

# Automatic MERCHANDISER

Convenience services for vending, micro markets and workplace beverages



## The art of optimization

California-based C&S Vending blends cutting-edge technology with exceptional customer service.

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## ONLINE EXCLUSIVES

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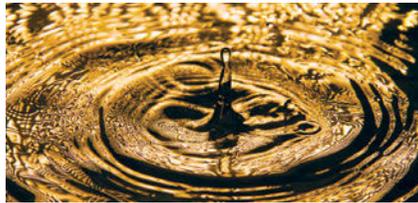


Bob Tullio

#### IS CONSOLIDATION A CAUSE FOR CONCERN?

If the landscape has suddenly changed in your market area, as an operator, there are certain steps you can take to strengthen your company's position.

[VendingMarketWatch.com/53060704](http://VendingMarketWatch.com/53060704)



#### Webinar | Turning Water into Gold

In Automatic Merchandiser's April 18th webinar, three fast-growing companies presented some unique avenues for opportunity – ideas for revenue growth that operators should consider.

[VendingMarketWatch.com/53058787](http://VendingMarketWatch.com/53058787)



#### Column | 3 tips for selling your vending and OCS company

Selling a business is a multistep process, requiring careful planning to maximize your potential sale. Mike Ferguson of VMAC Solutions offers three simple tips to help you navigate the process.

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#### Micro Market

## Aramark launches fully autonomous AI-powered Quick Eats Store in Scotland



Using Aramark's WorkXgo App, customers simply walk in and walk out for a quick, seamless and convenient checkout-free shopping experience. The store features overhead cameras and intelligent shelf sensors, which combine detection, visual cognition and secure payment integration.

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# A continued recovery



**Molly Rogers**  
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With the COVID-19 pandemic in the rear-view mirror, operators have found ways to restructure their operations to adapt to ever-changing market conditions and workplace environments.

## I HOPE EVERYONE IS ENJOYING SOME BEAUTIFUL WEATHER

and the beginning of summer. It was great seeing some familiar faces at the recent 2023 NAMA Show, and I know many of you came back from the show with new ideas, solutions and connections – there was a clear sense of optimism for the future of the convenience services industry.

In this issue of Automatic Merchandiser, we share some highlights from the event – from product unveils, to industry recognition, to the latest technology on display. We begin on page 10 with a recap of two NAMA educational sessions that discussed equipment and innovations for office coffee service. First, in “Understanding the functionality and purpose of future breakrooms,” panelists offered innovative thinking in product development, with sustainability and customization top of mind. Second, the “Innovation in single-serve coffee” session shared insights on what consumers are demanding for coffee offerings in the workplace – fresh, convenient and high quality – all in one package.

We’ve also featured some new technology in unattended retail that was showcased at NAMA’s Imagination Way. Read about equipment and innovations that continue to push the industry forward on page 34.

And, in our annual report, the State of the Industry for Vending and Micro Market, we take a deep dive into the industry’s overall growth in revenue for 2022. The past year showed a steady pace of recovery, representing almost 89% of 2019’s benchmark revenue high of \$22.2 billion, after falling 45% in 2020 when operators were faced with office closures and took their biggest hit. Embracing new tools that help meet customers’ demands as well as streamlining operations have contributed to the continued recovery for the vending and micro market industry. With the COVID-19 pandemic in the rear-view mirror, operators have found ways to restructure their operations to adapt to ever-changing market conditions and workplace environments.

A perfect example of rebuilding from the impact of the pandemic – this issue’s operation profile: C&S Vending. Located in Silicon Valley’s largest city, C&S Vending serves the tech industry with vending, micro market, office coffee and pantry service, and like most operators, took a big hit due to the office lockdowns in 2020. But, Andy Owen, general manager, says, “We’ve been dealing with the hybrid work model for almost three years at this point. We’re completely accustomed to that. Of course, it isn’t ideal if people don’t return to the office full-time, but we’re structured for it.” Read about how Andy and his team are using technology for both employees and its customers to optimize the operation, making it well-equipped for future growth.

Lastly, we are pleased to recognize the winners of Automatic Merchandiser’s Most Influential Women in Convenience Services Awards starting on page 24. Please join me in celebrating them for their achievements that are helping to shape the future of the industry, and thank you to everyone who submitted a nomination for a colleague deserving of this award.

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### NAMA announces strong 2023 NAMA Show turnout, sets date for 2024

[ ASSOCIATION ]



NAMA

#### THE NATIONAL AUTOMATIC MERCHANDISING

Association (NAMA) announced nearly 5,000 operators, suppliers and industry professionals, representing 35 countries, attended the NAMA Show 2023 at Atlanta's Georgia World Congress Center in May.

The show kicked off with the general session, which included a panel discussion on the association's next-level advocacy agenda, addressing two pivotal issues: The first was the acceptance of SNAP EBT (Supplemental Nutrition Assistance Program Electronic Benefit Transfer) in vending machines and micro markets. The second: elimination or reduction of state sales tax in vending machines and micro markets, achieving parity in relation to similar industries.

Imagination Way returned for its second year, and visitors explored hands-on exhibits replicating concepts and solutions for end consumers – showcasing everything from automated restaurants to robotic self-service retail technology. The show also offered over 30 education sessions across five tracks.

The NAMA Show 2024 will take place May 7-9, in Dallas, Texas, at the Kay Bailey Hutchison Convention Center.



#### Cantaloupe unveils new Seed Pick Easy at NAMA

Cantaloupe Inc. announced its newest product, Seed Pick Easy, a tablet-based warehouse picking system designed to deliver time and operational cost savings to operators of all sizes. It is a cloud-based plug-and-play solution that integrates with an operator's vending management software to generate digital pick lists, so pickers can pre-kit faster.

[VendingMarketWatch.com/53060502](https://VendingMarketWatch.com/53060502)

#### PayRange acquires Vagabond

PayRange Inc. acquired Vagabond, a mobile, cloud-based technology platform that offers real-time business intelligence for the convenience services industry. The acquisition will strengthen the PayRange mobile commerce platform by adding a vending management software solution, as well as an app-based micro market solution. The products complement the existing PayRange solutions and expand its offering to operators and consumers.

[VendingMarketWatch.com/53059741](https://VendingMarketWatch.com/53059741)

#### Nestlé appoints Stephanie Pullings Harts as executive VP



Magdi Batato, executive vice president and head of operations, will retire in early 2024 after a distinguished career of over 30 years

at Nestlé. Stephanie Pullings Hart, currently senior vice president of operations for Warby Parker, will return to Nestlé, effective July 1, as the deputy head of operations.

[VendingMarketWatch.com/53061516](https://VendingMarketWatch.com/53061516)



**Azkoyen receives award for its Vitro X1 coffee machine**

Azkoyen was recognized as a 2023 Silver Winner in the NY Product Design Awards for its Vitro X1 coffee machine in the Office Equipment category. The Vitro X1 is a modern, sleek espresso coffee machine ideal for medium-sized environments. It utilizes the latest MIA technology, which can produce drinks with fresh milk, such as velvety cappuccinos and latte macchiatos.

[VendingMarketWatch.com/53057949](https://VendingMarketWatch.com/53057949)

**Invenda Group AG partners with Burroughs**

The new integration grants Invenda Platform customers in North America seamless access to Burroughs' full-service offerings, including all levels of support ranging from onsite maintenance repairs to remote monitoring and triage services.

[VendingMarketWatch.com/53061778](https://VendingMarketWatch.com/53061778)

**Gimme announces new CEO**

Cory Hewett, co-founder and CEO of Gimme, is stepping down after eight years leading the company. Hewett will remain through June to ensure a seamless transition. During Hewett's tenure, Gimme experienced tremendous growth, launching award-winning products. Co-founder Evan Jarecki will take on the CEO role.

[VendingMarketWatch.com/53057152](https://VendingMarketWatch.com/53057152)

**Smart Soda partners with Compass Group**

Smart Soda Holdings Inc. announced a partnership with Compass Group North America to bring Smart Soda's JuLi wellness hydration system



to workplaces. The Compass partnership also provides real-time customer service and a national network of service technicians. The JuLi wellness hydration system features built-in IoT technology to deliver customizable healthy beverage options.

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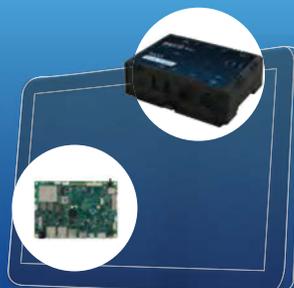
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*Industry experts weigh in on*

# OCS EQUIPMENT TRENDS

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## How operators meet customer demands for breakrooms and solutions that are being offered in office coffee service.

*By Bob Tullio, Contributing Editor*

**AT THE 2023 NAMA SHOW,** panelists in the educational sessions discussed new innovations in office coffee service equipment and solutions to drive people back to the office.

### **SESSION: UNDERSTANDING THE FUNCTIONALITY AND PURPOSE OF FUTURE BREAKROOMS**

As a global workplace expert for Jones Lang LaSalle, Kristine Cotton was clearly pleased to see the innovative

thinking offered by her co-panelists: Matt Fonte, CEO and founder of ColdSnap, Sean Gundy, co-founder and CEO of Bevi, and Paul Toscano, director, strategic accounts, Aramark/Joyride Coffee.

ColdSnap is a new technology that freezes single servings of ice creams, coffee lattes, smoothies, protein shakes and cocktails on demand using shelf-stable pods filled with premium liquid ingredients. No cleaning of the machine is required.

ColdSnap is planning to launch in late 2023.

Bevi's cold drink machine is a popular sustainable solution. Launched in 2015, Bevi now serves over 5,000 corporate clients and continues to innovate with new product selections.

The Joyride by Aramark program serves many notable locations across the country.

### **Seeking a commute-worthy office**

"We want to drive people back to the office with functional locations, desirable locations and variable locations," said Kristine Cotton, global work experience lead at Jones Lang LaSalle. "The built space has

to function in multiple ways now.” Cotton added that ColdSnap and Bevi are offering exactly what her company wants to see in breakrooms, both in offices and manufacturing facilities, where the challenge is employee retention and recruitment.

**Looking for the wow factor**

“The customer and the employees are looking for high-quality products, functional equipment that needs to be working consistently and they are looking for something that is ‘wow,’ something that is cool and something they want to be around,” Cotton explained.

“The workspace needs to accomplish different things at different times of the day,” she added. “Vendors need to match the outcomes, which can differ as the day goes on – as a breakfast space, as a social connection space and a networking space, as a happy hour space.”

