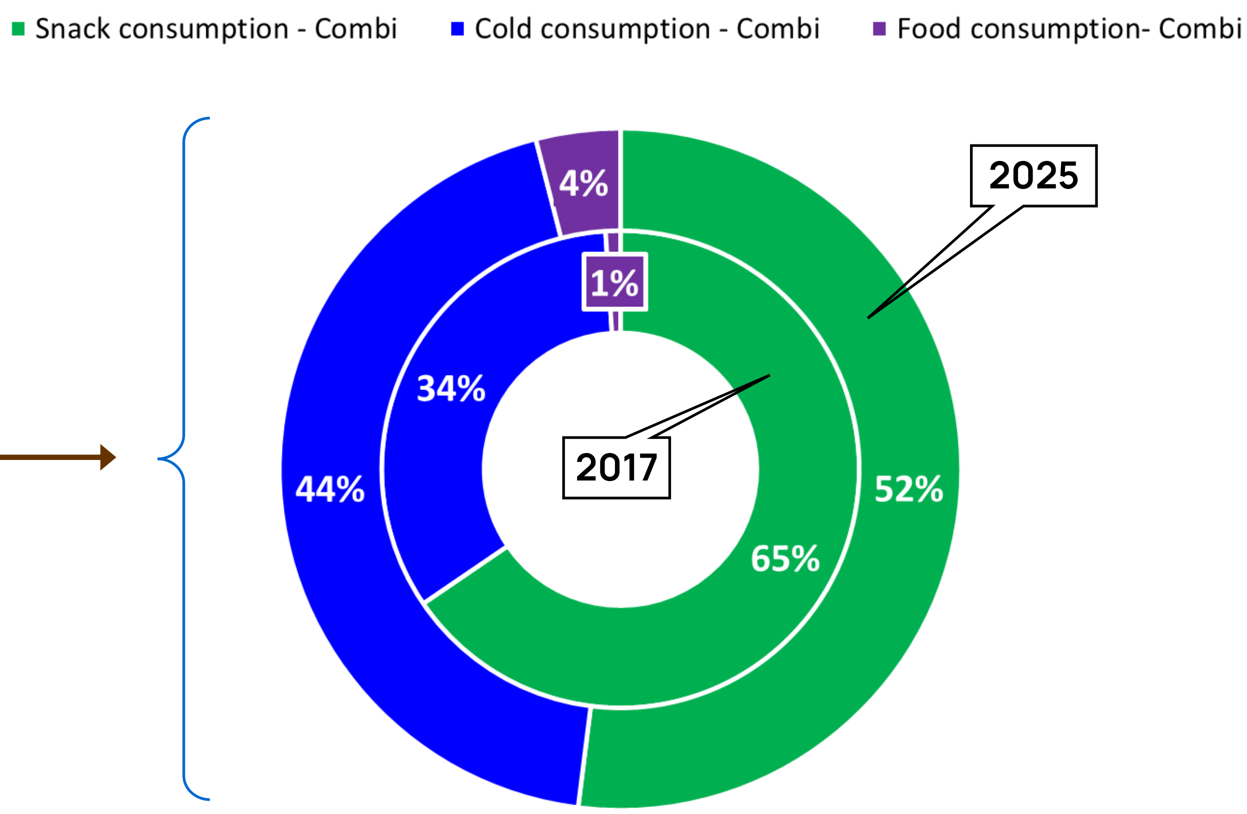


Sources: Census returns February to April 2026, EVMMA data on new machine sales, AVA Census history, inputs from operators and suppliers, CCL analysis

Cold, Snack, Food and Combi

Combi machines account for 28% of the non-hot beverage machine base.
For Combi, the consumption split by product category is gradually evolving with Cold Bev & Food growing share.





- For the COLD BEVERAGE category, operator data shows that just over 40% is soft drink bottles, 35% is soft drink cans, and just over 20% is bottled water
- Indicative data on the SNACK category shows that the split between savoury snacks and confectionery is about 50:50.

Sources: Census questionnaires February to April 2026, EVMMA data on new machine sales, AVA Census history, inputs from operators and suppliers, CCL analysis

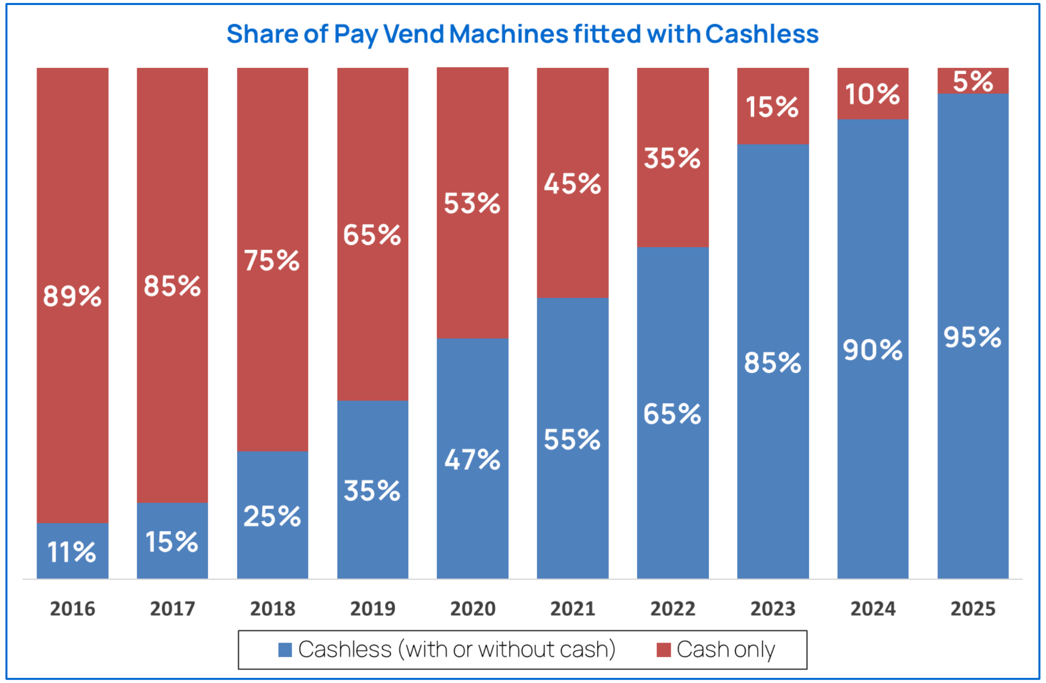
Trends in Cups
Material, Size, Premiumisation, Recycling and Re-use

