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Co-CEO

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Co-CEO

NO MORE STATUS QUO

SUCCESS IN OREGON Royal Vending up sells to
micro market service and hybrids to thrive.

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PLUS

The Micro Market
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and Strengthening
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Trends In
OCS Equipment
Go High-Tech
page 28

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*Source: IRI, Total California 52 Weeks ending 12/25/16

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OCTOBER/NOVEMBER 2017
VOLUME 59, NUMBER 7



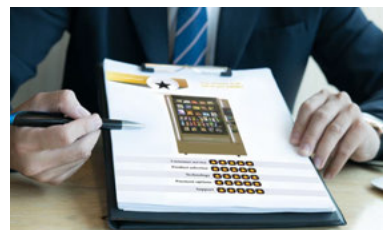
SUCCESS STORY OPERATION PROFILE

30 ▶ NO MORE STATUS QUO



Oregon Independent Royal Vending up sells to micro market service as well as hybrids for smaller locations in order to thrive in a growing, but saturated area.

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SPECIAL REPORT



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Published by SouthComm Business Media, Inc
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Vol. 59, No. 7

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The World Wide Vending Press Association



Automatic Merchandiser (USPS 017-280), (ISSN 1061-1797 print; ISSN 1948-5697 online) is published 8 times per year in March, April, May, June, August, September, October and December by SouthComm Business Media, LLC. 1233 Janesville Ave, Fort Atkinson, WI 53538. Periodicals postage paid at Fort Atkinson, WI 53538 and additional mailing offices. **POSTMASTER:** Send address changes to *Automatic Merchandiser*, PO Box 3257, Northbrook, IL 60065-3257. Canada Post PM40612608. Return undeliverable Canadian addresses to: *Automatic Merchandiser* PO Box 25542, London, ON N6C 6B2.

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Becoming Stickier To Locations

Take advantage of all the ways to create stronger operator-client relationships.

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This fall, I had the pleasure of speaking at the Texas Merchandise Vending Association (TMVA) annual meeting. It was a great time, full of education and inspiration, but one thing that stood out to me was a concept Jon Floyd of 365 Retail Markets brought up about stickiness. Specifically, he talked about how micro markets present an opportunity for operators to become more relevant, and even irreplaceable, as a means of disseminating information to employees.



HELP
*create a
positive
culture.*

A real-world example

Our larger publishing company, like many others, hosts events and provides recognition. There is a quarterly blood drive, the employee newsletter with work anniversaries and new hire notices as well as reminders for wellness program participation. All of these come by email, along with the dozens of job-specific emails we get

every day. It's not surprising that those notifications from human resources (HR) get pushed down until your mailbox (if it's like mine) has 29 unread emails that you actually can't find by scrolling (likely because you gave up after about a hundred). However, this common experience among employees is also an opportunity.

Floyd argued that a clever micro market operator could offer their customers a chance to make these events and corporate news items more prominent, highlighting all the company does for its employees. He didn't have a specific example, but using mine, ask the HR person to gather a photo and short sentence about an employee being recognized — chances are they did it anyway for that email I mentioned. The image and sentence could be put in as a rotating announcement on the kiosk. For larger events,

a full promotional piece with logos and photos could become a kiosk commercial.

Have your customer service team ask for these "events" regularly, or even check the website or event calendars of your best customers. Yes, it's extra effort, but the reward is becoming that much more beneficial to your customer. If they see that you are helping them promote a positive culture, it's much harder to send out a request for a new proposal and consider replacing you. Also, it elevates the service level and makes your organization stand out. Both are increasingly important in today's highly competitive industry. This month's success story centers on an operator who became successful by doing what others would not. Read about how Ryan Harrington with Royal Vending on page 30 challenges 'business as usual' with micro markets, cashless vending and service.

No matter your size

Even without micro markets or hundreds of routes, it is important to have relevancy to the customer through unique offerings. Our small operations columnist, Gary Joyner, talks about his personal experience winning accounts with the top ten ways his company was different than others. Take a look at how he compiled the list and what it got him on page 18.

Even our management strategies expert Bob Tullio has elevating your business on his mind. A recent column, How To Deliver 'Business Class,' talks all about setting your company apart.

It is important to offer competitive prices, popular products and similar services, but it's not enough. There has to be more to really cement the relationship between you and the customer. Micro markets are allowing operators to do that through the kiosk. Vending machines with mobile apps allow for loyalty and communication with the end user. But there are always more options. Any way to reach past the norm will be beneficial. Think creatively and read what others are doing for inspiration. | ◀



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per store, per month.

Source: NACS State of the Industry
Annual Report, 2015 data

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Source: Packaging Research, proprietary quantitative research, APF, 2016



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for purchasing a sandwich

Source: Usage and Barriers Study, proprietary
quantitative research, APF



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TMVA 2017 Spotlights Texans Helping Texans

Despite the devastating effects of Hurricane Harvey, the Texas Merchandise Vending Association (TMVA) held its 66th annual meeting at the Omni Corpus Christi from Sept 28 to 30. The well-attended three day event was full of robust education sessions and networking events, including two powerful key note speakers. Texas State Representative Todd Hunter told the group about staying in Corpus Christi when the hurricane hit and how it is and will impact legislation in the future. In the evening, retired NBA professional Derek Anderson talked about how hardwork and stamina pay off, especially when done in a positive way, which inspired his Acts of Kindness (AOK) organization.



TMVA attendees assisted in Hurricane Relief efforts wearing Acts of Kindness (AOK) T-shirts.

Volunteer efforts inspire and humble

While the event took place as planned, the hurricane did change the event into one focused on giving back. The traditional first day golf tournament was canceled, and instead all participants went out to volunteer in cleanup efforts. “Our TMVA Relief Volunteers were made up of 50 of our attendees, benefiting the Coastal Bend cities of Corpus Christi, Portland, Rockport, Fulton and Port Aransas, TX. The five hurricane relief centers told our conventioners that the donated time and muscle too, really benefited,” said TMVA president Charley Nelms. The effort, coined “Texans Helping Texans” was a high point, referenced throughout the convention.

TMVA is now the largest NAMA State Council, with 72 paid 2017 memberships. In 2018, the annual meeting will be Sept. 26 to 28 at Moody Gardens in Galveston, TX.

machines run on R290 instead of using CO₂ as the other vending machine refrigeration systems do. The R290 is safe and abundant CEO and President of SandenVendo America, Mike Weisser, is quoted as saying. It has zero ozone depleting potential and a global warming potential (GWP) less than 4, the article cites.

The availability of the hydrocarbon refrigeration systems allows the vending machines to meet Canadian and U.S. UL standards including exceeding U.S. Department of Energy and Environmental Protection Agency ENERGY STAR requirements.



Blind Accessible Vending Case Rejected By Supreme Court

► In early October, the U.S. Supreme Court denied review of a case brought by a visually impaired man from Louisiana. The case involved him invoking the Americans with Disabilities Act in suing Coca-Cola for its glass-front vending machines that did not ensure he could identify what he was buying and at what price, according to Law.com. The U.S. Court of Appeals for the Fifth Circuit refused the claim stating that vending machines do not meet the definition of “public accommodations” that must follow the ADA. However, the bus station and hospital housing the vending machines were left open to the “public accommodations” claim.



Death Wish Coffee Recalls Nitro Cold Brew Due To Botulism

► Death Wish Coffee Co., the Round Lake, N.Y.-based

Coffee producer known for producing the ‘World’s Strongest Coffee,’ has initiated a recall of its 11-oz Death Wish Nitro Cold Brew cans.

Death Wish in conjunction with an outside Process Authority has determined that the current process could lead to the growth and production of the deadly toxin, botulin, in low acid foods commercialized in reduced oxygen packaging.

SandenVendo Debuts Hydrocarbon Cooled Beverage Venders

► Dallas, TX-based SandenVendo America has announced a new line of vending machines that use hydrocarbon refrigeration systems, its first for the North American market, according to hydrocarbons21. The new glass-front vending machines and stack-style vending

Grant Awarded To Study Cook County Soda Tax

► The *Chicago Tribune* reports that a \$2.5 million funding grant from Bloomberg Philanthropies will be awarded to researchers at the University of Illinois at Chicago to study whether the tax improves public health over an extended period of time. The study is funded by former New York Mayor Michael Bloomberg's charity but university researchers and officials at Bloomberg Philanthropies say the research will be "rigorous in method, free of Bloomberg's influence and, ultimately, peer-reviewed by independent experts before being published."

de Jong DUKE Celebrates 120-Year Anniversary

► To celebrate the 120th anniversary of de Jong and 60th anniversary of de Jong DUKE, customers, suppliers and other partners gathered in Rotterdam on September 21st and September 22nd to take part in de Jong DUKE's anniversary event "It's all about experience."

The Dutch family-owned company de Jong was founded in 1897 by J.M. de Jong Sr., a blacksmith in Alblasserdam. What once started as a blacksmith, developed since 1957 into an internationally operating organization, which specializes in the design, development and engineering of high-end automatic coffee and espresso machines for corporate and professional

use. Today, with manufacturing locations in Sliedrecht and in Taylor, Michigan (USA), de Jong DUKE supplies customers worldwide.