Matt Fonte of ColdSnap noted that his company recently put the ColdSnap machine on a mobile cart, pointing out the versatility of the equipment. This allowed the machine to serve different areas at different times of the day, such as a breakroom in the morning and a cafe or a breakout session area in the afternoon. “We can make frozen coffees in the morning, protein shakes and smoothies for lunch, ice creams in the afternoon and even cocktails in the evening; the machine is multi-purpose and can be used all day,” Fonte said.

**Data is critical**

Cotton said that data has become increasingly important in determining the performance of breakroom areas. “We need to capture data relating to usage, because we are making decisions based on how many people are visiting these spaces, plus we need to evaluate the value of the



ColdSnap booth at the 2023 NAMA Show

equipment that we are bringing to the office. Is it helping with recruitment of top talent? Is it helping them retain employees?” she asked. Cotton added that when it is time to cut budgets, data that validates equipment usage can help

keep a piece of equipment from being removed from the location.

**Away from home must be better**

Paul Toscano with Aramark/Joyride Coffee, said that employees, working at home during the pandemic, got to make

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“We want to market the sustainability benefits, but we don’t want to shame people into using our product. We want them to use our product because they prefer it.”

– Sean Gundy, co-founder and CEO, Bevi

all their coffee choices for themselves, often making high-end selections. “Now, they come back to the office and might not have the same experience that they enjoyed at home,” he said, which adds value to the strength of Bevi and ColdSnap, since it is not something they can enjoy at home.

**The importance of sustainability**

“Sustainability must be top of mind,” Cotton said. “A lot of our offices

are going plastic-free. So many of them have already eliminated plastic bottles. You’ll see the bottlers starting to come out with different types of packaging. Our huge focus right now is meeting our company sustainability goals, including reduction of plastics. And we will be driving that hard in the next year.”

“We want to market the sustainability benefits,” said Sean Gundy of Bevi, “but we don’t want to



Sean Gundy, co-founder and CEO of Bevi, at the 2023 NAMA Show



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shame people into using our product. We want them to use our product because they prefer it.”

**Personalization**

Gundy spoke about the increasing interest of customers to enjoy their own personalized beverages. He said that customization of Bevi selections, a popular feature, came about rather naturally, because end users have different preferences, which can easily be accommodated by a point-of-use machine like Bevi, as opposed to a bottling plant that is miles away.

**SESSION: INNOVATION IN SINGLE-SERVE COFFEE**

In this session, panelists discussed single-serve coffee innovations in the workplace.

“Single-serve coffee is the largest part of the retail category, and it is the fastest growing,” said Marie Franklin, Specialty Coffee Strategist. “It has overtaken whole bean and ground coffee. Interest in single-serve coffee has paved the way for innovators.”

**Single serve in the workplace**

Maria Cleaveland, North American sales director for Urnex Brands, added: “Single serve has overtaken drip in the workplace. Less and less offices have traditional batch brewing, which is trending ahead of retail. There is more variety in the office in terms of brewing methods. Overall consumption hasn’t changed, people are still drinking plenty of coffee, but they want bean-to-cup, they want instant, they want espresso, they want options.”



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With the interest in multiple options, bean-to-cup is expanding to multiple hoppers, multiple soluble products – even more drink options, noted Franklin.

**What employers want**

Mickey Du, CEO of Brewbird, shared insights on what his clients are asking for. “When COVID happened, everyone started working from home, and coffee got thrown for a loop. As they tried to reopen safely, they found that they could not reopen to the same workplace reality that existed before COVID,” said Du. “The employees, the coffee drinkers, were now demanding convenience, sustainability and quality in one package. That’s what we have seen strongly in the last six to nine months.”

The panel also agreed that freshness, locally roasted coffee and selection have all emerged as employer priorities.

**The future of batch brewing – drip coffee**

The consensus of the panel was that drip coffee will not die, that technology will elevate it. For example, bean-to-batch coffee is coming, giving end users the option to brew by the cup or by the pot, using whole bean.

**The quality gap**

According to Du, quality is a big issue – there is a gap in coffee drinkers and consumer expectations. “We are

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seeing this gap becoming increasingly larger, which is an opportunity for operators. Single serve is the format of choice. It is a one-click coffee experience that everyone loves.”

### Sustainability

The entire panel agreed that sustainability was a major issue when it comes to single-serve coffee. “Single serve is inherently wasteful,” said Franklin. “We are trying to solve that, but we are competing with ourselves a bit. Consumers want single serve, and we need to offer it, so the sustainability part is challenging.”

Anne Djerai, CEO, Metropolis Coffee Company, added, “I agree with the wastefulness of single serve. It is a problem that is not going away, but we need to innovate ourselves out of it.”

### Why evolve?

One relevant aspect of the topic was stated in the session summary – Why should you evolve your single-serve offerings? The reasons provided were:

- Differentiation: Your clients expect you to be coffee experts and bring innovative solutions.
- Deepen engagement: Coffee has always been a unifier and contributes to productivity and collaboration.
- Revenue opportunities: More craft options onsite mean fewer dollars spent on the outside.
- For roasters: Many trends are built in the modern workplace. That environment can be a great entry to your brand.
- Brand alignment: No matter where you are in this chain, you deepen

commitment to your brand by partnering with companies who match your values.

Check out Automatic Merchandiser’s Vending & OCS Nation podcast, hosted by Bob Tullio, for more on the recent NAMA educational sessions. ■

### About the author



VendingMarketWatch.com contributing editor and industry consultant Bob Tullio is a content specialist who advises operators in the convenience services industry on how to build a successful business from the ground up and advises suppliers on how to successfully connect with operators. Tullio’s YouTube channel, b2b Perspective, is designed to “elevate your business in two minutes.” Visit [www.tullio2b.com](http://www.tullio2b.com) or email [bob@tullio2b.com](mailto:bob@tullio2b.com).

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# 2022

## A year of continued recovery

The vending and micro market industry jumps 12% in total revenue, representing almost 89% of 2019's benchmark high.

By Molly Rogers, Managing Editor

CHART 1A: Industry revenue in billions



CHART 1B: Micro market 2-year review

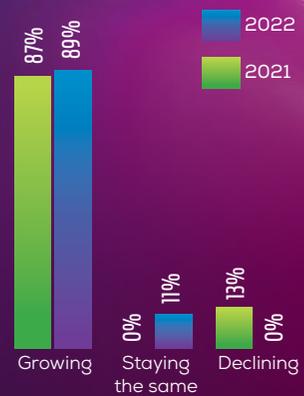


CHART 2: Operator sales

SIZE	REVENUE RANGE	% OF 2022 OPERATORS	PROJECTED 2022 SALES	% OF 2022 SALES
Small	under \$1M	57%	1.350B	6.20%
Medium	\$1M - \$4.9M	31%	4.700B	21.70%
Large	\$5M - \$9.9M	6%	4.661B	21.50%
Extra large	\$10M +	6%	10.989B	50.60%

**50.6%**  
of the industry's revenue  
is made up of 6%  
of the businesses.

As the convenience services industry continues to make a comeback — with workers returning to the office and a boost in workplace refreshments — vending and micro market sales also climbed in 2022 with a 12% increase over the previous year's revenue.

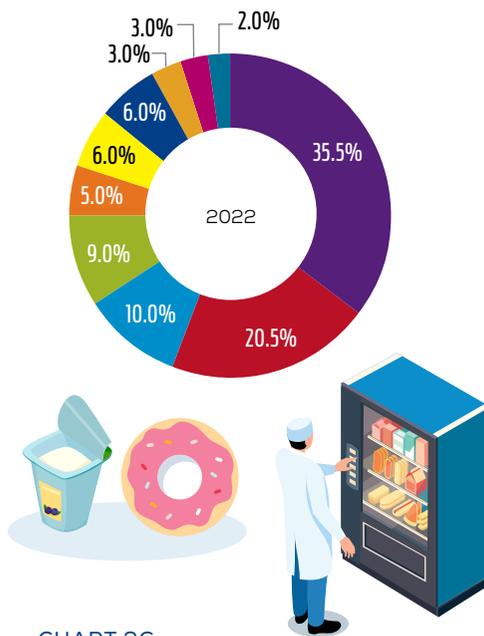
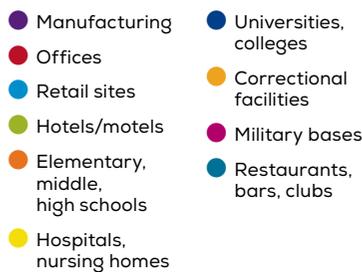
Sales in the unattended retail channel totaled \$21.7 billion in 2022, compared with \$19.4 billion in 2021, which was a year of rapid recovery since 2020, the first year of the COVID-19 pandemic when vending and workplace refreshments took its biggest hit due to months-long lockdowns.

While the vending industry's revenue was expected to return to pre-pandemic levels, 2022 shows a steady pace of recovery, representing almost 89% of 2019's benchmark revenue high of \$22.2 billion, after falling 45% in 2020.

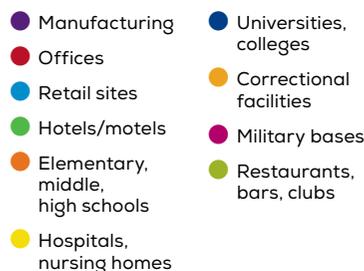
For 2022, sales remained \$2.5 billion below 2019's pre-COVID mark. But vending and micro market operators have found ways to better adapt to the challenges of rising inflation and supply chain disruptions, as well as the trend of hybrid work — a blended, post-pandemic model of in-office and remote workers. Operators looked for solutions and partnerships with business owners with the goal of attracting employees and giving them reasons to want to come into the office.

Pairing new ideas to meet customer demands with continued price increases offered some relief, but operators still felt the impact of labor shortages and lingering supply chain problems in the vending and micro market segment — continuing to struggle to procure common confections and beverage products that were once abundant.