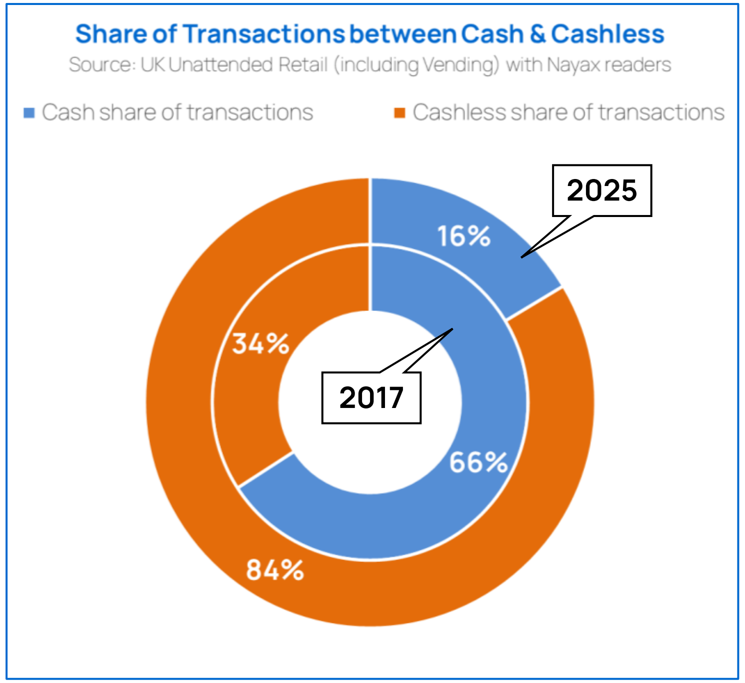
1. **Paper cups now dominate:**
   - Paper cups: Almost 100% share of single-use cups, up from 92% in 2024
   - Plastic cups: Almost 0% share of single use cups, down from 8% in 2024
2. **The average cup size continues to grow:**
   - The data below excludes the Coffee-to-Go specialists
   - 7oz or smaller: 22% - down from 26% in 2024
   - 8-9oz: 52% - up from 51% in 2024
   - 10oz or larger: 26% - up from 23% in 2024
3. **Multiple cups sizes in a free standing hot beverage machines:**
   - Around 15% of the traditional free standing machines offer more than one cup size. Various models of in-cup machines also offer this facility
   - On average, the larger portion size commands a 15-20% premium versus the standard size – significantly more than the cost premium
4. **Premiumisation through cups:**
   - Larger cups both command a premium price and can increase both consumer satisfaction and margin
5. **Cup recycling**
   - Operators estimate that over 25% of single use cups were recycled in 2025
6. **Incentive for using your own re-usable cup**
   - On many free-standing hot beverage machines, consumers can use their own cups and receive a discount for doing so. Where offered, the average discount was 5p in 2025. N.B. Most traditional free standing machines under 10 years old have the capability to work with re-usable cups.

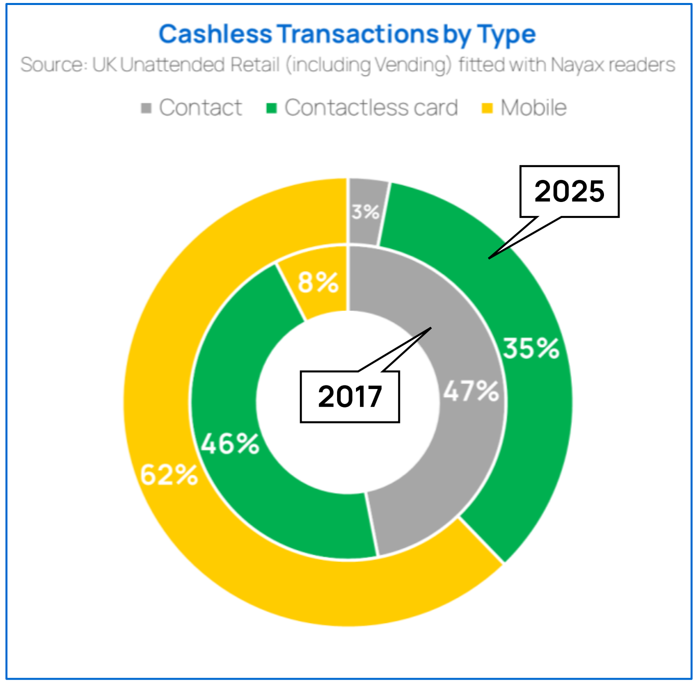
Sources: Census questionnaires February to April 2024, CCL analysis. Combined base of respondents was 32% of the total UK base of hot beverage machines

Cashless Payment

Cashless available on 95% of the pay vend base, with over 95% of readers now open-site. Cashless is growing share of transactions vs cash; & contactless is gaining share.







- **Significant investment in cashless**
  - Ongoin investment in cashless technology by operators with 95% of machines now fitted with cashless
  - Well over 95% of cashless systems now support credit card / mobile payments
  - Around 30% of the pay vend base is now cashless only.
- This data comes from the Census questionnaires, and only covers machines fitted with payment systems – excludes free vend machines

- **Cashless share of transactions is rising on machines accepting cashless**
  - 84% of transactions were cashless, up from 34% in 2017
- **Contactless share of cashless transactions is rising**
  - 62% of cashless transactions were Mobile, up from only 8% in 2017
  - 35% of cashless transactions were contactless card
  - Only 3% of cashless transactions were Contact, down from 47% in 2017
  - Cashless transactions were 100% higher in value vs cash, up from 30% in 2018
- N.B. This data comes only from machines fitted with Nayax readers

Sources: Census questionnaires February to April 2026, AVA Census history, inputs from operators and suppliers, Nayax, CCL analysis

Further Vending Industry Metrics
Based on Census returns

1. **Healthier Vending**

   The implementation of the sugar levy, and the requirements of the Government Buying Standards and Food Agency guidance have had a marked impact on the SKUs offered through vending:
   - 80% of pre-packaged Cold Drinks now have < 5g added sugar per 100ml, up from 44% in 2017
   - 75% of Confectionery and Sweet lines now have ≤ 250kcal, up from 35% in 2017
   - 40% of Savoury Snacks are now ≤ 30g, up from 22% in 2017
   - 30% of Sandwiches and other Pre-packaged Ready Meals contained ≤ 400kcal and < 5g saturated fat / 100g, up from 10% in 2018.

2. **Water dispensers:**
   - Over two thirds of our respondents reported a base of water dispensers
   - Their water dispenser base represents and incremental 11% of machines on top of their regular OCS and vending machine base
   - 66% were POU (plumbed into the mains water supply)and 34% were HOD (using large water containers)

3. **Data collection from machines by telemetry or handheld devices**
   - Operators are now collecting data from around 75% of their machines using either telemetry (for remote download) or handheld devices (for download in situ), up from 67% in 2024.

4. **Free Vend Hot Beverage:**
   - Free standing: around 40% free vend, up from 35% in 2024
   - Table top: around 90% free vend, the same as in 2024

5. **Operated vs DIY / Wholesale**
   - Over 60% of fully automatic machines (excluding in-cup) are operated. The rest are Self-fill / Wholesale

6. **Machine placements: New vs Refurbished:**
   - Around 70% of machines placed in 2025 were new, down from around 80% in 2024. The remainder were refurbished.

