

FALL 2018

InTouch

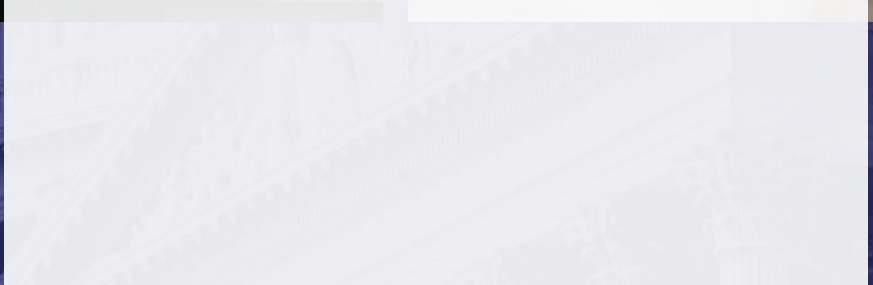
The Official Magazine of NAMA



2018 Fly-In in Review



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NOV. 12 - 14 • 2018
Hyatt Regency, New Orleans



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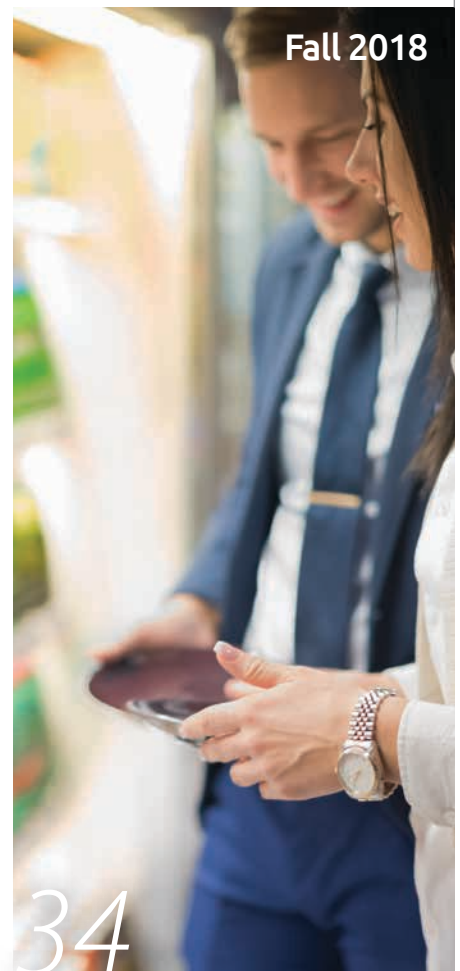
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Meeting Consumers Where They Are: You're Already There

Carla Balakgie, President & Chief Executive Officer of NAMA

As I write this, only a few blocks from NAMA's Chicago headquarters, Amazon's new store – Amazon Go – recently opened. Dubbed by the company as “just walk out shopping,” the retail space has extended the brand yet again.

Customers scan an app on their smartphone on the way in to let the store know they've arrived. Cameras and other sensors track shoppers as they browse and add items to a virtual cart, as customers take them off shelves. Reporters noted that while there were no checkout lines on Day 1, there was a line of customers down the block wanting to walk in.

NAMA Board members Josh Rosenberg and Joe Hessling took a look for themselves. “At Amazon Go, you find very little traditional product. Instead, you find a healthier assortment with a focus on emerging categories including a broad fresh food selection and meal solutions,”

said Rosenberg. “Trends, products and technology are the keys to being most relevant to consumers.”

In terms of staff, eliminating workers say Amazon is not the goal, rather the goal is to get rid of the part of the bricks-and-mortar shopping experience most customers wouldn't miss. According to the company, Amazon Go still needs workers to take deliveries, stock shelves and help customers.



Convenience services can compete with some of the brightest minds in retail by constantly innovating and meeting consumers where they are.

Amazon Go isn't the only game in town automating the checkout process. So is Sam's Club. And for the hundreds of operators with micro markets, so are you.

Micro market operators beat Amazon to the punch, in terms of an overall comparable cashless experience. This “early to market” achievement illustrates how convenience services can compete with some of the brightest minds in retail by constantly innovating and meeting consumers where they are.