Conagra Brands To Buy BOOMCHICKAPOP® Ready-To-Eat Popcorn

► Conagra Brands, Inc. announced that it has entered into a definitive agreement to acquire Angie's Artisan Treats, LLC, the maker of Angie's BOOMCHICKAPOP ready-to-eat popcorn, from TPG Growth, the middle market and growth equity platform of alternative asset firm TPG. Financial terms were not disclosed. The transaction is expected to close by the end of the calendar year, subject to customary closing conditions, including the receipt of regulatory approvals.

B&G Foods Completes Back to Nature Buy

► B&G Foods, Inc. announced that it has completed the acquisition of Back to Nature Foods Company, LLC, a leader in the better-for-you snack foods category, from Brynwood Partners VI L.P., Mondelez International and certain other entities and individuals for approximately \$162.5 million in cash, subject to customary closing and post-closing working capital adjustments.

People in the News

Jack Brown And Hans Lutkefedder Win Dan Mathews Scholarship

The NAMA Foundation announced two inaugural recipients of the Dan Mathews Scholarships to attend CTW in Grapevine, TX November 6-8.

This year's inaugural Dan Mathews CTW Scholarship recipients are:

- Jack Brown – ReFresh Facility Services
- Hans Lutkefedder – Vend Natural Holdings

Utz® Quality Foods Announces New Members To Executive Team

Dylan Lissette, chief executive officer of Utz Quality Foods, LLC., recently announced the addition of three new consumer packaged goods industry executives to the company's senior team in April, 2017: Tom Flocco as president and chief operating officer; Mark Schreiber as executive vice president and chief customer officer; and Jay Thompson as executive vice president and chief financial officer.



Flocco

Larry Atnip, NAMA Board Member, Attended China Vending Show

On August 30 Larry Atnip and his wife attended the 2nd China International Vending & OCS Showcase (Beijing) 2017 representing NAMA in Beijing, P. R. China.



Atnip

Muncie Power Products Welcomes Back Salvatore Knieriem

Muncie Power Products, Inc. is pleased to welcome back Salvatore Knieriem as the company's market specialist for the refuse industry.



Knieriem

Knieriem returns to the Muncie Power Products team with 37 years of experience selling power take-offs within the work truck equipment industry, five of which were previously with Muncie Power Products.

Server Products Promotes Brent Henschel To Marketing Manager

Server Products is pleased to announce the promotion of Brent Henschel to marketing manager. In the capacity of marketing manager, Henschel will lead Server's marketing team, whose role is to plan, coordinate and implement Server's marketing communication initiatives and marketing service offerings to Server's customers.



Henschel

Ohner Wants To Offer Vending Machine Spirals For Rent

A new company founded by recent Boston University school of business students wants to offer manufacturers a chance to rent vending machine space as a way to launch new products. Ohner, aimed specifically at the smaller manufacturers who have trouble getting retail space, will connect the vending operators and product manufacturers online. Vending operators offer spirals for sale, with descriptions of the machine location and user demographics. There is a rental fee paid to the operators in exchange for stocking the product and sending back specific sales information regarding how the selection performed.

According to one of the founders, there are no current trials, but Ohner hopes to launch a beta test this month, October 2017.



This start up plans to connect new product manufacturers with vending operators.

products are being recalled because *Listeria monocytogenes* was found in environmental sampling conducted by FDA.

No finished products have been found to have *Listeria* present and no confirmed illnesses were reported.



Accent Rallies Industry Partners To Donate To Harvey Victims

▶ Hurricane Harvey made landfall in Texas shortly after 11 p.m. Friday, Aug. 25, 2017, just north of Port Aransas. Accent Food Services wasted no time in coming to the aid of employees, customers and the people impacted by Harvey. Despite personal losses, its staff was quickly back to work. "Accent has the resources and the connections to immediately get food, water and more to those who needed it. We secured housing for our team members and care packages for our customers impacted by the flooding. We knew we had to do whatever it took to help," said Josh Rosenberg, Accent Food Services CEO.

Accent Food Services began collecting donations for hurricane relief through its branches and the Stamina Foundation which today total over \$50,000. It also reached out to and coordinated the delivery of donations from industry partners like Turn Key Corrections, Dr. Pepper Snapple Group, Company Kitchen and Wallingford Coffee.

CALENDAR OF EVENTS

NOV 6-8
2017 CoffeeTea&Water Show
 Gaylord Texan Resort Hotel & Convention Center
 Grapevine, TX
www.coffeeteaandwater.org

MAR 21-23, 2018
The NAMA Show
 Las Vegas Convention Center
 Las Vegas, NV
<http://thenamashow.org>

MAR 15-17, 2018
NCA Annual Convention
 New Orleans, LA
<http://www.ncausa.org/convention2018>

SEP 26-28
TMVA Annual Meeting 2018
 Moody Gardens
 Galveston, TX
tmva.org

PepsiCo Reports Third Quarter 2017 Results

▶ PepsiCo, Inc. reported results for the third quarter 2017. "Overall, our businesses performed well in the third quarter in what continues to be a challenging environment," said Chairman and CEO Indra Nooyi. "Each of our operating sectors delivered results in line with or ahead of our expectations, with the exception of North America Beverages (NAB) where revenues declined following two consecutive years of very strong third-quarter growth. Despite the challenges in our NAB business, the PepsiCo portfolio overall generated revenue, operating profit and earnings per

share growth. Although we have moderated our full-year organic revenue growth outlook, we are now on track to exceed the full-year earnings per share target we set at the beginning of the year."



Vending Food Recalled Due To Listeria

▶ Grencore, USA, LLC is voluntarily recalling egg salad sandwiches, ham salad sandwiches, and seafood stuffing used in the preparation of some vending food. The specific products are listed online at <https://www.fda.gov/Safety/Recalls/ucm578325.htm>. The



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Impact Of OCS-Focused Operations

By Emily Reformat, Editor

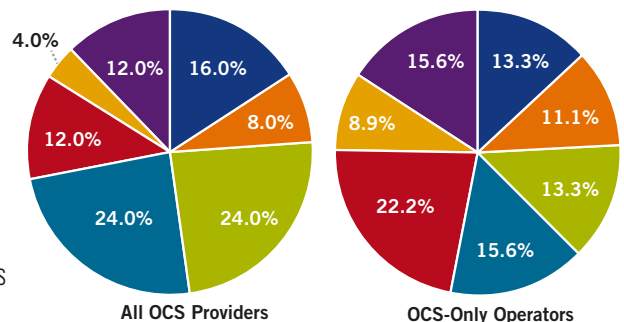
Few OCS-only companies venture into micro markets, sticking to high employee counts and coffee.

Office coffee service is still a strong business that is getting stronger. The 2017 State of Office Coffee Service report put revenues from the OCS segment of the industry at \$5.1 billion, thanks to customer appreciation for premium coffee, more single-cup brewer options and the expansion of businesses wanting to offer break room refreshment as a benefit.

There are still many OCS focused operations. About 76 percent of our survey respondents are only OCS operations that do not offer any vending service. Another 24 percent define themselves as office coffee ser-

SIZE

- LESS THAN 10 EMPLOYEES
- 11-14 EMPLOYEES
- 15-19 EMPLOYEES
- 20-29 EMPLOYEES
- 30-49 EMPLOYEES
- 50-74 EMPLOYEES
- 75-99 EMPLOYEES
- MORE THAN 100 EMPLOYEES

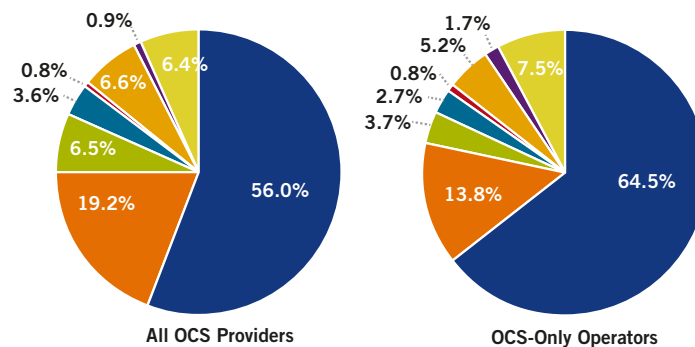


Location makeup differences

The number of locations for OCS operators tended to be larger, averaging in the mid 300s per operation, compared to the average of 250. In fact, the OCS-only operators tend to

TYPE

- OFFICES
- INDUSTRIAL PLANTS
- RESTAURANTS, DELIS, BAKERIES, ETC.
- CONVENIENCE STORES
- GOVERNMENT OR MILITARY FACILITIES
- SCHOOLS, COLLEGES, UNIVERSITIES, ETC.
- RETAIL OUTLETS
- OTHER



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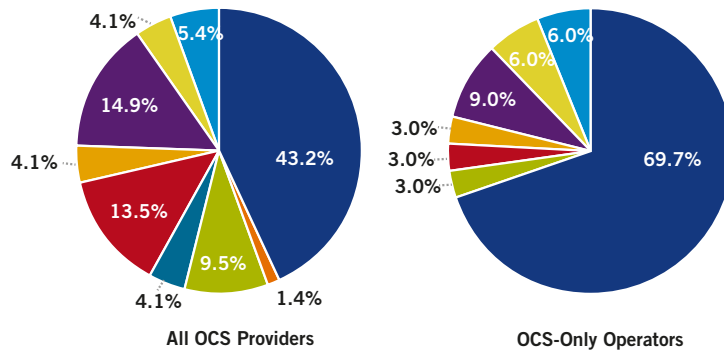
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MICRO MARKETS

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- KEURIG SINGLE-CUP BREWER
- FLAVIA DRINKS STATION
- OTHER SINGLE-CUP BREWING SYSTEM
- POUR-OVER/AUTOMATIC/THERMAL BREWER
- BEAN TO CUP BREWER
- NONE
- OTHER



service more of the larger locations. They report handling services for 46.7 percent of the locations that have 50 or more employees. For the segment as a whole, that number is 28 percent, meaning full line operators aren't winning as many of the larger accounts from OCS-only operators. With the other services they offer, full-line operators will also take smaller locations on for OCS, gaining the necessary revenue in vending or micro markets.