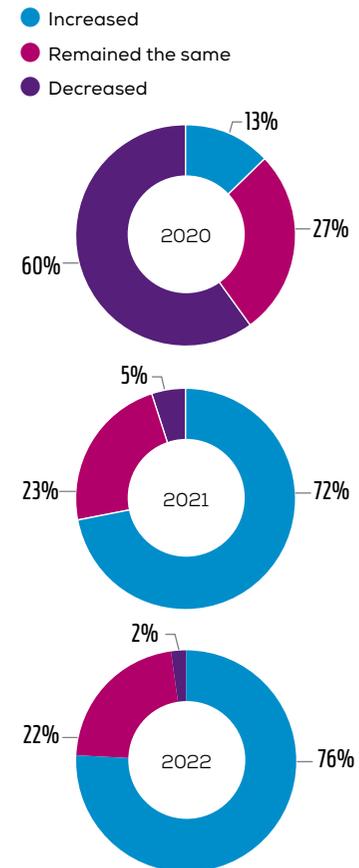
**CHART 3A:**  
**Machines by location**



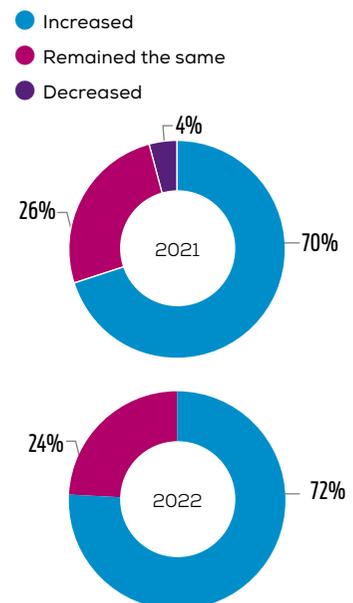
**CHART 3C:**  
**Micro markets by location**



**CHART 3B:**  
**Number of locations served**

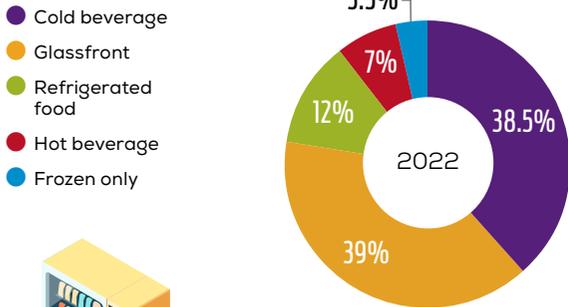


**CHART 3D:**  
**Number of micro market locations served**



Images: wacomika/Shutterstock, Macrovector/Vector illustration design studio/Shutterstock, Antonov Maxim/Shutterstock, Grand Reignhart/Shutterstock

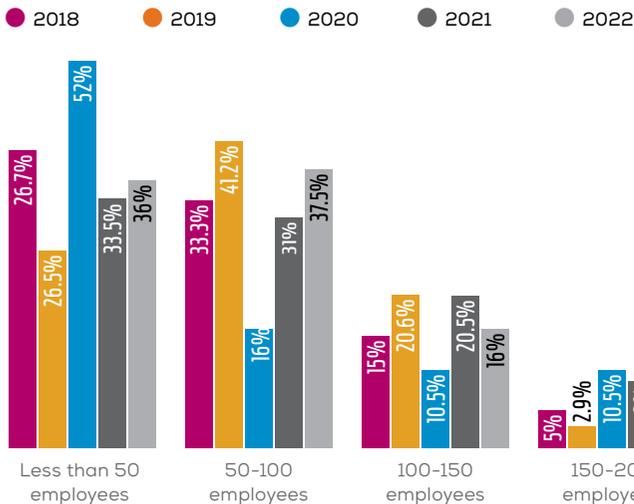
**CHART 4A:**  
Percentage of each type that makes up placed vending machines



**CHART 4B:**  
Active micro market locations



**CHART 4C:**  
Smallest location where a micro market is currently placed



**CHART 4D:**  
Average shrinkage rate in micro markets, as a %

	2019	2020	2021	2022
0%	3.4%	5.2%	0.5%	2.0%
1%	6.9	0.5	6.5	7.0
2%	13.8	5.3	8.5	8.0
3%	13.8	37.0	15.0	22.0
4%	10.3	21.0	31.0	30.0
5%	13.8	10.4	15.0	13.0
6%	13.8	5.2	15.0	11.0
>7%	20.7	10.5	7.5	6.0
I don't know	3.5	4.9	1.0	1.0

**CHART 4E:**  
Most common loss prevention techniques, as a %

	2020	2021	2022
Regular market inventory	63%	69%	67%
Hired loss prevention employee	5	23	16
Working with a loss-prevention consultant	16	7	11
Screens showing canceled orders	58	84	75
Signage about theft in micro market area	69	62	60
Camera feed displayed above kiosk	63	61	55

**Estimated total vending machines**

**2,103,473**  
in 2017

**1,740,604**  
in 2020

**2,084,500**  
in 2018

**1,971,600**  
in 2021

**2,175,756**  
in 2019

**2,059,612**  
in 2022

The number of micro markets placed in locations with 100 or fewer employees increased in 2022.

# Are ice machines a headache? Easy Ice has the solution

As ice machines become increasingly popular in the workplace, Easy Ice offers an attractive solution for OCS and vending operators.

*By Bob Tullio, contributing editor*

If Easy Ice had been available when I was an OCS operator, we would have been all over it. Ice machines can be bad news for operators on many levels. Even with a \$250 monthly rental, ice machines can easily make an operator wait 18 months to two years just to break even, especially when the cost of installation and service is factored in.

## A simple model

If the need for ice machines is seen by an operator as bad news, Easy Ice offers a solution that is certainly good news. "Our model is simple, and operators love it. We buy the ice machines that an operator needs, and we lease them back to the operator," said Ryan Kelly, chief marketing officer at Easy Ice.

At that point, operators can do one of several things:

1. Either pass the cost on to the customer.
2. Absorb the cost, if they need to do that for some reason – maybe as part of a very large deal.
3. Charge the customer a monthly rental that is higher than the monthly lease cost – an increasingly popular option that results in immediate positive cash flow.

There is another option that is gaining interest. "Some operators prefer to let us step in and deal directly with their client. It simplifies their life and allows them to focus

on their business, without having to worry about ice machines," he said.

## Two enticing features

As Kelly points out, the Easy Ice program allows operators to preserve capital. While that is an attractive feature, there is another part of the program that may be even more enticing to operators. "We take care of the service – from site surveys to installation (in most cases) to any service calls. We will even replace the machine if it goes down and are prepared to step in and provide bags of ice to the client to hold them over," Kelly said. "For the operator, the biggest and costliest headache – the service component – is completely covered."

## Increasing demand

The increasing demand for ice machines can put financial pressure on operators of all sizes, but Kelly feels that Easy Ice can level the playing field for operators. "When you are working with Easy Ice, a smaller operator doesn't need to flinch when they are told that getting that new big account requires multiple ice machines," Kelly said. "In many ways, our involvement levels the playing field for an operator who is trying to compete with the industry's largest companies."

## The service challenge

While ice machines are an asset and certainly do offer a return on investment – a slow return, but a

return nonetheless – operators have good reason to shy away from trying to navigate the ice machine business on their own. In addition to the necessary capital outlay, the current labor market has made it difficult enough to find qualified vending and OCS technicians; finding one with ice machine experience is a definite challenge.

"We have 35,000 machines in operation, 20 branches, and of those 20 branches, we have five of them with refurbishing facilities," said Kelly. "We have been at this for 14 years; we serve the entire country, and we have numerous third-party relationships with service providers to strengthen our ability to serve our customers. We can service and replace machines quickly and easily."

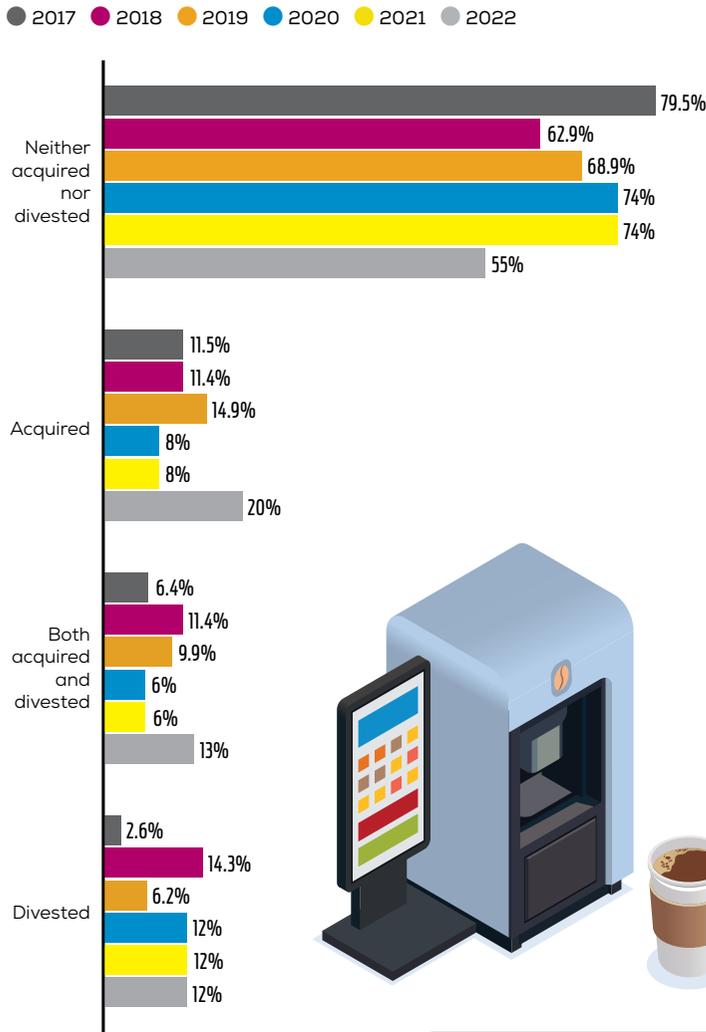
## The NAMA Show - A real eye-opener

Kelly said the 2023 NAMA Show in Atlanta was a huge success for Easy Ice. "We had an opportunity to introduce the concept to operators – from both the vending and OCS side. It was well-received to say the least," said Kelly. "Easy Ice has generated tremendous operator interest with our new buyback program, which involves buying out an operator's existing ice machines, allowing them to leave the ice machine portion of the business to us. It certainly has our phones ringing since we introduced the opportunity to operators in Atlanta."

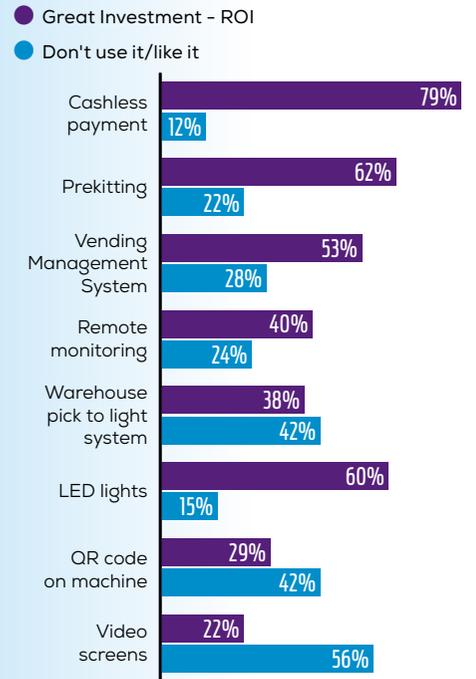
At the convention, Kelly and his team found out something that they knew already: operators would love to get out of the ice business for two reasons: the equipment cost and the service expenses. "The fact that we can eliminate both of those issues and allow operators to profit from day one – it was a real eye-opener for them," he said.