In fact, delivering a frictionless experience was among the fortuitous insights many of us heard from Intel as part of the inaugural Executive Forum in January 2016. At the time, Intel representatives shared that said the company's overall objective was to identify transactional “pain points” and to eradicate them, in an effort to deliver a “frictionless” consumer experience.

While this language was new, the idea of giving the consumer what they want, where they want it, how they want it, is not. And it's precisely what convenience services seeks to do for consumers.

In today's fiercely competitive business environment, delivering a frictionless experience requires an increasingly complex infrastructure, with technology to predict product preferences, day part preferences, browsing history, payment information and more.

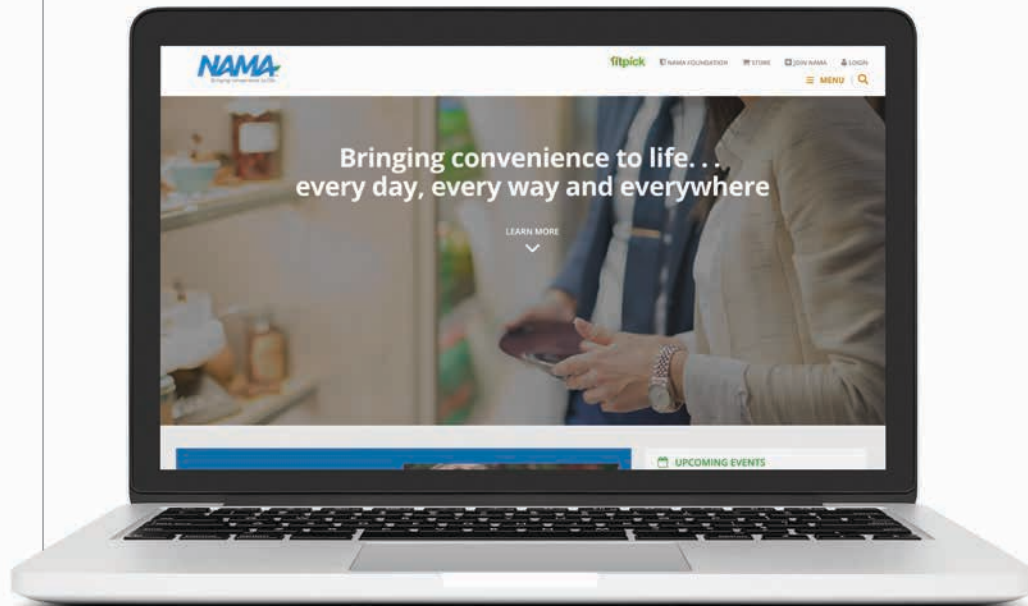
What's highly worth noting is that the consumer experience will be the biggest differentiator moving ahead and in distinguishing a company's services from myriad others. And you're ahead of the game, with an unattended retail experience already in place and owning the last mile in meeting customer demand.

Also in your favor is your ability to capitalize and leverage these existing relationships – and your proximity to your customers. The workplaces, university settings, hospitals, parks and more—where you provide nourishment—are exactly where Amazon wants to go.

That said, Amazon Go is a positive, for now, for the convenience services industry, says NAMA Board Member Joe Hessling. “Amazon Go will definitely have a good short-term effect on our industry. The adoption of this type of experience and technology will both make selling micro markets much easier and drive the costs of technology down. Operators have everything that Amazon Go has today, and more—payment options, product variety, service—for a fraction of the price.”

Down the road, however, competition will continue to grow more intense. In fact, according to Bloomberg, “Amazon.com Inc. is considering a plan to open as many as 3,000 new AmazonGo cashierless stores in the next few years.”

So let’s do this together. You can count on us to continue to deliver the advocacy, research, education, support and “out of the box” thinking you need, while you leverage and enhance the measurable business assets you have. Together we can take this wherever we want to “go.” ■



Welcome to the New namanow.org!

This summer NAMA launched its new website and the entire industry is invited to explore the new namanow.org.

“At NAMA, we continuously strive to improve the industry’s image and tell the story of convenience services in an engaging and compelling way,” said Kelly Doherty, NAMA’s Director of Digital Communications. “Our website is our most important storytelling asset and it is the first thing people see when they research our industry. We needed to reimagine and redesign namanow.org to reflect how truly diverse and innovative our industry is. We are thrilled to share the new namanow.org with the industry,” she continued.