UK VENDING INDUSTRY

Coffee-to-Go

Coffee-to-Go
Introduction

- **For the purposes of this report, Coffee-to-Go is defined as follows:**
  - 'Coffee-to-Go' installations are found in both Public and Workplace sites. The machines have impactful branding, use large paper cups, are usually Bean-to-Cup, and often use fresh liquid milk for cappuccino and latte etc. The price is always set at a premium vs 'standard' vending offerings.
  - Some examples of Coffee-to-Go solutions are shown here:

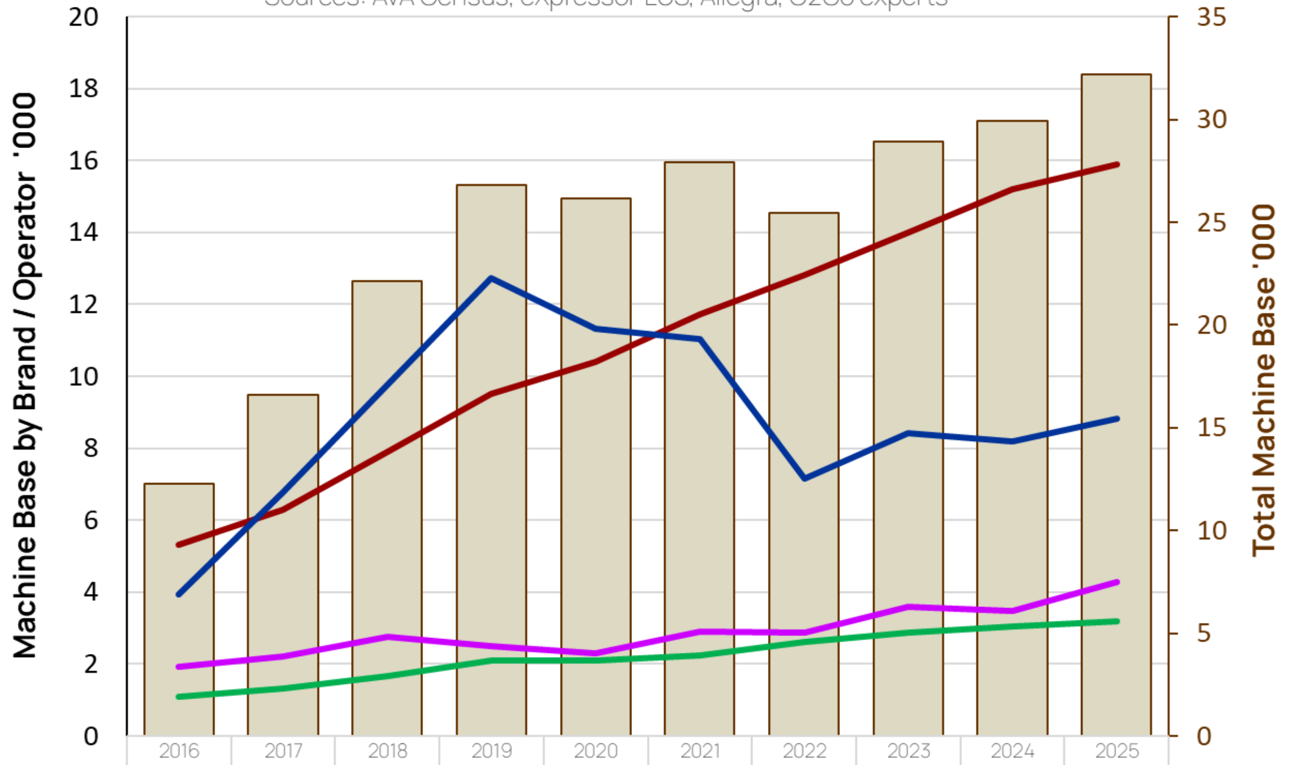

- **This section is in 2 parts:**
  - The first part covers Coffee-to-Go on its own
  - The second part shows the combination of Coffee-to-Go with Vending & OCS to give a holistic view of the whole industry
- **We have used a combination of AVA Census questionnaires with operators, machine base data from Allegra, interviews with major players, interviews with Coffee-to-Go experts and publicly available data.**
  - N.B. Allegra has a different definition for Coffee-to-Go than the AVA, the main difference being their requirement for fresh liquid milk whereas the AVA also includes propositions that use high quality freeze dried / granulated milk or skimmed milk powder. As a result the AVA Census and Allegra's Automated Coffee Report are not directly comparable.

Coffee-to-Go – Machine Base

Costa Express still leads the way, but other big brand players are competing strongly. Vending operators are growing in significance, and have more B&I focus.

Coffee-to-Go Machine Base

Sources: AVA Census, eXpressoPLUS, Allegra, C2Go experts



	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
TOTAL	12.3	16.6	22.1	26.8	26.1	27.9	25.5	28.9	29.9	32.2
Costa Express	5.3	6.3	7.9	9.5	10.4	11.7	12.8	14.0	15.2	15.9
Major Brands	3.9	6.8	9.8	12.7	11.3	11.0	7.1	8.4	8.2	8.8
Other brands	1.9	2.2	2.7	2.5	2.3	2.9	2.9	3.6	3.5	4.3
Vending Operators (incremental)	1.1	1.3	1.7	2.1	2.1	2.3	2.6	2.9	3.1	3.2

New insights this year have resulted in small adjustments to the base for 2022 and 2023 compared to last year's report

- **The total base of Coffee-to-Go machines was 33,200, up 8% vs 2024**
  - Costa Express still leads the way with 15,900 machines
  - The other major brands - Nescafé, Starbucks, Tchibo, Lavazza etc - have around 8,800 machines between them. The drop in their base is due to retirement of less premium solutions
  - A number of other branded players have a total of around 4,300 installations
  - Vending operators are involved in 2 ways:
    - They sell and manage bespoke installations for the brands, and those are included in the numbers above.
    - In addition, they have a total of around 3,200 of their own installations.
- **The prime locations are saturated**
  - As a result, more installations in lower footfall locations like convenience stores and smaller petrol stations.
- **Fresh liquid milk for specialities**
  - The premium solutions all use fresh liquid milk.
  - Around 50% of the vending operators' base uses fresh liquid milk, with the rest using high quality SMP.