The type of location also varies. For OCS-only operators, a greater percentage serve offices, 64.5 percent compared to 56 percent. In nearly all other locations, the more diverse OCS providers that also offer other refreshment options report the bulk of the market share, however. The most notable being industrial plants where all OCS providers claim to service 5.4 percent more of the locations than what is reported from OCS-only operators.

Micro markets prove less inviting

While fewer than half of OCS providers claim not to have any micro markets, the number is nearly 70 percent for OCS-only operators. The challenges in servicing micro markets is the main issue. Micro markets require a greater number of SKUs, including a higher percentage of fresh food in order to be successful. OCS-only operators are adding SKUs, but mostly of ancillary

items or different types of single-cup options. Few have the resources or desire to enter into the micro market segment, any more than they want to add vending.

For those OCS-only operators that do have micro markets, because there are around 30 percent who do, bean-to-cup is the type of brewer used most often in a micro market. This is similar to the overall OCS providers, although one interesting difference is that other single-cup brews are not placed in micro markets as often by OCS-only operators as they are in the segment as a whole. Only 3 percent of OCS-only operators place other forms of single-cup options, including pod brewers and liquid coffee specialty drink machines. Whereas 13.5 percent of the segment as a whole, places these types of brewers predominantly in micro markets.

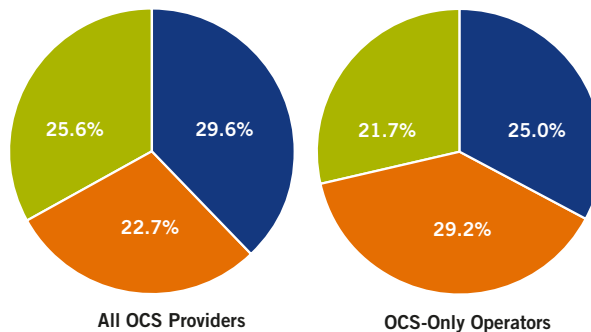
Threats differ by type

While the top three factors that contributed to changes in the office coffee service industry were the same for the two groups, where competition ranked was very different. For the segment as a whole, area businesses opening and closing impacted sales the most. With technology a close second, followed by competition. For those in the OCS-only business, competition was the top contender, showing the difficulty that these operators are having competing against national organizations, office supply stores and full-line operations.

At the right size in the right region, OCS-only operators still command a strong business. They handle larger offices and find their revenues increasing in-line with the industry as a whole. The majority don't intend to expand into food and snack services however, instead favoring other services in order to stand out. | ◀

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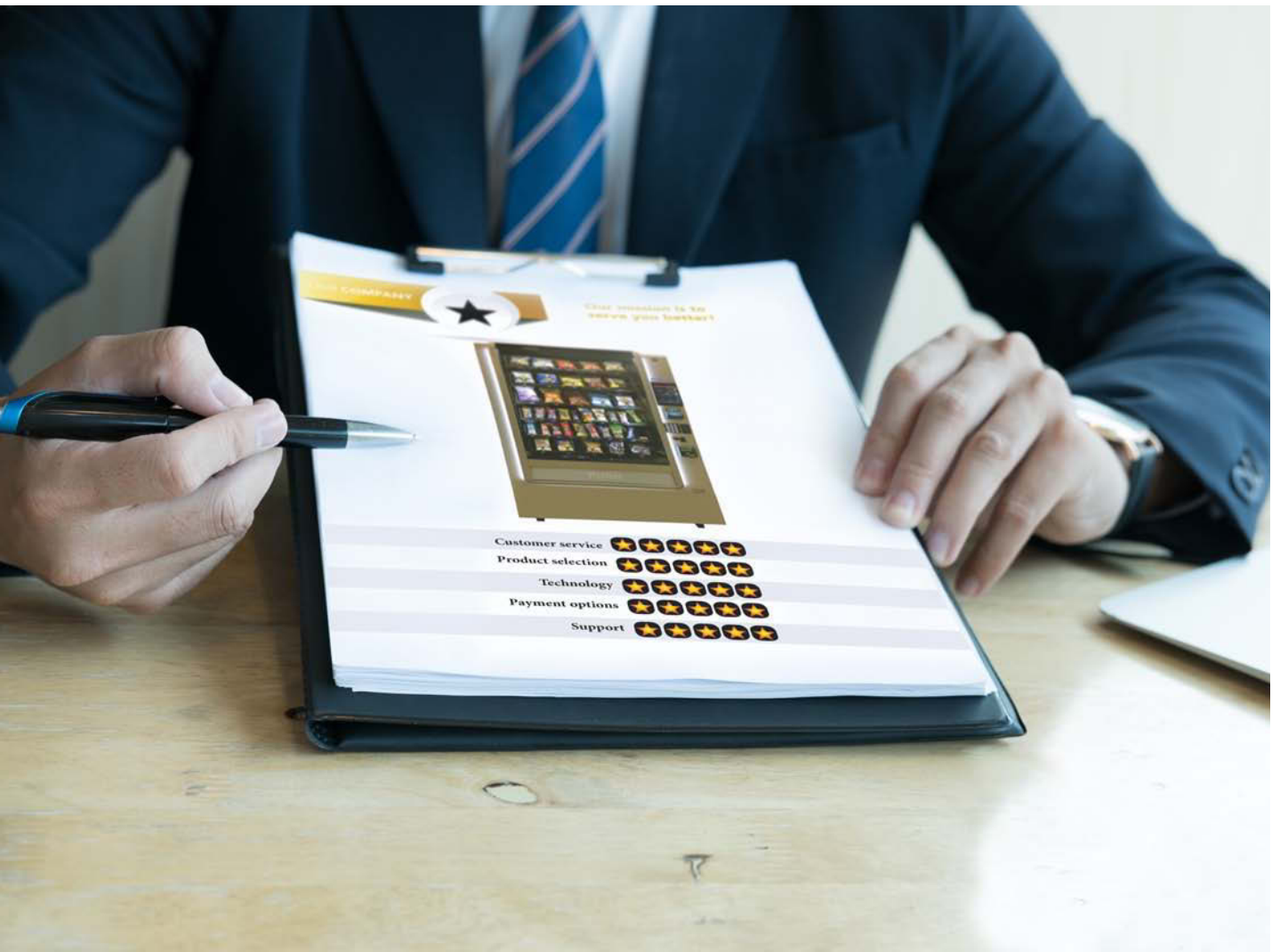
How Different Is Your Vending Company

By Gary Joyner, Contributing Editor

A tale from the trenches about winning business by disrupting the norm.

Let me tell you about a time everything my company did differently was a benefit. When I pulled into the parking lot of a particular corporate headquarters building years ago, the thought of being able to land this vending contract was paramount in my mind, to say the least. Our research had revealed that they had three prime locations in our market. Need I say that opportunities like that do not come along every day.

I walked into the lobby and asked the receptionist to please let the



human resource manager know I was here for our 11:30 a.m. appointment. She told me, "Please have a seat and I will let her know you are here."

A few minutes passed and the receptionist told me everyone was waiting in the conference room. She gave me directions to go down the hall to the third door on the left, and go right in. The first thought going through my mind was that I did not realize I was going to be making my vending presentation to more than one person. However, that was okay because I felt confident that once everyone saw the proposal, they would be impressed.

I opened the door and to say that I was surprised was an understatement. The four people sitting at the conference table included the president, human resource manager, vice president of operations and the facilities manager. After shaking hands with everyone and ensuring they all had one of my business cards, the human resource manager asked me to tell everyone about our vending company.

Cutting to the chase

Just as I was beginning to open my mouth, the president of the company said, "I don't want to sound rude, but you are the third company we have met with this week. How is your company any different than your competitors', because all vending companies are selling the same brand name products and, assuming your prices are competitive, why should we choose you as our employee refreshment service provider?" For good measure, he finished by saying that vending companies all say our service is great and that when our machines need service, we will be johnny on the spot.

I thanked him for his comment and then proceeded to agree with him that the overwhelming majority of vending companies are pretty much all just alike. He looked at me

and said, "well, at least we can agree on that."

I opened my presentation book and the first thing I took out was our TOP TEN LIST OF HOW WE ARE NOT YOUR TYPICAL VENDING COMPANY. I jokingly said to the room that if David Letterman could have his top ten list, we could also. I then asked the human resource manager if she could make a copy of my list and pass it out so we would all be on the same page. She said of course, and in a couple of minutes she came back in the conference room and made sure everyone got a copy.

