



The Bottom Line

Presented by Robert Andre
SVP Product Innovation & Customer Experience, Sonny's



7 Most Common Mistakes

1. Unrealistic expectations
2. No concept – unique selling proposition
3. Poor location
4. High unit costs
5. Building incorrectly
6. Operating incorrectly
7. Marketing & Advertising (lack of)

CAR WASH SHOW EUROPE 2023



Welcome To The Car Wash Industry

Presented by Robert Andre

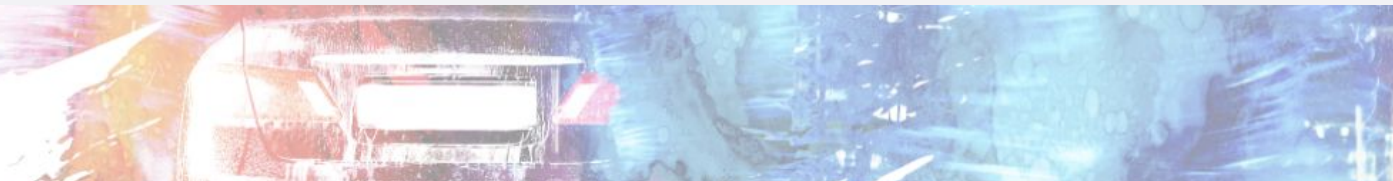
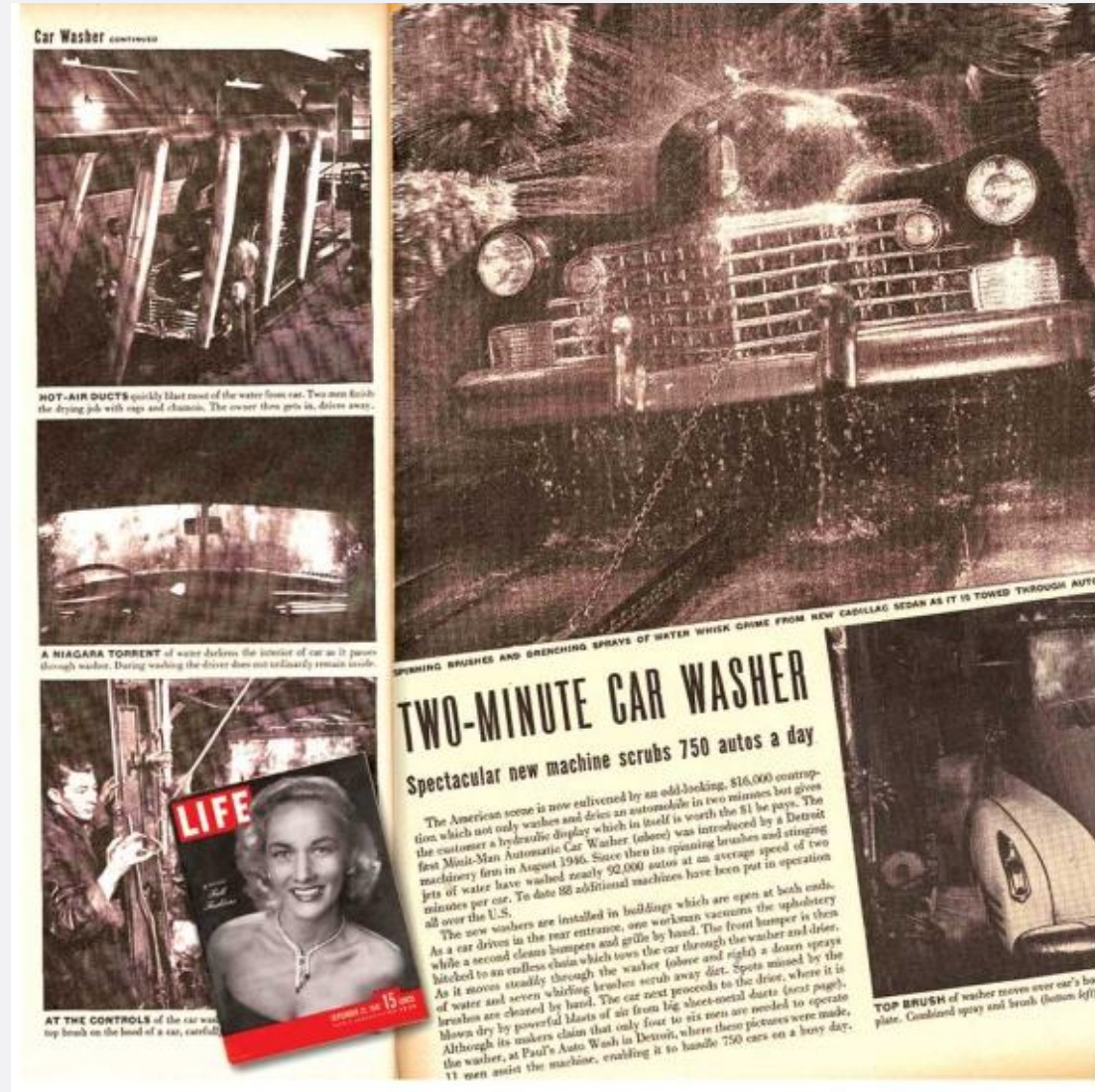


Make CarWashing Easy™

CAR WASH SHOW EUROPE 2023

Sonny's Family History

- Sonny Fazio started as a car wash owner / operator in 1949 in Lynn, Massachusetts
- 73 years ago
- September 22, 1947 article in LIFE magazine
- Left the retail side of the business after 24 years in 1973 and moved to Florida
- Opened a small parts business
- Today, Sonny's is the largest supplier of conveyorized carwash equipment in the world.




