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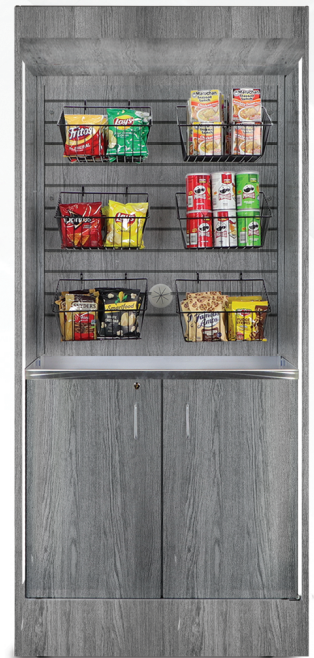
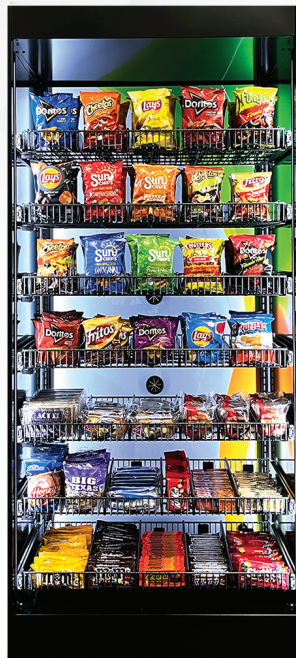


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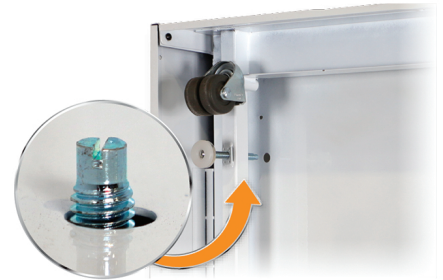
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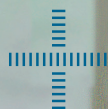
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State of the OCS
Industry Report

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September/October 2025

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On the cover: David Henchel shares insights on OCS as Corporate Coffee Systems marks its 40th anniversary

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Visit vendingmarketwatch.com for more on hot topics in vending, micro markets and office coffee service

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OCS training event adds sales track to drive real results



Bob Tullio

THIS FALL, HOLIDAY HOUSE DISTRIBUTING EXPANDS its popular Technician Training and Equipment Sales Trade Show with a new sales training program tailored for operators and reps. With hands-on learning from suppliers and expert-led business development sessions, the event offers an opportunity for OCS teams ready to grow.

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Are you a vending veteran? A micro market maven? Or just passionate about the convenience services industry? Put your knowledge to the test with VENDL, the weekly word puzzle that's as addictive as a perfectly stocked snack machine. Visit the VENDL archive to play puzzles you may have missed.

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PODCAST | What's fueling the explosive growth in vending and micro markets?

From smart stores to recurring revenue strategies, hear what's driving the momentum – and what operators should do next.

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▼ ▼ ▼ Micro Market

NEXCOM hits 100th micro market milestone, expanding convenience for sailors



Kristine Sturkie, Navy Exchange Service Command / U.S. Navy

The Navy Exchange Service Command has opened its 100th micro market, bringing fresh food, snacks and essential items to sailors at Naval Submarine Base Kings Bay, Georgia, and marking a decade of growth in unattended retail for the fleet.

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*The National Coffee Association of USA, 2024 National Coffee Data Trends (NCDT), Spring Edition



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Revenue climbs as OCS reinvents itself



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Espresso, cold brew taps, local roasters and specialty brands are replacing value coffee as offices look to attract workers to the office.

WITH THIS, OUR SEPTEMBER/OCTOBER ISSUE, WE LOOK

at the state of the office coffee service industry in 2024: a story of growth through change. Five years after the pandemic, operators have found footing in a new workplace rhythm: leaner, more flexible and more premium. Daily volumes remain lower than before the pandemic, but operators are making up the difference with premiumization. Employers understand that offering higher quality beverages is no longer a luxury but a workplace perk that supports culture and engagement. The data tells the story clearly: Value-priced coffee sales have fallen while specialty formats continue to climb.

Coffee, however, is no longer the whole story. In 2024, coffee accounted for just 27% of OCS revenue, a 15-point decline in two years. Growth in OCS stems from pantry services, water, ice and micro markets. Operators are no longer simply coffee providers; instead, they are selling the workplace experience. Employees may not be in the office every day, but when they are, they expect convenience, variety and premium service. OCS is filling that demand with offerings that stretch beyond the brew.

Rising costs remain a concern as inflation continues to pressure both coffee and supply costs. Green coffee prices have remained stubbornly high, and labor costs continue to be a consistent challenge. Still, operators are adjusting. Price increases, smarter product mixes and expanded services are helping preserve margins. Many are also investing in staff and training, building sales expertise and strengthening customer relationships.

This is not the same OCS business that existed in 2019. It's leaner, more diverse and more strategic. Operators who thrive will be those who recognize that coffee is no longer the endpoint but the entry point into a larger service portfolio. The industry is moving toward a model where every cup, every cooler and every pantry shelf adds to the value equation.

Looking ahead, the conversation continues in November at NAMA's Coffee Tea & Water show. With the momentum of 2024 behind it, the event will showcase how operators and suppliers are embracing premiumization, diversification and technology to capture more value from every account. The story of OCS is still being written, and CTW will be the stage where its next chapter begins. I look forward to continuing the conversation in Miami.

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Hospitality's lessons for OCS satisfaction

By Bob Tullio, Contributing Editor

IF YOU HAVE CHECKED INTO A hotel recently, you have probably experienced what the hospitality industry calls “personalization.” According to the hotel property management company OTA Sync, guest expectations have increased. They no longer book rooms: They book experiences.

Does that sound familiar to you as a convenience services operator? You aren't just creating a break room: You are creating an experience. Knowing your customer, making it personal and creating experiences that resonate in a positive nature drive customer satisfaction.

A perfect model

The hotel industry provides a perfect model of the right way to do personalization — and the wrong way. Let me share a recent example of the wrong way.

After four grueling hours in Orange County traffic, I checked in at the Omni Resort. I'm tired, I want to get to my room (and maybe the

bar) to relax and get settled. Instead, I am greeted by a desk clerk who has been trained in personalization.

Desk Person: *Where did you come in from today?*

Me: *Encino.*

Desk Person: *Oh, that's not too far. How was your drive down?*

Me: *Ugh! It was a long drive.*

Desk Person: *Any special plans while you are here?*

Me: *Yes. I have organized a group of 28 golfers. Do you not have any of that information?*

To compound the annoyance, I just had the same conversation with the hotel valet when I pulled up.

Here is what is suggested by *Hotel Technology News*. “Hotel staff should be well-versed in the nuances of having these types of conversations. Staff should recognize when to keep the conversation going or simply send guests with what they need to get on their way.”

The right way (did not happen)

Of course, there was a right way to greet me at the hotel and make me

feel like the special person that I am. The right way would have required a more thoughtful approach.

Desk Person: *Hi, Mr. Tullio. I see you are here as the coordinator of a large golf group. Have you played the courses before?*

Me: *I've only played one of the two courses.*

Desk Person: *You and your group are in for a treat. The North course is the home of the NCAA championship. I see that your trip coordinator is Sarah, and she put a note on your account: 'Please have Mr. Tullio contact me directly if his group has any questions or concerns, or if I can do anything to enhance your stay.' May I make a couple of suggestions for your group?*

The desk clerk then tells me a story about the great experience that another golf group had last month, out at the practice green with cocktails at happy hour before heading into the dining room. Then, after giving me some drink tickets and two bottles of water, he sends me to my upgraded room — a token of appreciation as the organizer. (Or at least that's what I was told.) Now, I can relax, and I'm feeling special!

The lessons for operators

What do we learn from this interaction as convenience services operators?

- Use some data to prepare for a sales meeting or a customer service meeting, and know who you are dealing with.
- Before a sales presentation, the rep should speak to the customer service department to find out if the sales prospect is a former customer.
- For both sales and customer service, look up the contact person on LinkedIn. Have they ever worked

for a company that your company has served? Do they have shared contacts — names you can drop?

- Do you understand what industry they are in so that you can tell them a story about how you provided a wonderful solution for a company that was similar to theirs?

As a customer service representative, before you visit a customer, in addition to checking their LinkedIn profile, ask the sales rep about the client. What do they know about them? Have there been any serious issues pertaining to the account?

It is certainly more impressive to visit a client or prospect and say, “We are so excited about the opportunity to serve you again.” Much better than being told by them, “We did business

with your company 10 years ago,” and not having a clue about that.

In short, there are three keys to a successful call:

- Be prepared.
- Use your data.
- Know your customer.

There is one more thing: Don’t be afraid to spoil people. That’s something I learned a long time ago.

Instead of a meeting, make it a lunch meeting. Pretty basic but very effective. Instead of coming to a meeting empty-handed, offer sports tickets or an invitation to a client event. Just like with the hotel check-in process, perks matter.

This Omni story just happened last week. Unfortunately, it was the wrong approach and — on an amusing note — it continued at check out.

Desk Person: *How was your stay at the Omni?*

Me: *Excellent, thank you.*

Desk Person: *What was your favorite part of your stay here at Omni?*

Me: *Ugh. Dealing with the front desk.* ■



About the author

VendingMarketWatch.com contributing editor and industry consultant Bob Tullio is a content specialist who advises operators in the convenience services

industry on how to build a successful business from the ground up and advises suppliers on how to successfully connect with operators. Tullio’s YouTube channel, b2b Perspective, is designed to “elevate your business in two minutes.” Visit www.tulliob2b.com or email bob@tulliob2b.com.






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IN A NEW YO

H E IS A NEW YORKER through and through. A loyal Mets fan, passionate about his business, dedicated to his employees and, like every busy entrepreneur, amazed that 40 years have gone by in a “New York minute.”

David Henchel, president and CEO of Corporate Coffee Systems, has been a part of the New York City business community for a long time, including 40 years as an operator. He had a job at a coffee service company in high school and was intrigued by the business — enough to start his own company in 1985.



RK MINUTE

A focused approach to office refreshment

From expert coffee programs to branded water and tailored pantry service, Corporate Coffee Systems delivers a smarter, more personal refreshment experience for New York workplaces.

By Bob Tullio, Contributing Editor





David Henchel co-founded Corporate Coffee Systems 40 years ago and serves as president and CEO.

He worked during the day and enrolled in night classes at Hofstra because “I thought I should go to college,” explained Henchel. “It was a short stay because I found that the professors that I came in contact with didn’t have the same type of context that I was experiencing out in the business world, even though it was just the beginning for me.”

“Before we knew it — along with

my brother Greg and my childhood friend Donn Luti — we decided that we would go out on our own,” he said. “We just started it from scratch, from zero.” While his brother and Luti are no longer affiliated with the company, Henchel said that without them, there would be no business to discuss 40 years later.

Henchel noted that starting up in 1985 was considerably easier than it

would be today. “The cost of entry back in 1985 was minimal. We were placing equipment that was a couple of hundred dollars at the most, and it was easy to get into a new account. Nothing like today,” he said.