**To learn more about Easy Ice, contact Bruce Trecek, national affiliate program director, at [btrecek@easyice.com](mailto:btrecek@easyice.com) or 913-915-6162.**

**CHART 5A:**  
**Acquired or divested business**



**CHART 6A: Technology rankings, averaged**



**50%**

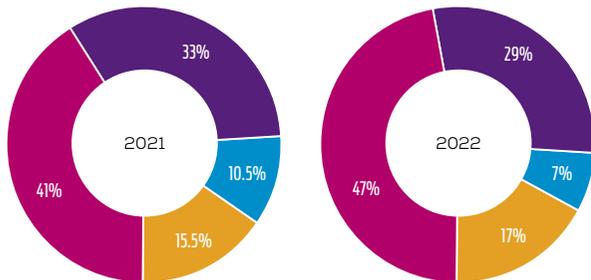
**of survey participants said 90%-100% of their machines were equipped to accept cashless payments in 2022.**

**6% of survey participants said they had no cashless-enabled machines in 2022.**



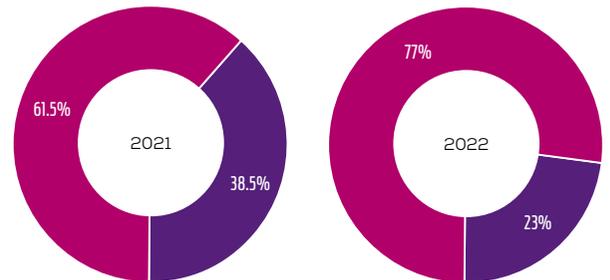
**CHART 6B:**  
**Vending data collection trends**

- Telemeter or cashless device remotely/using the cloud
- Manual process (such as paper and pencil) on location
- Handheld device on location
- Smartphone or tablet (Apple or Android) on location

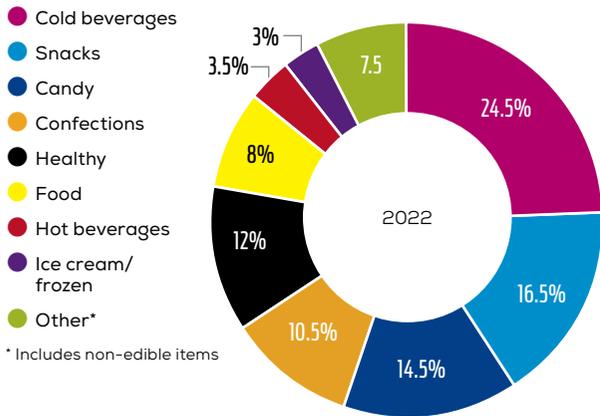


**CHART 6C:**  
**Vending management systems**

- Use a VMS
- Don't use a VMS



**CHART 7A:**  
**Vended share of sales by product category**



However, 2022's low unemployment rate in the U.S. signals room for at-work employee population growth in the coming years.

## PRODUCT CATEGORIES

Because vending and micro market operators provide reliable services to workplaces, product categories showed another year of improvements in 2022.

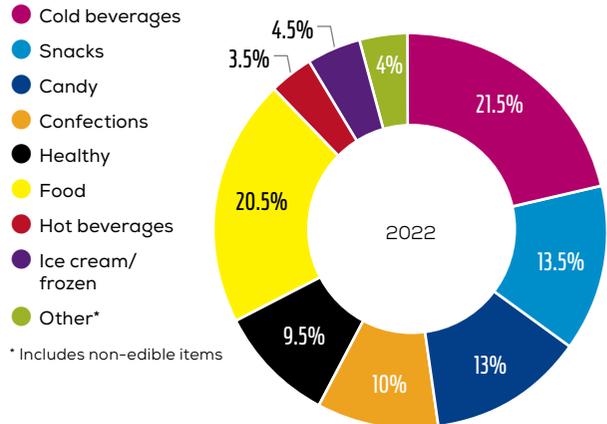
Combined vending machine and micro market revenue gains were:

- Healthy items (including plant-based) up 40%.
- Food (sandwiches, salads, entrées) up 35%.
- Snacks (salted, bars, mixes, etc.) up 27%.
- Packaged cold drinks up 15%.
- Candy (chocolate and non-chocolate) up 14%.
- Confections (pastries, cookies, etc.) up 14%.
- Ice cream/frozen items up 25%.
- Hot drinks (vended coffee, tea, cocoa, etc.) up 9%.
- Miscellaneous (other) items up 7%.

Packaged cold beverages continued to hold the highest rank among the convenience product categories last year, generating 23% of revenue, or \$4.1 billion.

Dynamic categories including packaged snacks, confections and candy jointly constituted the largest market share of convenience service. In 2022, items in these categories led the way in dollar volume, representing

**CHART 7B:**  
**Micro market share of sales by product category**



**CHART 7C:**  
**Share of sales by service category, combined services**

	2020	2021	2022
Vending	49.7%	48.0%	59.0%
Micro Markets	14.6	18.5	20.0
OCS	7.0	11.0	9.1
Water service	2.5	2.5	2.0
Other	8.5	6.5	1.3
Pantry service	3.1	4.5	2.0
Bulk vending	3.1	2.5	0.4
Manual foodservice	3.1	1.5	3.2
Music	2.5	1.0	1.0
Games	2.9	1.0	1.1
Janitorial	3.0	3.0	0.9
Supplies			

41.5% of all sales through vending machines and 36.5% of all sales in micro markets, or \$5.5 billion and \$1.5 billion, respectively.

For the healthy product category including plant-based products, sales in the combined vended and micro market segment increased from \$1.8 billion to \$2 billion.

Ice cream and frozen products also saw an increase in 2022, from \$0.3 billion to \$0.6 billion in revenue for combined vended and micro market segments.

## FROM VENDING TO MICRO MARKETS

Last year, U.S. operators had an estimated 2.05 million vending machines on location, an increase of 4.5% from 2021. Operators shared that some of their vending locations were converted to micro markets during 2022 due to more office re-openings. This shift can be seen in the growth of estimated active micro market locations in 2022 to 30,385, up 18% compared with 25,750 installed markets the prior year.

CHART 8:

Projected sales by category, in billions

VENDING PRODUCTS	2022	MICRO MARKET PRODUCTS	2022	SERVICES	2022	% CHANGE
Vended ice cream/frozen	\$0.4 (B)	Micro market ice cream/frozen	\$0.1 (B)	Vending	\$13.15 (B)	7.79%
Vended food	1.1	Micro market food	0.7	Micro markets	4.10	24.24
Vended candy	1.9	Micro market candy	0.5	OCS	1.80	20.00
Vended hot beverages	0.5	Micro market hot beverages	0.2	Water service	0.45	12.50
Vended healthy	1.6	Micro market healthy	0.4	Other	0.30	0.00
Vended confections	1.4	Micro market confections	0.4	Pantry service	0.45	12.50
Vended snacks	2.2	Micro market snacks	0.6	Bulk vending	0.09	-10.00
Vended cold beverages	3.2	Micro market cold beverages	0.9	Manual food-service	0.70	0.00
Vended other	0.9	Micro market other	0.2	Music	0.20	0.00
				Games	0.25	25.00
				Janitorial supplies	0.20	0.00

Methodology

Data in Automatic Merchandiser’s State of the Industry report are compiled from a survey sent to operators in the spring. It collects responses from vending and micro market providers, as well as snack and soda operations. The State of the Industry report looks at performance results in major product categories.

Manufacturing locations increased 7.5% from the previous year, and office locations increased 4.5%. Micro market locations at hotel/motels also jumped in 2022. Manufacturing and office locations combined continue to represent more than half of the convenience services demographic.

A shift to smaller micro markets was also evident in 2022, with an increase in the number of micro markets placed in locations with 100 or fewer employees.

OPERATION SNAPSHOT

Most of this year’s survey participants defined their businesses as full-line operations providing vending machines, micro markets and office coffee service. About 5% were traditional full-line vending operations without micro markets, while about 8% operate micro markets only. About 11% said they were



bottlers. Most of this year’s survey participants (74%) said they operated between one and 10 routes.

Almost half of all operators were involved in acquiring or divesting routes or parts of their operation. And most vendors said their cold drink machines, ranging from between 5% and 100%, were supplied by a bottler.

About 74% of operators said the number of combined vending and micro market locations they served in 2022 increased.

SOLUTIONS IN TECHNOLOGY

Nearly 80% of operators are embracing technology for vending and micro markets. Almost 80% said cashless payment devices are a great investment; 62% and 53% said prekitting and vending management systems, respectively, said they are also great investments. The number of operators who use a VMS increased from 61.5% last year to 77% in 2022. More operators are also using solutions for remote data collection (47%).



Operators said they were able to streamline their business better with the use of technology, contributing to the growth of their 2022 sales.

Looking beyond the pandemic, vending and micro market operators have found ways to restructure their operations to adapt to ever-changing market conditions and workplace environments and will continue to do so. Embracing new tools that help meet their customers’ demands, streamline operations and set themselves apart from the competition by bringing more value all contribute to the continued recovery for the convenience services industry. ■



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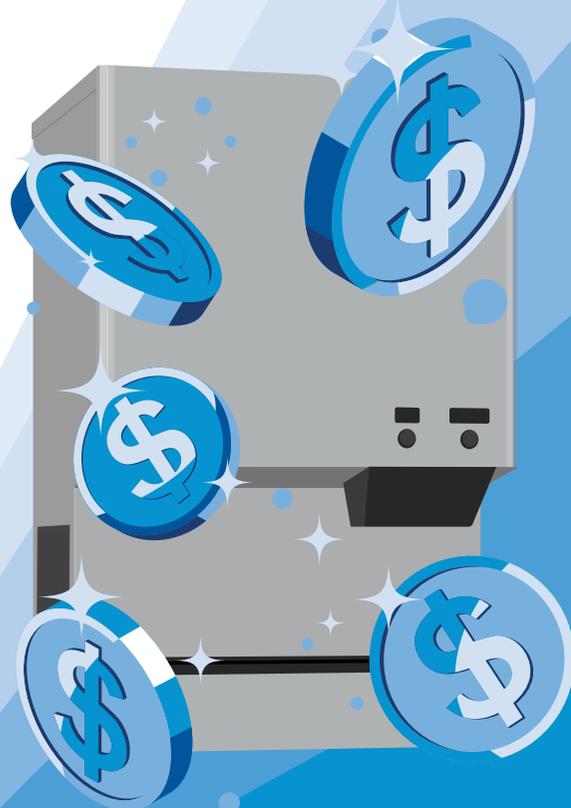
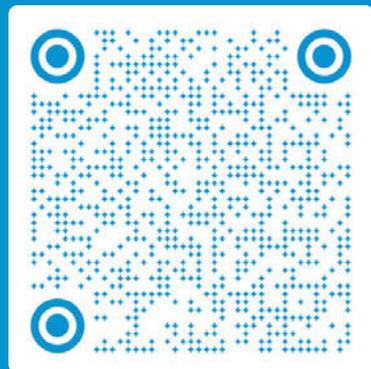
# Ice machines are a problem. Easy Ice has the solution.