CAR WASH SHOW EUROPE 2023


Conveyor History

2001 Birth in America of Express Model


- Benny's, Goo Goo's, Marc 1
- Value Priced, Free Vacuums, Pay Stations
 - Elimination of labor
 - Focus on speed and consistency through automation

20 YEARS OF THE EXPRESS CAR WASH
A Story From The Leaders That Started It All

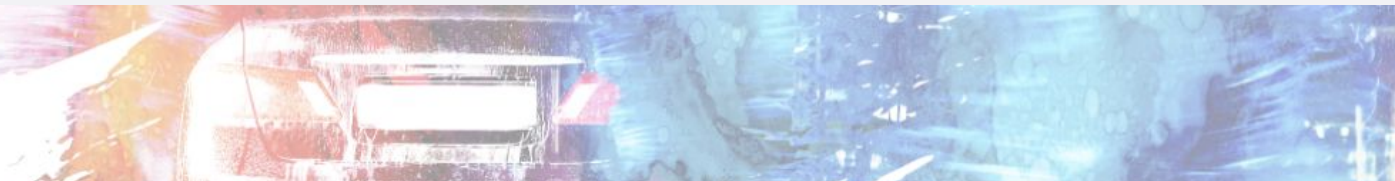
 **BEN ALFORD**
Benny's

 **ROGER BECK**
Goo-Goo's

 **MARCUS KITTRELL**
Marc-1



Scan to Watch the History of Express



CAR WASH SHOW EUROPE 2023

An Evolving Industry Past & Present

Presented by Robert Andre



Make CarWashing Easy™

CAR WASH SHOW EUROPE 2023

Evolving Industry | Increased Demand

CONSUMER DEMAND

1996	52.4%
1999	44.5%
2002	43.0%
2005	38.0%
2008	34.4%
2011	31.8%
2014	28.4%
2016	30.8%
2019	22.5%
2022	22.0%

ICA DATA

- Decline in home washing as “most often” choice
- Decline in home washing of **29.9% over 23 years**
- Trends continues “Do-it-Yourself” to “Do-it-for-Me”
- Increase from **47.6% to 78%** washed at professional wash “most often” choice

They are Leaving the Driveway!
Where are they going? 58% Conveyor “most often”



Source: IBIS World 2020

CAR WASH SHOW EUROPE 2023

Evolving Industry| Increased Demand

More Cars On The Road!

- Average car age in the US in 2019 was **11.8** years old
- There are **more new cars** on the road and they are **washing with greater frequency**

Vehicle registrations are forecasted to continue increasing at an annualized rate of 1.1%

2018: **276 MM** reg proj

2022: **285 MM** reg proj

2024: **298 MM** reg proj

2027: **308.5 MM** rep proj



Source: IBIS World 2020

CAR WASH SHOW EUROPE 2023

Evolving Industry | Increased Demand

Question was: How often do you wash your vehicle at the car wash?

Newer cars wash more often!

2019	0-3 yrs. old	4-9 yrs. old	>10 yrs. old
Once a month or more	57%	51%	44%
Every couple of months	29%	31%	33%
Every six months or less	14%	19%	23%



Source: ICA 2019 Study

CAR WASH SHOW EUROPE 2023

Evolving Industry Growth

NEW BUILDS INCREASING

Year	US New Tunnel Builds
2012	170
2013	180
2014	180
2015	220
2016	270
2017	350
2018	400
2019	450
2021	625
2022*	750

- New Tunnel growth has accelerated since 2015
- Number of New Tunnel builds:
 - 9% from 2012-2015
 - 20% from 2015-2019

Historically, installed base has been approximately 2-3% annually but this has accelerated to 4-5%.



Source: Sonny's Company Data

CAR WASH SHOW EUROPE 2023

Evolving Industry Industry Growth

15 YEAR RUNWAY

Year	US New Tunnel Builds
2012	170
2013	180
2014	180
2015	220
2016	270
2017	350
2018	400
2019	450
2021	625
2022*	750

ACCELERATING INSTALL BASE

- Current operators with aggressive growth plans
- New entrants
- Increasing consumer demand - helps drive build out of available white space
- BCG: **Additional 9-12K conveyors without cannibalizing**

At predicted rate, **build out** will take
more than 15 years
(based on today's demand!)



Source: Industry database; BCG call center data;
Sonny's company data; US Census, Industry interviews; BCG analysis

CAR WASH SHOW EUROPE 2023

Evolving Industry Industry Growth

STILL FRAGMENTED

PC&D Nov. 2020 Study: TOP 50 US Conveyorize Chains by Location Count

Top 10: 1233 Locations

Top 50: 2195 Locations

- Only 34 companies have 20 locations or more
- **Only took 13 locations to be in top 50**

Industry is still VERY fragmented

“There are no major players in this industry” **

IBISWorld definition:

Having at least 5% market share.

Largest in CarWash is at 3.5%.