Designed for a frictionless user experience, the new site serves as a fundamental resource for industry members as well as stakeholders, supporting advocacy efforts, education, networking, research and more.

In addition to its modern and clean look and feel, the website is mobile-friendly and integrates seamlessly with NAMA’s member database, providing easy access for users across the board.

“If you haven’t already, we encourage you to take a tour of the new website today,” she concluded. ■



*“Today, we forget about our competitors; we’re all **one** group working for **one** cause.”*

– Kurk Johnson, Three Square Market

While we all want to have an eye firmly focused on what’s ahead, I’d like to take a minute to step back and acknowledge those NAMA members who “took the hill” this July. Their efforts continue to pay off for their own businesses and perhaps more important to our industry, their efforts benefit all of us.

You’ve heard me—and others before—beat the drum regarding the importance of collaborating on advocacy. The work you do in the halls of Congress make a measurable impact. I’ve seen it and it’s real.

Don’t take my word for it—check out the Fly-In video, you can find it on the NAMA website—www.namanow.org/voice. If a picture tells 1,000 words, this video is all it takes to actively demonstrate the enduring value of NAMA’s Fly-In.

The NAMA Fly-In: Reaching Higher Heights

Jeff Smith, NAMA Chair

The results themselves also speak volumes. Participants met with more than 230 members of Congress, briefing them on the economic impact of the convenience services industry, discussing a proposed FDA calorie disclosure rule, and thanking them for their work on tax reform.

In a notable outcome for NAMA, several members of Congress have now signed a bicameral letter to the FDA supporting the agency’s proposed regulation finalizing front-of-pack calorie font size for calorie disclosure purposes.

As a result of the Fly-In, four members of Congress or their staff representatives have already visited NAMA member companies in their districts, further deepening these important relationships.

These advocacy efforts reflect a personal commitment of mine. During my time with the Michigan State Council, we worked closely with elected officials in Lansing. We met with state lawmakers to discuss taxation, regulation, coins and

currency, among other issues affecting the industry. We’ve continued to build relationships in the Legislature and we’ve been able to get more done.

Make no mistake about this: the Fly-In and other NAMA events serve two equally important functions, to facilitate both relationship-building **and** business-building. Throughout the Fly-In, I saw “power huddles” amongst colleagues at every turn. That in-person networking takes relationships to the next level, beyond emails queries and virtual responses—it’s a key to our industry and it’s second to none at NAMA events.

This November, “Much more than what’s in your cup,” is the theme for CTW in New Orleans. So, while you and your teams are getting business done on the show floor, participating in education sessions, networking with colleagues, take stock of all that you do so you can measure a true ROI for your time there.

We’re excited to see you—we all get so much more done **together**. ■



CTW 2018

MUCH MORE

than what's

IN  YOUR



NAMA 
COFFEE TEA & WATER
EDUCATION • NETWORKING • GROWTH
NOV. 12 - 14 • 2018
Hyatt Regency, New Orleans

TECHNOLOGY, DISRUPTION AND SUSTAINABILITY

are just a few of the hot topics brewing at NAMA's 2018 Coffee Tea & Water (CTW), taking place November 12-14 at the Hyatt Regency in New Orleans.

CTW delivers workplace insights by showcasing new technologies and industry trends that are impacting business and driving change in the \$4.25 billion U.S. coffee services industry.

The event will feature exclusive networking opportunities and a dynamic education lineup with a range of sessions tailored to seasoned operators, blended operators and those new to the coffee service industry.





KEYNOTE
SPEAKER

Howard Behar

The keynote presentation on Monday 11/12 will feature Howard Behar, Former President of Starbucks Coffee, North America, author and renowned business leader in an interactive and informative one-on-one dialogue with Liz Williams, president of the National Food & Beverage Foundation. Behar will provide an entertaining and enlightening view of his leadership principals and philosophies and impart wisdom we can all use in our day-to-day lives.



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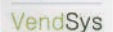
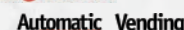


GOLD



SILVER

BRONZE



New!

