

# **Smart Vending & Automated Retail Market Forecasts to 2032 – Global Analysis By Machine Type (Beverage, Snacks, Combo, Frozen Food and Personal Care), Placement, Distribution Channel, Technology, End User and By Geography**

<https://marketpublishers.com/r/S9E107D8A1ACEN.html>

Date: September 2025

Pages: 200

Price: US\$ 4,150.00 (Single User License)

ID: S9E107D8A1ACEN

## **Abstracts**

According to Statistics MRC, the Global Smart Vending & Automated Retail Market is accounted for \$13.4 billion in 2025 and is expected to reach \$27.3 billion by 2032 growing at a CAGR of 10.6% during the forecast period. Smart Vending & Automated Retail is a technology-driven retail model that leverages IoT, AI, and contactless systems to deliver seamless, 24/7 consumer experiences. It includes intelligent vending machines, unmanned kiosks, and robotic stores that offer real-time inventory tracking, personalized recommendations, and mobile payments. Designed for convenience and efficiency, this model reduces labor costs, enhances data analytics, and expands retail access across high-traffic or remote locations—transforming traditional point-of-sale into a dynamic, automated, and scalable retail ecosystem.

According to the National Automatic Merchandising Association (NAMA), automated retail and smart vending systems are evolving into unmanned convenience hubs leveraging AI analytics, contactless payments, and dynamic product personalization.

Market Dynamics:

Driver:

Rising demand for contactless shopping

The market is propelled by increasing consumer preference for contactless shopping

solutions that enhance convenience and safety. Smart vending machines align with shifting retail dynamics, offering automated, 24/7 access to food, beverages, and essential goods. Fueled by growing urbanization, digital payments, and hygiene concerns, adoption has accelerated across both developed and emerging markets. Retailers leverage these systems to optimize space and reduce labor costs. The integration of IoT-enabled features further enhances user experience. Collectively, these factors make contactless shopping a central market driver.

#### Restraint:

##### High initial setup and maintenance costs

A major restraint for the smart vending machines market is the high upfront investment required for installation and advanced technology integration. These machines involve significant costs for hardware, software, IoT connectivity, and regular maintenance. Smaller retailers often find it financially challenging to adopt at scale, limiting widespread deployment. Additionally, technical failures or system downtime incur further operational expenses. While long-term efficiency benefits exist, the initial cost burden slows adoption in price-sensitive regions. This capital-intensive nature remains a limiting factor for market penetration.

#### Opportunity:

##### Integration with mobile payment platforms

The market is presented with strong opportunities through integration with mobile wallets and digital payment ecosystems. Consumers increasingly prefer seamless cashless transactions via apps, QR codes, or NFC-enabled devices. Smart vending machines embedded with these capabilities deliver frictionless experiences while enabling operators to collect valuable customer data. Spurred by fintech growth, partnerships with payment providers are expanding globally. This trend boosts user engagement and supports real-time promotional strategies. Consequently, mobile payment integration strengthens convenience, accessibility, and profitability, positioning it as a transformative growth lever.

#### Threat:

##### Regulatory hurdles in different regions

The market faces notable threats from varying regulatory frameworks across global markets. Rules governing consumer safety, data privacy, and product distribution differ significantly, complicating international deployment. Some regions enforce strict guidelines on food safety and payment compliance, raising operational complexities. Additionally, cross-border trade restrictions and licensing requirements delay rollouts. These regulatory inconsistencies increase compliance costs and deter new entrants. Without harmonized standards, scaling operations across regions remains challenging. As a result, regulatory hurdles pose a considerable threat to global expansion strategies.

#### Covid-19 Impact:

The pandemic reshaped smart vending machine adoption trends. Heightened consumer focus on hygiene and safety accelerated demand for contactless retail solutions. Many operators shifted toward touchless interfaces, facial recognition, and mobile-enabled purchases to align with new behavioral patterns. However, supply chain disruptions and reduced footfall in public spaces temporarily constrained revenues. Post-pandemic, demand rebounded as businesses sought resilient retail solutions. The long-term impact lies in sustained consumer preference for automated, low-contact shopping experiences, making smart vending a critical retail innovation post-Covid-19.

