

The US Car Wash Market: Analysis By Type (In-Bay Automatic/ Roll-over, Conveyor, and Self Services), By Vehicle Type (SUV, Sedan, Hatchbacks, and Others), By Size of Operations (Less Than 5 Sites, and 5 or More Sites) Size and Trends with Impact of COVID-19 and Forecast up to 2027

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Abstracts

The US car wash market in 2021 was valued at US\$14.59 billion. The value of the market is expected to reach US\$17.34 billion by 2027. A car wash is a facility used to clean the exterior and, in some cases, the interior of motor vehicles. Car washes can be self-serve, fully automated, or full-service with attendants who wash the vehicle.

Caring for and maintaining the car is the most important factor in ensuring that it enjoys a long and healthy life. The secular move away from do-it-yourself toward more effective do-it-for-me services, as well as increased awareness of safeguarding and prolonging the life of the vehicle in light of a competitive new car market and hyperinflationary old car prices, are all expected to boost the market. The market is anticipated to grow at a CAGR of approx. 2.9% during the forecasted period of 2022-2027.

Market Segmentation Analysis:

By Type: The report provides the bifurcation of the market into three segments based on the type: In-bay Automatic/Rollover, Conveyor, and Self-Services. The in-bay automatic/rollover held the highest share in the market, owing to the benefits such as low maintenance, fewer damage claims than tunnel washes, availability of touch-free washes, etc.

By Vehicle Type: The report further provided the segmentation based on the following vehicle type: SUV, Sedan, Hatchbacks, and Others. SUV is expected to grow at the highest CAGR in the forthcoming years. SUV is gaining immense popularity among consumers due to the features such as compact size, stylish design, and automatic safety features. Moreover, profitable prospects for market participants are expanded throughout the projection period by the electrification of SUVs.

By Size of Operation: Based on the size of operations, the US car wash market can be divided into two segments namely, Less Than 5 sites, and 5 or More Sites. Most of the US carwash market players operate less than 5 sites as the majority of car wash locations in the US are owned and operated by small to medium-sized independent car wash companies.

Market Dynamics:

Growth Drivers: The US car wash market has been growing over the past few years, due to factors such as a secular shift toward do-it-for-me offerings, growing base of vehicle registrations and consumer carwash spending, growing membership search activity, rising spending power, increasing vehicle's average life, low gasoline prices, and many other factors. Speed and convenience are the two major benefits car washing businesses offer and as a result, there has been a vast decline in the percentage of US consumers washing their cars at home. Additionally, due to their hectic schedules, individuals no longer have the time to wash their cars and instead choose to employ professional car washes.

Challenges: However, the market has been confronted with some challenges specifically, high initial investment and maintenance costs, seasonal in nature, etc.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as increasing automation, increasing use of sonar technology, emerging car wash market for self-driving cars, increasing environmental concerns, growing adoption of mobile apps and online booking, etc. Improvements in automation and technology have had a major impact on recent industry growth. This includes the use of radio-frequency identification (RFID) chips and license plate readers that allow car wash operators to automatically recognize monthly membership holders when they approach the site. Automating this process has helped significantly speed up the wash process and lower labor requirements.

Impact Analysis of COVID-19 and Way Forward:

The COVID-19 outbreak had widely disrupted the automotive industry. It resulted in the shutdown of manufacturing facilities and a drop in the sales volume of cars. The demand for both passenger and commercial vehicles fell in 2020. This decline adversely affected the US car wash industry, as the demand for car wash services is directly proportional to vehicle production. In the post-COVID era, the US car wash market is expected to grow significantly, owing to the technological advancement brought in by the pandemic.

Competitive Landscape:

The US car wash market is highly fragmented, with a large number of small- and medium-sized manufacturers accounting for a insignificant revenue share of overall market.

The key players in the US car wash market are:

Driven Brands Holdings Inc. (Driven Brands, Inc.)

Mister Car Wash, Inc.

Zips Car Wash LLC

Quick Quack Car Wash

Tommy's Express Car Wash

Tidal Wave Auto Spa

GO Car Wash

Autobell Car Wash

Cobblestone Auto Spa Car Wash

Mammoth Holdings LLC

WhiteWater Express Car Wash

True Blue Car Wash, LLC

Club Car Wash

Express Wash Concepts

Golden Nozzle Car Wash

Some of the strategies among key players in the market for car wash are mergers, acquisitions, collaborations, and opening new locations. For instance, in 2022, ZIPS Car Wash announced the acquisition of Jet Brite Car Wash, an 11-store mega car wash chain based in Chicago. Whereas, Mister Car Wash, Inc. announced the successful acquisition of Top Wash, three express exterior locations in Anoka, Fridley, and Champlin, Minnesota. Also, in 2021, the top 20 operators have increased their overall location count by approximately 850 locations over the past two years, effectively doubling the market share of the top 20 operators during this time as industry consolidation has begun to accelerate.

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