What has not changed for Henchel is his vision of what Corporate Coffee Systems would become — his core values for the company. “The vision for the company and those



Director of operations Bryant DeFranco oversees operations and technology at Corporate Coffee Systems.

core values have not changed since day one,” he said. “I feel very strongly about this.”

“Number one: Offer the most compelling solution to the customer. I really believed in this as a young man, and we are dedicated to this idea today. Number two: Make sure that Corporate Coffee Systems will always be a very profitable company. I’m not ashamed to be profitable. The third core value is also very important to me. I want to be sure that Corporate Coffee Systems is a great place to work,” Henschel said.

FOCUSED ON COFFEE, PANTRY AND WATER

While Corporate Coffee Systems has enjoyed steady growth over the years — both organically and through multiple acquisitions — Henschel said the company is not interested in growing the vending or the micro market side of the business, which only exists because of those acquisitions and an occasional need from a key customer. Instead, the company’s 70 to 80 employees are focused on coffee service, pantry service, water and office supply, serving a large customer base in the greater New York area.

According to Henschel, his team has what it takes to differentiate itself from others in the market. “To start with, your company must be an expert in what you offer — an expert in coffee, pantry and water,” he said. “We have been in the coffee business for four decades and are clearly established as a coffee expert,” Henschel said. He explained what he called a tremendous relationship with Reunion Coffee Roasters, a family-owned specialty coffee roaster that supports their product needs.

“Instead of trying to manage multiple private labels following many



acquisitions, trying to tell a backstory for each, we are aligned with a well-known label and brand, committed to quality, which better serves our customers. While it is not an exclusive relationship, we are Reunion’s

most significant customer in the New York metropolitan market, so it works out well for everyone,” he said.

On the pantry service side of the business, Henschel has been serving clients long before the concept

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became popular in most parts of the country: Corporate Coffee Systems was in the pantry service business before it was even known as pantry service. “The New York OCS business was pretty developed even back in the mid-80s,” said Henchel. “While operators in other parts of the country were probably more one-dimensional on coffee and a few allied products, our SKU list was probably around 500 products. It was an early version of pantry service as we were delivering cups, paper plates, utensils, napkins — even soda and snacks,” Henchel added that the service was needed by many of the garment industry showrooms that his company was serving at the time.

While Henchel and his team have been pantry service experts for a long time, that aspect of the business has evolved, and so has Henchel’s approach to it. “In the pantry service business today, it is very important to understand your costs,” he said. “A successful pantry service relationship requires a reasonable budget on the customer’s side. The customer needs to understand that they are going to spend a certain amount, so it makes sense for us to stock and deliver products in their facility. The operator needs to be clear on how many SKUs will be required. Having the software and technology to help us manage the program is critical.”

Henchel pointed out that there are many operators offering pantry service in the New York market, but two things set his company apart, and they go beyond the product selection. “It is important to execute — to provide a higher level of care and to be communicating with decision makers on an ongoing basis,” he said. “Also important, establishing a relationship with the client early on and maintaining that relationship. That’s what sets us apart.”

On the water side of the business, Henchel has doubled down on establishing the company as a recognized expert in supplying quality drinking water. “If you look at it from the perspective of a potential customer, I’m



Creative marketing manager Edward Luti (left) turns ideas into reality at Corporate Coffee Systems while Elizabeth Stone (right) handles the people side of the business as director of human resources.

not sure that they always see a coffee service as a water expert,” Henchel said. “We certainly have been selling water coolers since we got into the business. In fact, we were one of the first coffee services to go into the bottled water business in the early 80s when there were a lot of bottled water companies in New York — but that does not make us an expert.”

To establish themselves as a leader and expert in the water space, Corporate Coffee Systems recently trademarked its own water brand, Thyrst, with the tagline, “Hydration pure and simple.” Henchel said the move is more than a marketing effort: It is part of a commitment to providing clients with the highest quality, purest drinking water. “With the launch of Thyrst, we are established as coffee, pantry service and now, water experts,” he said.

MISUNDERSTOOD: OFFICE PRODUCTS

There is another product line at Corporate Coffee Systems that is often overlooked by operators: office supply, which Henchel believes it is misunderstood, but certainly offers some upside. “There’s a fallacy about the office products business,” he said. “The core office products business — copy paper, print, print cartridges, pen and staples — are certainly a declining business, because as everybody knows, more people are working remote, and there’s more technology. But there is another piece to that business because those office supply customers are also breakroom customers, so it does create opportunities for us.”

With the office population not quite what it was before 2020, Henchel said that operators need to tap into the annuity income that comes with equipment rentals and



OPERATION PROFILE

Corporate Coffee Systems

Founded: 1985

Founders: David Henchel, Gregg Henchel, Donn Luti

Headquarters: Westbury, N.Y., with an additional office and showroom in Manhattan

Number of Employees: 72

Number of Acquisitions: 30

Website: www.corpcofe.com

service-related fees. “It’s absolutely critical for operators to understand what it costs them to run their business and to understand the revenue they’re generating per customer,” he said. “They must be looking at what we call the non-product side of the business, which are filter changes, rentals and delivery charges, to offset the high cost of doing business today.”

Henchel also said that operators need to understand the minimum revenue required to justify a piece of equipment or a portfolio of equipment at a customer’s location. “I don’t know whether all operators do or don’t do it. We do it, and we ask customers to agree to a minimum revenue guarantee. This is not to charge them more money. It is to ensure that we’re going to see the revenue that’s been promised relative to the equipment we have installed,” he said.

On the business-development side, Corporate Coffee Systems enjoys a serious competitive advantage. “We maintain a 40,000 square foot building on Long Island. That’s

our distribution center. That’s where we run our trucks out of. That’s where we have our inventory. We do all our receiving and order picking. And that’s where most of the staff is,” said Henchel. “We’ve got a satellite office, 7,000 square feet, believe it or not, right in the heart of Midtown Manhattan on Seventh Avenue. We run sales out of there along with service for that area.” Henchel said that the satellite office is a powerful showroom and a strong asset for his sales team. “90 percent of the time, when a prospect visits that showroom, we close the deal.”

HENCHEL IS APPRECIATIVE

Henchel has won his share of industry awards over the years, and while he is honored by the recognition, he truly appreciates his employees for their hard work and dedication to the success of Corporate Coffee Systems. “There are so many people to acknowledge, like my director of operations, Bryant DeFranco, who runs the business, and Edward Luti, our master of brand management and creative marketing,” he said.

“Additionally, the work of our HR leadership, Lisa Stone, is game-changing,” Henchel said. “Times have changed. We need a quality HR team to help us through the many rules and regulations. They establish the corporate culture, they help us take care of our employees the right way, which is critically important to the business. A great company culture attracts people, and it can’t be faked. If you go back to my vision for the company that is still in place today, one of the three critical things I mentioned was to always make sure that our company is a place where people will want to work,” Henchel said. ■

Office coffee service sales kept climbing in 2024

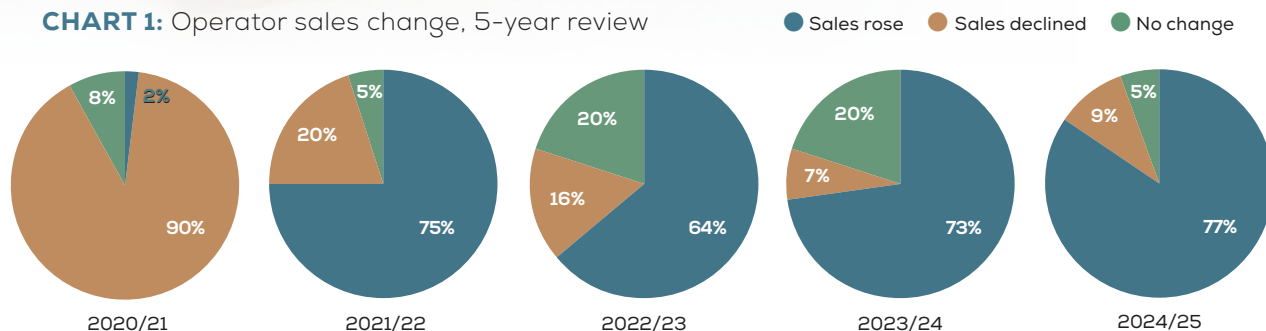
Operators saw stronger demand in 2024 as offices settle into hybrid schedules. While volumes remained below pre-pandemic highs, rising per-cup spend and premium options lifted OCS revenues 17% over the previous year's revenue.

By Linda Becker, Editor-in-Chief

FIVE YEARS AFTER THE pandemic, workplace employment patterns have largely settled into a new normal. Approximately 4 in 10 jobs allow at least some amount of remote work, according to recent data from Robert Half.¹ Hybrid work is a dominant model, with more than a third of companies requiring employees to be in the office at least a few days each week.

What does all that mean for OCS operators? Hybrid work schedules result in a lower overall volume for most OCS locations. Locations are likely to serve fewer people onsite daily, with the potential for inconsistent demand by day of the week and daypart. At the same time, while volume has decreased, premiumization and higher-margin premium, single-serve and specialty options can drive revenue in locations serving

CHART 1: Operator sales change, 5-year review



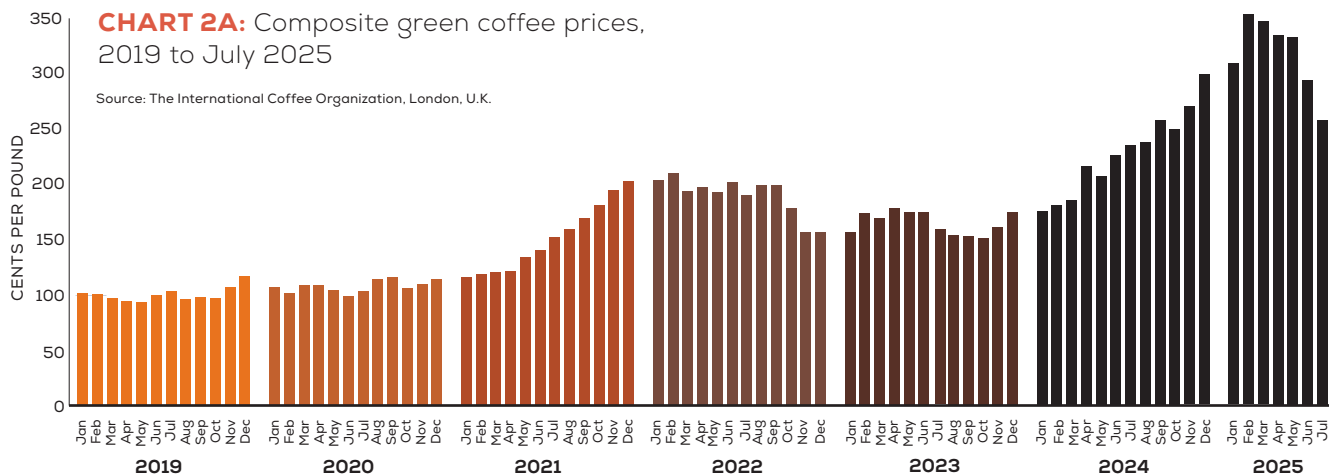
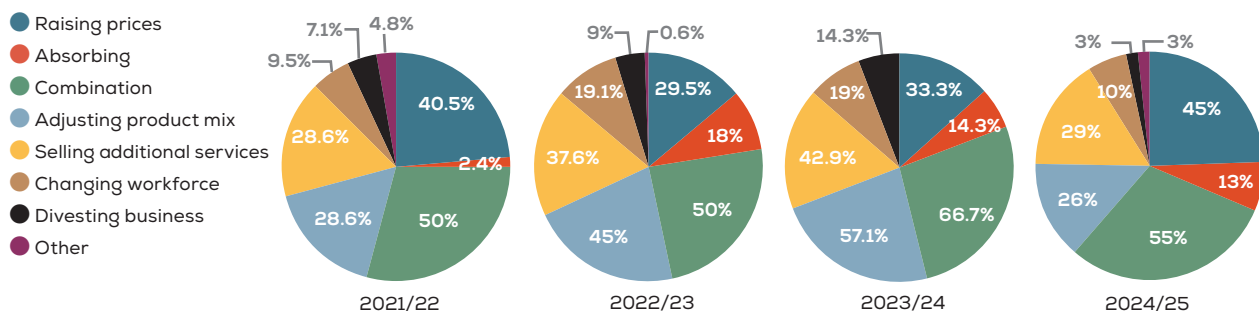


CHART 2B: How rising costs are being handled



fewer employees. Employers continue to offer premium coffee options such as espresso, cold brew taps and ready-to-drink (RTD) fridges to enhance the in-office experience with added perks.