With our **ice machine buyback program**, vending companies can make money providing their Ice the Easy Way.<sup>SM</sup>

If you want out of the ice machine game, **now's your chance.**

[easyice.com](http://easyice.com)

Start Here:



*The 2023  
Most  
Influential  
Women  
in Convenience  
Services Awards*

Automatic Merchandiser recognizes the outstanding women who are making a difference in the vending, micro market and office coffee service industry.

*By Molly Rogers, Managing Editor*

*A*utomatic Merchandiser is proud to present the 2023 Most Influential Women in Convenience Services Awards. We recognize these individuals who have made a positive impact on the convenience services industry or their organization. This award is a celebration of their achievements and spotlights influential women who are shaping the future of the industry. Congratulations to the following 2023 award winners!

## CAROLYN BARBARITE

### Javamelts

Carolyn Barbarite is the creator and president of Javamelts Flavored Sugar, a certified women-owned business. As a disruptive innovator, she introduced four-time Best Product Award-winning Javamelts Flavored Sugar (two awards from CTW NAMA Show in 2019 and 2021) into the marketplace for OCS and vending. Barbarite says her goals are to inspire, motivate and encourage her three daughters and others to follow their dreams. Sustainability is a priority, along with creating jobs, mentoring and educating those coming up behind her, attending charity events, making contributions for those in need, and using only natural and clean ingredients and recyclable packaging. Javamelts Flavored Sugar is made with pure cane sugar and natural flavor, is vegan, non-GMO, kosher, gluten-free, and offered in Flavored Sugar Packets as well as 1.5-lb granulated resealable pouch bags for coffee, tea, protein shakes, yogurt, oatmeal, baking, artisan cocktails and more.



## KIMBERLY GRAVES

### Evergreen Refreshments

Kimberly Graves started as an administrative assistant but quickly moved up when her managers saw her passion (maybe borderline obsession, she says) for saving money – when she asked for her first time off for the Black Friday holiday. Graves loves saving money and making people happy at the same time, so her job allows her to do just that. She is spearheading the company's commitment to be a greener company. She has been working on increasing healthy, affordable options in its markets and vending machines and working with more local vendors to reduce transportation costs and support local businesses. Outside of work, Graves runs marathons to honor the service and sacrifice of fallen military heroes.



## ANN CROSBY

### McKee Foods Corporation

Ann Crosby has worked her way up the ranks at McKee Foods Corporation. She was pleased to join the Little Debbie Vending Team as a regional sales executive for the Southeast region of the United States. Crosby has a passion for the vending industry and offering top-selling products that fill a great need for vending operators. She works closely with a team of vend brokers to provide great service to their customers.

## JENNIFER FOX

### Fox Vending

For the last 23 years, Jennifer Fox has managed a wide variety of responsibilities ranging from operations to sales and customer service. In this time, she has grown Fox Vending's customer base, streamlined routes, reduced overhead and increased the bottom-line. The accomplishment she is most proud of came in 2021 when she launched Dragonolia in honor of her late brother Justin, who died from a heroin overdose in December 2018. Dragonolia is a community of people sharing their stories of recovery to show the world that there can be beauty in the darkness of addiction. One dollar from every bag of Dragonolia coffee sold goes to Herren Project, a national nonprofit organization providing free resources and support for the treatment, recovery and prevention of substance use disorder.



## CAROLINE HOLDEN

### All Star Services Inc.

Caroline Holden, a third-generation member of All Star Services Inc., has spent her life in the convenience services industry. Since graduating with a Business Administration degree from Western Michigan University in 2009, she has actively contributed to her family's business. Starting as a member of the accounting team, she later shifted her focus to customer service and sales within the office coffee and specialty services department, where she now serves as the director. In addition, Holden manages All Star's product portfolio and supplier partnerships, constantly seeking to enhance operational efficiency and elevate customer experiences. With her extensive industry expertise, unwavering commitment to excellence and strong leadership skills, Holden ensures that All Star Services remains a trusted provider of breakroom solutions, always adapting to meet the changing demands of its customers.



## MOLLIE KRUPP

### 365 Retail Markets

With six years of experience at the company, Mollie Krupp is an integral member of 365 Retail Markets' executive team. She is a dynamic, accomplished leader who serves as the vice president of people at 365 Retail Markets, where she oversees human resources, hiring, careers and M&A people integration. Her ability to build strong relationships and foster a positive workplace culture has helped create a thriving, productive environment at 365 Retail Markets. Known for her engaging and approachable demeanor, Krupp has earned a reputation as a beloved and respected leader who inspires her team to achieve their best. She has built teams, programs and structures to ensure that the right people are hired, retained and promoted to maintain 365's growth objectives.





**Automatic**  
MERCHANDISER

### **PAM MACKAY**

#### **365 Retail Markets**

Pam MacKay has been an integral part of the sales team at 365 Retail Markets since she joined in 2018. She began managing and growing key relationships with customers who have since become some of the company's strongest partners. MacKay was promoted and tasked with building the account services department. Under her direction, that team became trusted and respected product and sales consultants to 365's large customer base. Throughout the company's fast growth with new acquisitions and product innovations, MacKay has armed her team with the knowledge and training necessary to provide effective solutions to meet both the company and the customers' business objectives. With a calm demeanor, she is committed to providing excellent and responsive communication, and customers feel supported. She is an astounding female leader and role model in the convenience services industry, evidenced by how she supports and encourages the contributions of the women on her team and the entire company.



### **LISA MATTIAS**

#### **Burdette Beckmann Inc. (BBI)**

Lisa Mattias joined BBI in 2008 through the Pacific Brokerage acquisition. Following her father's steps, she has worked in the convenience service industry for over 30 years, where she discovered her love for working with customers, distributors and manufacturers as a broker. She leads BBI's unattended retail sales team in the West. Mattias understands the impact of women's contributions driving the confectionery industry's growth, which is why she is a member of NAMA's Women in the Industry group, advocating for the empowerment of women professionals. In 2020, NAMA recognized her contributions by featuring her in InTouch Magazine's spring edition. Additionally, Mattias was awarded Supplier of the Year from the California Automatic Vendors Council and serves on the executive board further demonstrating her commitment to the industry's advancement. She is proud to work for a company that constantly recognizes and promotes its employees for their hard work and commitment.



### **KARALYNN MCDERMOTT**

#### **Eversys**

A pioneer in the coffee gear space, Karalynn McDermott is the vice president of business development at Eversys. She started her career in marketing and sales in coffee equipment manufacturing. McDermott has been a noteworthy leader in the coffee equipment space. She has worked in developing new technologies and can be credited with contributions in Pulse Brewing, IoT capabilities, thermal holding systems and brewing equipment programming to achieve excellent coffee bloom. Driven by a mission for innovation and entrepreneurship, McDermott is best known for inspiring and supporting operators and roasters on new coffee gear technology to aid the progression of their businesses. She has been honored with Specialty Coffee Association's Outstanding Contribution to the Industry Award, and Remote Equipment Management Gold Team Award from Connected World Magazine. She serves on the board of directors for the National Automatic Merchandising Association.



### **KIM MIROS**

#### **DAC Total Refreshments**

Kim Miros is new to the convenience services industry. Her first career was an educator, teaching elementary and high school for 18 years. She resigned from teaching in 2017 to take on a different career path as an entrepreneur. Miros purchased Drop A Coin Vending and has grown the business from two routes to five routes and from having only vending machines with no VMS to vending, micro markets and office coffee. With her company's growth, she changed the branding and name to DAC Total Refreshments. Miros has also been strongly involved in her community for 38 years, on several educational boards, and has been involved in The Salvation Army and Women's Pregnancy Center. Today, she continues to be involved with the local high schools by volunteering her teaching talents and donating to school programs. Miros is involved in NAMA and attends the Fly-In and other events. She enjoys connecting with other operators and mentoring new ones in the industry.



### **KAREN NATION**

#### **McKee Foods Corporation**

Karen Nation has played an integral role in making Little Debbie Vending a successful brand. Over the past few years, Nation has worked diligently with key personnel in the manufacturing facilities to ensure that Little Debbie daily products had a high fulfillment rate. She also handles daily customer service for operators, distributors and brokers. Her dedication to the brand, her customers and coworkers is unmatched. She works tirelessly to ensure orders are filled accurately and delivered on time, the regional sales team has everything they need to be able to sell efficiently, and customers are well taken care of.

# The Most Influential Women



**Mollie Krupp**  
Vice President of People-365 Retail Markets

Mollie Krupp oversees all aspects of Human Resources, hiring, careers and merger and acquisition staff integration. Her ability to build strong relationships and foster a positive workplace culture has helped create a thriving and productive environment at 365 Retail Markets.



**Pam MacKay**  
Director of Account Services – 365 Retail Markets

Since 2018, Pam MacKay has cultivated long standing partnerships between 365 Retail Markets and its customers, while also building the account services department. She has provided her entire department with the training necessary to provide effective solutions to meet company as well as customer objectives.



**Jenny Ortiz**  
Director of Operations & Accounting – Parlevel

Jenny Ortiz is the Director of Operations and Accounting at Parlevel Systems, an unattended retail solutions provider within 365 Retail Markets' family of companies. For the past seven years, Jenny has led the Accounting, Logistics, Administration, and HR teams and she continues to manage transformative projects across the company.

## Thank You!

365 Retail Markets would like to congratulate Mollie, Pam and Jenny on earning esteemed recognition in convenience services. It is not just our products and services that position us to be a premier provider of unattended retail solutions, but also the significant talent, knowledge and passion of team members like them. 365's industry standing would not be possible without the extraordinary efforts of each one of these remarkable women. We are proud to work alongside you, daily. Thank you for all that you do.





## JENNY ORTIZ

### 365 Retail Markets

Jenny Ortiz is the director of operations and accounting at Parlevel Systems, an unattended retail solutions provider within 365 Retail Markets' family of companies. With her keen eye for process management, organization and her ability to motivate her team, she remains a vital asset to Parlevel's growth. For the past seven years, Ortiz has led the accounting, logistics, administration and human resources teams, and she continues to manage transformative projects across the company as 365 Retail Markets continues to expand its product offerings and global footprint to better serve its customers.