The top ten list

My top ten list of what made our vending company different included the following:



1

We install brand new state of the art electronic merchandisers (vending machines) at each location. I realize that this goes against the typical thought process of numerous vendors who only want to install used equipment at a new location. In the August 2016 edition of this magazine, Mike and Jodi Glimpse were featured on the cover of this magazine and one of the reasons they were able to grow their company, Camelback Vending, to a seven route operation was the fact they always install brand new vending machines at a new location. The same can be said about Jack and Victoria Brown, owners of Refresh Facility Services in Chesterton, IN, who are on the

YOU will close more new business than ever before ... guaranteed.

cover of the Feb/March 2017 issue of *Automatic Merchandiser*.



2

All of our brand new merchandisers come equipped with credit/ debit card acceptors.



3

Each location receives a cash recycler that makes change for their employees in \$5 or \$1 bills for their employees who need change for a \$20 or \$10 bill instead of a pocket full of quarters.



4

Our brand new merchandisers all have an electronic guaranteed product delivery system that means their employees either get the product they have selected or get their money back right on the spot. No more post it notes on machines or employees kicking and shaking machines because they did not get their product The HR manger spoke up and said how nice that would be because she spends an inordinate amount of time handling refunds for their current vendor. They no longer have to fill out vending refund slips or wait for their vendor to come by and make refunds.



5

BOGO (but one get one free program) Every month we will have at least

one item in the machines that will have free vend tokens allowing their employees to get the second item free.

6

\$2 dollar bills will be attached to products for their employees to win when they purchase certain items.

7

Two for a dollar program (our company always has at least two cold drinks and three snack items that sell for 50 cents) It always amazes me when I have vendors say you cannot make money that way. I submit that you can purchase off brand cold drinks that usually cost 20 to 22 cents and products like peanut butter crackers, cheese crackers, etc. that cost 15 to 18 cents for an average combined cost of 35 to 40 cents that you sell for a dollar — that is more than doubling your money.

8

Free lottery scratch off tickets for their employees to win when buying vend products from our brand new merchandisers (be sure and check with your state lottery commission that it is OK to do that) One of our customers won \$1,000 when they bought a bag of cookies and our sales from that snack machine increased over \$150 in the two days after the winning ticket. We spent a grand total of four dollars for the lottery tickets in that snack machine that month.

9

Free tasting samples of our frozen food products on a periodic basis especially when we introduce new

items. Have you ever been in a Sam's Club, Target, Costco, BJ's, local supermarkets, food courts in malls, etc. where they are giving away free samples? The reason they do that is that it works. If you want to sell more food products from your merchandisers, schedule sampling days at your location.

10

Quarterly employee survey forms for their people to tell us what they want in their machines.

Show your differences first

After I had made my presentation and went over our top ten reasons why we were different than our competitors, the president of the company came up to me, shook my hand and apologized to me for possibly sounding rude when he made the comments about all vending companies being the same. Yes, we did end up getting all three of their locations.

If you really want to set your vending company apart from your competition make a list of what really makes your company different and show it to a new location every time you make a presentation. You will close more new business than ever before, 100 percent guaranteed.

While doing research for this article I Googled vending companies in four different markets to take a look at the websites of vending companies in those four cities. One thing that jumped out at me almost immediately was they all look alike and say basically the same thing. If you could tape over the names of the various vendors it would be very difficult to find any appreciable difference in the message they are attempting to convey to their customers.

I found they all basically said that they have great service when their machines break down. This made me wonder, why in the world would they tell prospective new locations that their machines are going to break down?

In addition, everyone says they have brand name products. Who in their right mind would say they have products no one has ever heard of?

There was always a line about professional service, too. I want to know what that means? Customers expect you to have professional service.

In one, I also saw "Highest commissions paid in the city." Why would you advertise anything about commissions? There are literally hundreds of thousands of locations in this great country of ours that never receive one dime in commissions. However, the vendor who lists that on their website is willing to give away profits when in most cases you do not have to pay commissions. I have been in the vending industry for 23 years and have had hundreds and hundreds of locations over the years that we never paid a commission.

I will close by saying that if you want your vending company to grow, put together a list that shows how your vending company is different from your competitors. Watch how many new profitable locations it helps you add to your customer base. | ◀



ABOUT THE AUTHOR

Gary Joyner started in the vending business in Orlando in 1994.

Since then he has owned, operated and sold three vending

companies in Florida. Joyner is currently the factory authorized distributor for Federal Machine Corp. in the state of Florida. He can be reached at fgwj45@aol.com.

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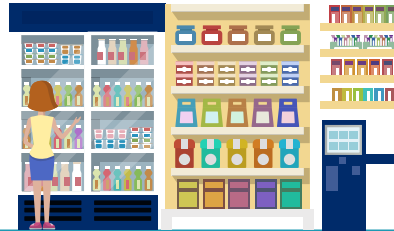


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The Micro Market Channel — Proven And Strengthening

Placements rise resulting in sales approaching \$1 billion and a new projected high for growth potential.

By Brad Bachtelle, Contributing Editor



Approaching our second decade of micro market placements and activities, a number of very positive indicators exist for continuing, aggressive channel growth.

Our most recent Micro Market Channel Census shows that the current micro market install base at the end of 2016 approached 18,000 markets, generating nearly \$1 billion in product sales. The sizable universe of micro market installations and continuing expansion clearly indicates that micro markets have already developed a very solid position as a legitimate and

independent channel within the away-from-home foodservice market.

New placements very strong

Our 2016 Micro Market Census numbers identified a micro market install base that has grown to more than 17,800 active locations, including a very strong increase of 39.5 percent over year-end 2015.

Within the micro market install base, nearly 7 percent of markets now have two or more payment kiosks on site. These larger, multiple-kiosk locations began increasing in placement

frequency in 2015 and now account for more than 13 percent of all operational payment kiosks.

With the sizeable number of active locations, micro markets can no longer be considered a “concept channel,” but rather one that has been validated in terms of location placements, sales expansion and positive reception.

Accelerating new location growth

In 2016, the channel added more than 5,000 new locations to the micro market install base. Of note, the 2016 growth number shows a continued

acceleration of new location placements, a positive indicator of overall market strength and a continuing opportunity for further expansion.

Of significance, the reported micro market location growth rates are net numbers, after adjustments for kiosks removed from locations during the year. With the install base now beginning to age a bit, kiosk removals during 2016 increased somewhat to 4.6 percent versus a 2015 removal rate of 3.8 percent. The kiosk removal rate includes all removed equipment including those relocated to other facilities or due to facility closure.

Channel sales approach \$1 billion

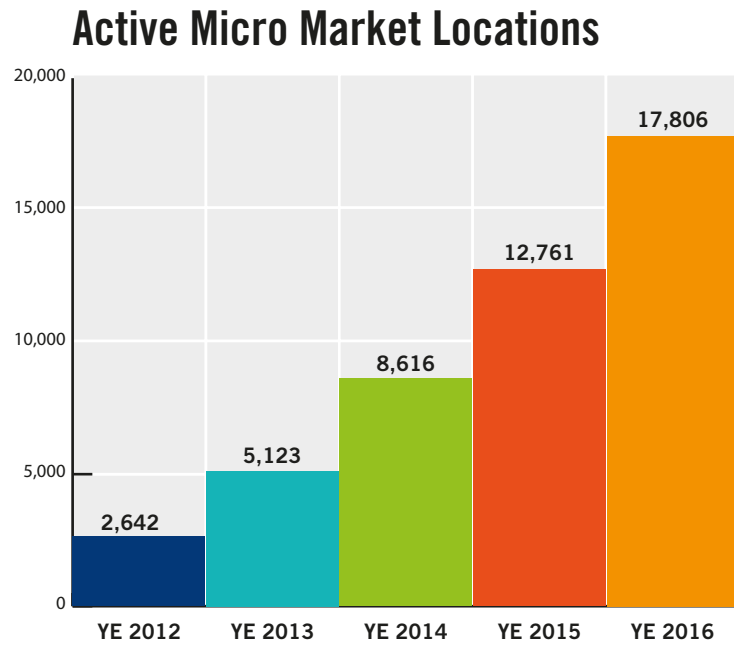
Micro market revenues in 2016 grew at a similar rate with the install base to \$949.9 million in product sales, an increase of 42 percent over the prior year. Just shy of the \$1 billion level, sales are actually accelerating at a faster rate than market placements as the existing full-year install base becomes a larger segment of total micro market installations.

Total 2016 channel sales included 456 million consumer transactions and 660 million plus product purchases.

Markets clearly in the growth stage

Looking at the census numbers and trend lines, accelerating micro market growth shows that the channel is currently solidly within the expansionary, growth stage of its market life cycle. A market with accelerating growth is normally some distance from maturity, indicating significant opportunities continue to exist to further increase market size. As market maturity approaches, it is normal for growth rates to decline as the market becomes more stable.