The 2024 data support this, as national value-brand coffee OCS sales fell to 19%, from a high of 34% in 2022. At the same time, OCS sales of espresso (11%), local brands (31%) and national specialty coffees (13%) increased from their 2022 share of sales of espresso (5%), local brands (22%) and national specialty coffees (11%). These factors and others contributed to a 17% increase over the previous year's revenue.

Customers expect more diversity in product choices and want to be catered to, respondents noted. Demand for premium and specialty options such as cold brews and iced coffees has decreased coffee's share



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77% of respondents reported an **increase in sales** revenue in 2024.

14% more reported **no change** in revenue.

CHART 3A: Revenue per cup in cents per cup, Fraction pack automatic/pourover coffee, 5-year review

| | 2020 | 2021 | 2022 | 2023 | 2024 |
|---------|-------|--------|--------|-------|--------|
| Revenue | 11.4¢ | 12.97¢ | 11.67¢ | 11.5¢ | 12.98¢ |

*Previous numbers have been adjusted based on additional data

CHART 3B: Revenue per cup, single-cup coffee, 5-year review

| | 2020 | 2021 | 2022 | 2023 | 2024 |
|--------------------------|-------|-------|-------|--------|--------|
| Single-Cup Capsule | 49.4¢ | 46.6¢ | 34.6¢ | 38.14¢ | 48.99¢ |
| Bean-To-Cup per cup cost | 44.8¢ | 40.9¢ | 35.1¢ | 36.13¢ | 45.27¢ |

CHART 4A: % OCS sales by supplier type

| SUPPLIER TYPE | 2024 |
|--|-------|
| Private label | 21.42 |
| Local coffee brands (known to customers) | 27.53 |
| National brand - value coffee | 18.77 |
| National brand - specialty coffee | 18.79 |
| Espresso coffee | 13.49 |

CHART 4B: % OCS sales by product category

| PRODUCT CATEGORY | 2024 |
|------------------------|------|
| Frac pack | 30.7 |
| Whole bean coffee | 39.6 |
| Single cup (non K-cup) | 25.0 |
| K-cups | 4.6 |

as a percentage of net sales by category. In 2024, the overall coffee category accounted for only 27% of net coffee service sales, a drop of 15% since 2022. Revenue growth is driven by bottled water (5-gallon format), which is up 4% from 2022, pantry service, which has nearly doubled, and ice machines, which grew to 11% of OCS net revenue in 2024. Cold brew formats such as on-draft kegs, single-serve packaged goods, iced coffee, bean-to-cup machines and cold brew concentrate are leading OCS formats.

Let's take a closer look at what the data tells us in our State of the Office Coffee Service Industry Report.

ADDING CLIENTS AND PRICING HIKES DRIVE REVENUE GROWTH

In this year's State of the Office Coffee Service Industry Report, 77% of respondents reported an increase in sales revenue in 2024, and 14% more reported no change in revenue. Respondents pointed to growth in clients and locations, strong business

CHART 4C: Top-selling OCS products for past 12 months, by volume (%)

| TOP PRODUCT | 2024 |
|--|------|
| Local coffee brands | 33 |
| Private label | 20 |
| Value frac packs | 0 |
| Specialty drinks | 0 |
| Whole bean | 13 |
| National brand coffees | 27 |
| K-Cups | 0 |
| Single-cup | 0 |
| Tea | 0 |
| Pantry or direct delivery service (food/snacks/beverages delivered to locations) | 7 |
| Water filtration service (point-of-use/POU) | 0 |

growth in their area, poor competitor service, return-to-work effects and pricing increases as key drivers of their revenue growth. At the same time, respondents cited headwinds, including broader economic effects such as inflation, as having a negative impact on growth.

For the number of locations served in 2024, more than two-thirds of respondents (70%) reported an increase in locations, an increase over 2024 (54%) as well as an improvement on the 62% who reported an increase in locations in 2022. Respondents again pointed to strong business growth in their area and poor competitor service for their success.

The rise in locations was accompanied by a reported increase in OCS staff as well, with 48% of respondents reporting that they added staff in 2024 while 39% made no changes to head count. Those OCS operators who added staff did so strategically, with respondents reporting headcount additions for dedicated sales representatives.

CHART 4D: OCS product category, % of sales

| PRODUCT CATEGORY | 2024 |
|--|------|
| Coffee | 27.4 |
| Non-coffee hot beverages | 5.8 |
| Soft drinks | 9.4 |
| Bottled water (5 gallon) | 11.1 |
| Creamers/sweeteners | 6.5 |
| Cups/plates/paper products | 6.8 |
| Tea | 7.1 |
| Pantry service/micro kitchen (paid by employer offered to employees) | 7.4 |
| Water filtration service (non bottled) | 7.4 |
| Ice machines | 11.3 |

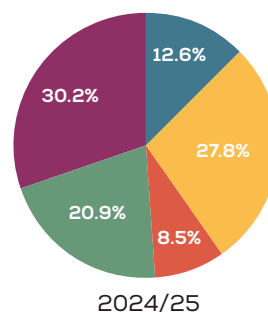
27% of the sales revenue in 2024 can be credited to coffee.



Alamy/Getty Images Plus/Getty Images

CHART 5: Plumbed-in, automatic and thermal as % of total

- Pourover glass pot
- Automatic glass pot brewers
- Pourover thermal brewers
- Automatic thermal brewers
- Countertop single-cup brewers



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CHART 6: Estimated market share of single-cup brewer placements in the U.S., 5-year review

| MARKETER | PRODUCT(S) | 2020/21 | 2021/22 | 2022/23 | 2023/24 | 2024/25 |
|---------------------|--|---------|---------|---------|---------|---------|
| Cafection | Avalon, Total Lite, Total 1, Alternative | 7.40% | 5.69% | 8.1% | 12.2 | 7.5 |
| Bodecker Brewed | Bodecker | 3.50 | 2.46 | 3.8 | 5.9 | 4.1 |
| VE Global Solutions | Brio, Colibri, Koro, Korinto, Kinvivo, Trophy, Venus, Cypris, Juno, Prosyd | 1.00 | 0.00 | 0.7 | 0.9 | 3.6 |
| Crane | Coti, Café System, Genesis | 2.50 | 0.00 | 1.7 | 1.5 | 1.5 |
| Cafejo | Cafejo | 1.00 | 2.40 | 2.6 | 5.9 | 2.3 |
| Technologies Coffea | Coffea, Pro-II G2 | 1.00 | 5.73 | 3.6 | 0.9 | 5.6 |
| JM Smucker's | Douwe Egberts C-300, C-600, C-60, N110, NG-300 | 5.10 | 1.88 | 4.9 | 3.5 | 3.1 |
| VKI Technologies | Eccellenza Express, Eccellenza Touch, Eccellenza Cafe, Latte Lounge | 1.90 | 3.82 | 3.7 | 2.6 | 5.3 |
| Lavazza | Espresso Point, Lavazza Blue, Dual Espresso, EP 2500 | 0.90 | 1.14 | 1.5 | 1.1 | 3.0 |
| Mars Drinks | Flavia Barista, Flavia Creation 500, Flavia Creation 400, Flavia Creation 200, Aroma | 2.50 | 2.99 | 3.1 | 3.0 | 6.1 |
| Filterfresh | Filterfresh | 1.30 | 0.00 | 0.9 | 0.6 | 2.9 |
| Grindmaster | Grindmaster | 9.80 | 14.72 | 13.2 | 10.2 | 3.8 |
| Kraft/Heinz | Gevalia, Tassimo T-3000, T-65 | 0.30 | 0.84 | 0.5 | 1.1 | 3.5 |
| Keurig | K3000, K150, K145, B155, K155, K130 | 19.80 | 14.24 | 13.9 | 10.8 | 5.5 |
| Rheavendors | Rhea, Cino | 0.40 | 0.00 | 0.2 | 1.0 | 5.4 |
| Saeco USA | Saeco, Estro | 1.00 | 1.27 | 1.1 | 1.1 | 1.7 |
| Newco | Smartcup, Freshcup, Freshcup Touch | 7.80 | 13.89 | 13.3 | 13.6 | 6.2 |
| Starbucks | Starbucks | 4.50 | 2.83 | 4.1 | 4.7 | 11.4 |
| Bunn | My Cafe Pod, AutPOD, Trifecta MB | 8.30 | 11.37 | 11.2 | 11.9 | 4.2 |
| Nespresso | Nespresso | 7.20 | 2.34 | 4.7 | 2.2 | 3.6 |
| Wilbur Curtis | Gold Cup, Expressions | 0.50 | 1.39 | 1.1 | 1.2 | 0.5 |
| Comobar | Comobar | 1.80 | 0.00 | 0.2 | 0.3 | 1.4 |
| MZB | La San Marco OC System | 6.10 | 0.96 | 2.8 | 1.0 | 2.2 |
| Cafe Primo | Cappuccino | 2.20 | 3.13 | 2.9 | 7.9 | 3.3 |
| Other | | 2.20 | 6.92 | 3.2 | 8.3 | 2.5 |