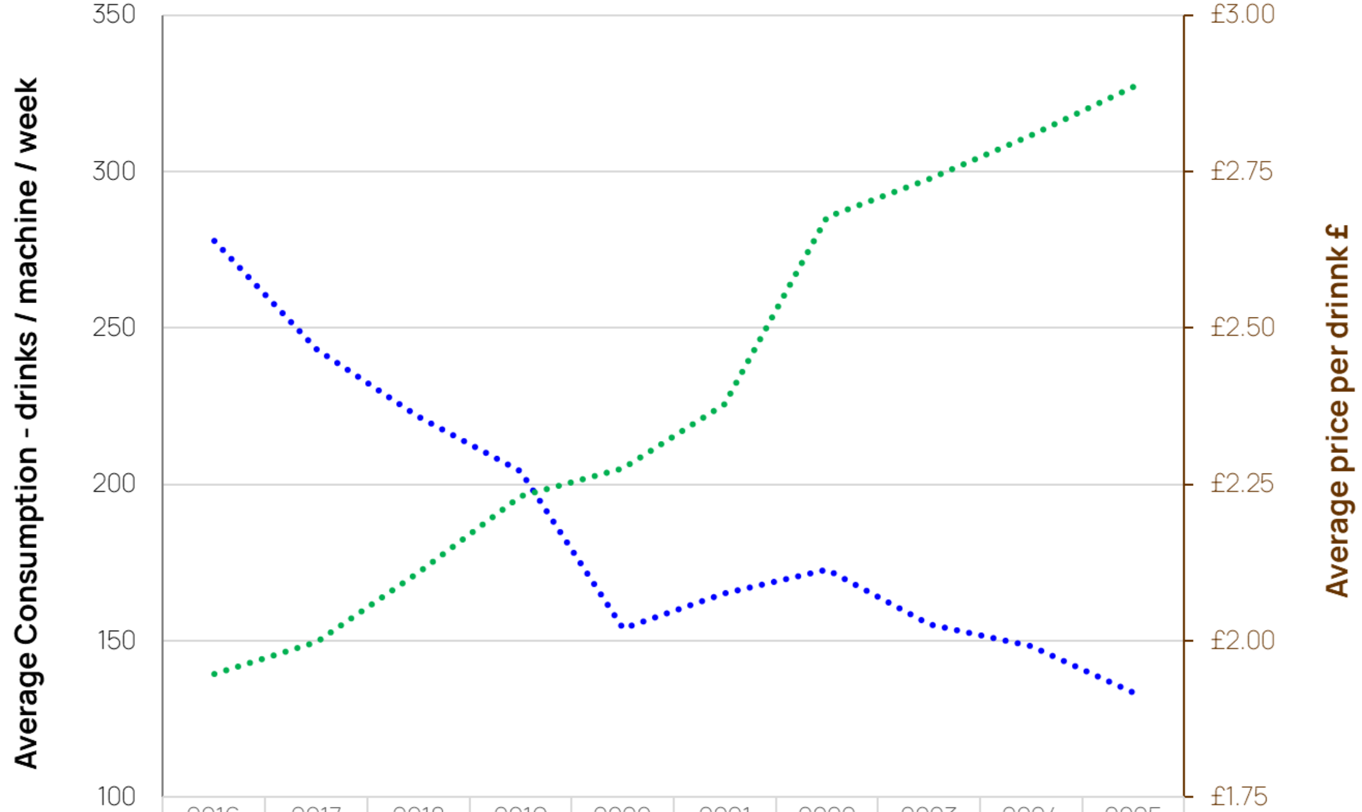
AVA

Sources: Census questionnaires February to April 2026, EVMMA data on new machine sales, AVA Census history, inputs from operators and suppliers, CCL analysis

Coffee-to-Go – Consumption vs Price
Consumption is in steady decline due to market saturation. Pricing continues to rise.

Coffee-to-Go Consumption vs Price (incl VAT)

Sources: AVA Census, eXpressoPLUS, Allegra, C2Go experts



	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Average consumption	278	243	222	204	154	165	173	155	148	133
Average Price £	1.95	2.00	2.11	2.23	2.28	2.38	2.68	2.74	2.81	2.89

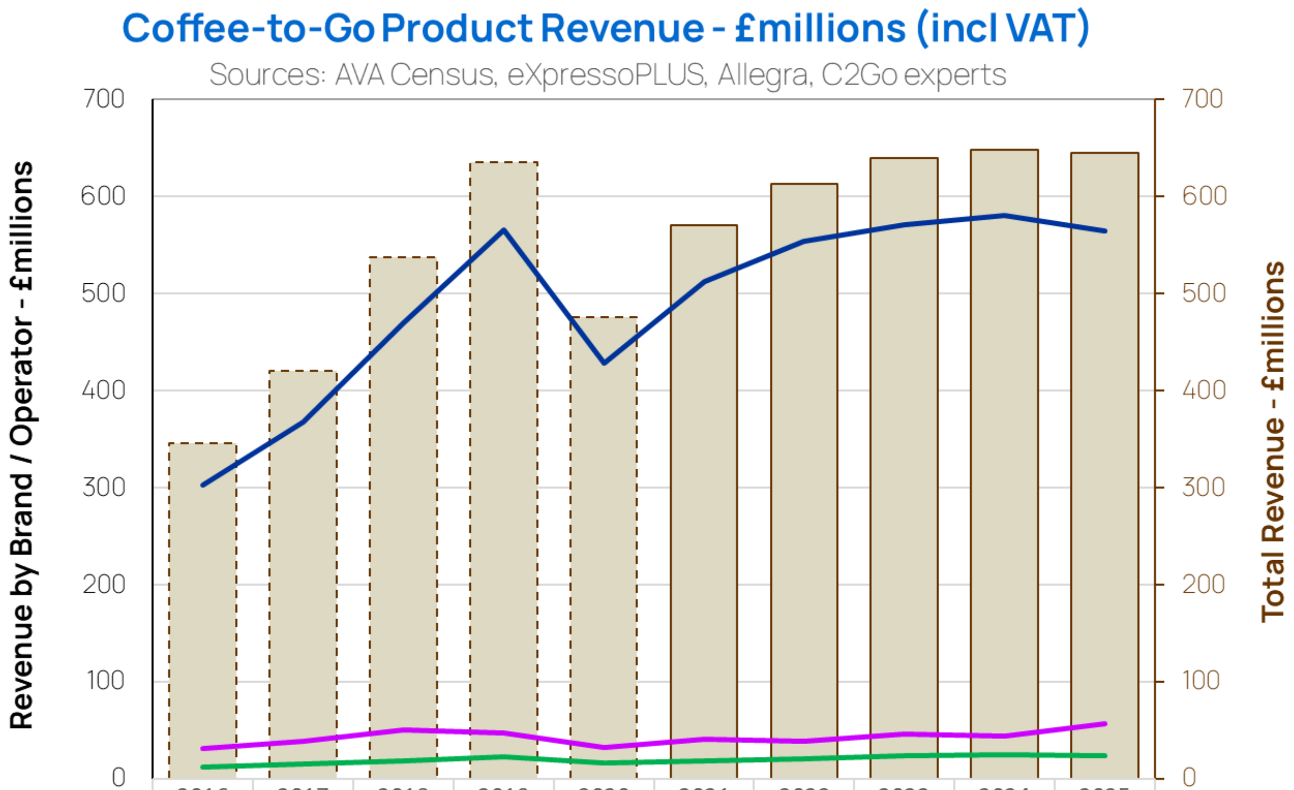
- **Consumption declined by almost 9% in 2025**
  - The long-term trend is still downwards due to saturation of the prime sites and base growth coming from lower footfall locations.
- **Category expansion to drive consumption**
  - We are seeing tea and syrups being offered in more locations, along with Cortados, seasonals
- **Average prices increased by 3% in 2025**
  - After steep post-Covid price rises, the rate of increase has slowed somewhat.
  - Increasing competition may also be having an effect.

New insights this year have resulted in a reduction in both the average consumption & price for 2022 and 2023 compared to last year's report.

Sources: Census questionnaires February to April 2026, EVMMA data on new machine sales, AVA Census history, inputs from operators and suppliers, CCL analysis

Coffee-to-Go – Product Revenue

The product revenue from Coffee-to-Go machines was around £645 million in 2025. Total revenue is now significantly up on 2019.



