

The only segment-built, source-graded market model for the global self-service kiosk industry — fourteen segments, named evidence, and confidence ratings behind every number.

\$39.4B

2024 base market

\$82.1B

2031E projection

11.1%

weighted CAGR

\$74–\$89B

2031E Bull/Base/Bear

WHY THIS REPORT WINS

- Built segment-by-segment. The 11.1% CAGR is the weighted result of 14 segment models — not a top-down guess.
- Named evidence + confidence ratings. Key figures carry footnoted derivations and High/Medium/Low grades.
- Scenario-modeled to 2031. Bull / Base / Bear with explicit drivers — board-ready.
- Accuracy over hype. No double-counting; adjacent verticals sized outside the core base.

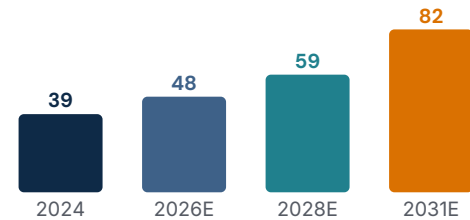
FIVE CONCLUSIONS

- 1 Self-service is a calibrated 11% growth market.
- 2 EV charging is the largest new opportunity (+22% uplift).
- 3 Managed services become the moat (\$12.4B attached, 2026E).
- 4 Accessibility becomes procurement (EAA in force 28 Jun 2025).
- 5 AI wins only if reliability improves — uptime is the constraint.

WHO IT'S FOR

Kiosk OEMs & integrators · Investors / PE / corp-dev · Payment & fintech · Retail / QSR / healthcare operators · EV-charging & energy · Accessibility & compliance teams · Vending / smart-locker / MRO vendors

Market trajectory (\$B)



WHAT'S INSIDE

- 22 chapters + 3 appendices · 47 pages
- 14-segment sizing + 6-input methodology
- Bull/Base/Bear 2031 + confidence matrix
- EV charging, smart vending, self-checkout
- NEW: MRO & industrial-vending chapter
- NEW: 6 adjacent verticals (+\$7.1B): parking, gaming, betting, DMV, self-storage, carwash
- NEW: customer-vs-employee self-service
- \$12.4B kiosk services market + Big Nine
- Accessibility (ADA/EAA/ICT) + regional sizing



The weighted whole-market CAGR resolves to 11.1% across 14 segments. Not a hype number, not a downward revision — a calibrated, segment-built rate.

Hardware spend is the most visible line on a kiosk program. It is rarely the largest — managed services are. The industry counts customer-facing self-service and underestimates the employee-facing market.