

## Automatic Vending Machines: Key Research Findings 2011

### ◆ Research Outline

Yano Research Institute has conducted a study on the automatic vending machine market as described below.

1. Research period: January to March 2011

**Note: The impacts of Great East Japan Earthquake broke out in March 2011 have not been taken into consideration.**

2. Research targets:

Beverage manufacturers, automatic vending machine operating companies, automatic vending machine manufacturers, and related enterprises and organizations

3. Research methodologies:

Face-to-face interviews by YANO expert researchers, questionnaire survey and literature researches

### ◆ Key Findings

- **The total number of installed automatic vending machines in 2010 is estimated to be 5,186,950, decreased by 0.6 percent from the previous year.**

The total number of installed automatic vending machines in 2010 is estimated to be 5,186,950, decreased by 0.6 percent compared to the previous year. The market has been in a decreasing trend since 2006, due to the decreased number of installed automatic vending machines for cigarettes and alcoholic beverages, in addition to the saturation of automatic vending machines for non-alcoholic beverages which account for 40 percent of the total. The decreasing trend is expected to continue in the future as well, with the estimated total number of installed automatic vending machines to be 5,149,850 in 2011, decreased by 0.7 percent compared to the previous year.

- **Automatic vending machines with discounted products are increasing, while vending machine manufacturers are focusing on environment-friendly or philanthropy-oriented automatic vending machines**

In the past, products were sold on the automatic vending machines at the list prices without any price discount. Recently, however, automatic vending machines with discounted products, such as 100 yen or 80 yen per bottle of beverage are increasing. The installation of automatic vending machines with discount products started to spread in Kansai area, then beginning to penetrate into Kanto area as well, becoming to be a threat to leading beverage producers and suppliers. In the background, there are ever toughening competitions with the other sales channels, and the emergence of independent automatic vending machine operating companies, freed from the constraints of established product distribution channels and pricing.

Further, in order to differentiate from the competitors and to improve corporate image, automatic vending machine manufacturers are working on the enhancement of environment-friendly vending machines and philanthropy-oriented automatic vending machines which may include functions such as providing products free of charge in case of disaster, LED panel for emergency messaging, provision for donating a portion of product price to environment protection and other social activities.

◆ **Report format:**

Published report: “Automatic Vending Machine Market 2011”

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Language: Japanese

Format: 343 pages in A4 format

Price: 100,000 yen (5,000 yen of consumption tax shall be charged for the sales in Japan.)

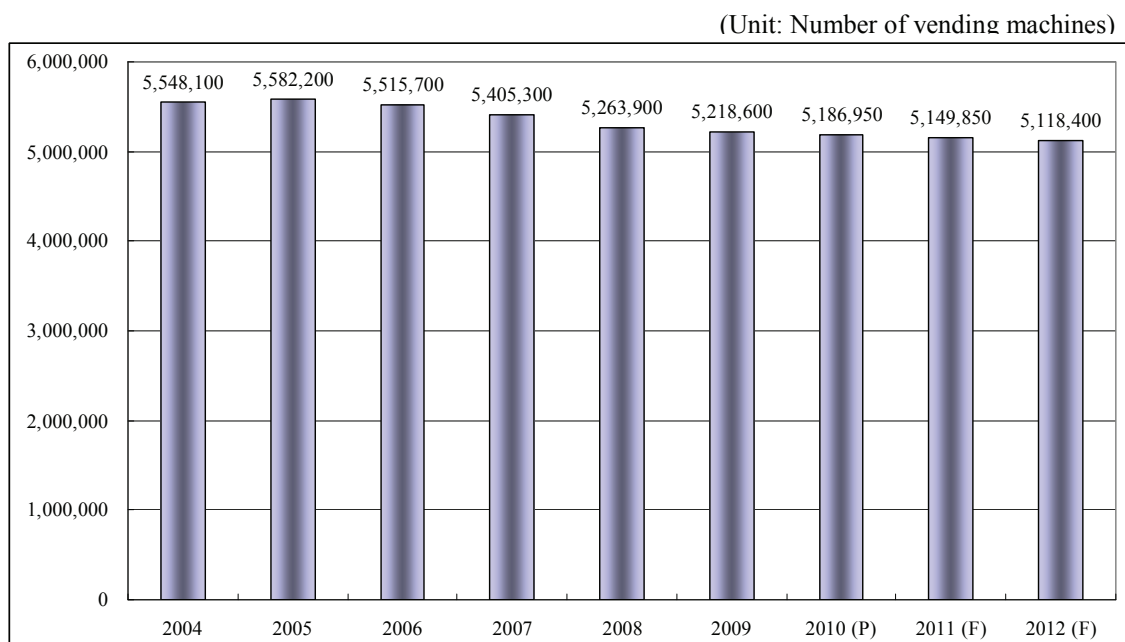
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Fig. 1: Number of Installed Automatic Vending Machines



Note 1: Data up to 2009 are from Japan Vending Machine Manufacturers Association, and thereafter estimated by Yano Research Institute.

Note 2: Impacts of Great East Japan Earthquake broke out in March 2011 have not been taken into consideration.

Note 3: (P) indicates projection and (F) forecast.