Micro markets probably passed through the initial introduction stage sometime in 2012 after innovative operators blazed the trail through trials at a few locations, providing proof of the basic concept. Since then,



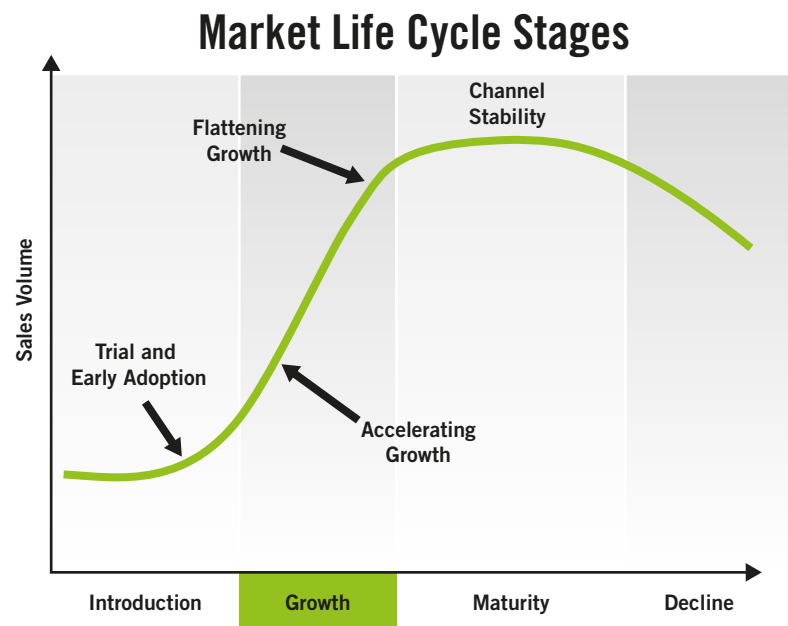
operators across the U.S. have driven micro markets into the growth stage with aggressive efforts (and successes) focused on rapidly expanding the micro market placement base.

Growth during the initial development of a new market is generally sourced through new placement acquisitions. As the micro market channel begins to enter into maturity, we expect operator emphasis will become more concentrated on maximization of

location sales, driving individual site and subsequently total channel sales beyond the growth delivered solely from additional location placements.

Initial channel projections

In early 2013, at the first micro market seminar in held conjunction with the NAMA OneShow, we projected a micro market placement opportunity at business and industry (B&I) locations of 35,500 within the domestic



Market life cycle stages

Both new markets and new products normally go through a life cycle that has four fairly distinct stages:

Introduction — the early times for a new product or market, where the concept becomes fully defined and validated, and early adopters enter into the market

Growth — the rapid expansion of the market

Maturity — the market stabilizes as volume meets demand capacity

Decline — the generally inevitable period of volume reduction as demand falters or alternatives develop that move consumers to alternative products/markets.

The introduction stage verifies that a market opportunity of some degree exists. New concepts such as micro markets strengthen and really define their future during the growth stage as the market becomes very active. The breadth of opportunities becomes more clearly defined, and the future strength and staying power become clearer.

The length of time that a product or market spends in the key growth and maturity stages depends upon a number of factors, including the depth and breadth of consumer demand and subsequently, the development of replacement options. Automobiles have been a mature market for nearly a century, while fax machines remained viable for only about a decade due to significant changes in communication technology. Pet Rocks were incredibly hot one holiday season, never to be seen again after about four months of intense sales activity.

After more than five years of developmental market activity, it certainly appears that micro markets are an innovation that is here to stay, and has a legitimate position as an independent foodservice channel. Recent micro market census data provides insight into where the channel is currently, and a glimpse into future potential.

U.S. market within 10 years, or by 2022. Our associated potential revenue projection was \$1.6 billion in product sales. Although the height of those projections elicited surprise from some, over the past four years we have moved from 7 percent of the location projection to our current position of more than 50 percent.

Clearly, the rather substantial opportunity projected at 35,500 micro market locations and \$1.6 billion in sales as developed in 2013 now appears to be well within reach.

The initial projection for the size of the micro market placement opportunity was based upon a general perception within the channel that location opportunities were restricted to businesses with employee populations between 150 and 500. Under 150, sales levels would not be adequate to deliver profit and justify the associated investment, while larger locations were already being served in most cases by on-site dining/food-service installations that delivered hot meal service that micro markets could not effectively compete against. The result was a perceived limitation

of host locations where the micro market concept would be acceptable and profitable. That has changed.

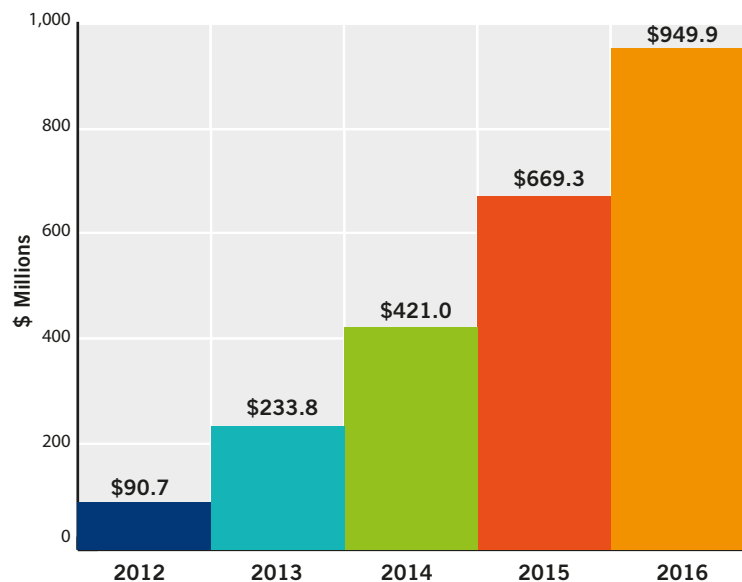
Additional opportunities: How high?

Now, to project the future of micro markets and the size of the overall opportunity requires a complete reassessment based upon a number of factors, beginning with basic economic growth and encompassing an expanding set of placement opportunities.

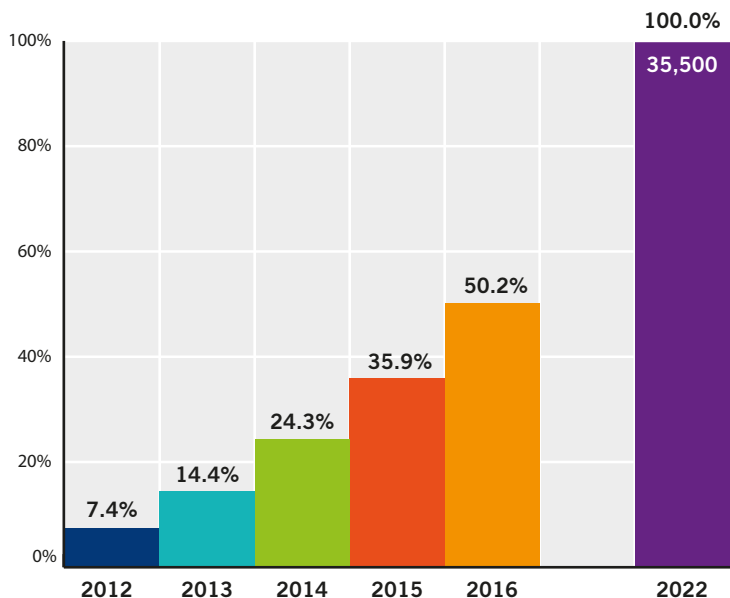
Looking initially at the core micro market target of business locations with substantial employee populations, U.S. employment census data indicates that the business location count with more than 100 employees has grown by 9.0 percent between 2012 and 2016. This increase alone in the number of micro market location candidates expands our initial “opportunity projection” at B&I locations from 35,500 to nearly 39,000.

In addition, our learnings as a channel relating to our growing universe of micro market locations provide strong indications that our prior employee threshold of 150 thought to be necessary for adequate location vol-

Micro Market Channel Sales



Micro Market Penetration Vs. Initial 2022 Projection



umes can now be shifted downward to 125, adding a significant number of new potential locations.

And, there's potentially much more. Some micro market operators have long viewed the micro market concept as being applicable to lower employee count locations, recognizing that modifications in the breadth of the micro market product offerings, especially in the fresh food category, would be necessary. In response to this expanded opportunity perspective, our equipment suppliers, including some new entrants into the market, have introduced lower cost equipment options that make lower volume locations financially feasible. The result? A further reduction in the employee threshold for a micro market installation to 100, or potentially, at some time, to as low as 75.



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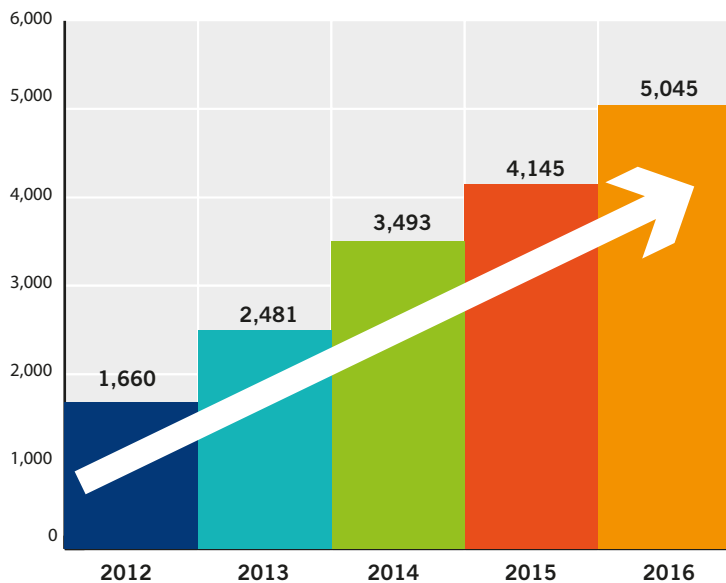





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Active Micro Market Placement Growth



Census Methodology

The Micro Market Census methodology is relatively unique in that it compiles actual installed micro market location and kiosk data from micro market equipment suppliers. As such, Bachtelle and Associates has a strong, dependable baseline of micro market install numbers, which allows a solid channel reference point without extensive projections and assumptions, which can result in widely different numerical manipulations. If anything, the census numbers may tend to be understated due to the omission of some new equipment suppliers to the market.