Source: PC&D November 2019 / IBIS World 2019**

CAR WASH SHOW EUROPE 2023

Evolving Industry Industry Today

Just Getting Started

Recap:

- Installed base growing at an annual rate of 4-5%
- Very fragmented market with no major players
 - IBISWorld Definition of a “Major Player”: Having at least 5% market share
- White space: Build out with today’s demand will take over 15 years to fill
 - With no cannibalization on returns

AM I TOO LATE TO THE DANCE??? NO!!!!!!!



Source: PC&D November 2019 / IBIS World 2019

CAR WASH SHOW EUROPE 2023

Evolving Industry Today

Conveyor Segmentation

What types of conveyor car washes are being built in the industry now?

Internal sales data revealed the following:

	2009	2011	2017	2018	2019	2020	2021
Express	75%	80%	93%	94%	95%	98%	98%
Flex	20%	15%	5%	5%	4%	1%	1.2%
Full	5%	5%	2%	1%	1%	1%	0.8%



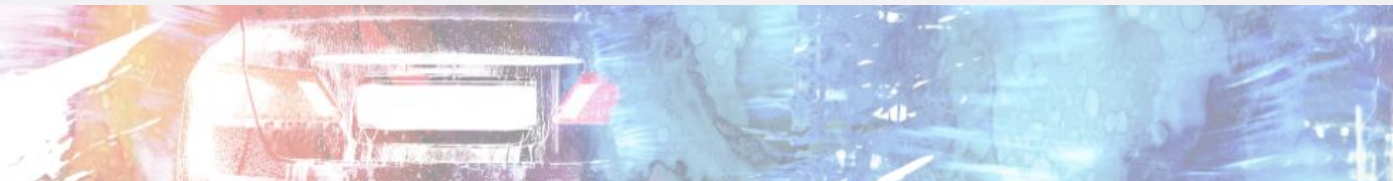
Source: Sonny's Sales Statistics

CAR WASH SHOW EUROPE 2023

Evolving Industryl Express Today

Mini Tunnels (50' or less)

- Multi site operators looking at Mini Tunnels
 - Build brand | Protect territory from competition
 - Secondary markets
 - Convert Self Serve
 - Convert old gas sites
 - Convert In-Bay at busy sites

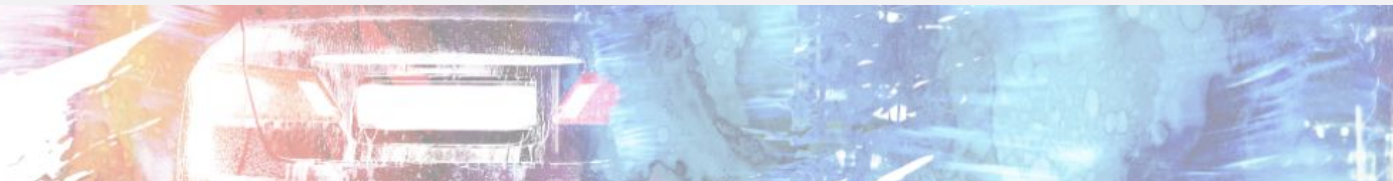


CAR WASH SHOW EUROPE 2023

Evolving Industryl Express Today

Double Mini:

- 53' Tunnel, Inbay, 3 SS Bays
- 2017 – Tunnel washed 258,863
- Opened second 53' in March 2018
- For 2018 -Washed 284,290

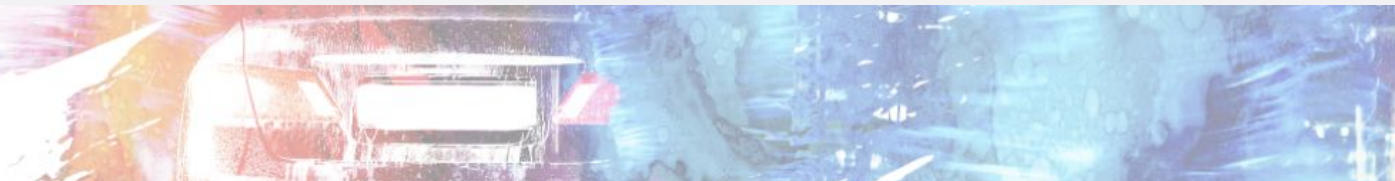


CAR WASH SHOW EUROPE 2023

Evolving Industry – Industry Resilience

Extremely Resilient Business

- Can't wash cars on the internet!
- Industry performed well through last deep recession (2008)
 - More insulated now with Unlimited Membership plans
- Safety shutdown, Express able to remain open in most municipalities
 - Little to no contact between employees
 - Little to no contact between customer and employee
 - LPR
 - Manage account online / Pay for washes online
 - Very Limited touchpoints
 - Customers felt safe

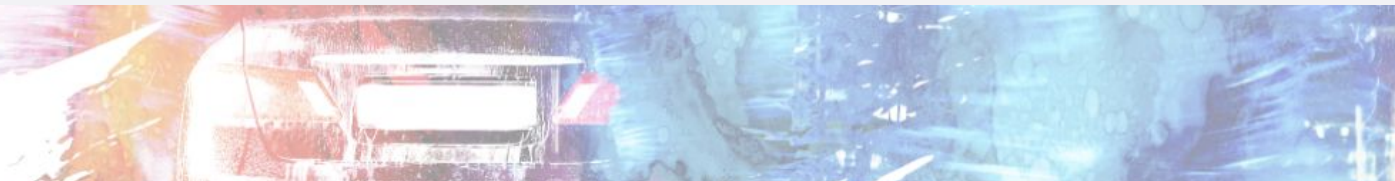


CAR WASH SHOW EUROPE 2023

Evolving Owner | Retail

ACCELERATED GROWTH

- Pace at trade shows
- Overall ROI is very good
- Impatience of investors
 - The industry would be growing faster if sites were more readily available
 - Picking “B and C” sites
 - We still believe in “Location, Location, Location” not “Build it and they will come”



CAR WASH SHOW EUROPE 2023

CAPITAL & OPERATING COSTS

All project costs can vary significantly based on location specific factors.