The beverage segment is expected to be the largest during the forecast period

The beverage segment is expected to account for the largest market share during the forecast period, owing to the high consumption of bottled drinks, juices, and energy beverages via automated channels. Strong demand across offices, public areas, and educational institutions drives sustained adoption. Innovations in temperature-controlled vending machines enhance freshness and appeal. Additionally, partnerships with leading beverage brands increase consumer trust and visibility. With consistent demand and ease of stocking, beverages remain the primary driver of revenues, consolidating this segment's market leadership.

The airports segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the airports segment is predicted to witness the highest growth rate, impelled by increasing adoption of automated retail to cater to high-traffic travelers. Airports seek vending machines to provide 24/7 convenience for beverages, snacks, and personal care products. Spurred by rising international travel and passenger volumes, smart vending ensures faster service with reduced staffing. Integration with

multilingual interfaces and digital payments further enhances usability. This growth reflects a broader trend of airports embracing automation to enhance passenger experiences and operational efficiency.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, driven by rapid urbanization, high population density, and digital payment adoption. Countries such as China, Japan, and South Korea lead in deploying advanced vending solutions across metro stations, offices, and public venues. Government initiatives promoting cashless economies and smart cities further support expansion. Additionally, the presence of strong local manufacturers boosts affordability and accessibility. Collectively, these dynamics establish Asia Pacific as the dominant regional contributor to market revenues.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR attributed to strong consumer inclination toward contactless retail and technological innovation. The region's robust digital infrastructure supports rapid adoption of IoT-enabled, AI-driven vending solutions. Partnerships between machine operators and retail brands expand availability across corporate hubs, airports, and educational campuses. Furthermore, rising demand for personalized, data-driven vending experiences accelerates uptake. With innovation leadership and advanced retail ecosystems, North America emerges as the fastest-growing regional market for smart vending machines.

Key players in the market

Some of the key players in Smart Vending & Automated Retail Market include Crane Payment Innovations, Mother, Vendekin Technologies, Silkron, Televend, Cantaloupe Inc., U-Select-It, Azkoyen Vending, Fuji Electric, Westomatic, Seaga Manufacturing, Bianchi Industry, Jofemar, Innovative Technology, 24Vend, FAS International, and Wurlitzer

Key Developments:

In October 2025, Azkoyen restructured its operations by transferring all industrial and commercial activities to a new subsidiary, Azkoyen Vending & Payment Solutions

(VPS). This move aims to streamline operations and enhance focus on smart vending and payment solutions, with an initial capital of €86.4 million.

In September 2025, Fuji Electric expanded its range of ultra-energy-efficient vending machines, including models with integrated beverage lockers and exclusive PET-bottle dispensers. These innovations align with their commitment to sustainability and energy conservation.

In August 2025, Seaga Manufacturing introduced advanced vending machines featuring intelligent inventory control systems, enhancing operational efficiency and product availability. These smart solutions cater to diverse consumer needs across various sectors.

#### Machine Types Covered:

Beverage

Snacks

Combo

Frozen Food

Personal Care

#### Placements Covered:

Airports

Metro/Transit

Malls

Offices

#### Distribution Channels Covered:

Direct Sales

Managed Services

Third-Party Operators

Technologies Covered:

Cashless Payment

AI Analytics

IoT Connectivity

Remote Monitoring

End Users Covered:

Retail Chains

Healthcare

Education

Transport Hubs

Regions Covered:

North America

US

Canada

Mexico

## Europe

Germany

UK

Italy

France

Spain

Rest of Europe

## Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

## South America

Argentina

Brazil

Chile

Rest of South America

## Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

### Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

### Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

### Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

## Contents

### **1 EXECUTIVE SUMMARY**

### **2 PREFACE**

- 2.1 Abstract
- 2.2 Stake Holders
- 2.3 Research Scope
- 2.4 Research Methodology
  - 2.4.1 Data Mining
  - 2.4.2 Data Analysis
  - 2.4.3 Data Validation
  - 2.4.4 Research Approach
- 2.5 Research Sources
  - 2.5.1 Primary Research Sources
  - 2.5.2 Secondary Research Sources
  - 2.5.3 Assumptions

### **3 MARKET TREND ANALYSIS**

- 3.1 Introduction
- 3.2 Drivers
- 3.3 Restraints
- 3.4 Opportunities
- 3.5 Threats
- 3.6 Technology Analysis
- 3.7 End User Analysis
- 3.8 Emerging Markets
- 3.9 Impact of Covid-19

### **4 PORTERS FIVE FORCE ANALYSIS**

- 4.1 Bargaining power of suppliers
- 4.2 Bargaining power of buyers
- 4.3 Threat of substitutes
- 4.4 Threat of new entrants
- 4.5 Competitive rivalry

## **5 GLOBAL SMART VENDING & AUTOMATED RETAIL MARKET, BY MACHINE TYPE**

- 5.1 Introduction
- 5.2 Beverage
- 5.3 Snacks
- 5.4 Combo
- 5.5 Frozen Food
- 5.6 Personal Care

## **6 GLOBAL SMART VENDING & AUTOMATED RETAIL MARKET, BY PLACEMENT**

- 6.1 Introduction
- 6.2 Airports
- 6.3 Metro/Transit
- 6.4 Malls
- 6.5 Offices

## **7 GLOBAL SMART VENDING & AUTOMATED RETAIL MARKET, BY DISTRIBUTION CHANNEL**

- 7.1 Introduction
- 7.2 Direct Sales
- 7.3 Managed Services
- 7.4 Third-Party Operators

## **8 GLOBAL SMART VENDING & AUTOMATED RETAIL MARKET, BY TECHNOLOGY**

- 8.1 Introduction
- 8.2 Cashless Payment
- 8.3 AI Analytics
- 8.4 IoT Connectivity
- 8.5 Remote Monitoring

## **9 GLOBAL SMART VENDING & AUTOMATED RETAIL MARKET, BY END USER**

- 9.1 Introduction
- 9.2 Retail Chains

- 9.3 Healthcare
- 9.4 Education
- 9.5 Transport Hubs

## **10 GLOBAL SMART VENDING & AUTOMATED RETAIL MARKET, BY GEOGRAPHY**

- 10.1 Introduction
- 10.2 North America
  - 10.2.1 US
  - 10.2.2 Canada
  - 10.2.3 Mexico
- 10.3 Europe
  - 10.3.1 Germany
  - 10.3.2 UK
  - 10.3.3 Italy
  - 10.3.4 France
  - 10.3.5 Spain
  - 10.3.6 Rest of Europe
- 10.4 Asia Pacific
  - 10.4.1 Japan
  - 10.4.2 China
  - 10.4.3 India
  - 10.4.4 Australia
  - 10.4.5 New Zealand
  - 10.4.6 South Korea
  - 10.4.7 Rest of Asia Pacific
- 10.5 South America
  - 10.5.1 Argentina
  - 10.5.2 Brazil
  - 10.5.3 Chile
  - 10.5.4 Rest of South America
- 10.6 Middle East & Africa
  - 10.6.1 Saudi Arabia
  - 10.6.2 UAE
  - 10.6.3 Qatar
  - 10.6.4 South Africa
  - 10.6.5 Rest of Middle East & Africa

## **11 KEY DEVELOPMENTS**

- 11.1 Agreements, Partnerships, Collaborations and Joint Ventures
- 11.2 Acquisitions & Mergers
- 11.3 New Product Launch
- 11.4 Expansions
- 11.5 Other Key Strategies