NAMA FOUNDATION COFFEE CRAWL

Join the NAMA Foundation at its inaugural Coffee Crawl to experience the finest flavors of New Orleans on Monday, 11/12 at 10am. This one-of-a-kind, guided tour through the famous New Orleans French Quarter will take attendees to four notable establishments – including the world-famous Café du Monde. Led by a professional historian, this exclusive event will let participants sample and taste the New Orleans flavor while learning about the Crescent City’s colorful culture and rich coffee history. This not-to-be-missed opportunity will include networking with fellow attendees and a ride on the famous New Orleans street car.

Get Social & Join the Conversation!

Follow us on social media for all the latest updates and join in the CTW conversation!



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Coffee Tea Water Show Hashtag: #NAMACTW



New Education – the Essence of Coffee

This immersive experience will take you from the origin of coffee to taste profiles to the customer experience. This is the quintessential program for coffee sales professionals, coffee managers, route sales representatives, as well as those responsible for the decision-making, direction and growth of the coffee business.

Other education topics include:

- Bean2Cup Strategies
- Leveraging technology trends in OCS
- Water taste and quality
- Sustainability
- Packaging innovations
- The corporate café experience
- Tea trends and innovation

New Product Zone

Get a sneak peek at the latest new product premiers at the New Product Zone. Preview, compare and discover innovative items that will drive sales and satisfy customers. Representing a variety of categories, attendees will have the opportunity to see, touch and taste the new offerings being introduced into the channel and vote for their favorites.



CTW is Brimming with Networking Opportunities

Other exciting elements of CTW 2018 include a welcome reception and a bustling tradeshow floor with more than 100 exhibiting companies expected.

Attendees can continue to forge connections at networking events hosted by NAMA's Emerging Leaders Network (ELN) and Women of the Industry (WIN).



NAMaste!

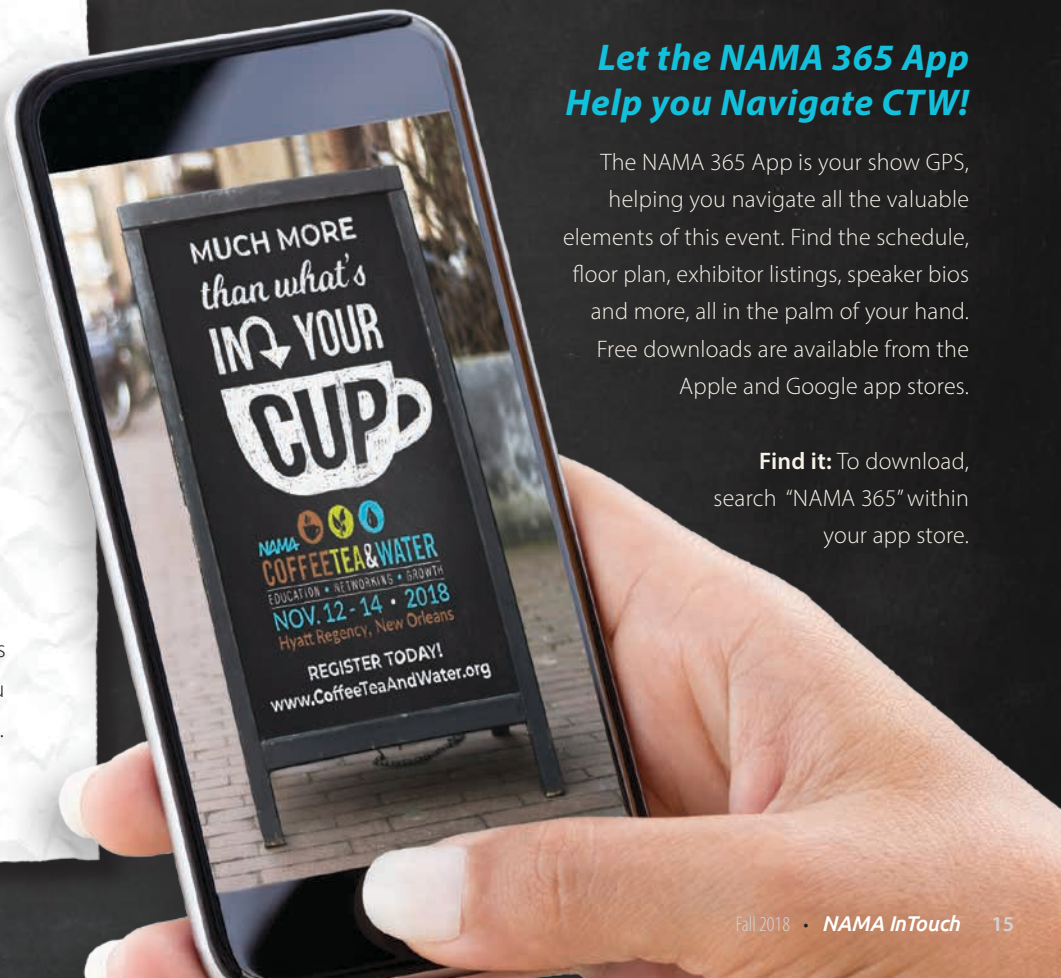
Power up for the day with Women of the Industry's (WIN) Power Yoga with Powerful Women – an early morning event, featuring yoga, yogurt, and roundtable discussions to foster peer-to-peer networking.

