

Car washes, Vehicle care products, Lubricants, Service areas

Car washes,
contributing to the green transition .

THE CARWASH MARKET IS GROWING STEADILY IN FRANCE

Annually sales
(€ excluding VAT)

OPERATIONS

€ 1
billion

EQUIPMENT

€ 200
million

10,000
CAR WASHES

7,300
INDEPENDENT OPERATORS
(usually belonging to a
brand such as Eléphant
Bleu, Kärcher, etc.)

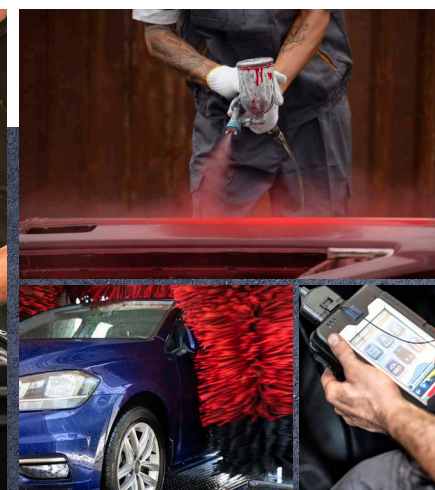
1,200
WASHES IN SUPERMARKET
CAR PARKS

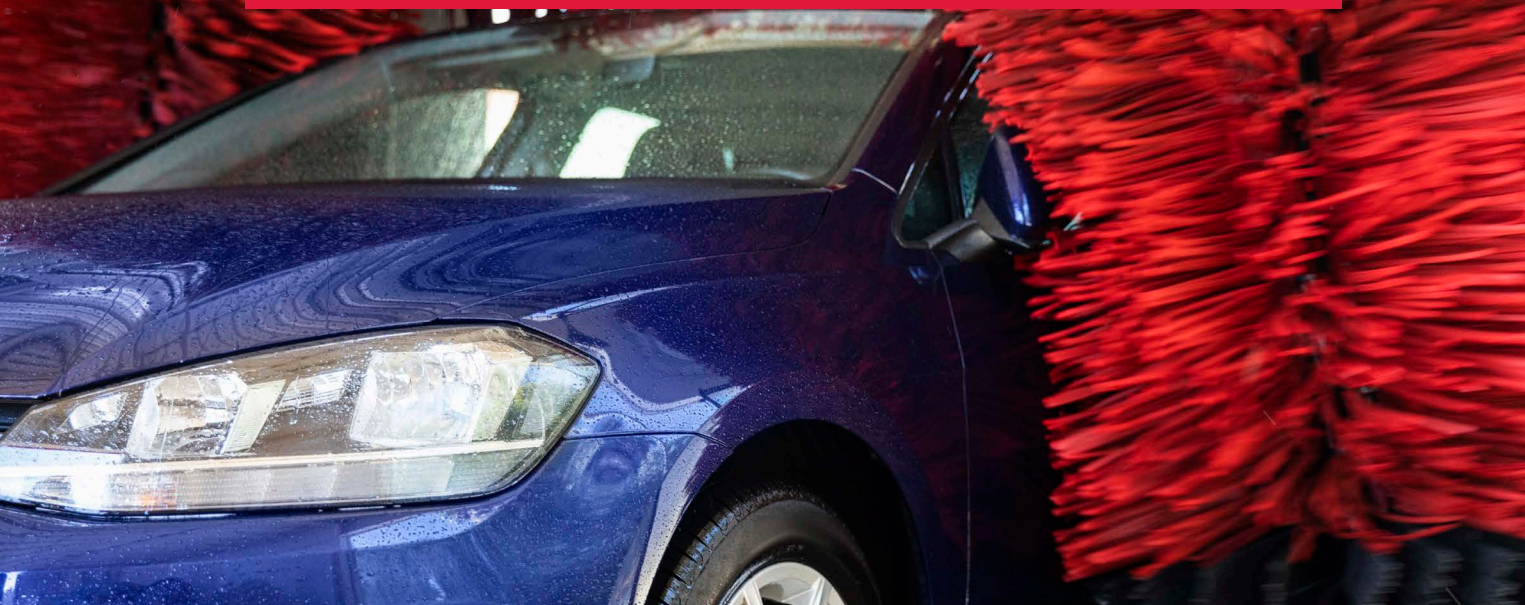
1,500
PETROL STATIONS

12,500
DIRECT JOBS

and **just as many indirect jobs**
such as maintenance and the installation
of payment terminals