*Represents OCS provider placements only

CHART 7: Account populations by size

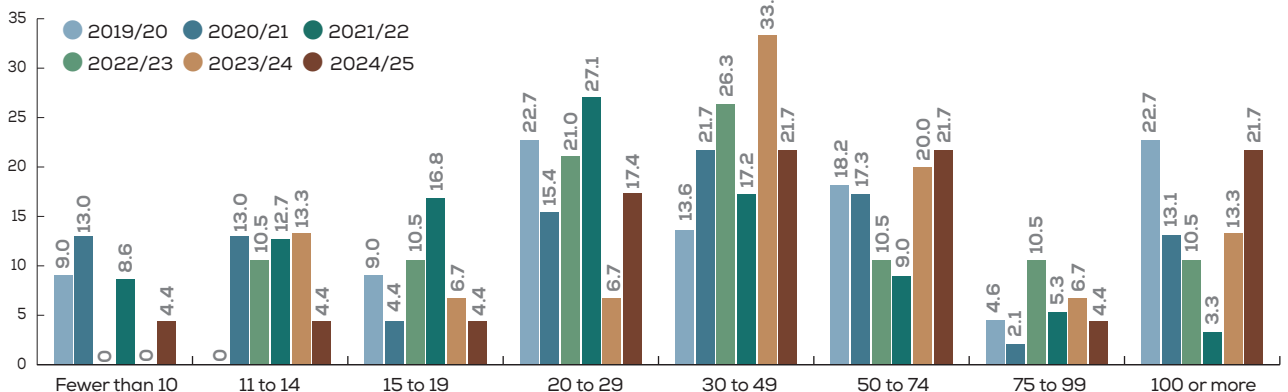
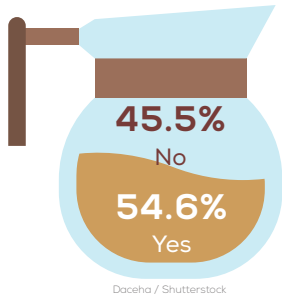


CHART 8: Accounts by type, 5-year review

| | 2020/21 | 2021/22 | 2022/23 | 2023/24 | 2024/25 |
|--|---------|---------|---------|---------|---------|
| Offices | 51.2% | 36.5% | 40.2% | 37.0% | 27.3% |
| Industrial plants | 16.8 | 17.3 | 19.3 | 16.0 | 13.1 |
| Schools/colleges | 6.3 | 8.3 | 12.1 | 7.8 | 11.3 |
| Convenience stores | 8.6 | 8.0 | 4.1 | 11.0 | 10.5 |
| Restaurants, delis, bakeries | 4.1 | 8.0 | 3.6 | 3.3 | 9.0 |
| Other (healthcare, hotels, auto dealerships) | 3.8 | 9.5 | 12.8 | 12.3 | 18.3 |
| Government/military | 4.1 | 6.1 | 4.2 | 5.5 | 5.4 |
| Retail outlets | 5.1 | 6.3 | 3.7 | 7.3 | 5.1 |

CHART 10: Company currently offers online ordering on its website



| Respondent revenue profile | |
|----------------------------|-------|
| Less than \$500K | 31.8% |
| \$500K to \$1M | 4.6 |
| \$1M to \$2.5M | 27.3 |
| \$2.5M to \$5M | 13.6 |
| \$5M to \$10M | 4.6 |
| Over \$10M | 18.2 |

Operators also invested in their existing teams with additional training to better explain product and equipment features and benefits to prospects and clients.

RISING COSTS REFLECTED IN NET REVENUE

The costs of goods and labor were top of mind for many again in 2024. Green coffee prices climbed steadily, although recent data from the International Coffee Organization suggests that relief is in sight.²

Inflation drove up the cost of both coffee and supplies, but price adjustments allowed operators to regain the revenue per cup they had lost in 2024. For frac pack automatic and pour over coffee, revenue per cup, in cents per cup, rose to nearly \$0.13 in

2024, from \$0.11 in 2023. Single-cup revenues fared even better, with the average revenue per single-cup capsule of \$0.49 in 2024, up from \$0.38 in 2023. Average revenue per single-cup bean-to-cup products likewise increased, from \$0.36 in 2023 to \$0.45 in 2024.

Among the new services offered by some to add to the bottom line, micro markets (16%) were added most often. Other respondents added pantry service (13%), water services (16%), vending (10%) and even janitorial services (6%). Still, 45% did not offer any new services and looked to other strategies.

More than 54% of respondents reported raising some prices while absorbing some costs. Other

CHART 9: New services added in 2025

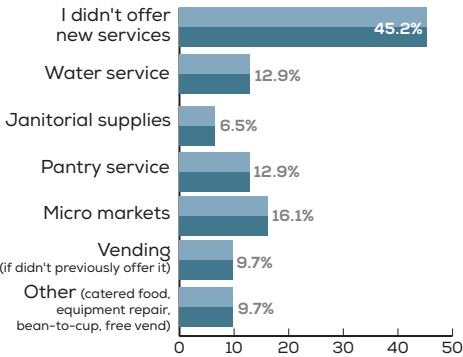
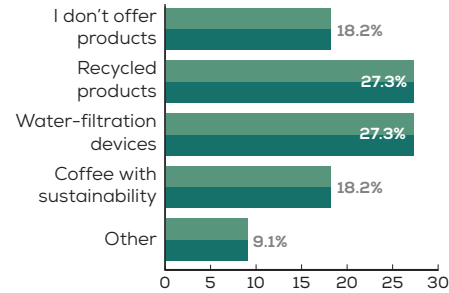


CHART 11: Most popular environmental product offerings



techniques to deal with rising business costs included adjusting the product mix (26%) and selling additional services (29%).

Right-sizing accounts was another cost-saving technique: No respondents indicated they serviced accounts with fewer than 10 employees. The majority (61%) had typical account populations of 30 to 75 employees, with another 21% serving accounts with more than 100 employees. ■

Sources

1. Remote Work Statistics and Trends for 2025, <https://www.roberthalf.com/us/en/insights/research/remote-work-statistics-and-trends>.
2. International Coffee Organization, Coffee Market Report, July 2025. <https://ico.org/specialized-reports/>



By Linda Becker, Editor In Chief

Spotlighting the industry's changemakers: 2025 Pros to Know Awards

This year marked the 12th time that readers nominated individuals and teams whose accomplishments are moving the industry forward, and this esteemed award recognizes and celebrates their achievements. Congratulations to the 2025 *Automatic Merchandiser* Pros to Know Award winners who have helped their companies excel in the vending, micro market, office coffee service and industry. The following individuals and teams have persevered through today's changing business environment to elevate workplace refreshments and embrace new technology to promote future growth of the industry.

CHRISSY BRESHEARS

As Mid-South regional vending sales manager at Saverino & Associates, Chrissy Breshears brings 28 years of experience in the consumer-packaged goods industry, marked by entrepreneurial drive, deep industry knowledge and a people-first approach. Her journey began in 1997 when, still a high school senior, she launched her own vending machine company. She successfully operated and expanded the business for a decade before stepping away to focus on raising her two daughters. Chrissy later returned to the industry as a marketing associate with Sysco of Kansas City, where she developed and managed accounts across northwest Missouri and northeast Kansas. During this time, she honed her expertise in territory development, customer relationships and solution-based selling. Today, as the Mid-South regional vending sales manager at Saverino & Associates, she leverages her entrepreneurial background and extensive industry experience to support partners and drive results across the Mid-South region. She is honored to be nominated and grateful for the opportunity to continue making a positive impact in the vending and consumer-packaged goods space.



QA engineer and API Team Lead. She's been with 365 since 2018. During her tenure at 365, Ashley has driven dozens of engineering initiatives. She founded the company's hackathon and expanded it into an internal knowledge-sharing conference. She built a successful engineering internship program that developed four classes of interns and contributed to long-term hiring and retention. Favorite projects include building a new API ecosystem, reengineering promotions logic for improved flexibility and performance, and designing AWS serverless architectures. Outside of work, Ashley contributes to the development community through MLH hackathons. She's the DM for her D&D group and does ceramics in her spare time. She lives in Michigan with her partner, Evan, and their two cats, Chester and Boo.

CRAIG GASPEROSKY

Craig Gasperosky began his career at Coley Canteen in September 2003 as a route driver. He steadily advanced through roles in utility, service and service management, ultimately becoming branch manager. He has led several large-scale projects, including the successful conversion of more than 3,000 vending machines to accept cashless payments and the full integration of Seed across all equipment and more than 100 markets. Oversight also included the design and rollout of a warehouse pick system powered by Lightspeed, structured around multiple pick zones for snacks, candy and beverages. Additional initiatives have involved streamlining service workflows,



ASHLEY COPELAND

Ashley Copeland has been the engineering manager for the Stockwell team at 365 Retail Markets since May 2024. She has nearly nine years of experience in tech and has held roles including software engineer,



improving inventory accuracy and supporting system-wide operational upgrades. These large-scale projects were executed with an emphasis on practical, scalable solutions that support both internal teams and customer satisfaction. Craig's work reflects Coley Canteen's commitment to continuous improvement and innovation within the convenience services industry.

BRYAN HEBERT

Bryan Hebert has spent two decades in cashless payments, unattended retail and data-driven loss prevention, repeatedly turning pain points into profitable offerings. At USA Technologies, he built the first analytics-led customer success group, which served 350,000 devices at the time. At Nayax, he doubled the North American sales force and introduced cashless products that drove triple-digit growth. Now, as CRO/CFO of ProWatch Solutions, he is working with a team to provide an AI-powered platform, ARMS (Automated Retail Management System), that monitors micro markets for theft and lost sales opportunities, providing an actionable, profit-enhancing tool for operators. Bryan's blend of P&L ownership, product strategy, financial discipline and frontline operator empathy, along with his ability to scale innovations that directly address the thorniest 2025 threats — shrinkage, consumer demand, payment complexity and cost inflation — are keys to his success. Brian is always happy to share his industry knowledge to help operators seeking to maximize profits and mitigate theft by utilizing ARMS (Automated Retail Management System).



ORRIN HUEBNER

With more than 40 years in the refreshment services industry and business consulting, Orrin Huebner is a respected expert in operational excellence, leadership and growth strategy. From fixing machines as a teen to building and selling his own company, then scaling post-acquisition revenue twenty-fold, Orrin's journey reflects ground-up leadership and proven success. As a trusted voice in mergers and acquisitions, he helps business owners prepare for sale, increase value and navigate transitions with confidence. Now, through Orrin Huebner,



Business Consultant, he partners with entrepreneurs to strengthen systems, improve performance and lead with clarity. Orrin's unique blend of operational grit, corporate insight and consulting impact makes him a standout leader — and a true 2025 Pro to Know.

DARNELL HUPPERT

Darnell Huppert has spent 37 years in the convenience services industry, with the past 14 years dedicated to managing the vending and micro market segment at Core-Mark Iowa, based in Carroll, Iowa. For the last decade, Darnell served as president of the Iowa Automatic Merchandising Association, following 16 years as a board member and vice president. During this time, he's developed a strong working relationship with the Iowa Department of Inspections, Appeals and Licensing, which regulates vending, retail and many other industries across the state. The annual Legislative Day at the capitol in Des Moines has helped foster open communication with state senators, representatives, legislative leadership and the governor's office. Darnell says it has been rewarding to witness the evolution of technology in our industry and how it has enabled our customers to grow their businesses. At Core-Mark, he leverages retail expertise to support operators as they expand into micro markets and smart vending. Darnell notes that the outstanding support from the entire team at Core-Mark further drives his success.