Tuesday, November 13 • 7:00-8:30 am

ELN in NOLA NETWORKING EVENT

Connect with ELN friends and colleagues over light appetizers and libations as you experience a unique New Orleans venue.

Tuesday, November 13 • 6:30-7:30 pm
Saints & Sinners



Let the NAMA 365 App Help you Navigate CTW!

The NAMA 365 App is your show GPS, helping you navigate all the valuable elements of this event. Find the schedule, floor plan, exhibitor listings, speaker bios and more, all in the palm of your hand. Free downloads are available from the Apple and Google app stores.

Find it: To download, search "NAMA 365" within your app store.

Schedule Preview

SUNDAY, NOVEMBER 11

Evening

Member Meet Up: An opportunity for NAMA members to enjoy New Orleans with each other.

LOCATION TBD

MONDAY, NOVEMBER 12

10:00am – 12:00pm

NAMA FOUNDATION COFFEE CRAWL

This is a one-of-a-kind, guided tour through the famous New Orleans French Quarter will take you to four notable establishments.

Departs from the Hyatt Regency

1:00pm – 2:00pm

BEAN2CUP STRATEGIES – WHERE PROFITABILITY AND SUSTAINABILITY MEET

- Klarc Snowden, Entrepreneur / Coffee Service Innovator / Director of National Accounts & Strategic Partnerships, De Jong DUKE

Sponsored by Hershey

1:00pm – 2:00pm

TECHNOLOGY TRENDS IN OCS

- Hannah Davies, Moderator, Greenhithe Software Solutions
- John Hickey, President, Tech 2 Success
- Bill Lockett, Director of Marketing, VendSys
- David Marler, Vice President of Sales & Marketing, LightSpeed Automation
- Ryan McWhirter, Director of Product, 365 Retail Markets

Sponsored by 365 Retail

1:00pm – 3:00pm

THE ESSENCE OF COFFEE PART 1 – COFFEE CONCEPTS

- Melinda Grandell, VP of Key Accounts, Accent Food Services
- Tony Laudazio, President of Sales, Cadillac Coffee Company

2:15pm – 3:15pm

WHAT'S IN THE CUP: TRENDS IN FLAVORS AND ENHANCEMENTS

- Mark L. DiDomenico, Director, Customer Solutions, Datassential

Sponsored by Vistar

4:00pm – 5:30pm

FEATURED KEYNOTE PRESENTATION

It's Not About the Coffee

- Howard Behar, Former President of Starbucks Coffee, North America, Founding President of Starbucks International, Author, *It's Not About the Coffee*
- Liz Williams (Moderator), Founder, President & CEO, National Food & Beverage Foundation

5:30pm – 7:00pm

WELCOME RECEPTION

Sponsored by Vistar

TUESDAY, NOVEMBER 13

7:00am – 8:30am

POWER YOGA WITH POWERFUL WOMEN

Registration required space is limited

- WIN presents this early morning event, featuring yoga, yogurt, and roundtable discussions to foster peer-to-peer networking. NAMAste!



8:30am – 9:30am

LEVERAGING TECHNOLOGY TO ENHANCE YOUR BUSINESS

- C.J. Recher (Moderator), VP Marketing, Five Star Food Service
- Evan Jarecki, Chief Customer Officer & Co-Founder, Gimme Vending LLC
- Michael Lovett, Co-Founder & CEO, Vagabond Vending
- Mickal McMath, New Business Development, M&M Sales Company

Sponsored by The Coca-Cola Company

8:30am – 9:30am

Green Coffee Market Update

- Everett Brown, Green Coffee Importer, Westfeldt Brothers Inc.