Presented by Robert Andre



Make CarWashing Easy™

CAR WASH SHOW EUROPE 2023

Capital and Operating Costs Comparison of 3 Layouts



Express Exterior

- Hybrid Tunnel
- 10k Cars / Month



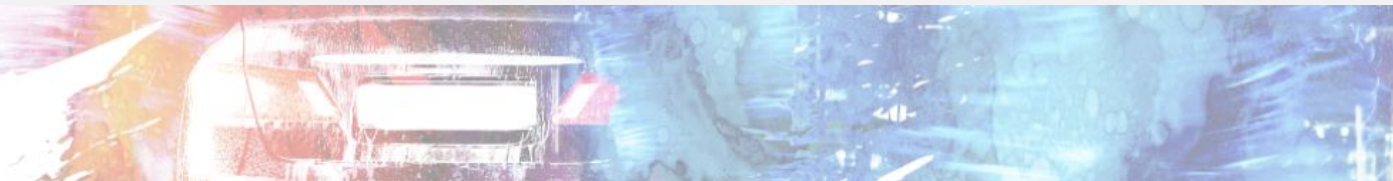
Flex Serve

- Hybrid Tunnel
- 10k Cars / Month



Xtreme Xpress

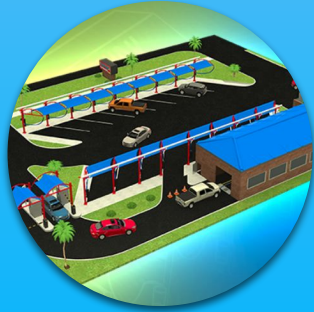
- Mini Tunnel
- 5k Cars / Month
- 7k Cars / Month



CAR WASH SHOW EUROPE 2023

*All project costs can vary significantly based on location specific factors.

Capital and Operating Costs Comparison of 3 Layouts



Express Exterior

Range: \$2.8 to \$6.6 Million
Average: \$4.7 Million*



Flex Serve

Range: \$3.1 to \$7.1 Million
Average: \$5.1 Million*



Xtreme Xpress

Range: \$1.5 to \$2.9 Million
Average: \$2.3 Million*



All figures shown in US Dollars

CAR WASH SHOW EUROPE 2023

*All project costs can vary significantly based on location specific factors.

Express Exterior: Capital Construction Costs

Description	Cost Range		
Land (.8 to 1 acre)	\$750,000	to	\$2,500,000
Building 125' x 35' = 3750 sq. ft.	800,000	to	1,400,000
Site Work (grading, paving)	100,000	to	400,000
Landscape and Irrigation	75,000	to	130,000
Site Lighting	35,000	to	40,000
Signs (street and building)	40,000	to	50,000
Equipment (Computers, Vacs, Water Treatment, etc.)	800,000	to	1,500,000
Grand Opening	10,000	to	25,000
Professional Fees (architect, engineer, etc.)	65,000	to	140,000
Permits, Tap Fees, and Municipal Fees	65,000	to	270,000
Start-up Working Capital (first 3 months)	100,000	to	135,000
Total	\$2,840,000		\$6,590,000
Estimated Average Actual Project Cost*			\$4,715,000



All figures shown in US Dollars

CAR WASH SHOW EUROPE 2023

*All project costs can vary significantly based on location specific factors.

Express Exterior: Wash Distribution (10k Cars / Month)

	Average per Car	\$15.35		Car Count	10,000
Menu Price	\$10	\$15	\$20	\$25	
% of Total Cars	45%	25%	8%	22%	100%
Number of Cars	4,500	2,500	800	2,200	10,000
Revenue Generated	\$45,000	\$37,500	\$16,000	\$55,000	\$153,500



All figures shown in US Dollars

CAR WASH SHOW EUROPE 2023

*All project costs can vary significantly based on location specific factors.

Express Exterior: Proforma (10k Cars / Month)

	Proj \$	Proj %	Proj/car
SALES			
Number of cars washed	10,000		
Average per car	\$15.35		
Gross Sales	\$153,500.00		
Customer Comp	\$525.00	0.3%	\$0.05
Employee Comp	\$200.00	0.1%	\$0.02
Net Sales	\$152,775.00		
LABOR & SALARY			
Location Manager	\$7,000.00	4.6%	\$0.70
Assistant Manager	\$5,000.00	3.3%	\$0.50
Hourly	\$5,418.00	3.5%	\$0.54
BONUS			
Location Manager	\$525.00	0.3%	\$0.05
Assistant Manager	\$263.00	0.2%	\$0.03
Supervisor	\$0.00	0.0%	\$0.00
Payroll Taxes	\$1,638.00	1.1%	\$0.15
Employee Benefits	\$400.00	0.3%	\$0.04
Health Benefits	\$107.00	0.1%	\$0.01
Vacation	\$243.00	0.2%	\$0.02
Labor Expense Total	\$20,594.00	13.5%	\$2.06
C.O.G.S.			
Chemicals Total	\$9,000.00	5.9%	\$0.90