## MALIN ÖSTMAN

### Selfly Store

Malin Östman, a visionary and creative leader, serves as the chief marketing officer at Selfly Store. Since joining in summer 2022, she has been instrumental in redefining the company's brand and marketing strategy, successfully positioning Selfly Store as an innovative growth leader in the vending, micro market and office coffee service industry. Leveraging her background in management consulting and communications, Östman has championed innovative marketing approaches, such as the Metaverse launch of the first intelligent vending freezer on the market, the Selfly Freezer. Her commitment to embracing cutting-edge technology and creative solutions has fueled the company's rapid growth in brand awareness, lead generation and customer base. Her passion for driving change and pushing the boundaries of the vending industry is evident in her work. Her inspiring leadership continues to motivate others in the sector to explore new possibilities and advance the industry.



## LINDA SALDANA

### Seventh Wave Refreshments

Linda Saldana is the co-founder and CEO of Seventh Wave Refreshments. She joined the industry almost 12 years ago as a sales director at Southern Refreshment Service and fell in love with the industry. Seventh Wave Refreshments was established in 2020 with a mission to "Bring Joy to the Workplace" in the most unsettling time in refreshments. With a deep passion for the customers and a heart for innovation in the industry, Seventh Wave Refreshments has led a refreshment revolution in Atlanta – pioneering new ways of servicing and offering a white glove approach to hundreds of offices in just two years.



## MELISSA SCHWARTZ

### Aramark

Throughout Melissa Schwartz's 20+ years in the industry, she has implemented key business strategies – from route, warehouse, service, account management, finance and IT to sales. Schwartz began her career as a route accounting implementation leader responsible for replacing the paper-based route order and vend management process to leveraging handhelds and DEX capabilities. Today, she leads the operation teams for the Aramark Refreshments division across the U.S. and Canada. Schwartz's handprint on transformations includes development of a single view of the customer for end-to-end customer experience from prospecting, contracting, installation, customer service and account management, along with a warehouse forecast tool. She was also instrumental with the introduction of aramarkrefreshments.com and has extensive experience with the acquisition process. Schwartz's recognitions within Aramark include Ring of Star recipient for Operational Excellence as well as a two-time CEO Star of Excellence recipient for Sell and Service with Passion and Front Line First. Her eye for improvement and mentoring those around her has allowed Schwartz to pave ways for future women leaders in the industry.



## BARBARA RUSSELL

### Holiday House Distributing

Barbara Russell, vice president of sales and marketing for Holiday House Distributing (HHD), began her career in the OCS industry with Holiday House Coffee Service in Lynbrook, New York, in 1985 and with US Coffee from 1990 to 1998. After relocating to Florida in 2002, Russell went back to work in the industry and is now on the supplier side with HHD. She is passionate about the industry and is always looking to find ways to help operators – whether it is trying to source industry products or promoting service and technician training. Russell started the Holiday House Distributing Technician Training event in 2020. It held its second event in February 2023 and had over 45 OCS operators (150 attendees) attend three days of hands-on coffee equipment training. She was awarded the 2020 NAMA Coffee Legend and is one of the founding members of NAMA's WIN group. Russell also serves on the NAMA Trade Show Committee and Coffee Service Committee.



# Congratulations

LISA MATTIAS

Regional Manager - West



JOANNE WEISSMAN

Senior Account Executive



## MOST INFLUENTIAL WOMEN IN THE INDUSTRY

The entire BBI team celebrates these two incredible women for being selected by Automatic Merchandiser as the **2023 Most Influential Women in the Industry.**



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## ELYSSA STEINER

### Cantaloupe

Elyssa Steiner joined Cantaloupe in 2017. As chief marketing officer, she oversees all aspects of the marketing team. Her responsibilities include the development and implementation of all strategic marketing campaigns that drive measurable results and support the company's business objectives. Steiner has been in the self-service retail industry since 2010. Before joining Cantaloupe Systems, she served as the vice president of sales and marketing for Avanti Markets, where she was one of the early pioneers to introduce micro markets to the industry. During her tenure in this market, Steiner's enthusiasm and success have led her to become a well-respected mentor and award-winning executive in the industry. In 2013, she was voted Automatic Merchandiser Readers' Choice Manufacturer Representative of the Year. She has served on NAMA's Government Affairs, WIN and ELN committees. Steiner has a master's degree in communication and leadership from Gonzaga University and a Bachelor of Arts in business and marketing from the University of Washington.



## TAMMY STOKES

### Five Star Food Service

Tammy Stokes returned to Five Star Food Service after five years with Canteen Corporate heading the Southeast division – office coffee and pantry line of business. Her 30+ years of experience in the food and beverage industry with companies such as Pepsico, Sysco, and Compass Group North America provides a great amount of diversity for the Central region team. Stokes specializes in cultivating dynamic leaders to impact the customer experience at the highest level. She supports Five Star Food Service in all things coffee, water and pantry lines of business and leads multiple teams and projects for Five Star. Recently, she led an entire rebrand of John Conti Coffee, now Conti Coffee, which took over a year to complete. Her determination to see the project finished and of high quality is admirable. Stokes studied communications and education at the University of Louisville.



## MEREDITH STORM

### Mahaska

Meredith Storm, markets sales representative at Mahaska, has worked extensively for several years in sales and marketing throughout different industries in her career, but she says that working in the micro market and vending industry for Mahaska has been the most rewarding of all her jobs. Storm made a career change into a new industry, but after a little over a year, she has quickly learned aspects of the equipment, continuing to grow her industry knowledge, and she has helped the company grow its new customers in under a year. Mahaska, a seventh-generation family-owned company, has seasoned employees with over 30 years of experience in micro markets and vending, so she uses her experience in sales and marketing to create the perfect mix for a dynamite team. She looks forward to helping take Mahaska to the next level.



## CHRISTINE VERTUCCI

### Vistar Illinois

Christine Vertucci has been a customer service professional for over 30 years. During her 25-year career with W. R. Grace & Co., she became the North American customer service manager for its Specialty Construction Chemicals division where she oversaw the consolidation of customer service operations into a national service center. She has been with Vistar for six years and quickly assimilated into the candy, snack and beverage industry. Vertucci has set a standard for service excellence, where she and her team support one of the largest Vistar operating companies in the country. Vertucci leads by example and enables her team through empowerment. She is a champion for growing female leaders, as evidenced by several internal promotions from within her team. Vertucci attended the University of Wisconsin, is a certified Six Sigma Greenbelt, co-chairs Vistar's customer service best practices team, and is a member of the Women at PFG Associate Resource Group.



## MAUREEN WASHINGTON

### MoBeauty Supply Vending

Maureen Washington is an entrepreneur and community leader who has made significant contributions to the beauty industry. As the founder of MoBeauty Supply Vending, she revolutionized the way women access beauty products. Her innovation empowered countless individuals to become entrepreneurs. Despite facing numerous challenges, including racial profiling and discrimination, Washington persevered to achieve success. She is a strong advocate for women in the convenience services industry and has demonstrated her commitment to supporting minorities through the development of the Vending Grant of Minorities. She is also dedicated to promoting the vending machine industry and has been instrumental in establishing the first National Vending Machine Day in Georgia. She was recognized for her achievements and was a recipient of the 2020 Enterprising Women of the Year Award. As a respected figure, Washington continues to inspire others with her entrepreneurial spirit, leadership and dedication to creating positive change.



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### JOANNE WEISSMAN

**Burdette Beckmann Inc. (BBI)**

Joanne Weissman is a highly accomplished senior account executive for the unattended retail channel at BBI, a national sales agency. She joined BBI in 2014, managing Vistar OPCO accounts in Denver, Colorado, and Portland, Oregon. Prior to this, Weissman worked for 20 years at Vistar in Kissimmee, Florida, and 10 years at Warner-Lambert Consumer Products, calling on retail convenience headquarters and grocery headquarters. With over 30 years of experience in sales and marketing, Weissman has honed her skills in developing sales strategies, generating new business and marketing products to key accounts. Her extensive training has earned her numerous awards, including being recognized as the #1 Account Executive of the Year multiple times and receiving the President's Club Pentathlon Award in 1992. Her passion for building solid relationships with her customers and being a mentor for their businesses sets her apart as a respected and sought-after figure in the retail industry.



### HONORABLE MENTION:

Tien Ho

Seattle Vending

### KATHY WYGANT

**AAA Vending Services**

At AAA Vending Services, Kathy Wygant, along with brothers Ken and Gary Gehrlein, have achieved distinction by putting competition aside to invest in the well-being of others, the local business community and the vending industry. Led by the example of their father, Gordon, who founded the snack and beverage business in 1986, AAA Vending has promoted additional business opportunities in the Erie area by supporting other vendors. Wygant's pursuit of ways to keep customers interested, buying and returning has resulted in the maximization of competitor buying experiences with the ability to special order and place orders that will be compiled for pickup; generation of a company social media presence that supports local job hunters, businesses and the vending industry and provides another avenue for customers to submit order and service requests; a tailored program offering better-for-you choices; and special items for captive accounts.



# Congrats!



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Evergreen Refreshments  
congratulates Kimberly Graves

### JAIME WYNETTE

**Guardian Refresh**

Jaime Wynette has had the great pleasure of working with Guardian Refresh as her introduction to the vending industry. Her passion for helping people is in direct alignment with the Guardian Refresh motto. She has a background in marketing and advertising, which she has used to increase the client base of Guardian's growing network of operators. Her business acumen and out-of-the-box thinking has helped drive Guardian's innovation and elevation of service. Working alongside industry leaders, Wynette is learning and adapting her skill set to continuously improve Guardian's impact in the management space.



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# Unattended retail technology *is pushing the industry forward*

Instant Retail Systems showcased its Self Service Store in NAMA's Imagination Way.

Automatic Merchandiser

**Operators should consider the latest equipment innovations to help stay competitive.**

*By Adrienne Klein, Contributing Editor*

**U**NATTENDED RETAIL HAS SEEN A BOOM IN technology, especially in the equipment realm. Companies leading the way are creating innovations that give customers a range of offerings – whether it's baked desserts in a minute, a hot main course, or a coffeeshop-like experience without a barista. Other manufacturers are producing technology that makes it easier for vending operators to sell age-restricted products in machines, thereby diversifying offerings and increasing sales.

Further, other manufacturers have created dual-climate-zone smart machines that use AI product recognition technology, allowing consumers to touch products and knowing which items the customer selects. Not too long ago, these technologies and their capabilities were unheard of in the industry; but today, new innovations are helping operators in the unattended retail market stay competitive.

## A UNIQUE UNATTENDED SHOPPING EXPERIENCE

One of the downsides of the traditional vending experience has been that customers weren't able to engage with the product they're thinking of buying – until now. Through new innovations, operators can sell a more diverse mix of products, and customers are able to touch and feel their products prior to purchase. The Quik Pick by PepsiCo, for example, won Automatic Merchandiser's Readers' Choice

Product of the Year in the equipment category for a reason: its technology and intuitive user experience. The Quik Pick allows customers to simply use their card to unlock the door, pick out a beverage and shut the door, thereby completing the transaction. The product's automatic recognition technology puts a spin on traditional vending.