9:00am – 11:00am

THE ESSENCE OF COFFEE PART 2 – IT'S IN THE CUP

- Tom Bauer, Director of National Sales, DS Services
- Dan Ragan, National Sales Manager, Pod Pack International
- Tom Steuber, President, Associated Coffee





WEDNESDAY, NOVEMBER 14

9:00am – 10:00am

THE NEW CORPORATE CAFE EXPERIENCE: HIGHER & HIGHER!

- Mark Crawford, Director of Sales, North America, Eversys; Managing Director, BevLeverage
- Michael Tompkins, Consultant, Coffee Products Associates

Sponsored by PepsiCo Foodservice

9:00am – 10:00am

HEY TEA, WAKE UP! WHY TEA IS NO LONGER AN AFTERTHOUGHT IN OCS

- Linda Appel Lipsius, Co-Founder & CEO, Teatulia Organic Teas

10:15am – 11:00am

PLANTING A SUSTAINABLE IMAGE WITH YOUR CUSTOMERS

- Ralph Bianculli Jr., Managing Director, Emerald Brand

10:15am – 11:00am

2018 ENERGY STAR COFFEE, VENDING AND WATER COOLER UPDATES

- Tanja Crk, Product Manager, U.S. EPA'S ENERGY STAR Program
- Adam Spitz, ICF Technical Specialist, U.S. EPA'S ENERGY STAR Program

11:15am – 12:15pm

SPECIAL CLOSING SESSION

A Holistic View of the Consumer

- Jim Watson, Senior Beverage Analyst, Rabobank

Sponsored by USA Technologies

Schedule as of 10/8/18



- Jillian Hendershot, Business Development Manager, Accent Food Services
- Karen Webster, CFO, Newco Enterprises

11:00am – 12:00pm

THE BEAN2CUP MOVEMENT: HOW IT SUPPORTS A CULTURE OF SUSTAINABILITY

- Karalynn McDermott (Moderator), SVP, Market Development, BUNN
- Ralph Bianculli Jr., Managing Director, Emerald Brand

- Joe Simonovich, Chief Growth Officer, Corporate Essentials

- Tom Steuber, President, Associated Coffee

12:15pm – 5:15pm

TRADE SHOW FLOOR OPEN

6:30pm – 7:30pm

ELN IN NOLA

By invitation only

- Tuesday, November 13 • 6:30-7:30 pm Saints & Sinners

9:45am – 10:45am

WATER: THE FOUNDATION FOR THE PERFECT CUP

- Cortney Scharenberg, CCS, CWS, Technical Training Manager, Foodservice, Pentair
- David Emmens, Technical Training Manager, Pentair

9:45am – 10:45am

FLEXIBLE PACKAGING INNOVATIONS FOR COFFEE, TEA AND WATER

- Ryan Balock (Moderator), Director of Marketing & Communications, Scholle IPN
- Randy Austin, Product Line Manager, Scholle IPN
- Erica Rios, Packaging Applications Engineer, Scholle IPN

11:00am – 12:00pm

COFFEE, TEA, WATER AND WINE

- Janette Carter (Moderator), National Sales Manager, Fixturelite
- Cathy Feeley, Southwest Sales Manager, C.B.I & Associates
- Jamie Guadagnino, Sales Manager, Vistar



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*Exhibitors as of 10/8/18



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NAMA'S FOURTH ANNUAL FLY-IN

REACHES NEW LEVELS OF ENGAGEMENT

Nearly 300 NAMA members and guests gathered in Washington D.C. July 24 and 25 for *NAMA Takes the Hill*, the association's fourth annual Fly-In, according to Jason Eberstein, NAMA's Director of Government Affairs.

"It was great to see attendees from across the country travel to DC representing the industry with one voice," said Eberstein. "Attendee excitement and enthusiasm was palpable around Capitol Hill and throughout meetings. The Fly-In was an incredible success as it further cemented the industry's presence in Washington," he continued.