Plus, there is no longer any upside to limiting market placement in terms of employee populations. At large businesses with more than 500 employees and on-site dining, micro markets are being installed due to the emphasis on “grab and go” feeding options. The always open, 24/7 operations of micro markets greatly enhance the employee foodservice experience as on-site dining facilities have limited hours and are often closed on weekends.

In essence, the strong success and extremely positive consumer response have significantly expanded the range of locations where micro markets are viable. If (or when) we can make 100

employee micro market locations profitable, our B&I placement opportunity count increases by 65 percent. Our updated 39,000 location projection becomes nearly 64,000!

New segment opportunities

Finally, our equipment suppliers are working towards expanding micro market opportunities into entirely new location segments through their development of software that is designed specifically to meet different and unique operating and payment requirements of non-B&I locations.

In just the past year or so, equipment suppliers have developed micro market software that can sync with

college/university payment card programs, which is critical to support on-campus purchases by both students and faculty/staff. Micro markets now can be placed in dormitories across the country (that have enhanced security through resident card-key access), bringing the micro market expanded product variety and simplicity of purchase to an entirely new consumer segment. With more than 2,300 private and public four-year colleges in the U.S., there may be 5,000+ new opportunities for micro market placements within just the college/university segment alone.

In addition, new micro market placement initiatives are underway at semi-public locations such as hotel pantry sites, health clubs, condominium and apartment complex clubhouse facilities, etc., that will create a large number of additional micro market placement candidates in the near future, but also require adjusted micro market operational guidelines to meet the new categories.

How high is up for the micro market channel? The next couple of years will clarify the overall size of the opportunity, but we expect it is actually more than double the initial 2013 projection of 35,500 micro market sites and will ultimately deliver \$4 billion plus in channel sales. All market indicators point to a channel that is already very solid, continuing to strengthen and has a very positive future ahead. ▶



About the Author

Brad Bachtelle is president of Bachtelle and Associates, a national consulting and research firm dedicated to driving increased product

sales volumes and market share positions for its clients within the at-work and other specialty segments of foodservice. Contact Bachtelle at bbachtelle@bachtelle.com or 714-731-5830.



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Trends In OCS Equipment Go High-Tech

By Brittany Farb Gruber, Associate Editor

Bean-to-cup and sophisticated brewers that can create specialty drink machines and impress customers are among the most popular.

For those in the industry, it shouldn't come as a surprise that office coffee service consumers of all ages crave unique, specialized beverages. Long gone are the days of boring cups of joe being synonymous with the break room. In order to meet these demands, OCS equipment sup-

pliers shared some of their thoughts on equipment trends:

At Bravoril Bonamat North America, bean-to-cup has experienced some of the most monumental and fastest growth. In response to the growing demand, the Aurora, IL-based company will launch another bean-to-cup

machine in the fourth quarter of this year. The machine will be a low profile, fully automatic true espresso brewer named the Esprecious. In 2018, the company will launch a very cost effective bean-to-cup unit for smaller usage locations where operators currently are not able to justify placing a higher priced unit.

"Bean-to-cup machines offer OCS operators an opportunity to distinguish themselves with premium quality drinks from, for example, that hip local roaster and café," said Debora Mehlert, office manager at Bravoril Bonamat North America. "Bean-to-cup equipment allows an operator to truly offer that unique experience and service that distinguishes themselves from their competition or even the possibility of losing business to Amazon or other retailers."

At Québec, Canada-based Cafec-tion, the bean-to-cup category has also shown great promise.



Freshly made coffee by the cup is trending.

“The growth of bean-to-cup can be related to the decline of the traditional vending industry,” explained Mike Cochrane, vice president of sales and business development at Cafection. “Those companies need to seek new markets in order to survive. A quick glance around where the margins are and satisfaction all points to coffee. This has helped fuel

the growth. Over the last few years, those operators were convinced that less expensive or even free machines with flavor pack coffees were the way to get into the market only to find that the margins were tight and clients were using their equipment with their own purchased coffee. Now we are full into bean-to-cup and the growth is accelerating.”

Personalization is key

Interaction and personalization are also trending in OCS equipment, says Cochrane. The way users interact with the screen is paramount.

“The ability to utilize the screen to message and create more of a user interaction with their co-workers or human resource (HR) departments is growing in popularity,” said Cochrane. “I really think as we go forward, more operations based technologies to reduce downtime, be more proactive and more entertaining will become a need.”

“Our bean-to-cup equipment offers enormous possibilities when it comes to programming drinks, matching the customers exact taste profile and offering a variety of options when it comes to on-screen branding,” added Mehlert. “All of this comes of course, with a need for more operator education, so we never try to lose sight of the ease of operation, programming and serviceability when we design our equipment.”

High-tech becomes a must

According to Karalynn McDermott, senior vice president of market development at Springfield, IL-based BUNN North America, self-service equipment that “wows the operator” is trending.

“Large touchscreens that can upload at install with the client’s content [are trending],” explained McDermott. “For the past six months, interest has been in touchscreen, innovative solutions. At BUNN, that is our specialty. Operators want easy to clean equipment and pictures on the touchscreen of the unit of the cleaning process. Picture-prompted cleaning on the front touchscreen gives ease in cleaning.”

With technology also comes a higher demand for technical support.

“As OCS operators bring on more new technology in bean-to-cup equipment, they expect partnership with their equipment manufacturer, who supports them with 24/7/365 phone support, technical service schools and parts availability,” said McDermott. While there are challenges to service, the rewards in higher margins and more product sales can make up for it in the right location.

The OCS industry has experienced continued growth over the past year. The outlook is positive with the variety of single-cup equipment that exceeds the expectations of customers available. | ◀



Debora Mehlert, office manager, Bravor Bonamat North America.



Mike Cochrane, vice president of sales and business development, Cafection



Karalynn McDermott, senior vice president of market development, BUNN



NO MORE STATUS QUO

By Emily Refermat, Editor

Oregon independent Royal Vending up sells to micro market service as well as hybrids for smaller locations in order to thrive in a growing, but saturated area.

Ryan Harrington, Co-CEO of Royal Vending, came into the vending industry during a challenging time. The economy was in recession and the reputation of vending in the Portland, OR, area was poor. Companies asking for vending complained about a lack of response from their service providers, and most didn't even know their

route drivers. Harrington used this to his advantage by starting small with dedicated service and working to maintain his attention to customers even as he grew Royal Vending, based in Tigard, OR, into a full-line vending, micro market and office coffee service operation. He embraced technology, such as going 100 percent cashless on vending machines and using an online vending management system. However, it is micro markets that have truly captivated his region and drove profits since the company

Even when customers call looking for vending service, Ryan and Michelle Harrington suggest their micro markets.



placed its first in 2014. Micro market revenues, which include hybrid micro market pantry service, overtook vending the next year and now account for the majority of the \$2.4 million in annual revenue.

Unattended profits

The path to becoming a vending operator started for Harrington on a Ferry in 2006. “I was waiting in a 12-person line to get a soda from the vending machine when I thought, ‘the owner of this machine isn’t even here and is making money,’” recalled Harrington. He was working as a real estate investor and looking for a business he could do during downtime in-between transactions. Vending seemed to be perfect. He did research and by the next year had purchased two new, branded Red Bull machines and found locations to place them. “I just kept doing that, a couple of machines at a time,” said Harrington. “I rented a truck and serviced them myself.”

Around 2009, when the real estate market was in decline, Harrington was thinking about entering another line of work. His wife, Michelle, suggested going into vending full time. He had already placed 40 vending machines, and was doing so well selling Red Bull, the company was giving him free machines.

“I wondered if I could go into business in the Portland environment and treat everyone with the same high standard of service,” he said. He decided to give it a try and opened Royal Vending with his wife. Within two years they had built up enough routes that they needed a commercial warehouse space and brought on some employees, including Michelle who left her career in human resources (HR) to manage Royal Vending full time.

Manual forecasting

One of the things that set Harrington’s vending machine operation apart was



Fresh food is the centerpiece of Royal’s micro markets, enticing customers to visit.

that he started with dynamic routing from the start. “I would track every sale and use formulas in Microsoft Excel to forecast future sales and make routes,” he said. He had no idea there was such a thing as a static route until he started talking to other operators at trade shows.

ALL IN FOR CASHLESS BRINGS ROI

In 2015, Royal Vending upgraded not only to a vending management system (VMS), but also to 100 percent cashless acceptance. Ryan Harrington knew that cashless readers could use the same signal as the telemetry needed to support the online VMS. He also knew the consumer’s preference for paying with electronic means was growing, which made going cashless an upgrade to his service. It was a good move. “Sales went up 17 percent across the board once all machines accepted cashless,” he said.