JENS KNUDSEN

Jens Knudsen is the senior national sales manager of unattended retail, travel and convenience distribution. He is responsible for leading sales and distribution within vending and unattended retail with leading brands such as Planters, Columbus, Corn Nuts, Spam, Hormel and more. Within the last four years, Jens and his team across convenience and unattended retail have delivered innovative products and growth in their core business, creating solutions for their customers. Jens is a 17-year veteran of Hormel Foods and looks forward to continued collaboration and new channel opportunities.



STEPHEN KONDROIK

Stephen Kondroik is vice president of category management and purchasing for Five Star Breaktime Solutions. He leads Five Star's category growth strategy, consumer insights, merchandising direction, trade promotion optimization, assortment planning, vendor relations and procurement for markets and vending. Previously, Stephen worked at The Coca-Cola Company on the global customer and commercial leadership team, leading the direction and strategy on integrated execution and segmentation, working in RGM tools and capabilities, category management and execution capabilities. He has held several roles leading space strategy and category management at Coca-Cola Bottling Company United in the United States. Before Coca-Cola, Stephen worked in the convenience store industry at 7-Eleven in store operations and merchandising, and he was an operations consultant to several independent owners.



MIKAYLA LINDENFELD

Mikayla Lindenfeld is an emerging leader in the better-for-you food industry, bringing bold innovation and fresh perspective to the shelf-stable snack space. As co-founder of Magos, she is pioneering a new category with clean-label egg chips designed to meet the strictest dietary, allergen and regulatory standards. Although new to the CPG world, she has successfully led product development, branding and strategic positioning efforts, earning attention from both major distribution channels and key health enthusiasts. Her work champions ingredient transparency, inclusivity and functional nutrition without compromise. Mikayla is most proud of her ability to navigate complex and novel manufacturing, compliance and marketing challenges with agility.



AMBER MAGDALENO

Amber Magdaleno has spent more than 35 years in the industry, 28 of them spent working at Atnip Co, Inc., where she provides inside support for 10 salesmen, covering the western United States. Amber is known for being thorough, organized and results-driven, always remembering to follow up, a lesson learned from mentor Dick Atnip. She



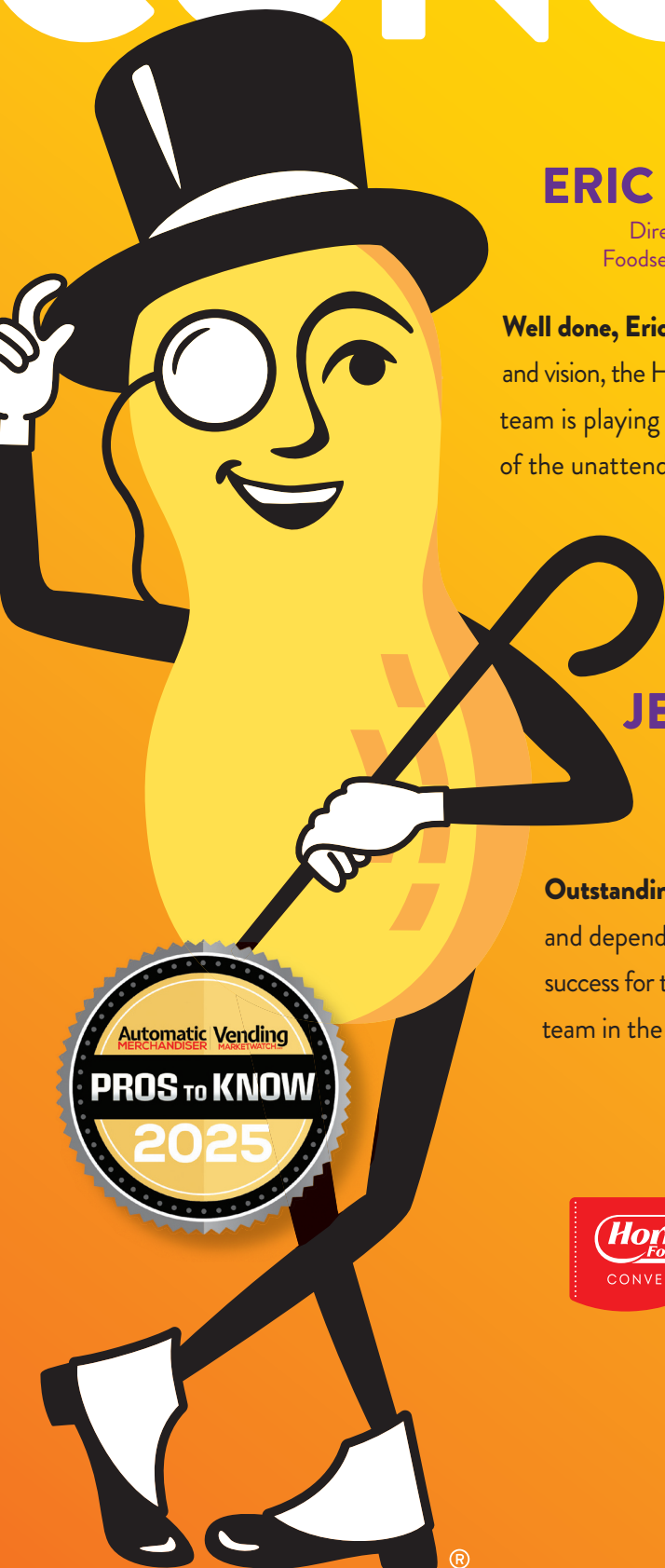
strives to give her customers quick and accurate information and to help them through every aspect of their demands. Amber is a vital right-hand to her sales team, accompanying them to various meetings, trainings and shows, staying up to date with the industry. She is the go-to person at Atnip for all things OCS, everything from coffee to equipment to accessories. She looks forward to continuing to learn and grow in this segment. Amber is grateful for the amazing colleagues she has had the opportunity to work with and for all the support and knowledge they provide.

JAMES McCANDLISH

Jim McCandlish discovered the convenience services industry one day while having lunch with a friend, who suggested that he come work with him at Aramark Refreshments. Jim applied to the only opening Aramark had in Las Vegas and became a route sales representative (RSR), also known in the industry as an OCS route driver. He absolutely loved the job, especially his daily interactions with the customers as he restocked their breakrooms. Within his first year, he became an account executive and started selling Aramark Refreshment Services to the local businesses of Las Vegas. During his time with Aramark, Jim consistently met sales and revenue goals and performed in the top 20 (of over 225 account executives) in the annual performance rankings for six consecutive years. He was awarded membership to the company's Sales STAR Club in 2017 and 2018. After achieving great success at Aramark, Jim joined First Class Vending as the manager of business development for Las Vegas. In this role, he has expanded his experience into traditional vending, micro markets and pantry services with the advantage of working with season veterans and the large number of existing accounts in the Las Vegas market. In 2021, Jim played a critical role in the company's expansion into the Reno market. The new accounts that Jim acquired in Reno played a critical role in the company's success as it became the largest vendor in northern Nevada, and they accomplished that during the pandemic. Jim blends operations capabilities and a consultative sales approach, working hard to understand exactly what a client's needs are to determine the best solution.



CONGRATS



ERIC STEINBACH

Director of Marketing –
Foodservice and Convenience

Well done, Eric! With your leadership and vision, the Hormel Foods Convenience team is playing a key role in the future of the unattended retail segment.



JENS KNUDSEN

Senior National Sales Manager
Distribution C-Store,
Vending & Travel

Outstanding job, Jens! Your passion and dependability are helping to drive success for the Hormel Foods Convenience team in the unattended retail segment.



HOW CONVENIENT

Convenience Collection
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MIKE McCLURE

Mike McClure began his sales career in 1986 with Dixie Crystal Foodservice. After 13 years, Mike transitioned to the vending and micro market channels by accepting the role of Southeast area sales representative for G and J Marketing Co. Mike's dedicated service covered Georgia, north Florida and south Alabama for the past 26 years. He has been instrumental in growing this market area by developing relationships with manufacturers, distributors and operators. He takes great pride in his commitment to excellence, driving sales growth for all brands represented, and collaborating with the Southeast area sales team to produce growth for regional operators. Mike is a graduate of the University of West Georgia in Carrollton, Ga., as well as a graduate of the Michigan State University NAMA Executive Development Program and the Certified Coffee Professional Training Program. He is a longstanding member of SEVA and GAMC.



MATT PIERE

Matt Piere is the operations manager with Imperial Vending in Davenport, Iowa. With more than 17 years of experience in the beverage and vending industries, Matt is an expert in operational efficiency, technical troubleshooting and team leadership. For the past three years, Matt has served as operations manager at Imperial Vending's Davenport location, overseeing day-to-day operations. His leadership has been instrumental in boosting productivity and improving customer satisfaction. Before joining Imperial Vending, Matt spent 10 years at PepsiCo and four years at Atlantic Coca-Cola Bottling in Cedar Rapids, Iowa, gaining valuable experience as a field service technician. His extensive knowledge of vending systems and field service operations has enabled him to streamline workflows and make strategic improvements. Outside of his professional life, Matt is a dedicated family man.



NATALIE PRINCE

Natalie Prince is the operational force behind VendTastic, the fast-growing vending company she co-founded in late 2023. From just three machines to a fleet nearing 100, Natalie has



been instrumental in scaling the business with precision and grit. She manages everything behind the scenes — ParLevel systems, credit card integrations, planograms, pre-kitting and even filling a weekly route — to ensure that VendTastic runs like clockwork. Her blend of technical savvy, relentless work ethic and strategic thinking has helped transform a small startup into a vending powerhouse. Natalie's tenacity, intelligence and eye for detail make a Pro to Know and a leader redefining what's possible in the industry.

BROOKE REEVES

Brooke Reeves, an account manager at 365 Retail Markets, stands out as a deserving recipient of this honor because of her exceptional ability to translate industry challenges into actionable and impactful solutions. Brooke doesn't merely identify problems; she actively drives innovation and delivers measurable results for her clients. Her proactive approach to understanding market shifts, optimizing operational efficiencies and leveraging new technologies demonstrates a deep commitment to her clients' success and the broader advancement of the industry sector. The examples provided — from the significant sales increase achieved through smart store conversions to the immediate elimination of overtime costs and the strategic deployment of new POS systems — clearly illustrate her capacity to drive tangible improvements and position her clients for sustained growth in a dynamic environment. And when operators grow, it only serves to strengthen our industry as a whole. Her consistent focus on practical application and demonstrable impact makes her a true leader and a valuable resource within the industry.



MARK RINCON

Mark Rincon has dedicated 25 years to the coffee industry, gaining extensive knowledge and expertise in office coffee/vend, foodservice and retail. His long-standing commitment to the industry has made him an asset in driving growth and innovation. Throughout his career, Mark has developed a deep understanding of coffee trends, customer preferences and market dynamics, enabling him to lead and build strong relationships



effectively. He is an experienced business development and client relations professional specializing in operations excellence, client management and sales negotiation within the foodservice and office coffee sectors. Mark's career spans leadership roles in major companies, including Starbucks, Nestle USA and First Class Vending, with a focus on sales growth, team leadership and strategic partnerships. Currently at First Class Vending, Mark expands business units and implements new vendor programs to meet customer preferences. His unwavering dedication and leadership leave a lasting impression on every organization he engages with.