"Proactive advocacy does not happen in a vacuum; the commitment that NAMA members have shown year

after year to travel to Washington and walk the halls of Congress advocating for their businesses has been essential to our collective success. Relationships have been built, the industry has effectively positioned itself, and we have been successful on several fronts. Results like this only happen when members engage – and this year, like always, NAMA members stepped up and made their presence known," he concluded.

Attendees representing 35 states and Washington D.C. took part in more than 230 scheduled meetings with elected officials and their staffs from both the Senate and the House. Meeting discussions focused on three main issues: support for FDA's Calorie Disclosure proposal, introducing the

economic impact of the industry, and the commercialization of interstate rest stops.

Several hundred people, including Fly-In participants and congressional staffers attended a NAMA-hosted reception on Capitol Hill, showcasing cold brewed coffee, high-tech vending machines, and micro market displays, all stocked with a selection of the industry's better-for-you and FitPick-compliant products, along with traditional favorites and beverages.

The Fly-In featured special events including a session with representatives from the FDA who addressed a range of issues impacting the industry, a meeting with EPA leadership on the refrigerant transition, a WIN organized panel discussion on

women's leadership featuring the Women's Foodservice Forum, and an advocacy education session led by NAMA staff designed to better prepare attendees for Congressional meetings.

Tuesday's dinner program featured remarks from Steve Munisteri, Deputy Assistant to the President at the White House and a first look at NAMA's newly-redesigned website Tuesday evening concluded with networking in the hotel lobby and an offsite event for ELN members.

.....
FLY-IN RESULTS

From an advocacy perspective, the event was an overwhelming success. Attendees were successful in building new relationships with Capitol Hill and strengthening existing ones. During Congressional meetings participants asked Members of Congress to sign a bicameral letter supporting FDA's efforts to finalizing regulations on Calorie Disclosure.

As of September 15, 2018, nearly a dozen Members of Congress have signed the letter – a very impressive feat. One of the Fly-In's main goals is to build and strengthen relationships; in the weeks following the event there have been four visits to NAMA member companies from legislators and/or staff, and proactive outreach by a Member of Congress to NAMA regarding the Bureau of Engraving and Printing's plans for future note redesign. Strong member engagement, enthusiasm, and individual stories have helped NAMA build a recognized, respected presence on Capitol Hill. ■





NAMA @NAMAvending · Sep 5
#NAMAFlyIn = Results! Today, Congressman @BradSherman encouraged colleagues to consider the industry impact related to coin and currency:

090518 -- "The Future of Money: Coins and Bankno...
Wednesday, September 5, 2018 (10:00 AM) --
Subcommittee on Monetary Policy and Trade
(Committee on Financial Services) Hearing: "The Fut...
[youtube.com](https://www.youtube.com)

5 7



Byron Brooks @byronbrooks4 · Jul 25
Proud to be with my PepsiCo Team at the #NAMAFlyIn

Parlevel Systems @parveleysys · Jul 25

Parlevel has landed! Our very own Chris Stave is on Capital Hill supporting the #namaflyin by discussing legislative issues surrounding the industry. We're excited to be out here fighting for our operators! @ericdell @NAMAvending



NAMA @NAMAvending · Jul 31

Thank you for meeting with our AZ members, @RepDLesko! #NAMAFlyIn #AdvocacyInAction



Congresswoman Debbie Lesko @RepDLesko

Meeting with #Arizona representatives from @NAMAvending, the National Automatic Merchandising Association, last week in Washington, D.C. including Allan from #Glendale and Kevin from #Phoenix. Thanks for...





 **Tech 2 Success LLC** @Tech2Success · Jul 25
Tim Perkins, NAMA ELN Member, is representing Tech 2 and the state of Colorado while Taking the Hill with @NAMAvending in DC! #NAMAFlyIn #vending #micromarkets #officecoffee



CONTINUING THE CONVERSATION: 2018 POST-FLY-IN MEMBER VISITS



(from left) Brian Hoben; David Ratterman; Ron White; Alicia White; and Whitney Meadows are photographed above during a recent visit to Total Vend.



(from left) David Ratterman; Andrew Condia, field representative for Senator Mitch McConnell; Ron White and Alicia White were photographed recently at Total Vend in Louisville, Kentucky.