At the 2014 NAMA trade show, he and Michelle saw the micro market concept. By January 2015, they had installed the first one and had more planned. Michelle immediately recognized micro markets as a HR benefit. She helped create programs specially targeted to helping HR professionals meet employee needs and increase benefits with micro markets, and eventually pantry service offerings. The focus worked, partly because Portland has a number of technology companies. “Many companies want to offer refreshment on-site, whether that is free product, cheaper subsidized options or just better product variety,” explained Harrington. He rarely deals with a purchasing manager or facility manager anymore, but communicates with the wellness committee or personnel department. “That shows the change in thought process for locations,” he said.

Launching micro markets also showed the Harringtons how much they could be benefiting from more streamlined sales and forecasting analysis, so they opted to add an online vending management system (VMS) in 2015, as well as accompanying cashless readers. “It was really easy to upgrade because we were already prekitting, already dynamic scheduling and already had micro markets,” said Harrington. “The

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VMS just made it all more efficient and less labor intensive.” He used that extra time to grow micro markets.

The revenue from micro markets over took vending revenues in 2015 and continued to increase. Vending now only makes up around 35 percent of annual sales with the rest being micro markets, pantry service and office coffee service (OCS). “In a matter of two years, vending machines became only a third of our business,” said Harrington, “after all those years of working to add vending accounts.” Despite this, Harrington is grateful for the change. “Micro markets increase sales, service calls go to zero and the account is happier.”

Building on the success of micro markets, Royal Vending began adapting the way it sold refreshment services. “When someone calls for vending, we pitch a micro market or pantry service. Vending machines are the last resort,” he said.

Royal Vending has a well crafted and streamlined marketing strategy for micro markets as well as the installation. The presentation uses slides and sample photos of layouts. The key, however, is making the switch to micro markets easy and worry free. “Every week we do one,” said Harrington. “Install on Monday. Grand opening, Wednesday. No contracts or money from the location. We take care of everything.” Royal Vending will even work with the previous vending company for removal of equipment.

The lack of contract is a point of difference for Royal Vending. “We are so confident that they will appreciate the service and like it, that we don’t require a contract,” Harrington said. He will often offer to remove the micro market upfront, if it doesn’t work, which sets the location’s mind at ease. He says that 99.9 percent of the time, the location loves it, however.



The bulk of Royal’s annual revenue now comes from its micro market segment.

OPERATION PROFILE: ROYAL VENDING

Headquarters: Tigard, OR

Founders: Ryan & Michelle Harrington

Number of employees: 11

Micro market provider: 365 Retail Markets

VMS/Cashless: Parlevel Systems, USA Technologies

Annual revenue: \$2.4 Million

Local retail displays

Royal Vending has made micro market installation an art, down to how quickly its customized fixtures and cabinets and kiosk take to install. “We can have one up in a couple of hours and remove one in an hour,” explained Harrington. He and Michelle went to a local store fixture company and cabinet maker to get their micro market displays. It allowed them to make the fixtures the same height as the coolers as well as pick the style and finish they wanted. It also allows them to reinforce the Royal Company Market name, the brand Royal Vending uses for its micro markets.

The creation of fixtures locally also keeps costs low, Harrington finds. He has considered ordering fixtures from elsewhere, but shipping costs are a challenge. He finds his current suppliers are more convenient and half the price than other offerings.

While locations like to be part of the design process of the micro market, Harrington finds he gets called in after the break room remodel is done. The location usually asks him to compliment the new decor or style, rather than help redesign an old break room.

Royal Vending has a variety of micro market sizes as well. “We’ll install a traditional micro market for 90 people or more, if they are all onsite, especially if its a 24-hour location,” he said. For smaller locations, Royal Vending uses a micro market hybrid. There is a monthly subsidy paid for by the location, perhaps for healthy items, which ends up going into the employee accounts. “We will put \$20 a month into the employee accounts,” said Harrington. “No one pays us to put in a micro market. Instead it all goes towards employees so they buy more, so we can have more fresh food.”

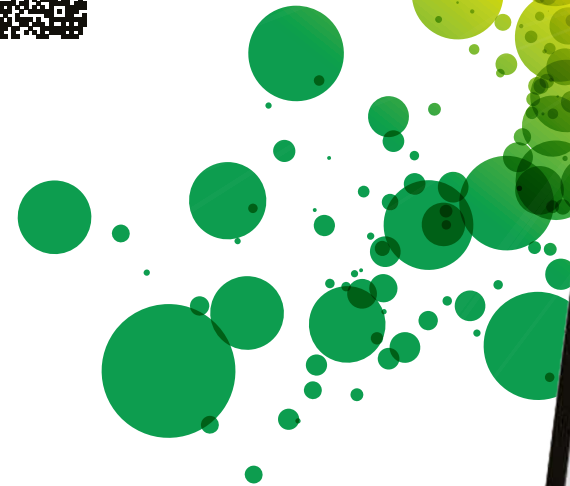
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While fresh food can be difficult to manage due to short shelf life and

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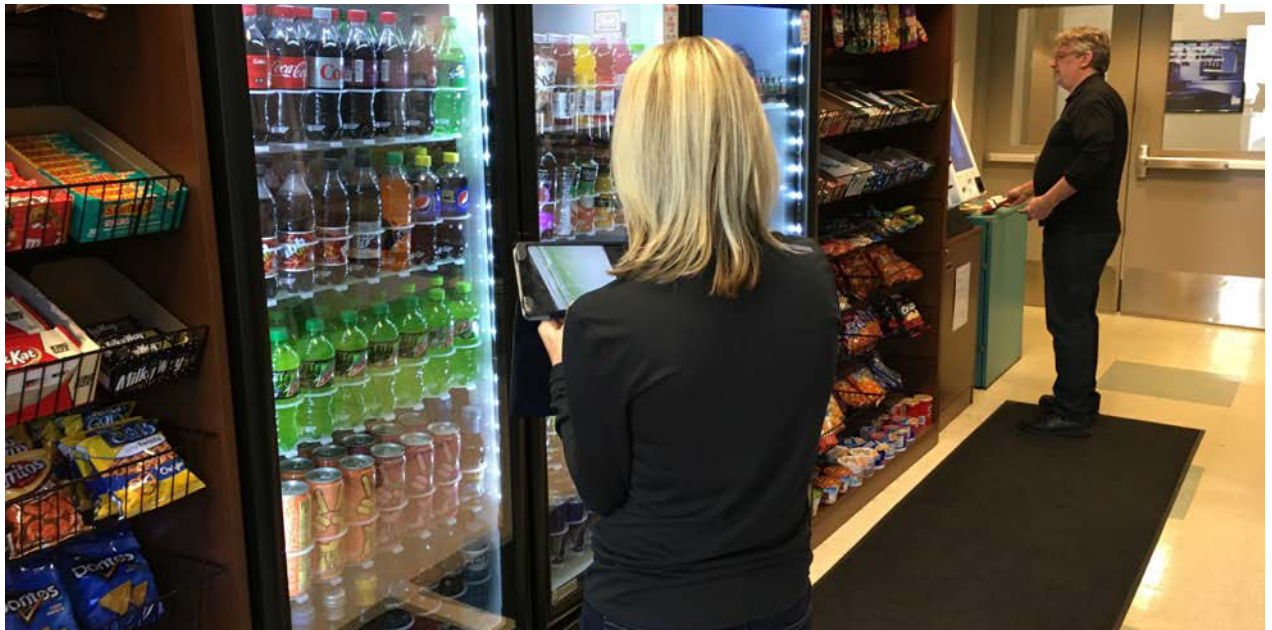


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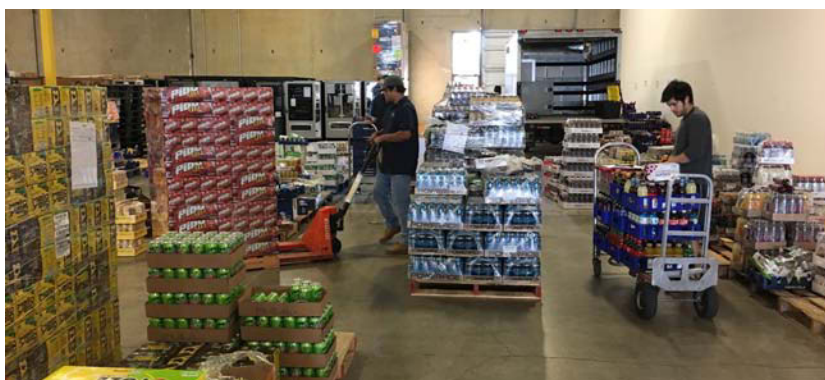
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Michelle Harrington regularly conducts inventories and audits of each market.

high spoilage, Harrington feels it is vital. “It is the centerpiece of a micro market,” he said. “It is what brings them in.” In an effort to reduce the amount that has to be thrown away, Royal Vending keeps a low margin on fresh food which induces sales. The revenues support this strategy as Harrington reports that he rarely sees a purchase of just a fresh food item. Usually, the food item is accompanied by a snack and or beverage. “Our whole goal with subsidies is to put more fresh food into the micro market,” Harrington said. It might drive up waste, but it also drives up sales.

Royal’s warehouse personnel manage around 600 product SKUs.