	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
TOTAL PRODUCT REVENUE	345	420	538	635	476	571	613	640	648	645
Major Brands incl Costa	303	367	469	566	428	512	554	571	581	564
Other brands	31	38	50	47	32	40	38	46	43	57
Vending Operators (incr)	12	15	18	22	16	18	21	23	24	24

- **Product revenue down 0.5% vs 2024**
  - The increase in total machine base along with the modest price rise were not quite enough to compensate for the ongoing fall in average consumption
- **The major brands maintain their strong market position**

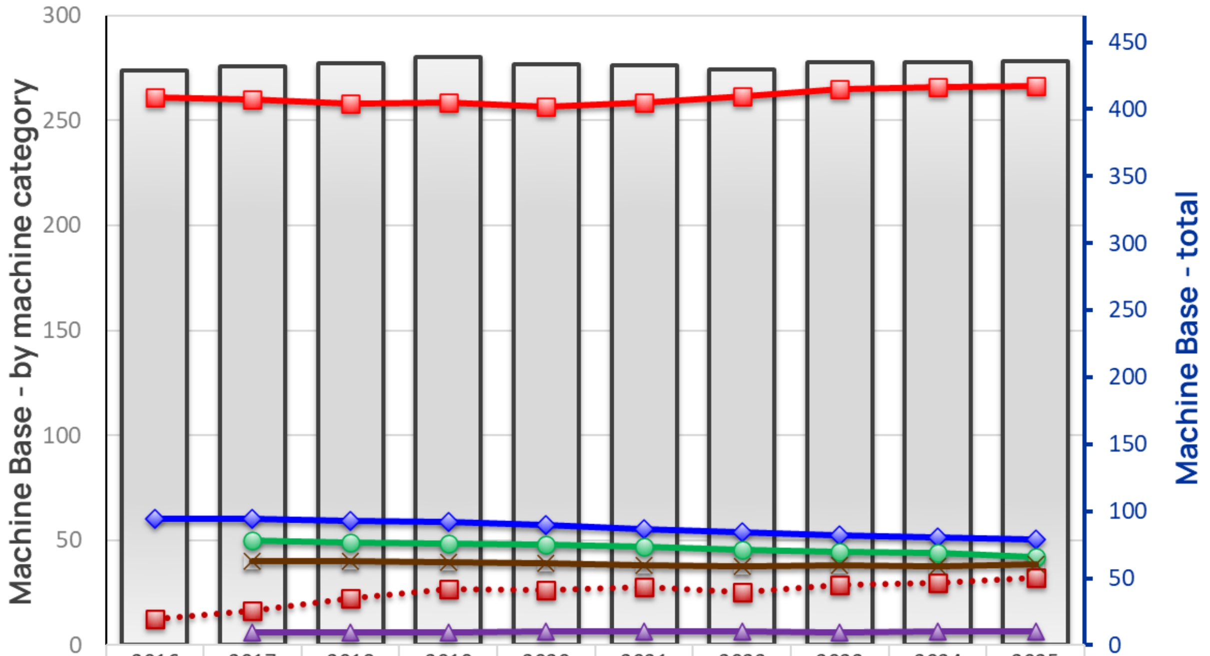
New insights this year on both machine base and price mean the revenue for 2022 & 2023 is lower compared to last year's report.

Sources: Census questionnaires February to April 2026, EVMMA data on new machine sales, AVA Census history, inputs from operators and suppliers, CCL analysis

Combined Machine Base: OCS, Vending & Coffee-to-Go

The combined base grew marginally vs 2024.

UK Machine Base: OCS, Vending & C2Go - in thousands



	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Total Machines (incl CtGo) '000	428.8	432.3	434.3	438.5	433.6	433.0	430.0	435.3	435.3	435.7
Hot Bev - Traditional Vending & OCS	260.7	260.0	258.2	258.6	256.5	258.5	261.6	265.0	265.8	266.2
Hot Bev - Coffee-to-Go	12.3	16.6	22.1	26.8	26.1	27.9	25.5	28.9	29.9	32.2
Cold Beverage (dedicated)	60.0	60.0	59.0	58.5	57.3	55.3	53.6	52.5	51.6	50.5
Snack (dedicated)		49.8	48.9	48.6	48.0	46.7	45.7	44.6	44.1	41.8
Food (dedicated)		6.0	6.1	6.1	6.4	6.4	6.3	6.3	6.4	6.4
Combi		39.8	40.0	39.8	39.3	38.2	37.4	38.0	37.5	38.6

- **The combined machine base of OCS, Vending & Coffee-to-Go was 435,700, essentially flat**
  - The Coffee-to-Go machine base increased by 8% and represents an incremental 12% of hot beverage machines.

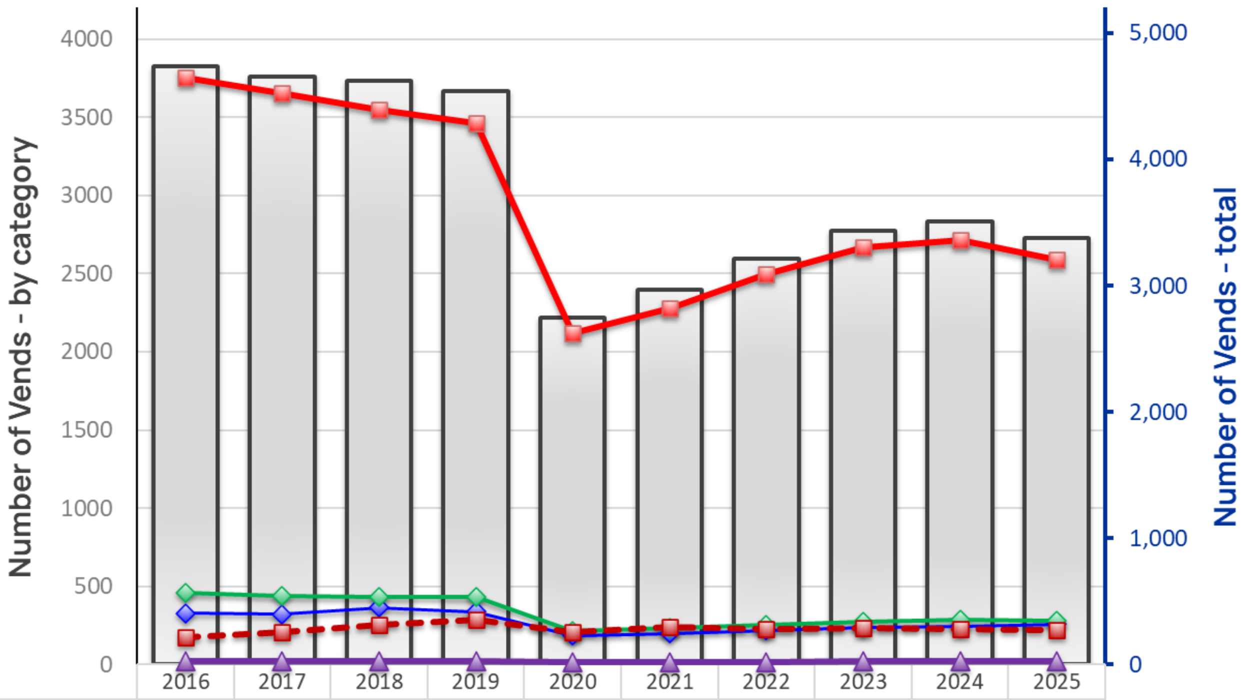
New C2Go insights this year have resulted in small adjustments to the base for 2022 and 2023 compared to last year's report

Sources: Census questionnaires February to April 2026, EVMMA data on new machine sales, AVA Census history, inputs from operators and suppliers, CCL analysis

Combined Total Vends: Coffee-to-Go plus Traditional Vending & OCS

The overall number of vends declined for the first time since 2020.

