

Exploring the European Car Wash Market: Customer Behaviour, Sector Value and Channel Success

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Abstracts

Introduction

The European car wash sector is one which is dominated by service station retailers, however, other players are active in the market and in certain countries commercial hand car washing operations are increasing in importance. This report provides insight into key sector trends as well as data on motorist's wash behaviour, market value and installation numbers by type of car wash and channels.

Scope

- * Insight into the key trends impacting the car wash retail sector including forecasts of new vehicle registrations and motorists' car washing behaviour
- * Up-to-date car wash value, wash volume and installation data for the UK, France, the Netherlands, Belgium, Sweden, Germany, Spain and Italy
- * Consumer data on the effectiveness of different wash types based on criteria including wash quality, wash speed, care for vehicle and value for money
- * Overviews of the key car wash manufacturers and operators including service station providers as well as standalone players such as Elephant Bleu

Highlights

In 2009 the combined total value of the commercial car wash market in the region was EUR4,423m. There were 916 million commercial car washes in 2009, and on average

each vehicle in the eight markets is cleaned at a commercial wash 4.8 times each year. Service stations are the largest commercial car wash channel in the region.

Germany has the largest commercial car wash market in Europe. In comparison with the rest of the region, Spanish vehicles are cleaned at a commercial car wash most frequently. The UK's commercial hand wash market is the largest wash channel in the country.

The car wash industry has been affected by the economic downturn, with some of the major manufacturers reporting a decline in installation sales. They are now focusing on improving dealer sales. Shell has the largest number of service stations with a car wash in Europe, while IMO has the largest network of standalone wash sites.

Reasons to Purchase

- * Make informed investment decisions by understanding the size of the car wash retail market and the nature of the competition within it.
- * Formulate market share objectives for your company and assess performance using our value data segmented by channel and installation type.
- * Develop superior strategies to those of your competitors by accessing information on their site numbers and marketing activities.

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strong>OVERVIEW

Summary

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DEFINING THE CAR WASH MARKET

There are three main types of car wash installation

Automatic washes are still perceived negatively by consumers

A reduction in service stations has reduced the number of roll over installations

Tunnel washes are suitable for sites with a high throughput

Jet washes are the most commonly used installation

Across Europe, there are three commercial wash channels used by private motorists

Service stations are the largest car wash channel in Europe

Standalone operators typically feature well-maintained equipment and high wash throughputs

Hand car washes have varying penetration across Europe due to differing environmental legislation

EUROPEAN OVERVIEW

Each registered vehicle is washed at a commercial car wash an average of 4.8 times each year

The commercial car wash market was worth €4,423m in 2009

Germany has the highest average commercial car wash spend per vehicle

Service stations are most commonly used for car washing

Roll over machines are the largest wash type in the region by value

MARKET DRIVERS

The current economic environment has created new challenges for car wash retail

The crisis-struck European new car market is unlikely to recover properly until 2015

Car usage and fuel demand have been less resilient than usual

Some European motorists have sacrificed paid car washing services in order to reduce motoring spend

Although car wash installation investment is suffering, there are opportunities to improve wash numbers

Site consolidation and occasional supermarket new builds still provide growth opportunities

When selecting a car wash, wash quality and vehicle care are most important to motorists

Environmental issues are increasingly impacting the car wash market

Germany has the strictest car wash regulations in the region examined

More biodegradable chemicals are being developed

The emergence of commercial hand car washing operations is fuelling the environmental debate

Commercial wash operators must appeal to the growing number of environmentally aware consumers

MAJOR PLAYERS IN THE EUROPEAN CAR WASH MARKET

Manufacturers often sell their equipment through specialist car wash dealers

WashTec is one of the leading European car wash manufacturers

Ryko sells its automatic installations in Europe both directly and through distributors

Istobal installations have a strong presence across the Iberian Peninsula

Christ exports just under half of its products to countries outside of Germany

Ceccato has a strong presence at Agip branded sites in Italy

Tammermatic's key markets are Scandinavia and the Baltic states

Kärcher offers a car wash equipment cash back scheme in the UK

Large standalone operators are typically arranged in a franchise-based model

Europe's largest standalone operator, IMO, went into administration in 2009

Standalone player Elephant Bleu has introduced roll over machines at a number of its sites

Mr Wash sites feature conveyor and self-service jet washes

ProntoWash sites are predominantly located at commercial car parks

Service stations are the main car wash operators in Europe

Shell has the largest number of branded service stations with a car wash in Europe

TOTAL offers a pre-loaded car wash card in a number of European markets

Repsol Sprint Wash centres are located throughout Spain and Portugal

Agip accounts for 24% of all service stations with a car wash in Italy

PKN Orlen has begun to invest in car washes

Two-thirds of car wash installations at Statoil sites in Sweden feature water recycling equipment

CAR WASH COUNTRY PROFILES

France

- On average each vehicle in France is cleaned over 6 times each year
- Jet washes are most prevalent installation type in France
- Service stations are the biggest car wash channel in France
- Standalone sites have the highest number of jet wash installations
- The paid hand wash segment is the smallest commercial car wash channel in France
- Each of the major wash types exceed French consumers' expectations

Germany

- Germany has the largest car wash market in Europe by both installation type and value
- Most wash installations in Germany are roll over machines
- Service stations are the largest car wash channel in Germany
- Around a third of all wash installations in Germany are located at standalone sites
- Stringent regulations mean that the commercial hand car wash segment in Germany is small
- Automatic washes are the highest rated and most frequently used wash type in

Germany

UK

- On average, each vehicle in the UK is washed eight times per year
- The majority of wash machines in the UK are jet installations
- Many service stations in the UK feature a car wash installation
- The standalone segment is the smallest car wash channel in the UK
- Paid hand car washes are the largest channel by market value in the UK
- Washing at home is the most popular car wash type in the UK

Belgium

- Each vehicle in Belgium is washed over 7 times per year
- Jet wash machines are the most commonly found installation type in Belgium
- The Belgian service station channel was worth in excess of €40m in 2009
- The standalone wash segment is the largest commercial channel by market value
- The paid hand wash channel in Belgium is growing in importance
- Each of the four wash types in Belgium exceeds consumers' expectations

Netherlands

- On average each vehicle in the Netherlands is washed over 6 times each year
- Jet installations are the most commonly found wash installation in the country
- Service stations are the largest channel by market value in the Netherlands
- A major standalone operator in the market is IMO
- Paid hand wash sites exist in the Netherlands

Each of the four wash types in the Netherlands exceeds customers' expectations
Sweden

Vehicles in Sweden are washed less frequently than in any other country in the region
Roll over machines are the most commonly found wash type in Sweden due to the cold climate

Service stations are the biggest wash channel in Sweden

The Swedish standalone channel is the smallest in the region

Water recycling legislation has limited the number of commercial hand wash sites in Sweden

Washing at home and jet washing score the highest consumer wash rating in Sweden

Spain

Registered vehicles in Spain are washed more than in any other market in the region

Jet wash machines are the most commonly found installation type in Spain

Service stations are the biggest car wash channel in Spain

Jet installations are the most frequently used wash type at standalone sites in Spain

In 2009, the commercial hand wash channel in Spain was worth €20m

Automatic machines and washing at home are both rated the highest by Spanish consumers

Italy

Italy is the third largest market by value

Jet installations account for over half of installations in the country

The majority of car wash installations in Italy are located at service stations

Each registered vehicle in Italy is cleaned more than once a year at a standalone site

Commercial hand washes are the smallest wash channel in Italy

All major wash types in Italy tend to exceed customers' expectations

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