Part of Harrington’s plan for the future is capturing all the locations that shy away from vending machines, but don’t qualify for micro markets, with the hybrid option and also high service. “Our region is micro market saturated,” he admitted. “The benefit is that locations are educated about micro markets and their benefits.” This makes the location more receptive to a subsidy program when Harrington explains he can give them a micro market-like experience. As the last independent company in the area, he also focuses on keeping top tier, personalized service. “We love being independent — we have a lot of years left in us. We want to build this culture and business up. Being local is a great asset,” he said.

Pantry service growing

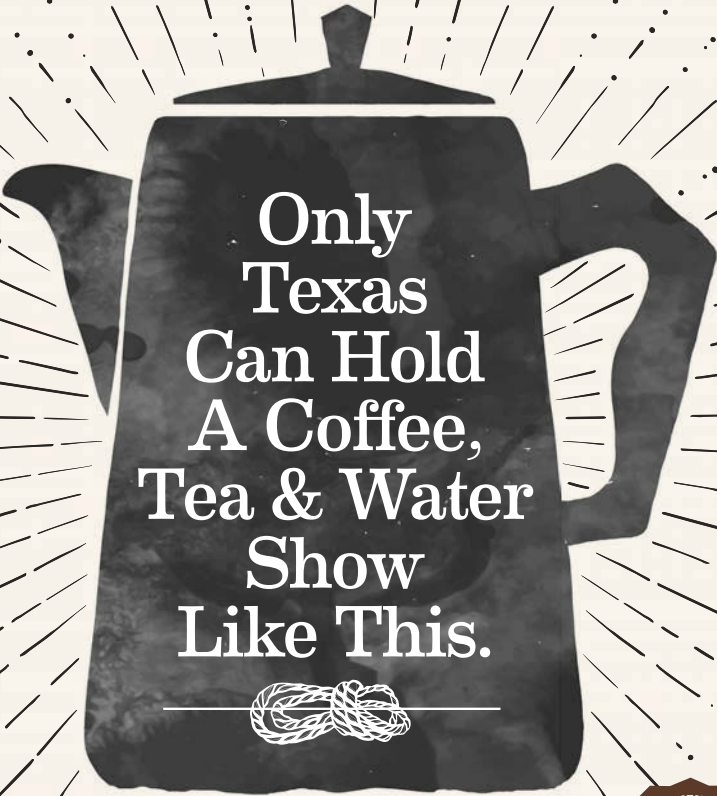
We think pantry service is the future,” said Harrington. “We think more and more companies will be offering it.” Royal Vending offers a couple versions currently. The first is the kitchen and cabinet restock. This is where a delivery driver will stock the whole kitchen weekly or twice weekly, whatever is needed. “It is more labor intensive,” admitted Harrington, “because the driver inventories and restocks, and then we invoice the location. It can be 5 to 10 times the revenues of a micro market, however.”

The second pantry service option Royal Vending offers is essentially a micro market without the kiosk (and cameras). Harrington has found that this can work very well. For example, a location of 30 employees who are all onsite and working long hours can have the same revenue as a 150 employee micro market. Additionally, the cost of entry is less with no kiosk, but there is more labor and stocking with a higher demand on the manual data. “The lack of product data is a

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challenge,” commented Harrington. Currently he uses Excel, but hopes to find a company who can streamline the process.

One area essential to support the growing number of Royal Company Markets and Royal Vending pantry service is warehouse management. “When I think back, I started with just beverage vending machines that had maybe 40 SKUs,” said Harrington. “Now with micro markets, there are around 600 SKUs.” Michelle manages that side of the business, working out efficient pick paths and product tracking. She decides what to order and when it should be delivered. Royal Vending does not operate its own commissary, but instead gets fresh food delivered twice a week from three different local kitchens. Harrington gives her a lot of credit for Royal Vending’s prosperity. “Michelle is instrumental in the operations and success of our business,” he said.

Drivers are specially trained

Drivers don’t pick or load product into their vehicles. “We really try to specialize roles,” said Harrington. Drivers stay on the road and merchandise micro markets. Royal Vending has a standard operating procedure for merchandising. Part of that procedure is to clean, answer questions, and maintain the market, including ensuring items look appealing and removing what doesn’t sell. Planograms are all handled in the central office, which keeps all the micro markets looking the same. One advantage of this is cross-training and a consistency of service. “Locations get the same service no matter who is the driver — it’s less variable with less variation,” said Harrington. Any driver can cover for another and the micro market and merchandising responsibilities will all be familiar.

Royal Vending offers drivers hourly pay and bonuses that relate to total sales and expired product.

REALIGNING VENDING WHEN YOUR MICRO MARKET FOCUSED

Royal Vending, which started as a vending company, has actually begun reducing the number of vending machines it services. Ryan Harrington, president, shares that the company is eliminating low volume accounts while keeping around 300 vending machines placed in quality locations. “We offer options when we eliminate the account. We ask if they want to subsidize it or we suggest one of our vending partners who will take the location,” said Harrington. “It’s driving up our vending revenue but not our number of machines.”

“We have a short dated program for fresh food that doesn’t come into this,” said Harrington. “It’s the other stuff — the chips, bottled drinks, etc. If drivers don’t catch these things, it can cost the company lots of money in product needing to be thrown away.” Drivers are trained on how to find short dated product and pull it in the last two weeks to move to a quick turning location. Doing this well leads to monetary compensation.

There is also an employee recognition program and a focus on culture, because Harrington knows finding the right kind of employee can be challenging “In Portland, the unemployment rate is low, making finding quality employees a bit difficult. Plus we are growing, needing to hire someone new every 3 to 6 months,” said Harrington. “And it’s hard work. All our employees work hard.”

Estores and national partnerships

When looking into the future, the Harringtons value partnerships, both online and offline.

“We are looking at the next step in the industry right now” said Harrington, “an estore.” This would be for the location that doesn’t qualify for full service pantry, but wants to order by the product and have it delivered locally. Royal Vending is working with 365 Retail Markets on a trial of the estore program. Harrington’s main goal is to take care of every-

thing area businesses need. Along with that idea he’s found there are also companies who want to negotiate service for other branches across the nation. This has led Harrington and Michelle to consider the need for some kind of nationwide vending management to compete with large corporations. Therefore, they created an operator network.

“We now have independent operators in various cities as partners,” said Harrington. The operators are all dedicated to service and each coach each other and share ideas, if needed. Many met Harrington at industry trade shows, such as NAMA, or through supplier contacts. The negotiating operation takes a small percentage of the revenue, the remainder going to the operator servicing the local account. Currently, the partnership consists of operations in Atlanta, GA; Denver, CO; Sacramento, CA; Dallas, TX; and New York City, NY. “It’s allowed us to win bids on national accounts looking for service,” reported Harrington. “Really, it’s helped us all.”

Royal Vending isn’t just dedicated to service, it’s dedicated to changing the way things have been. From bringing custom micro markets to locations, hybrid and pantry service concepts to smaller locations and even forming a national network, Royal Vending is pushing the boundaries of traditional workplace service. | ◀



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Magliner Heavy-Duty Aluminum Appliance Truck

Magline, Inc. manufacturer of innovative material handling equipment, has launched an aluminum heavy-duty Appliance Truck. While lighter than its steel equivalents, the Magliner Appliance Truck moves heavy, oversized loads more safely and easily. The Appliance Truck features a 4th wheel attachment to support loads up to 800 pounds in an incline position. This attachment is easily deployed and folded using an innovative handle release, allowing the user to keep both hands securely on the truck at all times. The truck offers an increased capacity in the two-wheel position of 600 pounds. The Appliance Truck also features a patent-pending break back bar which prevents the truck from rolling when breaking back or putting an item in place, which promotes ergonomic posture that reduces muscle strain.



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1. Publication Title Automatic Merchandiser	2. Publication Number 017-280	3. Filing Date September 15, 2017
4. Issue Frequency Mar, Apr, May, Jun, Aug, Sep, Oct, Dec	5. Number of Issues Published Annually 8	6. Annual Subscription Price Free to Qualified Subscribers
7. Complete Mailing Address of Known Office of Publication (Street, City, County, State, and Zip+4) SouthComm Business Media, LLC 1233 Janesville Ave PO Box 803 Fort Atkinson, WI 53538-0803		Contact Person Terri Pettit Telephone (920) 563-1727
8. Complete Mailing Address of Headquarters or General Business Office of Publisher SouthComm Business Media, LLC, 1233 Janesville Ave, PO Box 803, Fort Atkinson, WI 53538-0803		
9. Full Names and Complete Mailing Addresses of Publisher, Editor, and Managing Editor		
Publisher (Name and Complete Mailing Address) Ron Bean 1233 Janesville Avenue, PO Box 803 Fort Atkinson, WI 53538-0803		
Editor (Name and Complete Mailing Address) Emily Refermat 1233 Janesville Avenue, PO Box 803 Fort Atkinson, WI 53538-0803		
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13. Publication Title Automatic Merchandiser	14. Issue Date for Circulation Data Below September 2017	
15. Extent and Nature of Circulation	Average No. Copies Each Issue During Preceding 12 Months	No. Copies of Single Issue Published Nearest to Filing Date
a. Total Number of Copies (net press run)	11973	11991
b. Legitimate Paid and/or Requested Distribution (By Mail and Outside the Mail)		
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1. Technomic, Breakfast Consumer Trend Report, 2015

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