	Proj \$	Proj %	Proj/car
INSURANCE			
Gen. Liability	\$600.00	0.4%	\$0.06
Workers' Comp	\$500.00	0.3%	\$0.05
Insurance Total	\$1,100.00	0.7%	\$0.11
BANKING			
Credit Card Fees	\$1,500.00	1.0%	\$0.15
Chargebacks	\$0.00	0.0%	\$0.00
Bank Service Charges	\$100.00	0.1%	\$0.01
Banking Total	\$1,600.00	1.0%	\$0.16
ADVERTISING			
Marketing Total	\$4,583.25	3.0%	\$0.46
OTHER EXPENSES			
Information Systems	\$300.00	0.2%	\$0.03
Garbage	\$200.00	0.4%	\$0.02
Cash Over/Short	\$0.00	0.0%	\$0.00
Recruiting/Training	\$200.00	0.1%	\$0.02
Uniforms	\$50.00	0.0%	\$0.01
Waste Tank Pumping	\$400.00	0.3%	\$0.04
Other Expenses Total	\$1,150.00	0.8%	\$0.12



All figures shown in US Dollars

CAR WASH SHOW EUROPE 2023

*All project costs can vary significantly based on location specific factors.

Express Exterior: Proforma (10k Cars / Month)

	Proj \$	Proj %	Proj/car
UTILITIES			
Electricity	\$4,000.00	2.6%	\$0.40
Water/Sewer	\$2,300.00	1.5%	\$0.23
Gas	\$315.00	0.2%	\$0.03
Phone	\$350.00	0.2%	\$0.04
Utilities Total	\$6,965.00	4.6%	\$0.70
SUPPLIES			
Office	\$100.00	0.1%	\$0.01
Wash	\$400.00	0.3%	\$0.04
Tools	\$100.00	0.1%	\$0.01
Supplies Total	\$600.00	0.4%	\$0.06
REPAIR & MAINTENANCE			
Equipment	\$1,000.00	0.7%	\$0.10
Damages	\$617.00	0.4%	\$0.06
Landscape	\$250.00	0.2%	\$0.03
R & M Total	\$1,867.00	1.2%	\$0.03

	Proj \$	Proj %	Proj/car
Operating Expense	\$45,179.25	31.1%	\$4.75
Depreciation	\$11,190.49	7.3%	\$1.12
Amortization			
Property Tax	\$2,500.00	1.6%	\$0.25
Principal/Interest	\$22,771.00	14.9%	\$2.28
Total Expenses	\$83,920.25	54.9%	\$8.39
Net Unit Profit	\$68,854.75	45.1%	\$7.11
Cash Flow	\$80,044.75	52.4%	\$8.23



All figures shown in US Dollars

CAR WASH SHOW EUROPE 2023

*All project costs can vary significantly based on location specific factors.

Flex-Serve: Wash Distribution (10k Cars / Month)

Exterior Only

Plus Interior

Detail Services

	Avg per Car	\$15.35	Car Count	10,000	Avg per Car	\$25.50	Car Count	2,000	Avg per Car	\$38.00	Car Count	500
Menu Price	\$10	\$15	\$20	\$25	Menu Price	\$20	\$30		Menu Price	\$30	\$50	\$70
% of Total Cars	45%	25%	8%	22%	% of Total Cars	45%	55%		% of Total Cars	72%	16%	12%
Number of Cars	4,500	2,500	800	2,200	Number of Cars	900	1,100		Number of Cars	360	80	60
Revenue	\$45,000	\$37,500	\$16,000	\$55,000	Revenue	\$18,000	\$33,000		Revenue	\$10,800	\$4,000	\$4,200
				\$153,500			\$51,000					\$19,000

Gross Revenue \$223,500

Average Per Car \$22.35

** 20% of total cars washed are expected to purchase an interior service.*

** 5% of total cars washed are expected to purchase a detail service.*



All figures shown in US Dollars

CAR WASH SHOW EUROPE 2023

*All project costs can vary significantly based on location specific factors.

Flex-Serve: Proforma (10k Cars / Month)

	Proj \$	Proj %	Proj/car
SALES			
Number of cars washed	10,000		
Average per car	\$22.35		
Gross Sales	\$223,500.00		
Customer Comp	\$1,580.00	0.8%	\$0.16
Employee Comp	\$1,056.00	0.5%	\$0.11
Detail Wash	\$800.00	0.4%	\$0.08
Net Sales	\$197,464.00		
LABOR & SALARY			
Location Manager	\$8,000.00	4.1%	\$0.80
Assistant Manager	\$5,000.00	2.5%	\$0.50
Hourly	\$9,216.00	4.7%	\$0.92
BONUS			
Location Manager	\$1,000.00	0.5%	\$0.10
Assistant Manager	\$500.00	0.3%	\$0.05
Supervisor	\$0.00	0.0%	\$0.00
Payroll Taxes	\$2,059.00	1.0%	\$0.17
Employee Benefits	\$400.00	0.2%	\$0.04
Health Benefits	\$107.00	0.1%	\$0.01
Vacation	\$243.00	0.1%	\$0.02
Labor Expense Total	\$26,525.00	13.4%	\$2.65
C.O.G.S.			
Chemicals Total	\$12,000.00	6.1%	\$1.20