UK: Total Vends with C2Go - in millions



	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Total Vends (incl C2Go) - millions	4,741	4,653	4,621	4,541	2,745	2,966	3,217	3,438	3,505	3,376
Hot Bev - Traditional Vending & OCS	3,755	3,657	3,548	3,466	2,119	2,280	2,496	2,670	2,717	2,586
Cold Beverage - total	330	323	365	340	187	198	218	239	246	260
Snack - total	458	442	433	431	215	231	254	275	287	280
Food - total	21	21	20	20	16	17	19	21	24	25
Hot Bev - Coffee-to-Go	177	210	255	285	209	240	229	234	231	223

- The total number of vends fell by 3.6% in 2025
- Coffee-to-Go brings an incremental 7% of vends to the industry, increasing the overall number of vends across all categories to 3.38 billion

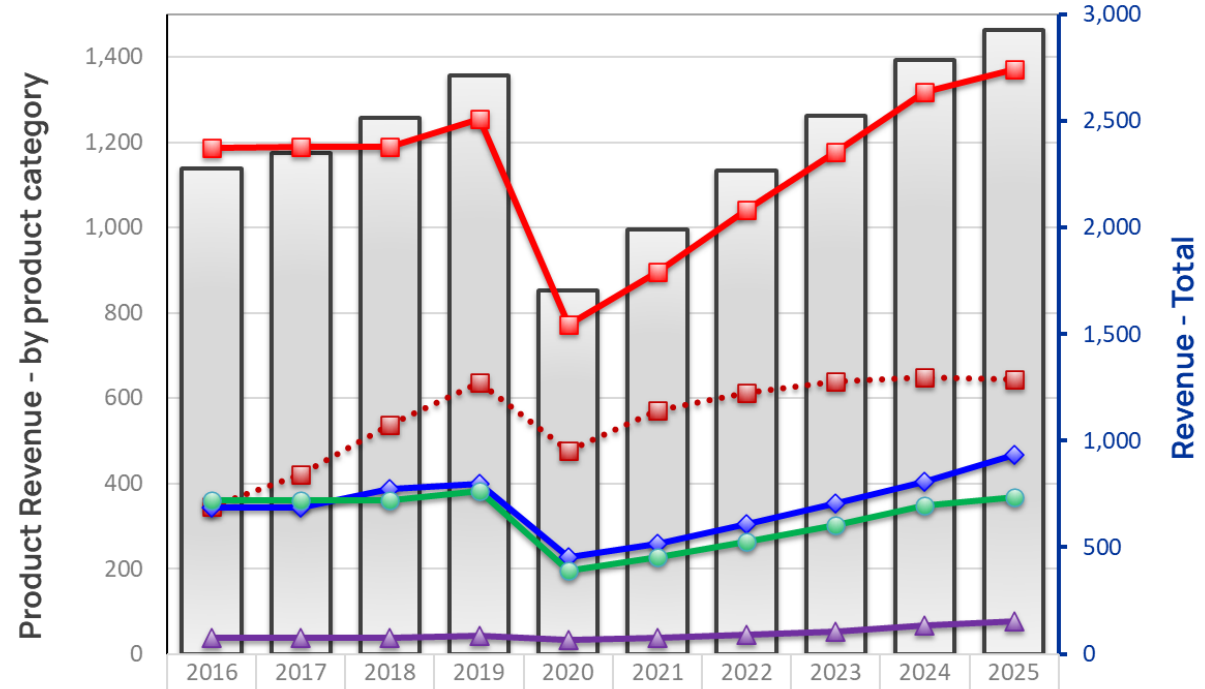
New C2Go insights this year on machine base mean the total number of vends for 2022 & 2023 is lower compared to last year's report.

Sources: Census questionnaires February to April 2026, EVMMA data on new machine sales, AVA Census history, inputs from operators and suppliers, CCL analysis

Combined Product Revenue: Coffee-to-Go plus Traditional Vending & OCS

The combined product revenue remains higher than it was in 2019.

UK: Product Revenue with C2Go (incl VAT) - £GBP millions



	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Product Revenue (incl C2Go) - £ millions	2,275	2,349	2,513	2,713	1,705	1,989	2,268	2,525	2,784	2,924
Hot Bev - Traditional Vending & OCS	1,188	1,189	1,190	1,255	773	895	1,042	1,177	1,317	1,370
Hot Bev - Coffee-to-Go	345	420	538	635	476	571	613	640	648	645
Cold Beverage - total	344	343	388	399	228	258	304	353	404	466
Snack - total	360	360	360	381	196	226	264	302	347	367
Food - total	37	38	38	42	32	38	45	52	67	76

- **Overall Product Revenue was £2.92 billion, up 5% on 2024, and up 8% on 2019**
  - Coffee-to-Go has a 22% share of the total product revenue
- **There remains significant scope for premiumisation of hot beverage through OCS and vending**
  - The weighted average coffee price for Coffee-to-Go was £2. 89 in 2025 compared with only £0.56 for hot beverages from Vending and OCS – that's 5.2 times higher

New C2Go insights this year on both machine base and price mean the revenue for 2022 & 2023 is lower compared to last year's report.

Sources: Census questionnaires February to April 2026, EVMMA data on new machine sales, AVA Census history, inputs from operators and suppliers, CCL analysis

UK VENDING INDUSTRY

Micro-markets & Smart Fridges

Micro-markets

- **For the purposes of this report, Micro-markets are defined as follows:**
  - Micro-markets are small, automated convenience stores in workplaces and other closed locations like universities, apartment complexes and hotels:
    - Products are on open shelves, or chiller cabinets or fridges so consumers can select them as they would in a store
    - Selected products are scanned by the consumer either at a central unattended till, or using a smartphone app
    - Payment is taken either at the central till (usually cashless), or through the smartphone app
    - Usually includes at least one hot beverage machine
    - Minimum number of non hot beverage SKUs – say > 30
    - May include a microwave to heat purchased food
    - May include an area with tables and seating