KURT D. RING

Kurt Ring is the chief revenue officer at Tacs LLC. His career in the unattended retail industry began as a principal in a guest amenities company that provided rental mobility equipment and electronic lockers to theme parks, water parks, zoos and casinos. Over nearly 20 years, Kurt held several senior leadership roles in operations, sales, marketing and strategic development. He played a key role in launching the market's first online reservation system with an integrated POS solution. Kurt also pioneered the first unattended electric convenience vehicle (ECV) rental system and storage dock. He holds multiple patents related to both the system and its advanced technologies. His expertise in sales and use tax developed during his tenure at a leading tax technology firm, where he led large-scale integrations of tax software with content platforms, e-commerce systems, procure-to-pay solutions and ERP platforms. Kurt holds a bachelor of science degree from Northeastern University and an MBA from Boston University.



JOE SIMONOVICH

Joe Simonovich is the director of at-work operations at New Stand. Joe has been a part of the convenience services industry in some capacity since joining New York City-based Corporate Essentials in 2006. In his most recent role as director of operations with the workplace experience company New Stand, he has worked with operators across the country to create programs that allow companies to level up their service and deepen client relationships by offering easy-to-roll-out solutions such as



integrated apps, computer vision smart coolers, premium fixtures, in-person events and employee gifting programs. During his 13-plus years at Corporate Essentials, the company was recognized by *Inc. Magazine* as one of America's fastest-growing companies eight times, and Shoffee.com, a company he co-founded with Corporate Essentials owner Judson Kleinman, was listed at #651 on the magazine's Inc. 5,000 list in 2012. In 2016, he took part in the NAMA executive development program at Michigan State University.

PRESTON SNODGRASS

With nine years of industry experience, including four with Five Star in Ohio and northern Kentucky, Preston Snodgrass has built a reputation as a strategic, customer-focused leader who consistently drives growth through strong relationships and innovative problem-solving. His personable approach and dedication to client satisfaction set him apart and helped him earn Five Star's Rising Star Award in 2022. Preston combines a deep understanding of the industry with a natural ability to connect with people to help clients find tailored solutions that support their food and beverage goals. He is known among colleagues and clients alike for his integrity, energy and results-driven mindset. Preston holds a B.A. from Wittenberg University.



JON SNYDER

Jon Snyder is the vice president of Snyder Food Services Inc., a family-owned business founded in 1969. As a third-generation leader, Jon has more than 20 years of experience in the food service and vending industries.



He is a former chair of the Coffee, Tea & Water committee, served on the NAMA trade show committee, and was part of the founding class of the Emerging Leaders Network (ELN). Jon holds both NCE (NAMA Certified Executive) and CCS (Certified Coffee Specialist) certifications. He is known for his leadership and commitment to innovation, specializing in technology, exceptional customer service and custom-tailored solutions across north and central Indiana, western Ohio and southern Michigan. Jon is also actively involved in philanthropy, supporting organizations such as Easter Seals Arc, the American Red Cross, the American Cancer Society and local youth sports programs.



INDIVIDUAL WINNERS

JONATHAN STACK

Jonathan Stack recognized the shift toward fresh, high quality, grab-and-go offerings long before it became a national trend. Over the past decade, he built Fresh Creative Cuisine into a strategic commissary partner for breakroom service providers across the country. He brings deep expertise in culinary innovation, supply chain execution, packaging sustainability and operational excellence. In a landscape where most breakroom providers carry the same national snack and beverage brands, Jonathan has enabled operators to differentiate themselves through fresh food designed for micro markets, smart coolers and high traffic locations. He has met market demands by providing diverse, chef-driven options that utilize high quality ingredients, have eye-catching packaging and employ production systems that are both eco-responsible and operator-friendly. Jonathan's efforts have helped elevate the standard for what "Cuisine to Go" can be, all while preparing his company to meet the explosive demand in a rapidly evolving channel.

ERIC STEINBACH

As director of marketing for food-service and convenience at Hormel Foodservice, Eric Steinbach is a driving force behind channel-focused innovation in the evolving landscape of unattended retail.



With a deep understanding of consumer behavior, he bridges the gap between operator needs and shopper expectations, translating insights into breakthrough programs that build both traffic and loyalty. Eric has a proven ability to shape strategic marketing platforms that elevate foodservice in convenience environments from micro markets to traditional vending. His leadership is defined by a balance of creativity and data-driven precision, ensuring that every initiative has a measurable impact. Under Eric's direction, his teams have introduced solutions that enhance the consumer experience and deliver scalable profitability for operators and distributors. Passionate about the future of convenience, Eric continues to position Hormel Foodservice as a trusted partner in defining what's next for unattended foodservice retail.

BRETT STENNER

Brett Stenner is recognized as a 2025 Pros to Know for his work as sales manager of Sunrise Vending.

JOSHUA WELLS

Joshua Wells is recognized as a 2025 Pros to Know for his work as chief operating officer of American Food and Vending, Syracuse, N.Y.



&BACK COFFEE

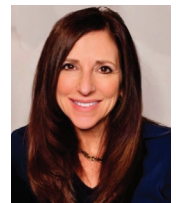
The &Back Coffee leadership team is redefining what office coffee can be, using quality, storytelling and purpose to drive value for businesses and impact for women coffee farmers. Founder and CEO Roxanne Joyal brings more than 30 years of experience in social enterprise and sustainable development. A recognized advocate for women's empowerment, Roxanne leads with a long-term vision, aiming to positively impact the lives of 10,000 women through responsible sourcing, training and community investment. COO Lucas Goodenough has scaled &Back Coffee across North America while embedding sustainability and corporate responsibility at every level. He leads the company's partner-centered approach, delivering strategic partnerships, tools and sales enablement that help operators successfully bring &Back Coffee to market. CMO Jacqueline Grossman is an executive with more than two decades of experience in hospitality, CPG and experiential marketing. She leads content strategy and creative execution, helping &Back Coffee's B2B partners activate purpose through turnkey campaigns and value-added storytelling. Together, this team has built a model that helps businesses meet corporate goals around sustainability, workforce engagement and productivity while protecting the future of coffee for the people and communities who depend on it.



Roxanne Joyal



Lucas Goodenough



Jacqueline Grossman

Key personnel include Roxanne Joyal, founder and CEO; Lucas Goodenough, chief operations officer; and Jacqueline Grossman, chief marketing officer.

BOOST INC

The product team at Boost inc has reimagined what unattended retail can deliver. At a time when operators are seeking new and effective ways to scale, this team has introduced a suite of technology innovations, enabling operators to increase revenue, drive operational efficiency and enhance the customer experience. The team has introduced retail-like features and remote point-of-sale management capabilities to unattended retail. With every release, the team focuses on simple, scalable tools that deliver measurable impact to vending businesses on the ground. What truly sets this team apart is their willingness to challenge the status quo. They aren't just improving existing systems; they're reshaping how the industry thinks about vending. By pairing rapid product development with deep operator insight and a vision for creating the most seamless and exciting customer experience, Boost inc's product



Benedict
Koehncke

team has positioned itself as a driving force in the future of unattended retail.

Key team personnel include Benedict Koehncke, vice president of product; Annelous Konijnenberg, product owner point of sale and UX/UI lead; Sara Berrino, lead product owner software; Christopher Radones, scrum master; Christopher Tlusty, technical project manager; Viktória Molnár, project manager, product; Nigel Boxhoorn, UX/UI designer; Lavinia Lattanzio, UX/UI designer; and Emmy Daniel, implementation engineer.

CANTEEN MIAMI

The team at Canteen Miami is a 2025 Pros to Know Team Award winner for its passion for customer service and client relations, which makes the company a force to be reckoned within the industry. The well-rounded team of Andres Hernandez, district operations manager; Craig Thornburg, customer service manager; and Khalil Ali, customer service manager, completes market refreshes with the highest sales uplift in the division.

365 Retail Markets is proud to recognize Ashley Copeland & Brooke Reeves

2025 Pros to Know

Ashley & Brooke's expertise, dedication, and vision exemplify the values of 365 Retail Markets and inspire our entire team. Congratulations on this well-deserved recognition!



Ashley Copeland
Software Development
Manager



Brooke Reeves
Account Manager

EVEREST ICE AND WATER

The production team at Everest Ice and Water, led by Hector Miranda, exemplifies a relentless commitment to overcoming industry challenges while driving innovation, efficiency and sustainability. Despite the challenges posed by supply chain disruptions and labor shortages, the team has maintained a strong focus on producing high quality machines that meet the evolving demands of the market. The team's proactive approach to addressing material shortages through better inventory management, alongside its successful implementation of energy-efficient and eco-friendly solutions, has helped set them apart as a leader in the vending equipment industry and helped ensure that Everest continues to meet customer expectations for sustainability and cost-effectiveness. Additionally, the team's efforts to invest in workforce development and automation demonstrate a forward-thinking approach to ensuring long-term operational success and resilience. Hector Miranda's leadership and the team's collective focus on continuous improvement have led to increased production capacity, faster turnaround times, and consistent product quality.



Key personnel include Hector Miranda, director of manufacturing; Thomas Denardo, national service manager; Jordan Flores, logistics manager; Edgardo Garcia, assembly technician; Jon Black, production manager; Jared Black, plant engineer; Astrid Ramos, supply chain administrator.

NATURALS2GO

Naturals2Go isn't just vending machines. They serve as a gateway for vending entrepreneurs to access the \$40 billion convenience services industry, offering a business model that can include frozen food, coffee services, pantry services, AI-powered coolers and micro markets.

The Naturals2Go business opportunity team is the reason approximately 14% of all vending business owners in

the U.S. have turned their dreams into successful business ownership. From day one, each new operator is paired with a dedicated account manager who offers one-on-one coaching, reviews performance and helps develop strategies for growth. These team members go beyond setup: They help owners analyze sales, refine product choices and expand into high potential areas. They also lead training, Q&As and community networking to keep everyone supported and inspired. What makes this team truly stand out is their personal investment in each owner's success. Each new operator is paired with a dedicated account manager who provides one-on-one coaching and performance reviews throughout their business journey. They bring practical guidance, real encouragement and a genuine belief in what is possible. Operators are also backed by other professionals offering valuable, essential skills such as technical support and professional location services, growth experts and a leadership team committed to innovation, technology, engineering and R&D. With 49 employees (many of whom are operators, too) dedicated to bringing the best-in-class training and programs for entrepreneurs, this team is certainly among the Pros to Know for new vending business operators. With Naturals2Go, people don't just get a business: They get a team that's with them every step of the way.

