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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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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
K?rcher 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

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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

APPENDIX

Secondary Research
Further reading
Ask the analyst
Datamonitor consulting
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