	Proj \$	Proj %	Proj/car
INSURANCE			
Gen. Liability	\$1,200.00	0.6%	\$0.12
Workers' Comp	\$1,000.00	0.5%	\$0.10
Insurance Total	\$2,200.00	1.1%	\$0.22
BANKING			
Credit Card Fees	\$2,000.00	1.0%	\$0.20
Chargebacks	\$0.00	0.0%	\$0.00
Bank Service Charges	\$100.00	0.1%	\$0.01
Banking Total	\$2,100.00	1.1%	\$0.21
ADVERTISING			
Marketing Total	\$5,923.92	3.0%	\$0.59
OTHER EXPENSES			
Information Systems	\$300.00	0.2%	\$0.03
Garbage	\$200.00	0.3%	\$0.02
Recruiting/Training	\$1,000.00	0.5%	\$0.10
Cash Over/Short	\$200.00	0.1%	\$0.02
Waste Tank Pumping	\$500.00	0.3%	\$0.05
Other Expenses Total	\$2200.00	1.1%	\$5.52



All figures shown in US Dollars

CAR WASH SHOW EUROPE 2023

*All project costs can vary significantly based on location specific factors.

Flex-Serve: Proforma (10k Cars / Month)

	Proj \$	Proj %	Proj/car
UTILITIES			
Electricity	\$4,000.00	2.0%	\$0.40
Water/Sewer	\$2,300.00	1.2%	\$0.23
Gas	\$315.00	0.2%	\$0.03
Phone	\$350.00	0.2%	\$0.04
Utilities Total	\$6,965.00	3.5%	\$0.70
SUPPLIES			
Office	\$100.00	0.1%	\$0.01
Wash	\$1,000.00	0.5%	\$0.10
Tools	\$100.00	0.1%	\$0.01
Supplies Total	\$1,200.00	0.6%	\$0.12
REPAIR & MAINTENANCE			
Equipment	\$1,000.00	0.5%	\$0.10
Damages	\$890.00	0.5%	\$0.09
Landscape	\$260.00	0.1%	\$0.03
R & M Total	\$2,150.00	1.1%	\$0.03

	Proj \$	Proj %	Proj/car
Operating Expense	\$61,263.92	31.0%	\$5.77
Depreciation	\$11,656.00	5.9%	\$1.17
Amortization			
Property Tax	\$2,500.00	1.3%	\$0.25
Principal/Interest	\$24,509.90	12.4%	\$2.45
Total Expenses	\$99,928.92	50.6%	\$9.99
Net Unit Profit	\$97,535.08	49.4%	\$9.75
Cash Flow	\$109,191.08	55.3%	\$10.92



All figures shown in US Dollars

CAR WASH SHOW EUROPE 2023

*All project costs can vary significantly based on location specific factors.

Mini Tunnel (Xtreme Xpress): Capital Construction Costs

Description		Cost Range	
1	Land (.4 to .5 acre)	\$320,000	to \$844,000
2	Building 55' x 30' = 1650 sq. ft.	450,000	to 699,000
3	Site work (grading, paving)	50,000	to 100,000
4	Landscape and Irrigation	35,000	to 65,000
5	Site Lighting	25,000	to 35,000
6	Signs (street and building)	40,000	to 45,000
7	Equipment (computers and others)	415,000	to 850,000
8	Grand Opening	10,000	to 20,000
9	Professional fees (architect, engineer, etc.)	50,000	to 85,000
10	Permits, tap fees, and municipal fees	65,000	to 105,000
11	Start-up working capital (first 3 months)	75,000	to 100,000
Total		\$1,535,000	\$2,948,000

Estimated Average Actual Project Cost*

\$2,241,500



All figures shown in US Dollars

CAR WASH SHOW EUROPE 2023

*All project costs can vary significantly based on location specific factors.

Mini Tunnel (Xtreme Xpress): Wash Distribution (5k Cars / Month)

	Average per Car			\$15.35	Car Count	5,000
Menu Price	\$10	\$15	\$20	\$25		
% of Total Cars	45%	25%	8%	22%		100%
Number of Cars	2,250	1,250	400	1,100		5,000
Revenue Generated	\$22,500	\$18,750	\$8,000	\$27,500		\$76,750



All figures shown in US Dollars

CAR WASH SHOW EUROPE 2023

*All project costs can vary significantly based on location specific factors.

Mini Tunnel (Xtreme Xpress): Proforma (5k Cars / Month)