Meanwhile, 365 Retail Markets' Stockwell 2.0 is a dual-temperature merchandiser that can house refrigerated products on one side and ambient products on the other. Customers simply scan their phone or swipe their card, giving them the ability to open the door and select their product. AI product recognition technology makes purchasing the product easy.

Attendees at the NAMA Show this year could view firsthand an unattended retail experience at the U-Select-It (USI) booth. The Scan & Go Market from USI uses innovative technology that benefits both the operator and the consumer. Consumers simply pay at the market, grab their items, scan the products and check out. They have the ability to touch and feel the



365 Retail Markets

365 Retail Markets Stockwell 2.0



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products prior to purchase, enhancing their shopping experience. In addition, operators can offer customers fresh foods, beverages and snacks all in one solution, while controlled access and automatic locking reduces chances of theft. The Scan & Go Market sends data through DEX, integrating into an operation's already existing VMS.

Likewise, at this year's NAMA Show, Instant Retail Systems showcased its Self Service Store in Imagination Way wherein cameras track customers while they shop, and shelf sensor technologies monitor the inventory. Items removed from shelves are added to the customer's virtual shopping cart where they have the ability to modify and confirm their shopping cart prior to payment at the exit.

The company also has its Grab & Go Flex system, wherein customers first use a credit card or mobile phone to attach payment to the kiosks and are then only charged for what is removed. Coolers, freezers, cabinets and coffee makers can all be mixed and matched in order to give the customer a truly expansive product offering.

### HOT, FRESH AND HIGH-QUALITY

Micro markets are a great way to offer quality foods to consumers, but hot food has been a missing component in micro markets. One solution: Just Baked Smart Bistro from Automated Retail Technologies. This kiosk offers fresh, hot food – from desserts to entrees – at the touch of a button. The autonomous smart kiosk is cashless, giving customers the ability to pay via credit card, debit card, student cards or the Just Baked app. The kiosk, which holds up to 64 unique SKUs, offers remote management and real-time alerts for operators.

Josh Rosenberg, president and chief revenue officer at Automated



Just Baked booth at the NAMA Show

Retail Technologies, notes that this technology is an opportunity for the vending industry. “We deliver a reliable solution for all types of occasions including hot or cold temp snacks, indulgence and meals with 24/7 accessibility,” he said. “In the majority of cases, this enables our industry to participate in a space they’ve been absent. If an operator can keep a consumer from going offsite or ordering delivery, they stand a greater chance at capturing a higher share of wallet with increased visits and add-on sales to accompany their meal purchases.”

The Just Baked Smart Bistro is integrated with Parlevel and Cantaloupe, enabling the operators to work within their existing VMS solutions. “For payment, we have integrations with Nayax and all the major university campus and employee payroll deduct platforms, all of which make both operations and revenue growth viable,” said Rosenberg. “In addition to industry norm, we have some unique capabilities we are very proud to showcase, too. Our kiosk does its own inventory, which reports to the back office as well as informing both

management and the fulfillment specialist if they loaded the kiosk correctly, what was loaded, and any other pertinent information related to the fill. This also includes a feature that matches the front-end digital menu to the load.” He noted that everything on the kiosk is trackable, and alerts can be set up on any iOS or Android device for kiosk management.

The Silicon Valley-based food technology company Yo-Kai Express launched its YKE Desktop earlier this year at CES 2023. The YKE Desktop creates on-demand hot ramen noodles in 90 seconds for customers. As the name suggests, the YKE Desktop is ideal for small spaces. It may take up a small amount of space, but it comes with big innovation. The machine uses RFID (radio frequency identification), paired with an RFID freezer able to store 20 to 24 bowls.

But these innovations don't just stop with food vending machines. A recipient of the National Restaurant Association Show's Kitchen Innovations Awards, Coca-Cola's



Coca-Cola's Costa Smart Cafe Marlow 1.2 at NAMA's Imagination Way

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“If an operator can keep a consumer from going offsite or ordering delivery, they stand a greater chance at capturing a higher share of wallet with increased visits and add-on sales to accompany their meal purchases.”

– Josh Rosenberg, Automated Retail Technologies

Costa Smart Cafe Marlow 1.2 is a technologically advanced machine providing gourmet coffee without the barista. The autonomous system uses real milk and freshly ground beans, offering customers more than 200 high-quality beverage options in less than 90 seconds. For operators, this means the ability to offer locations a quality coffee experience with little maintenance or labor requirements.

### AGE VERIFICATION MADE EASIER

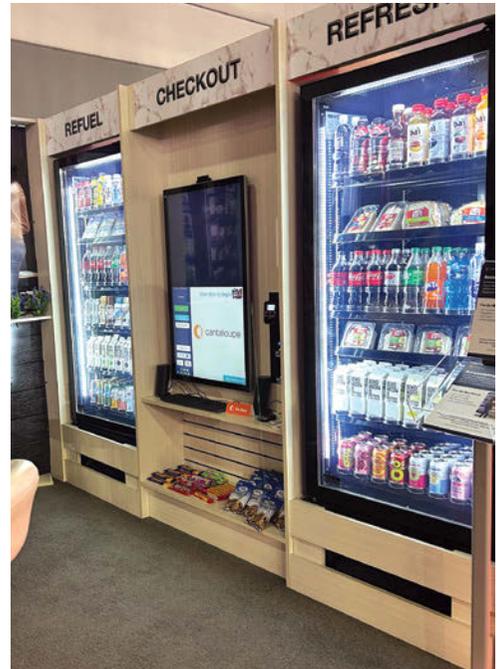
Technology is also making it easier for operators to responsibly sell regulated items from vending machines. For example, PayRange has made it easy for operators to sell 21+ products with its new in-app age verification solution, immi. Once a PayRange BluCheck device is installed on a vending machine and activated by the operator, consumers launch the immi age verification process from within the PayRange app. The user scans the front and back of their government issued ID, then takes a selfie, wherein FaceMatch AI matches the person to the ID. The immi technology and BluCheck are fully integrated into the PayRange platform.

Fastcorp Vending also showcased its game-changing DIVI Regulated Vending Machine with new IDScan technology at this year’s NAMA Show. The machine uses an ID authentication device able to detect nearly 98% of fake IDs. Through the

use of a high-resolution webcam and proprietary software, the vending machine matches the purchaser to the image on the ID. With the introduction of these solutions, unattended retail has become a viable option to selling regulated products.

### SMART SOLUTIONS WITH ACCESSIBILITY FEATURES

Cantaloupe introduced its newly branded Cantaloupe Go product



Cantaloupe’s Smart Market debuted at NAMA’s Imagination Way

Automatic Merchandiser



Fastcorp Vending’s DIVI Regulated Vending Machine with new IDScan technology at NAMA’s Imagination Way

Automatic Merchandiser

line of solutions at the NAMA Show. This was the first time Cantaloupe’s advancements in Smart Store technology using artificial intelligence (AI) and Smart Lock features were debuted publicly. The Smart Café uses dynamic vision and AI technology to charge the consumer for products they select out of the cooler. Consumers present their payment, grab the item, and walk away. Making its debut at NAMA’s Imagination Way, the Smart Market, a completely locked micro market, allows consumers to log into a user account or unlock the market with a credit/debit card. Once the consumer has made their selections, they complete their purchase at the kiosk. The ADA-height compliant kiosk has accessibility features such as a large touchscreen, headphone jack and audio assistance.

This and the other new equipment technology proves that there is a lot to be excited about in the unattended retail industry – now and in the future. ■

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## OPERATION PROFILE



# The art of optimization

California-based C&S Vending blends cutting-edge technology with an unwavering focus on exceptional customer service.

*By Aaron Jed, contributor*

**C** &S VENDING IS A ONE-STOP SHOP FOR VENDING, MICRO MARKET, pantry, office coffee and water service. Based in San Jose, C&S Vending was founded over 30 years ago by Chuck Owen. His son, Andy Owen, general manager, leads the company today and draws from the strong foundation his father built, while harnessing the innovative spirit of Silicon Valley.

“My father was doing vending part-time,” Andy Owen reflected. “He was also a boat and car salesman, so three jobs at the same time. He ended up realizing that the vending route had a lot of potential, so he left the other two jobs to work on vending full-time.”

### DAD ALWAYS KNOWS BEST

Upon graduating college in 2006, Andy Owen wasn't sure which direction to go. From door-to-door sales to working as a bouncer, he struggled to find something that really stuck. One day, his father called and asked him if he could take over a route for a couple of weeks while an employee was on vacation. He took on the route and stayed around to fill in wherever his father



### OPERATION PROFILE

## C&S Vending

**Founded:** 1988

**Headquarters:** San Jose, CA

**Website:** [www.csvend.com](http://www.csvend.com)

**Number of routes:** 6

**Number of vending machines:** ~500

**Number of micro markets:** 7

**Number of acquisitions:** 4

**Micro market equipment suppliers:** Avanti, Fixturelite

**Vending machine suppliers:** AP, AMS, Dixie Narco

**Technology providers:** Cantaloupe/Seed, LightSpeed

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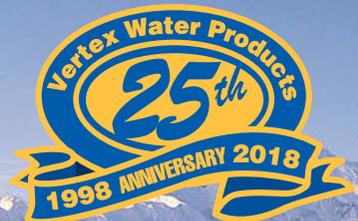
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“ My father was doing vending part-time ... He was also a boat and car salesman. He ended up realizing that the vending route had a lot of potential.”

-Andy Owen, C&S Vending

needed the help. His responsibilities gradually expanded from delving into technician work to general warehouse duties. “I kind of was doing everything,” he recalls.

When Owen arrived, C&S only offered vending and minimal pantry and office coffee service. The company was also entirely analogue, “aside from a few Excel spreadsheets,” he joked. “My main goal was to get the company set up on computers, so we weren’t stuck in the money room counting all of the cash by hand.”

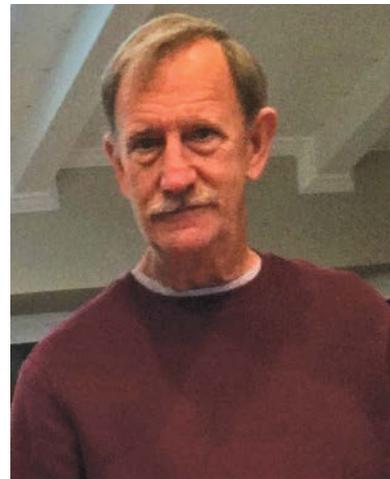
Owen implemented Vending Essentials, a somewhat rudimentary VMS software. “It basically just gave meter readings on all of the machines. That was about all it did,” Owen recalled. With the not-so-cutting-edge software in place, he soon discovered that one of C&S Vending’s employees

had been stealing products and putting them in a storage unit. That moment ignited Owen’s passion for the business. “I could really change things,” he realized. “I could make a difference.”