Figures: Mobilians 2023, INEC 2024





The market also has to cope with constraints

Owing to the goals of preserving water resources (Water Plan 2030, April 2023) and climate change (droughts in 2022 and 2023 ⁽¹⁾ meant water supply restrictions and even car wash closures in some departments), existing and new facilities have to be ever more economical with their water.

CONSUMER SURVEY

IPSOS, november 2023 for Wash France / TotalEnergies

92%

of motorists wash their cars at least **once a year**

41%

do so at least **once a month**

8%

never wash

THE AVERAGE WASH FREQUENCY

Source NGC Data 2024

288 million

washing cycles

for 42 million cars and 6.5 million light commercial vehicles

Equally split between roller washing and high-pressure jet washing.

However, 35% to 37% of motorists wash their cars at home⁽²⁾, which is forbidden by law, as it leads to the discharge of wash residues into rainwater, a major factor in pollution. The waste generated by car washes (polluted sludge, particularly hydrocarbons), is treated on site.



6

wash times a year

The environment is the first big issue for professionals in the sector. One goal is:

- dissuade people from washing at home;
- depollute wash water all year round using appropriate, continuously maintained facilities;
- ensure that their fixtures use as little water as possible by fitting shutters to roller gantries (to prevent water from being dispersed outside) and installing dedicated water reprocessing units.

Specialist equipment manufacturers offer increasingly effective solutions.

(1) Guide circulaire de mise en œuvre des mesures de restriction des usages de l'eau en période de sécheresse, May 2023. Download at www.mobilians.fr/metier/lavage-haute-pression/nos-dossiers/arretes-secheresse

(2) Car washing survey - INEC Institut National de l'Economie Circulaire, 2024, www.institut-economie-circulaire.fr

The lubricant market running smoothly on the existing fleet.

The car lubricant market is slowly leaking volume

2023

Market in decline

-2.5%

273,500
tonnes of automotive
lubricants marketed in
France*,

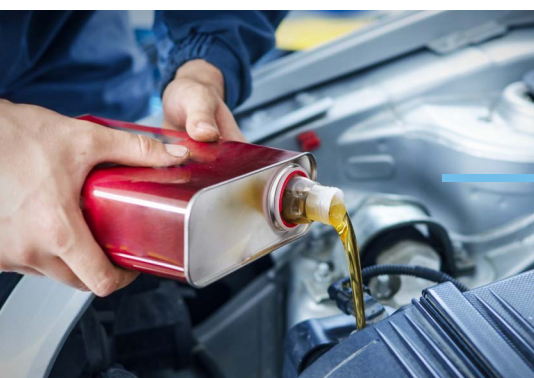
2024

The trend similar

-2%

Within this market, which includes both cars and commercial vehicles, the 'car' segment remained stable over the ten months.

* Source: Centre Professionnel des Lubrifiants



All-make services responsible for 70% of oil changes

This relative resilience of the automotive lubricants market can be attributed

to the state of the vehicle fleet, **WHICH IS BOTH EXPANDING AND AGEING ALL OF WHICH UNDERPINS DEMAND FOR LUBRICANTS FOR OIL CHANGES**

SALES
OF WASTE DISPOSAL

70%

carried out
in all-make workshops

30%

carried out
by **manufacturer networks**



42.22 millions
cars

11.9 years
average age

THE AVERAGE MILEAGE DRIVEN IS ALSO A KEY FACTOR
in 2023, it had returned to pre-Covid levels

14,000 km
diesel cars, down slightly

9,500 km
petrol cars, up

In terms of maintenance, the high average age of the vehicle fleet works in favour of independent garages and chains.