	Proj \$	Proj %	Proj/car		Proj \$	Proj %	Proj/car
SALES				INSURANCE			
Number of cars washed	5,000			Gen. Liability	\$270.00	0.4%	\$0.05
Average per car	\$15.35			Workers' Comp	\$130.00	0.2%	\$0.03
Gross Sales	\$76,750.00			Insurance Total	\$400.00	0.5%	\$0.08
Customer Comp	\$525.00	0.7%	\$0.11	BANKING			
Employee Comp	\$200.00	0.3%	\$0.04	Credit Card Fees	\$500.00	0.7%	\$0.10
Detail Wash	\$0.00	0.0%	\$0.00	Chargebacks	\$0.00	0.0%	\$0.00
Net Sales	\$76,025.00			Bank Service Charges	\$100.00	0.1%	\$0.02
LABOR & SALARY				Banking Total			
Location Manager	\$5,000.00	6.6%	\$1.00	Banking Total	\$600.00	0.8%	\$0.12
Assistant Manager	\$4,000.00	5.3%	\$0.80	ADVERTISING			
Hourly	\$3,612.00	4.8%	\$0.48	Marketing Total	\$2,280.75	3.0%	\$0.46
BONUS				OTHER EXPENSES			
Location Manager	\$500.00	0.8%	\$0.10	Information Systems	\$350.00	0.5%	\$0.07
Assistant Manager	\$0.00	0.0%	\$0.00	Garbage	\$200.00	0.8%	\$0.04
Supervisor	\$0.00	0.0%	\$0.00	Recruiting/Training	\$200.00	0.3%	\$0.04
Payroll Taxes	\$1,003.00	1.6%	\$0.20	Cash Over/Short	\$0.00	0.0%	\$0.00
Employee Benefits	\$400.00	0.7%	\$0.08	Waste Tank Pumping	\$200.00	0.3%	\$0.04
Health Benefits	\$107.00	0.2%	\$0.02	Uniforms	\$50.00	0.1%	\$0.01
Vacation	\$243.00	0.4%	\$0.05				
Labor Expense Total	\$15,110.00	19.9%	\$3.02	Other Expenses Total	\$1,000.00	1.3%	\$0.20
C.O.G.S.							
Chemicals Total	\$4,500.00	7.4%	\$0.90				



All figures shown in US Dollars

CAR WASH SHOW EUROPE 2023

*All project costs can vary significantly based on location specific factors.

Mini Tunnel (Xtreme Xpress): Proforma (5k Cars / Month)

	Proj \$	Proj %	Proj/car
UTILITIES			
Electricity	\$2,000.00	2.6%	\$0.40
Water/Sewer	\$1,150.00	1.5%	\$0.23
Gas	\$120.00	0.2%	\$0.02
Phone	\$100.00	0.1%	\$0.02
Utilities Total	\$3,370.00	4.4%	\$0.67
SUPPLIES			
Office	\$50.00	0.1%	\$0.01
Wash	\$200.00	0.3%	\$0.04
Tools	\$100.00	0.1%	\$0.02
Supplies Total	\$350.00	0.6%	\$0.07
REPAIR & MAINTENANCE			
Equipment	\$450.00	0.6%	\$0.09
Damages	\$308.00	0.4%	\$0.06
Landscape	\$200.00	0.3%	\$0.04
R & M Total	\$958.00	1.3%	\$0.04

	Proj \$	Proj %	Proj/car
Operating Expense	\$28,568.75	37.6%	\$5.71
Depreciation	\$5,908.73	7.8%	\$1.18
Amortization			
Property Tax	\$1,000.00	1.3%	\$0.20
Principal/Interest	\$11,263.00	14.8%	\$2.25
Total Expenses	\$46,740.48	61.5%	\$9.35
Net Unit Profit	\$29,284.52	38.5%	\$5.86
Cash Flow	\$35,193.25	46.3%	\$7.04



All figures shown in US Dollars

CAR WASH SHOW EUROPE 2023

*All project costs can vary significantly based on location specific factors.

Mini Tunnel (Xtreme Xpress): Wash Distribution (7k Cars / Month)

	Average per Car			\$15.30		Car Count	7,000
Menu Price	\$10	\$15	\$20	\$25			
% of Total Cars	45%	25%	8%	22%			100%
Number of Cars	3,150	1,750	560	1,540			7,000
Revenue Generated	\$31,500	\$26,250	\$11,200	\$38,500			\$91,630



All figures shown in US Dollars

CAR WASH SHOW EUROPE 2023

*All project costs can vary significantly based on location specific factors.

Mini Tunnel (Xtreme Xpress): Proforma (7k Cars / Month)

	Proj \$	Proj %	Proj/car		Proj \$	Proj %	Proj/car
SALES				INSURANCE			
Number of cars washed	7,000			Gen. Liability	\$270.00	0.3%	\$0.04
Average per car	\$15.35			Workers' Comp	\$130.00	0.2%	\$0.02
Gross Sales	\$107,450.00			Insurance Total	\$400.00	0.4%	\$0.06
Customer Comp	\$525.00	0.6%	\$0.08	BANKING			
Employee Comp	\$200.00	0.2%	\$0.03	Credit Card Fees	\$700.00	0.7%	\$0.07
Detail Wash	\$0.00	0.0%	\$0.00	Chargebacks	\$0.00	0.0%	\$0.00
Net Sales	\$106,725.00			Bank Service Charges	\$100.00	0.1%	\$0.01
LABOR & SALARY				Banking Total			
Location Manager	\$5,000.00	4.7%	\$0.71	\$800.00	0.7%	\$0.11	
Assistant Manager	\$4,000.00	3.7%	\$0.57	ADVERTISING			
Hourly	\$3,612.00	3.4%	\$0.52	Marketing Total	\$3,201.75	3.0%	\$0.46
BONUS				OTHER EXPENSES			
Location Manager	\$700.00	0.7%	\$0.10	Information Systems	\$300.00	0.3%	\$0.04
Assistant Manager	\$300.00	0.3%	\$0.04	Garbage	\$200.00	0.7%	\$0.03
Supervisor	\$0.00	0.0%	\$0.00	Recruiting/Training	\$50.00	0.1%	\$0.01
Payroll Taxes	\$1,286.00	1.2%	\$0.15	Cash Over/Short	\$200.00	0.2%	\$0.03
Employee Benefits	\$400.00	0.4%	\$0.06	Waste Tank Pumping	\$200.00	0.2%	\$0.03
Health Benefits	\$200.00	0.2%	\$0.03	Uniforms	\$500.00	0.6%	\$0.07
Vacation	\$200.00	0.2%	\$0.03	Damage Claims	\$1,000.00	1.2%	\$0.14
Labor Expense Total	\$15,698.00	14.7%	\$2.24	Other Expenses Total	\$2,450.00	2.9%	\$0.35
C.O.G.S.							
Chemicals Total	\$6,300.00	75.9%	\$0.90				



All figures shown in US Dollars

CAR WASH SHOW EUROPE 2023

*All project costs can vary significantly based on location specific factors.