TECH 2 SUCCESS

What sets Tech 2 Success apart is its deep industry specialization paired with future-focused innovation. Tech 2 Success doesn't just offer generic IT or software: The company designs, builds and supports solutions specifically for convenience services businesses. From fully integrated B2B e-commerce systems that sync directly with VMS platforms, to PCI-compliant hosting, data security and operational automation, Tech 2 Success enables operators to scale efficiently, serve smarter and compete with larger players.

Key personnel include John Hickey, CEO; Brian Butrym, vice president of web services and development; and Darryl Perkins, cloud services manager.

WITH ME INC.

SipWithMe customers and their satisfaction are the top priority for the service operations team. In an industry full of options, this team was built from the ground up to be customer-obsessed and deliver consummate support. It was intentionally designed to be different: Not just reactive but committed to delivering true service. Today, 89%



of SipWithMe customers are supported directly by internal team members, with the remaining 11% served by trusted partners who uphold the organization's standards. This structure enables SipWithMe to scale without compromising the personalized service that customers rely on and appreciate. While the ops team drives the experience, their success is made possible by strong collaboration with other groups across the WithMe organization. Support from client experience, business operations and

technical support helps ensure that every customer interaction is seamless and consistent.

Key team members include Andrew Shockley, service operations manager; Mario Rodriguez, principal technical service specialist; Ardiana Hysenaj, service admin; Mike Benson, field service supervisor; Jason Brillantes, Atlanta service representative; Diego Rivas, Houston service representative; Emanuel Brown, New York service representative; Craig Lewis, Dallas service representative; Brady Fosse, Denver service representative; Jorge Cordero, Miami service representative; Luis Castillo, Orlando service representative; Edward Torres, Austin service representative; Mohamed Sillah, Baltimore/DC service technician; Luis Popoca, Chicago service representative; Keith Kerr, Connecticut service representative; Matt Kaplan, Philadelphia service representative; Nadia Assad, senior project specialist, and Brad Duncan, client onboarding manager. ■

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Water and ice

An overlooked profit center in OCS

From sleek dispensers to advanced filtration and sparkling enhancements, water and ice systems offer long-term value and sustainable growth for coffee service providers.

By Bob Tullio, Contributing Editor

WATER AND ICE: ARE THEY THE BEST-kept secret in the coffee service business? The ongoing opportunity for operators that exists from point-of-use water systems and ice machine rentals may not be much of a secret after all — certainly not with experienced operators. Equipment innovation is further enhancing revenue.

As veteran operator David Henschel points out, “Any coffee service operator who is not taking advantage of the ancillary income associated with water, filtration and ice is just leaving money on the table.” After 40 years, Henschel, president and CEO of Corporate Coffee Systems, knows a thing or two about running a profitable business.

RECURRING REVENUE OPPORTUNITY

Pete Tullio, a former NAMA chairperson and CFO of Gourmet Coffee Service in Los Angeles (sold in 2017), recalls a conversation about the water business with the late Bill Reed, a Newco representative who was helping Tullio get started in the OCS business. “Bill told me that ultimately, even though the individual water rentals were not big numbers on their own,

it would be my favorite part of the OCS business,” Tullio said. “He was right. It was like an annuity — the one source of revenue you could count on every month, and when we reached something like 1,500 water units, plus filter changes, the revenue was impressive.”

Industry consultant Orrin Huebner advises his operator clients to focus on recurring revenue, and water and ice machines fall squarely into that category. He has a simple formula for his operator clients.

“If you are at 10% recurring revenue, you are OK. If you’re at 15%, you’re doing well. If you are at 20%, you are the gold standard. Water and ice contribute to those numbers very nicely,” said Huebner. “We still have too many operators, unfortunately, that are not jumping on the bandwagon.” Huebner added that it reminds him of the vending operators who took forever to finally make a move into the coffee service business.

Some small operators are thinking about water and ice the wrong way, Huebner said. “They see \$50 a month for a rental, and they feel it isn’t worth the effort. They are looking instead at the big accounts they have, \$20,000 a year and up, but they do not realize the annuity that builds with rentals



Photo: Champion

18399767 © Lukas Gajda / Dreamstime.com

and everything that goes with it — filter changes, line flushes, annual maintenance. Customers are willing to pay for an exceptional water and ice experience. As a consultant, I do my best to explain that, but it can be a struggle,” he said.

Huebner advises clients to use a smarter rental strategy. “Rent it by the week: charge them every four weeks, get 13 rentals per quarter and run with it. Get your ice machines out there.”

“Do the clients demand premium water quality? Not a problem! That means quarterly filter changes,” he said. “If I were going into the business today, I would do water and ice. I might not do OCS,” he said.

FUNCTIONAL BEVERAGES START WITH GREAT-TASTING WATER

With new technology and more stylish equipment, rental rates continue to rise. One popular water system extends beyond rental and can be a major revenue source for operators. Bevi offers hot, cold, sparkling and ambient water. According to Joanna Choi, national account manager, Bevi provides a powerful revenue opportunity for independent operators, far better than the \$50 a month rented water units she once sold for Aramark and Filterfresh. In fact, Choi said some operators are generating over \$1 million in annual sales on Bevi alone.

Bevi offers quite a variety to end users. “We have three different enhancements currently available. One is called Energy Boost. That utilizes green coffee extract. It is caffeine, basically, and you can set it high or low. We also offer electrolytes — sugarless, no calories, so comparable to Gatorade, but without all the additional sugar and food dyes. We also have vitamin boost — your B12s, your B6, your zinc — everything you need. We’re also coming

out with a new enhancement called Focus Blend, and that has magnesium and B12 vitamins to help enhance focus for folks while they’re at work and to reduce their stress levels while doing it,” said Choi. “In a perfect situation, you would have those three enhancements plus five fruit flavors. Potentially, around 40,000 different beverage combinations.”

LOOKS MATTER: A DESIGN-ORIENTED APPROACH

Vivreau offers a water unit that is part of an emerging trend toward stylish equipment. Davin Wickstrom, director of industry relations, said his company was quite intentional about the design of its water unit.

“We wanted it to be front of house so when people walked into a break room or a meeting room, they were wowed by the visual,” said Wickstrom. “Hot, cold and sparkling water — a really small footprint on the counter, which we know is prime OCS real estate. It is sleek and stylish.”

Wickstrom said that Vivreau goes beyond good looks. The company stands behind its Purity C filtration system, and Vivreau offers a sustainable, custom-made bottle feature. “If you had a client that wanted to get their name on the bottles, or an OCS partner wanting that, we work with them to get them specifically set up for those bottles. The bottles are unique to us, which will then be unique to the customer. We are very mindful to put our money where our mouth is when it comes to sustainability,” he said.

Well-hydrated employees are happier, perform better, are healthier and have less brain fog, directly hitting the bottom line.



IMPACT OF SPARKLING WATER

Matt Dudley, sales and operations director for North America at Marco Beverage Systems, said the growth of his company's stylish water system, Friia, has been largely driven by the popularity of sparkling beverages, a trend that operators often overlook. "If you went to your local grocery store a decade ago, sparkling water wasn't a major category. Now, in a C-store or a grocery store, it's a major category in their beverage section," said Dudley.

"That category is driving the popularity of dispensed water, along with the growing trend of people looking for alternatives to single-use plastics. For a long time, everybody was purchasing bottled water. Now you see a large part of the population, particularly the younger people, carrying refillable water bottles," he said.

Dudley pointed to the look of the Friia unit as a major selling point. "From an aesthetic standpoint, Friia is very much on trend in terms of being small and compact, taking up minimal counter space, having that super sleek, beautiful aesthetic that really complements the environment," he said.

Water industry veteran Steve Silha, president of F&B Innovation Group, said that sustainability in today's workplace creates a water service opportunity for operators. "I've worked with hospitality groups and major corporations that have offices across the United States," said Silha. "Those are the organizations that start with a sustainability mission because they have many employees, and they can have a pretty big impact. It's definitely a top-of-mind issue."

A HEALTHY CHOICE

"Health and wellness are another issue. Water and ice play right into that. There are studies that support the idea that



well-hydrated employees are happier, perform better, are healthier, and have less brain fog," he said. "Water is also an awesome opportunity to lock in a client with another product and keep competition out of your location."

Brian Zelesky, national sales manager for Follett Products, an ice machine manufacturer, said the demand for ice in the workplace has exploded, and that is good news for OCS operators. "Consumers are into cold brew teas and sparkling water, healthier cold drink options, and all of that starts with ice and water," said Zelesky. "If the operator is not dialed into how to deliver ice and water, they are missing a huge opportunity."

According to Zelesky, ice in the office is no longer just a luxury item, and data from our latest State of the Office Coffee Service Industry Report bears that out. "70% of beverages sold are now iced. Ice is a consumer-demanded item. If it's not part of the office refreshment package, you are going to have consumers asking for it."

"Follett's Champion 7 and 15 models are very successful in workplaces," Zelesky said, pointing out that the units are low profile with a small footprint. "One of the best things about these units is that they are completely drainless. All you need is power and a water line, and you can place them practically anywhere."

Tullio recalls that when he started in OCS in 1995, the rental rate on a basic point-of-use water system was modest, typically \$25 to \$35 per month. "In those days, you could still pay for the equipment in a year," said Tullio. "We saw those rental rates go up a lot over the next 20 years as the equipment quality improved and the filtration became more advanced. From my perspective, this aspect of the business only gets better for operators." ■



READY TO SELL YET?

Mike Ferguson has over 34+ years Vending & OCS industry experience, as an ex-operator and owner turned intermediary business broker to assist you in selling your business. I speak fluent Vending and Office Coffee.



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Today, these services are strategic tools for building engaging, wellness-focused workplaces that unite teams and keep them inspired. The providers who deliver on this will be the ones clients rely on to attract and retain top talent.

"Workplace amenities are no longer extras — they are strategic drivers of culture, connection and performance," stated Kristen Griffith, NAMA's senior vice president, member experience. "OCS professionals are uniquely positioned to help organizations create spaces that inspire people to come together, do their best

work and thrive. CTW is where our industry's leaders unite to shape that future."

CTW 2025 IS EVOLVING

First reimagined in 2024, CTW now delivers transformative ideas through collaboration, not just content. It's designed for operators and suppliers to come together as true partners — engaging in relaxed but purposeful conversations, sharing expertise and co-creating approaches to meet evolving workplace needs.

"CTW offers a fresh approach to industry gatherings by creating a practical forum for operators and suppliers to tackle real challenges together. The key is partnership — understanding each other's needs and collaborating to create solutions that move the workplace forward. That's the value of the CTW experience," said Linda Saldana, Seventh Wave Refreshments CEO and co-chair of NAMA's Coffee Services Committee..

CONTENT & CONNECTION LEARNING JOURNEYS

Introduced in 2024, Learning Journeys have become a cornerstone of the CTW experience. These interactive, peer-driven sessions offer deep dives into Sales, Operations and Technology & Innovation, all tied to addressing real workplace challenges.

Attendees engage in intentional dialogue and collaborative, peer-to-peer idea exchange designed to cultivate relationships. You'll gain fresh perspectives on workplace trends, company culture and leadership, while exploring collective solutions for how to sell, what to sell and which product trends can improve employee satisfaction and workplace culture.