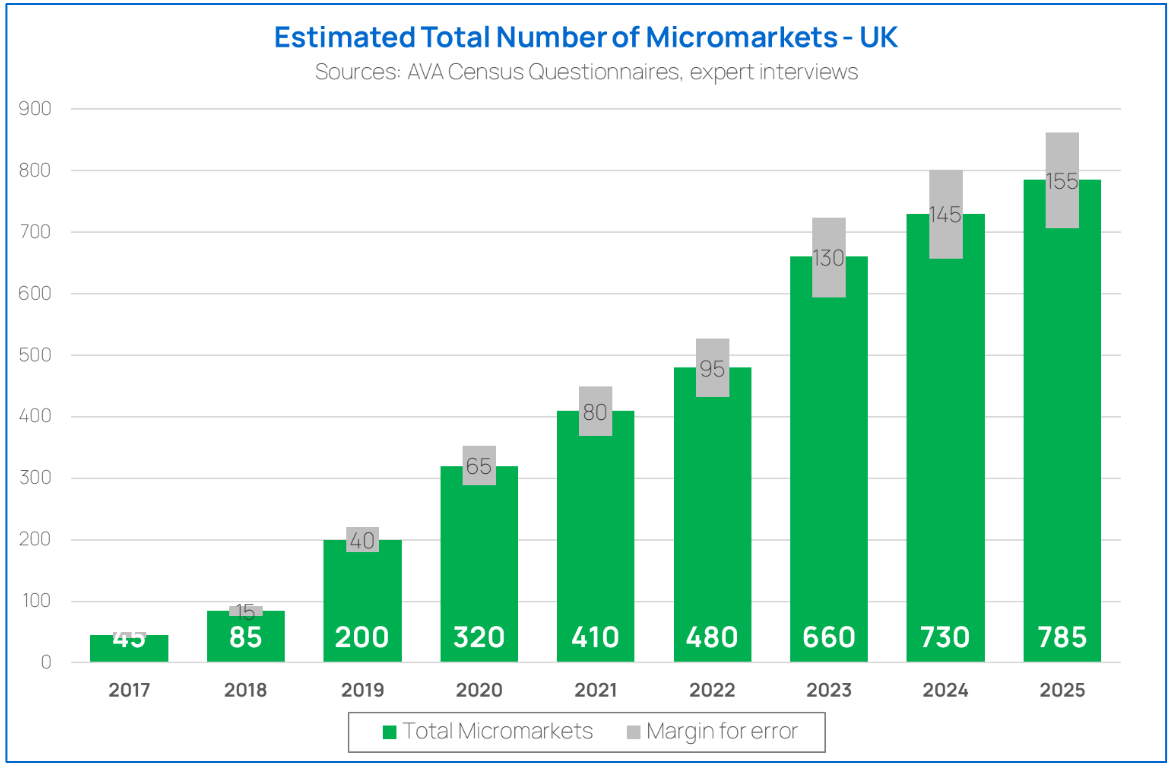
  - Some examples of micro-market solutions are shown here:


- **We have used a combination of AVA Census questionnaires with operators, interviews with major players, interviews with suppliers, and publicly available data.**

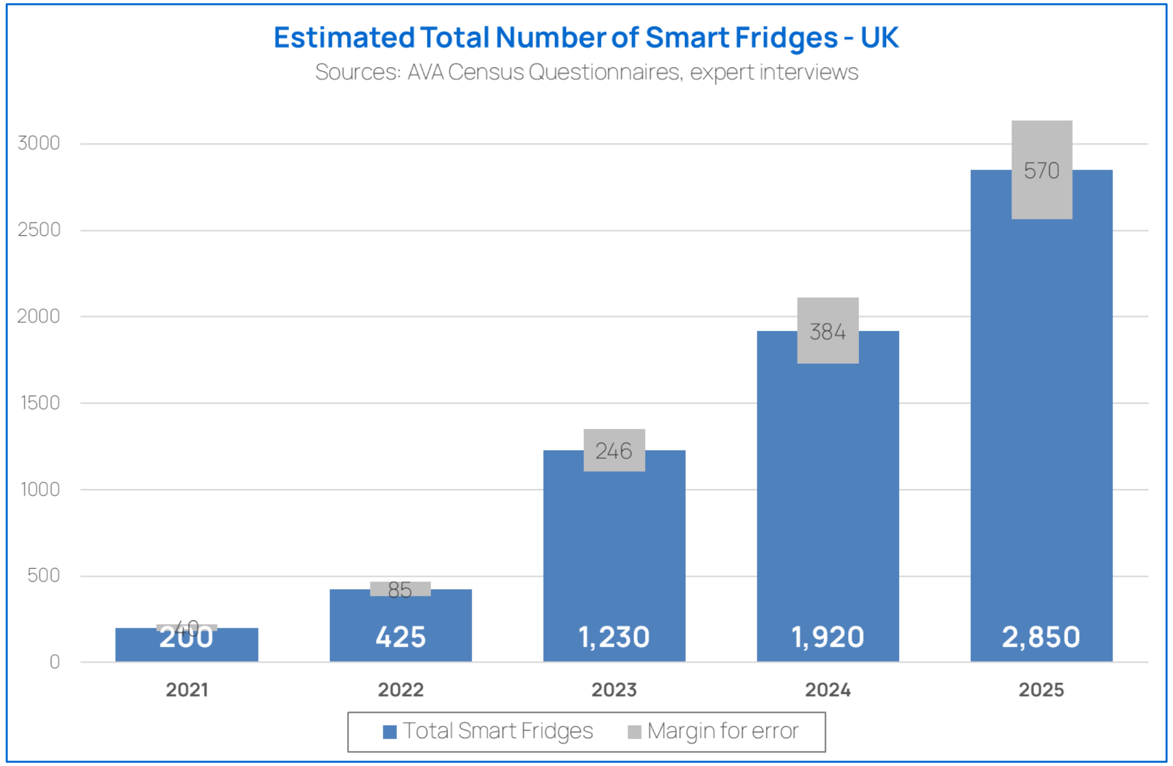
Micro-markets & Smart Fridges

Slowing growth in base of micro-markets.
Stand-alone Smart Fridges continuing to grow rapidly.

- **Micro-markets**
  - The base grew to around 785, up 8% vs 2024, which is a slow-down in growth compared to the last few years
  - The share of respondents with micro-markets decreased marginally vs 2024
  - It feels like the momentum is switching more to Smart Fridges & Freezers



- **Smart Fridges & Freezers** (excluding those within micro-markets)
  - The base grew to around 2,850, up by around 50% vs 2024
  - They offer a flexible solution for fresh food
  - As they're much closer to regular vending than micro-markets, more operators seem willing to try them.
  - Smart Freezers and Smart (Ambient) Cabinets increasing share.
  - Increased demand for fraud detection.



Sources: Census questionnaires February to April 2026, EVMMA data on new machine sales, AVA Census history, inputs from operators and suppliers, CCL analysis

APPENDICES

Appendices

- Appendix 1 – Information Sources & Methodology
- Appendix 2 – Definitions for traditional vending and OCS machine types
- Appendix 3 – Definitions for Newer Propositions
- Appendix 4 – Definitions for Industry Size
- Appendix 5 – Legal Information

Appendix 1
Information Sources and Methodology

- **Data Sources:**
  - Operator Members of the AVA: Census Questionnaires sent to all Operator Members. Returns received give a robust, statistically valid and representative sample: completed questionnaires from operators accounting for around 1/3 of the total machine base, and a good cross section of operators including several who had not provided before which is very encouraging.
    Many thanks as always to all our contributors.
  - European Vending Machine Manufacturers Association (EVMMA): details of the number of new machines, by type, sold into the UK market each year from 2000 up to and including 2025.
  - Interviews with UK Vending Industry Suppliers and Industry Experts.
- **Timing**
  - Operator members completed their Census Forms between February & April 2026, reporting on their businesses in 2025.
  - Interviews with Operators, Suppliers and Industry Experts were carried out between January and April 2026.
- **Industry Modelling Inputs:**
  - EVMMA data on new machines
  - Operator questionnaire data: share of machine placements that are new vs refurbished; average loss rates from the machine base; the split of multi-purpose spiral machines between dedicated Snack and Combi; average vend prices and average consumption by machine type and product category.
- **Accuracy and data rounding:**
  - The AVA believes the Census to be the most realistic of any available UK vending industry report. However, given the highly fragmented nature of the industry and the diversity of propositions on offer, it is not possible to be precise. The methodology is sound, and consistently and professionally applied, and therefore we are highly confident in the trends, and estimate the margin of error on the data itself to be +/- 10%.
  - The data on number of machines, number of vends and total revenue are all rounded to reflect the fact that there is a margin of error. In a few instances, this may result in the totals in the data tables appearing to be incorrect – however the underlying data is correct, and it is simply the result of rounding.
- **2025 Census produced by Colston Consultants (CCL) on behalf of the AVA**
  - This is the 12th year the Census has been produced by CCL.