## **12 COMPANY PROFILING**

- 12.1 Crane Payment Innovations
- 12.2 Mother
- 12.3 Vendekin Technologies
- 12.4 Silkron
- 12.5 Televend
- 12.6 Cantaloupe Inc.
- 12.7 U-Select-It
- 12.8 Azkoyen Vending
- 12.9 Fuji Electric
- 12.10 Westomatic
- 12.11 Seaga Manufacturing
- 12.12 Bianchi Industry
- 12.13 Jofemar
- 12.14 Innovative Technology
- 12.15 24Vend
- 12.16 FAS International
- 12.17 Wurlitzer

## List Of Tables

### LIST OF TABLES

Table 1 Global Smart Vending & Automated Retail Market Outlook, By Region (2024-2032) (\$MN)

Table 2 Global Smart Vending & Automated Retail Market Outlook, By Machine Type (2024-2032) (\$MN)

Table 3 Global Smart Vending & Automated Retail Market Outlook, By Beverage (2024-2032) (\$MN)

Table 4 Global Smart Vending & Automated Retail Market Outlook, By Snacks (2024-2032) (\$MN)

Table 5 Global Smart Vending & Automated Retail Market Outlook, By Combo (2024-2032) (\$MN)

Table 6 Global Smart Vending & Automated Retail Market Outlook, By Frozen Food (2024-2032) (\$MN)

Table 7 Global Smart Vending & Automated Retail Market Outlook, By Personal Care (2024-2032) (\$MN)

Table 8 Global Smart Vending & Automated Retail Market Outlook, By Placement (2024-2032) (\$MN)

Table 9 Global Smart Vending & Automated Retail Market Outlook, By Airports (2024-2032) (\$MN)

Table 10 Global Smart Vending & Automated Retail Market Outlook, By Metro/Transit (2024-2032) (\$MN)

Table 11 Global Smart Vending & Automated Retail Market Outlook, By Malls (2024-2032) (\$MN)

Table 12 Global Smart Vending & Automated Retail Market Outlook, By Offices (2024-2032) (\$MN)

Table 13 Global Smart Vending & Automated Retail Market Outlook, By Distribution Channel (2024-2032) (\$MN)

Table 14 Global Smart Vending & Automated Retail Market Outlook, By Direct Sales (2024-2032) (\$MN)

Table 15 Global Smart Vending & Automated Retail Market Outlook, By Managed Services (2024-2032) (\$MN)

Table 16 Global Smart Vending & Automated Retail Market Outlook, By Third-Party Operators (2024-2032) (\$MN)

Table 17 Global Smart Vending & Automated Retail Market Outlook, By Technology (2024-2032) (\$MN)

Table 18 Global Smart Vending & Automated Retail Market Outlook, By Cashless

Payment (2024-2032) (\$MN)

Table 19 Global Smart Vending & Automated Retail Market Outlook, By AI Analytics (2024-2032) (\$MN)

Table 20 Global Smart Vending & Automated Retail Market Outlook, By IoT Connectivity (2024-2032) (\$MN)

Table 21 Global Smart Vending & Automated Retail Market Outlook, By Remote Monitoring (2024-2032) (\$MN)

Table 22 Global Smart Vending & Automated Retail Market Outlook, By End User (2024-2032) (\$MN)

Table 23 Global Smart Vending & Automated Retail Market Outlook, By Retail Chains (2024-2032) (\$MN)

Table 24 Global Smart Vending & Automated Retail Market Outlook, By Healthcare (2024-2032) (\$MN)

Table 25 Global Smart Vending & Automated Retail Market Outlook, By Education (2024-2032) (\$MN)

Table 26 Global Smart Vending & Automated Retail Market Outlook, By Transport Hubs (2024-2032) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

## I would like to order

Product name: Smart Vending & Automated Retail Market Forecasts to 2032 – Global Analysis By Machine Type (Beverage, Snacks, Combo, Frozen Food and Personal Care), Placement, Distribution Channel, Technology, End User and By Geography

Product link: <https://marketpublishers.com/r/S9E107D8A1ACEN.html>

Price: US\$ 4,150.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/S9E107D8A1ACEN.html>