Each Learning Journey embraces the emerging role of operators as essential resources for meeting clients' workplace goals. These

NAMA CTW 2025

A transformed experience offering participants the value of deeper knowledge and relationships to shape the workplace of the future.



peer exchanges focus on real-world applications and customer-first approaches that you can take straight to clients when designing workplace experiences.

RELATIONSHIPS THAT MATTER: THE CONNECTION HUB

The Connection Hub represents a significant shift from the traditional exhibit hall to a reimagined networking space built for purposeful connection. Centrally located, it encourages spontaneous conversations during breaks, meals or over a cocktail.

Here, knowledge sharing takes center stage. Structured networking meets unplanned, organic interactions, creating a space where meaningful dialogue replaces the typical exhibitor-attendee transaction. The result is an environment where suppliers and operators discover mutual opportunities, exchange expertise and build partnerships that extend well beyond the event.

IMMERSIVE COFFEE CRAWL

No event focused on improving workplace experiences would be complete without an experience of its own. In Miami, the Coffee Crawl offers an insider's look at the city's rich Cuban and Latin coffee traditions through a curated tour of roasters and coffeehouses.

Two specific outings blend cultural insight with product inspiration — perfect for coffee lovers and professionals looking to spark new ideas. You'll see how coffee is more than a beverage; it's an anchor for community, conversation and creativity, offering lessons you can bring back to your own client experiences.

YOUR OPPORTUNITY FOR GROWTH

Office amenity culture is shifting — employees care not just about better products and brands, but also where products come from, the causes they support and the

connections they foster. Meeting these expectations requires partners who understand space design, amenity planning, product selection and brand experience.

Harvard Business Review reports companies can boost revenues by up to **50%** by improving employee experience. CTW gives you the insight and partnerships to deliver on that opportunity and grow your business.

FILL YOUR CUP AT CTW

Whether you want fresh product inspiration, smarter ways to position your services or strategies to strengthen client relationships, CTW 2025 delivers the ideas, connections and momentum to keep you ahead.

It's time to move beyond service provider to become an essential business partner — and it starts in Miami. Registration is now open at namactw.org.

Better-for-You Snacking

With functional benefits, health-forward ingredients and demand tied to dayparts, better-for-you products are moving from niche to mainstream in vending, micro markets and unattended retail.

By Linda Becker, Editor-in-Chief

CONSUMERS WANT MORE than just immediate gratification from their snacks, and savvy operators know how crucial it is to capitalize on the trends. On-the-go customers expect snacks that offer better-for-you and functional benefits in a tasty, delightful package. Snacking is replacing regular meals for many consumers as they opt for several small meals rather than the earlier generations' preference for "three squares a day."

The snack-as-a-meal trend, however, is nothing new. It has its roots in 20th-century shifts in employment patterns, the advent of quick-cooking technologies such as the microwave, and the introduction of convenience foods tailored for home use.

What is different is how often snacks have replaced mealtimes. Commuting, hybrid work setups and extended office hours mean workers often snack rather than sit down for lunch. Snacks offered via vending, micro markets and unattended retail venues must meet nutritional expectations, not just fill the void.

For convenience services operators, offering health-conscious snacking is no longer optional. Consumers actively seek better-for-you options, linking diet with overall well-being. While generational preferences

influence specific choices, there's no mistaking that snacks which were once confined to wellness aisles are now mainstream.

MEETING DEMAND

Demand for better-for-you options, particularly in the morning, presents opportunities for operators, said Nicholas Banke, director of marketing and insights at Vistar, a PFG Company, during his presentation at the 2025 NAMA Show. Consumers are increasingly snacking and eating outside the home, especially with more workers returning to the office,

he noted, and functional ingredients and label transparency are top priorities for younger cohorts.

Savvy operators will also target dayparts to drive multiple sales opportunities throughout the day and drive bottom-line sales. Targeting consumers with healthy, energy-based items for breakfast, meal bundles for lunch and indulgent, energy-boosting snacks in the afternoon offers distinct sales opportunities, Banke noted. Strategic stocking by daypart can lift overall micro market performance.

Consumers are increasingly snacking and eating outside the home, Banke noted. Most micro market visits involve unplanned purchases, often driven by what "looks good." Visual appeal, product discovery and assortment variety are key to capturing these sales.

DRIVING PROFITS

While indulgence items will likely never disappear from convenience outlets like vending and micro markets, 60% of individuals also consume healthy snacks, according to Innova Market Insights from 2024. As convenience services operators push into locations such as gyms and hotels, products like protein bars, dried fruit mixes or low sodium options — rather than candy bars or chips — appeal to consumers at those locations. Such shelf-stable, better-for-you products sell without sacrificing convenience, and operators benefit from the repeat business.

On the following pages, learn about products you can add to your vending machines, micro markets, smart coolers and smart stores to meet the demand for better-for-you snacking options.



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Hormel Foods Corp.

Planters Nut Duos in 3 Flavors

Planters Nut Duos snacks from Hormel Foods Corp. combine two complementary nut types in a single 5oz resealable bag. Three crave-worthy options include Planters Buffalo Cashews and Ranch Almonds, with the zesty taste of Buffalo-sauce flavor combined with the cool, tangy taste of ranch. Planters Cocoa Cashews and Espresso Hazelnuts pair espresso-dusted hazelnuts and sweet cocoa cashews. Planters Parmesan Cheese Cashews and Peppercorn Pistachios teams a creamy Parmesan cheese cashew with a peppercorn pistachio.

Jack Link's Duos Sticks pair two protein treats in one package

Jack Link's Duos Sticks pairs two bold, complementary meat stick flavors in one convenience package. An industry-first concept, according to the company, the Duo Sticks are offered in two flavor combinations.

In Frank's RedHot Buffalo-Style and Ranch Chicken Sticks, the two-stick pack pairs one protein snack with the kick of Frank's RedHot Buffalo Sauce and another with the cool taste of ranch for the ultimate game-day-inspired snack.

In the Original and Teriyaki Beef Sticks, the two-stick pack pairs one protein snack with the brand's balance of smoky and savory in its Original flavor and another with the tangy twist of its Teriyaki flavor.

In recognition of the popular duos snack segment, Jack Link's is bringing a fresh twist to the fast-growing meat snacks category.



Jack Link's

Nutri-Grain bars refresh yields a snack bar with more whole grains

Following a brand refresh, Nutri-Grain bars now offer 10 grams of whole grains and 10 vitamins and minerals in each serving.

Whole grains remain one of the most under-consumed essentials, Kellanova noted while announcing the change, and most Americans get less than two-thirds of the daily recommendation.

The new bars offer "a hearty yet tender texture, with a delicate crumble and a crave-worthy, fruity flavored filling," said a Kellanova representative. The product appeals to consumers seeking a better-for-you option in fruit bar snacking.



Kellanova / Nutri-Grain

Ocean Spray debuts Sour Blueberry Lemon and Chili Lime

For dried cranberry snack fans seeking a bold taste, Ocean Spray Cranberries Inc. has introduced Sour Blueberry Lemon and Chili Lime Craisins.

Positioned as flavor-forward options perfect for go-to snacks, the new flavors are the latest in the brand's push into fresh flavors. In the past two years, Craisins has also introduced limited-edition mixes and coated flavors, including Cherry, S'mores, Blueberry Crisp and Raspberry Cheesecake Dipped Cranberry Mix.

According to the company, Sour Blueberry Lemon pairs tart lemon and sweet blueberry notes while Chili Lime pairs sweet and spicy.



Ocean Spray Cranberries

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Welch's expands better-for-you snack lineup with Juicefuls Fusions

Welch's Fruit Snacks Juicefuls Fusions — designed to meet growing demand for better-for-you snacks — are the company's first fruit snacks to combine two flavors in one bite, with a chewy outer layer surrounding a juicy center. The debut varieties — Watermelon & Lemon, Green Apple & Peach and Blueberry & Raspberry — offer what the company calls “2 in 1 Juicy Fun” while tapping into consumers' desire for snacks that are both flavorful and functional.

Welch's Fruit Snacks Juicefuls Fusions offers several better-for-you attributes. They are made with natural flavors and colors from natural sources, and each serving is a source of vitamins A, C and E. Juicefuls Fusions are also gluten-free and peanut-free, appealing to health-conscious consumers and those with dietary restrictions.

They are offered in 4oz peg bags as well as multipacks with 50 or 20 0.8oz pouches.



PNV Brands

Jarritos and Taste Salud team up for hydration powder

Mexican soda brand Jarritos has leaned into the wellness market, working with powdered drink mix brand Taste Salud to offer a ready-to-shake drink mix.

The powdered drink packets pair “the nostalgic punch of Jarritos' iconic flavors” with Taste Salud's better-for-you benefits like hydration, immunity support and mental focus. The single-serve packets are available in four flavors: Jarritos Mandarin with Hydration and Immunity, Jarritos Guava with Hydration and Immunity, Jarritos Fruit Punch with Energy and Focus, and Jarritos Lime with Energy and Focus.



Jarritos



Kanzen Meal (USA) Inc. / Nissin Food Products Co. Ltd.

Kanzen Meal debuts nutrient-dense frozen meals

Seeking to meet consumer demand for nutrient-dense, single-serve meals, Nissin Foods has launched Kanzen Meal and a line of single-serve frozen meals designed for health-conscious consumers.

With the increasing use of GLP-1 medications, nutrient density has become more important to consumers. The company states that it utilized “Japanese culinary techniques and tools to precisely distribute micro and macro nutrients throughout each meal while optimizing flavor.”

Each of the three varieties — Fettuccine Alfredo, Spaghetti Bolognese and Shrimp Teriyaki — contains up to 23g of protein and 10g of fiber.

Kanzen Meal (USA) Inc. is a wholly owned subsidiary of Nissin Food Products Co. Ltd. ■

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5TH ANNUAL

THE MOST INFLUENTIAL WOMEN IN CONVENIENCE SERVICES AWARDS

***A celebration of female power that
is shaping the future of the industry***

Nominations are now open for *Automatic Merchandiser's* fifth annual awards recognizing the most influential women in the convenience services industry.

Women continue to gain ground as business owners, at the C-suite level, and other influential positions. The advancements as well as benefits of female leaders are especially evident in the vending, micro market and coffee service industry.

Nominate yourself or someone you know who is deserving of this award!

Rules and guidelines

- » This award spotlights individual achievements by women who have positively impacted the convenience services industry and/or a company/organization for which they work or own.
- » Nominations can be made by the nominee themselves or someone else. Multiple nominations for the same nominee are allowed.
- » Nominations from all industry segments and allied markets are welcome. These include operators, product and equipment distributors, product brokers, machine manufacturers, technology and payment system providers, CPG companies, and trade associations, among others.
- » Nominations are allowed for previous award winners and will be considered with an updated nomination entry.
- » Submitting party(ies) acknowledge that all information presented is truthful to the best of their knowledge.
- » Submission forms must be completed. Incomplete and/or incorrect submissions cannot be considered.

Deadline
January 10,
2026

Winners will be
featured in the
February/March
2026 issue of
the magazine.

**Nominate
today!**

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