Appendix 2
Key Definitions – Traditional Vending and OCS Machine Types

- **Free standing Hot Beverage machine**
  - Tall vending machine (typically 1830mm high) that stands on the floor.
  - Fully automatic, which means it dispenses the complete drink in the cup – all the consumer does is make the selection (and pay for the drink if required).
- **Table top automatic Hot Beverage machine**
  - Small vending machine that sits on the counter / table.
  - Fully automatic, which means it dispenses the complete drink in the cup – all the consumer does is make the selection (and pay for the drink if required).
- **Table top semi automatic Hot Beverage machine**
  - Small machine that sits on the counter / table.
  - Semi automatic because they do not contain or dispense cups. In addition, many semi automatics do not dispense sugar, and some do not dispense milk either. Therefore the consumer needs to place the cup, and may have to add milk and sugar after the drink has been dispensed.
- **Dedicated Cold Beverage machine**
  - Mainly free standing, but some table tops.
  - Sells only cold beverages in cans, bottles or cartons.
- **Dedicated Snack machine**
  - Mainly free standing, but some table tops.
  - Sells only Snacks – confectionery or savoury snacks or other shelf-stable snacks like flapjacks.
- **Dedicated Food machine**
  - Free standing, typically using a revolving drum
  - Designed to dispense short shelf-life products like sandwiches and salads.

Appendix 2
Key Definitions – Traditional Vending and OCS Machine Types

- **Combi machine**
  - Mainly free standing, but some table tops.
  - Set up to dispense a combination (hence Combi) of Cold beverages, Snacks and Food items.
  - Categorised as either Cold (chilled to ≤ 4˚C, with cut-out if temperature exceeds 5˚C), or Ambient / Chilled (either no chiller = Ambient), or Chilled with a chiller that can take the temperature down to ≥ 5˚C.
- **Smart Fridge / Freezer**
  - A locked fridge / freezer that is opened either using an app, bank card or mobile phone. It detects what product has been taken – using either RFID tags, weight sensors or cameras (or a combination of two or more technologies)– and then charges the consumer accordingly

Appendix 3
Key Definitions – Newer Propositions

Coffee-to-Go

Premium 'Coffee-to-Go' installations are found in both Public and Workplace sites. The machines have impactful branding, use large paper cups, are usually Bean-to-Cup, and often use fresh liquid milk for cappuccino and latte etc. The price is always set at a premium vs 'standard' vending offerings.

Micro-markets:

Micro-markets are small, automated convenience stores in workplaces and other closed locations like universities, apartment complexes, and hotels:

- Products are on open shelves, or chiller cabinets or fridges so consumers can select them as they would in a store
- Selected products are scanned by the consumer either at a central unattended till, or using a smartphone app
- Payment is taken either at the central till (usually cashless), or through the smartphone app
- Usually includes at least one hot beverage machine
- Minimum number of non hot beverage SKUs – say > 30
- May include a microwave to heat purchased food
- May include an area with tables and seating

Sources: Census questionnaires February to April 2026, EVMMA data on new machine sales, AVA Census history, inputs from operators and suppliers, CCL analysis

Appendix 4
Key Definitions – Industry Size

- **Machine base**
  - This is reported as an overall total, and by product category: Hot Beverage, Dedicated Cold Beverage, Dedicated Snack, Dedicated Food, and Combi.
  - For each category, the machine base is the total number of machines placed in the market that are actively dispensing products.
- **Consumption**
  - This is reported by machine category: Hot Beverage, Dedicated Cold Beverage, Dedicated Snack, Dedicated Food, and Combi.
  - For each machine category, consumption is the average number of products dispensed per machine per week.
    - Product = 1 cup of hot beverage, or 1 can / bottle / carton of cold beverage, or 1 snack, or 1 item of food.
  - For Combi machines, the total consumption is split into Cold Beverage, Snacks and Food.
- **Total number of vends**
  - This is reported as an overall total, and by product category: Hot Beverage, Cold Beverage, Snack, and Food.
  - For each category, the number of vends is the average consumption multiplied by the base of relevant machines.
    - Cold Beverages, Snacks and Food are sold through both dedicated and Combi machines. Therefore the total number of vends is calculated by adding the vends through the dedicated machines to the vends through Combi machines.
- **Vend price**
  - This is reported by product category: Hot Beverage, Cold Beverage, Snack, and Food.
  - For each product category, the vend price is the average price per product dispensed.
    - For pay vend, it is the price the consumer pays at the machine.
    - For free vend (hot beverage only), it is the invoice price the customer pays.
- **Product revenue**
  - This is reported as an overall total, and by product category: Hot Beverage, Cold Beverage, Snack, and Food.
  - For each category, the total product revenue is the total number of vends multiplied by the average price.
  - Any other revenue sources are not included – e.g. machine sales / rental revenue, or service revenue or management fees.

Appendix 5
Legal information

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AVA Census
Feedback and suggestions

- **Any suggestions for improvements to be made for next year?**

- **Any volunteers for data contributions next year?**

- **Any volunteers to provide case studies next year?**

- **Feedback welcome at any time to:**

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About Colston Consultants

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- Colston Consultants was founded in 2014, and is an independent strategy and insight consultancy specialising in the Vending industry.
- The principal consultant is Martin Colston, who has over 35 years' experience in Vending and the wider Away From Home Hot Beverage industry in the UK, USA, Canada, Japan, China, France and Germany.
- In addition to the AVA Census, Martin also produced the annual Market Reports for the European Vending & Coffee Service Association from 2016 to 2025, and has produced the first four editions of the Operator-Studie for the German Vending Association, the BDV.
- Martin was the Global Strategic Insight Director for Mars Drinks (now Lavazza Professional) for 10 years, responsible for all primary research globally, all competitor analysis and data acquisition, and then using the insights gained to develop robust growth strategies and support key business investment decisions.
- While at Mars Drinks, Martin was a member of both the Mars Incorporated Global Strategy Community and the Mars Incorporated Global Insight Community.
- Also, while at Mars Drinks, Martin was a regular data contributor to the both the annual AVA Census, the EVA market reports, and to the quarterly EVMMA machine sales tracker.