### THE RIGHT MAN FOR THE JOB

When C&S Vending’s general manager left in 2008, Owen stepped up to the task – which isn’t to say he was fully prepared for the undertaking. “I was just thrown from the frying pan into the fire. It was complete chaos trying to learn everything,” the operator said.

Having worn all hats in the family business, from route runner to technician and now manager, he understood the ins-and-outs of every role, priming him to be a knowledgeable, fair and empathetic



Chuck Owen, founder of C&S Vending Inc.

leader. “When I interview people, I tell them I’ve done everything within this company, so I know what is and what is not feasible,” Owen remarked. “When I structure routes, I know what people can actually accomplish. I will never give you 12 hours of work; I’m going to make sure you get eight hours of work every day.

### STREAMLINING SUCCESS WITH SOFTWARE

Owen got to work optimizing all facets of the operation. At the time, C&S was still running cash-only



C&S Vending’s close-knit group of 16 employees ensures top-notch service to its 250 accounts served by six routes.

vending machines. As a part of his optimization plan, he sought to implement credit card readers, but he wanted to avoid financing the project until he was sure the technology could be seamlessly incorporated into the routes. In 2013, Owen came up with an outside-of-the-box solution to introduce Cantaloupe's VMS. "I didn't want to outlay the cash in order to see all of the benefits. So I asked Cantaloupe if I could demo their software on just one route and keep all of the machines offline," he said. Cantaloupe offered him a 30-day free trial, which gave Owen plenty of time to restructure his routes for maximum efficiency and profitability. The operator was then able to slowly roll out the readers onto all of the machines.

According to Owen, the biggest benefit of integrating Cantaloupe's VMS was planogramming and scheduling. The integrated documenting system saved the route runner an extra trip to complete the delivery, reducing time spent per stock by up to 40%. "Back then, you would have to go into the account, collect the cash, inventory the machine, go back to the truck, pick everything, and then go back in. Now, once you walk in, all you have to do is collect the money and stock the machines. Everything is done in one trip and in much less time. We also know and have a record of which products go where in the machines, allowing us to keep much better control of things remotely," he said.

C&S continues to advance its technological capabilities to offer the most user-friendly experience for both its employees and its customers. For its customers, C&S has a QR code on all of its vending machines to easily submit reviews, request service and offer product ideas. The vending machines are equipped

with contactless payment to make transactions as easy as possible.

### THE PEOPLE WANT COFFEE!

Owen saw that C&S was leaving money on the table with its tunnel-

vision focus on vending, so he started making the push for office coffee service (OCS). During Owen's first few years with the company, C&S supplied a simple air pot and brewer setup.

**a snapshot of just baked smart bistro in universities, hospitals, and casinos**

**universities...**



our top performing university kiosks generate

**\$14,000**

per month



**65%**

of sales are after hours  
8pm - 5am



our top performing university kiosks generate

**2,200**

vends per month

**hospitals...**



our top performing hospital kiosks generate

**\$5,700**

per month



**70%**

of sales are after hours  
8pm - 5am



our top performing hospital kiosks generate

**870**

vends per month

**casinos...**



our top performing casino kiosks generate

**\$3,300**

per month



**75%**

of sales are after hours  
8pm - 5am



our top performing casino kiosks generate

**457**

vends per month



Chicken Potstickers



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C&S Vending's recently installed micro market at Levi Strauss is personalized to the location's breakroom.

The paradigm shift occurred in 2013 when Owen introduced the Colibri single-cup brewer, which prompted offices to open their doors for C&S. "It didn't make a big difference with current sales, but a big difference as far as what we could go

after for new business," he said. "Now we were able to go out there and get different customers."

Since then, the operator's OCS progressed to include high-tech coffee and espresso machines. Its arsenal of coffee tech includes de Jong Duke's

Nio and Virtu, Nespresso machines and Bravor's Segó 12.

Offering premium coffee technologies has been instrumental to C&S's customer retention. Whereas customers are quick to jump ship when using a standard

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coffee pot, the high-quality coffee machines are too beloved to let go. “When you get that revolving door, it’s messy for everyone. I like to keep customers for a long time,” Owen said.

### FUELING INNOVATION, ONE PANTRY AT A TIME

C&S hit its stride in pantry service. Located in Silicon Valley’s largest city, C&S was well-positioned to cater to the ever-blossoming tech industry, where pantries are a must-have for startups and tech giants alike. “I’m guessing it started with people wanting to do something nice for their employees, and so they can work longer hours,” he hypothesized. “But in my opinion, that’s secondary in the thought process of these companies. The main reason companies want pantry service is employee retention. Employees are very highly sought after here, and they can just bounce from Google to Facebook, from here to there. So, if a company offers pantry service, and another company doesn’t, it’s going to be very difficult for that other company to bring people in and retain their current employees.”

Seeing the huge demand, Owen doubled down with the goal of becoming the premier pantry service in the Bay Area. In 2018, he hired Kurtis Bosacki, a pantry service expert with decades of experience in the industry. “With his experience, we were able to transform the way that we did pantry,” Owen said. “Now, we are able to offer our current and future customers a comprehensive, top-of-the-line service.” The operator’s pantry service quickly blossomed and, by 2019, represented 70% of its business.

### GOOD OL’ RELIABLE

When COVID-19 hit, C&S lost 90% of its pantry customers overnight. “I remember very well. It was around noon,” Owen recollected. “One of my employees came up and told me that the government had their meeting, and we were all getting locked down for two weeks inside.” Only one thing kept C&S’s head above water: vending. With vending machines placed in public spaces and essential businesses, C&S was able to stay afloat and ride out the COVID storm. “Vending is what saved us,” he emphasized. “If it weren’t for vending, we would have probably been out of business or just in very poor shape.”

C&S primarily operates snack machines, and Owen isn’t seeking to reinvent the wheel. “We run older AP vending machines and renovate them. Tear out the guts, new boards, new everything. I don’t see a real need to buy expensive new equipment when the older ones work perfectly fine,” he said. On the beverage side, C&S almost exclusively runs Coca-Cola machines.



Warehouse lead, Jake, picks products for the day.

### A CLEAN SLATE

By April 2020, C&S was forced to let go of all of its 22 employees. “I joke that I fired myself and my dad too,” Owen said. In the following months, he analyzed their previous roles and found redundancies and was able to better restructure the company.

As COVID restrictions eased, Owen was able to rebuild the company from nearly zero. Since then, he has brought back employees deliberately and strategically. This gave him the opportunity to optimize all facets of C&S, including staff, logistics and technology. Today, the C&S team is



C&S Vending matches snack and coffee service to location tastes and spaces.

16 strong and is fully operational. “Before COVID, it was a little more chaotic,” he said. “We weren’t properly organized for growth. Structurally, we’re in a much better place. We’re much more ready to grow.”

Prior to the pandemic, C&S had separate routes for vending and pantry/OCS. With time on his hands, Owen re-trained his drivers to cover all facets of the business. In doing this, C&S was able to service its customers more frequently – and the customers loved it. The simple tweak killed two birds with one stone: Delivery routes became significantly more efficient, and the customer experience was elevated.



From left, Tommie, Eric, and Robert Lomas and his wife Tatiana Ramirez are key players on C&S Vending’s team of customer-focused professionals.

## A NOT-SO-SMALL FAMILY BUSINESS

Over the years, C&S has acquired a handful of small, typically one-man operations. When looking at a business to buy out, Owen ensures it is a strong strategic step forward. “Sometimes, we don’t even buy companies for their routes or customers,” he

explained. “For example, we bought a company that was essentially just for equipment. They had an insane amount of equipment, something like 50 snack machines.”

Today, C&S Vending operates six routes, which cover 250 accounts. To continue growing, Owen ensures the company maintains

its uncompromising dedication to customer service that allowed it to achieve success in the first place. “We hear from our customers all the time that many larger companies don’t even pick up the phone,” he said. “People call us, we pick up the phone. I’ll answer emails at midnight! It’s really that simple. That sets us apart.”

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Despite Owen's father being retired, C&S remains a true family business. "My daughter works here," he said. "We have three employees who are all brothers, and one of their wives works here. We also have a father-son duo on staff. We have a very tight-knit group."

Owen credits much of the operation's consistency to its core team of employees. "As with all companies, there's always one or two roles which are constantly in flux. But knowing that we have that core – basically half the company or more – that we can depend upon 100% makes a huge difference. It gives us those building blocks to expand on," he said.

With so many close friends and family on the team, Owen genuinely looks forward to spending the day at the warehouse. "I get to hang out with my friends all day!" he declared. "There aren't many people that wake up and say 'Hey, I get to go to work every day.' I consider that a huge win."

C&S Vending provides a wide variety of cold beverages to cater to diverse tastes.

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Father-son duo, account and sales manager, Kurtis, and route driver, Krieg, embody the family spirit upon which C&S Vending was built.

## MOVING FORWARD

To adjust to the altered workforce, Owen looks to expand C&S's arsenal of micro markets. Continuous advancements in self-checkout technology and security make micro markets more feasible than ever before. "Micro markets are the smallest part of our business currently. As we continue to grow, they will be my area of focus," he said.

COVID transformed the vending world immensely, and Owen thinks these changes are here to stay. "We've been dealing with the hybrid work model for almost three years at this point. We're completely accustomed to that."

With C&S Vending's tight-knit operation and strong backbone of employees, the company is well-equipped to forge ahead for years to come. "Of course, it isn't ideal if people don't return to the office full-time, but we're structured for it. We're totally ready," the operator concluded. ■

# Marketplace

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NAMA announces its 2023 industry award recipients: Industry Person of the Year, David Marler; Operator of the Year, Moran Refreshments (Patrick D. Moran); and Allied Member of the Year, G & J Marketing and Sales (Dan Kozlak). #TheNAMAShow



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365 Retail Markets introduces the MM6 Kiosk for Markets: The countertop #kiosk features a large vibrant display to help operators drive revenue as well as solutions to address shrinkage and market uptime. #micromarket #technology



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Automatic Merchandiser and Mondelez International kick off the 2023 Route Driver of the Year contest at #TheNAMAShow. The award puts the spotlight on hardworking route professionals – the driving force behind the vending, micro market and office coffee service industry. Access the nomination form and complete rules: [bit.ly/3VMrBGy](https://bit.ly/3VMrBGy) #awards #vending #micromarket #officecoffeeservice

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