Congresswoman Karen Handel visits Flowers Foods & Vendedge

FLOWERS FOODS

NAMA @NAMAvending · Sep 19
Thanks @karenhandel for visiting NAMA member @flowersfoods! Great discussion on industry issues following the #NAMAFlyIn.



VENDEGE

NAMA @NAMAvending · Sep 21
More #NAMAFlyIn relationships formed: Thanks @karenhandel for visiting our member Vendedge and meeting with their owners, staff and some suppliers!



“Following the NAMA Fly-In, this was a great way to educate a key staff member on technology in our industry,” said Ron White, President/Owner of Total Vend, based in Louisville, Kentucky.

“We are always interested in welcoming elected officials to our business as a great way to introduce our employees, our industry and our issues,” he continued.

“This demonstrates the real value of advocacy and building relationships with lawmakers and their staff members. We’ve participated in the NAMA Fly-In, along with nearly 300 other members of the industry, and found it to be an experience that has delivered positive results,” he said.

“This visit was another great result of the relationships we’ve been building through the years at the NAMA Fly-In. Making a personal connection with elected officials and their staffs has been rewarding for Total Vend and for our employees as well,” said White said.

The visit included a facility tour and discussions regarding economic growth, immigration, employee training, and Calorie Disclosure, according to White.

“We encourage member companies to be proactive – invite your elected officials to visit your businesses. It’s a win for your company and a win for the industry,” he continued. ■



ECONOMIC RESEARCH DEBUTED AT NATIONAL PRESS CLUB

NAMA Chair Jeff Smith and CEO Carla Balakgie unveiled the most defining research ever undertaken by the convenience services industry, serving as a momentous kickoff for the 2018 Fly-In. Funded by the NAMA Foundation, the comprehensive, statistically valid study focused on four key areas — overall economic impact, jobs, wages and taxes — driving home the breadth and depth of the industry. The standing-room-only crowd at the National Press Club included industry leaders, federal agency representatives, allied associations and nutrition advocacy organizations. Highlighting consumer empathy and growth opportunities, NAMA’s new video, “This is Convenience Services,” provided a compelling context for the findings shared by John Dunham, whose firm conducted the research.



IMPACT BY REGION:

A robust online tool allows members and stakeholders to calculate the impact of the industry by state. Users simply plug in their state and congressional district and a custom report is generated outlining the specific economic impact in their region. ■

See how your state is impacted at: <https://www.namanow.org/voice/economic-research/>

ECONOMIC IMPACT OF THE CONVENIENCE SERVICE INDUSTRY

With a total economic impact of nearly \$25 billion, the U.S. Convenience Services Industry is represented in every community across the United States through traditional vending and micro markets – unattended recall – as well as office coffee and pantry services. The industry, providing 140,000 good paying jobs with \$7.21 billion in wages, paying \$3.5 billion taxes at every level of government. From manufacturing to small-drop distribution, the industry meets the needs of consumers everywhere they are – at work, home and play.

If you find that this research has value to you or your company, please consider making a donation to the NAMA Foundation to ensure that future research like this can be adequately funded.



TOTAL ECONOMIC IMPACT
\$24.6 BILLION



TOTAL WAGES
\$7.2 BILLION



TOTAL JOBS
140,000+



TOTAL TAXES
\$3.5 BILLION



Economic Impact of the Convenience Services Industry

With a total economic impact of nearly \$25 billion, the US Convenience Services industry is represented in every community across the United States through traditional vending and micro markets — unattended retail — as well as office coffee and pantry services. The industry, providing 140,000 good paying jobs with \$7.21 billion in wages, pays \$3.5 billion taxes at every level of government. From manufacturing to small-drop distribution, the industry meets the needs of consumers everywhere they are — at work, home and play.

To learn more on industry impacts at the state or Congressional District level, click on the map below.

Please [view our FAQ](#) to learn more.

If you find that this research has value to you or your company, please consider [making a donation to the NAMA Foundation](#) to ensure that future research like this can be adequately funded.

TOTAL OUTPUT	\$24,602,083,500
TOTAL JOBS	140,475
TOTAL WAGES	\$7,211,467,700
TOTAL TAXES	\$3,504,490,100

Choose State: United States

Choose District: (optional) US Congressional District

Choose Report: Economic Impact Report

E-Mail Copy To: [Input Field]

[View Report / Send E-Mail](#)