Mini Tunnel (Xtreme Xpress): Proforma (7k Cars / Month)

	Proj \$	Proj %	Proj/car
UTILITIES			
Electricity	\$2,200.00	2.6%	\$0.31
Water/Sewer	\$1,500.00	1.7%	\$0.21
Gas	\$200.00	0.2%	\$0.03
Phone	\$100.00	0.1%	\$0.01
Utilities Total	\$4,000.00	4.7%	\$0.57
SUPPLIES			
Office	\$100.00	0.1%	\$0.01
Wash	\$400.00	0.5%	\$0.06
Tools	\$200.00	0.2%	\$0.03
Supplies Total	\$700.00	0.8%	\$0.10
REPAIR & MAINTENANCE			
Equipment	\$1,200.00	1.4%	\$0.17
Building	\$150.00	0.2%	\$0.02
Landscape	\$160.00	0.2%	\$0.02
R & M Total	\$1,510.00	1.8%	\$0.02

	Proj \$	Proj %	Proj/car
Operating Expense	\$35,059.75	32.9%	\$5.01
Depreciation	\$5,908.00	5.5%	\$0.84
Amortization			
Property Tax	\$1,000.00	0.9%	\$0.14
Principal/Interest	\$11,263.00	10.6%	\$1.61
Total Expenses	\$53,230.75	49.9%	\$7.60
Net Unit Profit	\$53,494.25	50.1%	\$7.64
Cash Flow	\$59,402.25	55.7%	\$8.49



All figures shown in US Dollars

CAR WASH SHOW EUROPE 2023

*All project costs can vary significantly based on location specific factors.

Appendix A – Labor Cost | Loan Principal Interest and Asset Depreciation Assumptions

1. 84 hours of operation (8 a.m. - 8 p.m. Monday through Sunday)
2. 84 hours x 4.33 weeks per month = 364 hours
3. Hourly labor is \$15.00 per hour, per person x 84 = \$1260.00
4. \$1260.00 x 4.3 weeks = \$5,418.00
5. Asset depreciation calculated using “standard” terms. Asset depreciation calculated using “standard” terms.
6. Loan calculations based on an SBA loan with twenty percent (20%) down, eighty (80%) financed using an interest rate of 2% over prime (currently 5.50%) amortized over twenty-five (25) years.

Example Calculations:

Depreciable Items	Years
Building 125' x 35' = 3750 sq. ft.	15
Site Lighting	7
Signs (street and building)	7
Equipment (computers and others)	7



All figures shown in US Dollars

CAR WASH SHOW EUROPE 2023

*All project costs can vary significantly based on location specific factors.

Car Wash Equipment

Elevate Customer Experience | Reduce Operating Costs

Presented by Robert Andre



Make CarWashing Easy™

CAR WASH SHOW EUROPE 2023

Car Wash Equipment: 101



Equipment

Chemistry

Water

Backroom

Vacuums

Controls

1. Delivers *premium wash quality* that customers rave about

- a) **While:** reducing water & electric utility costs
- b) **While:** eliminating human labor costs
- c) **While:** maximizing every drop of chemistry
- d) **While:** processing your peak hour

2. Speeds *customers through your site* with a smile on their face



CAR WASH SHOW EUROPE 2023

WASH MORE CARS

Car Wash Equipment: 101

Equipment

Chemistry

Water

Backroom

Vacuums

Controls

Tunnel Layout is **not dependent** on the wash model. **EVERY tunnel must:**

1. Reduce water & electric utility costs
2. Eliminate human labor costs
3. Maximize every drop of chemistry
4. **Process your peak hour**



Express



Flex-Serve



Full-Serve



Mini Tunnel

CAR WASH SHOW EUROPE 2023

Car Wash Equipment: 101



Equipment

Chemistry

Water

Backroom

Vacuums

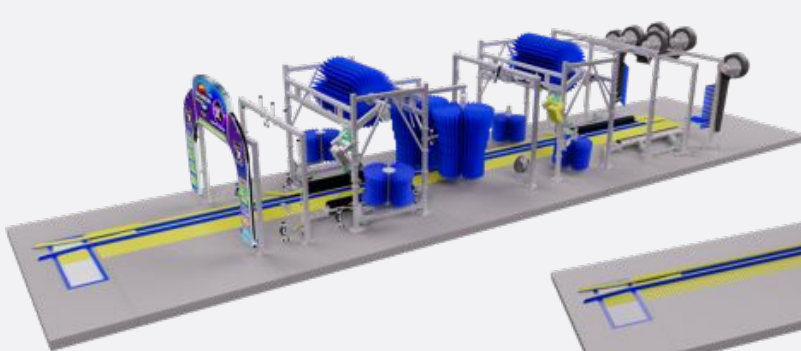
Controls

Correct Tunnel Length Processes Your Peak Hour

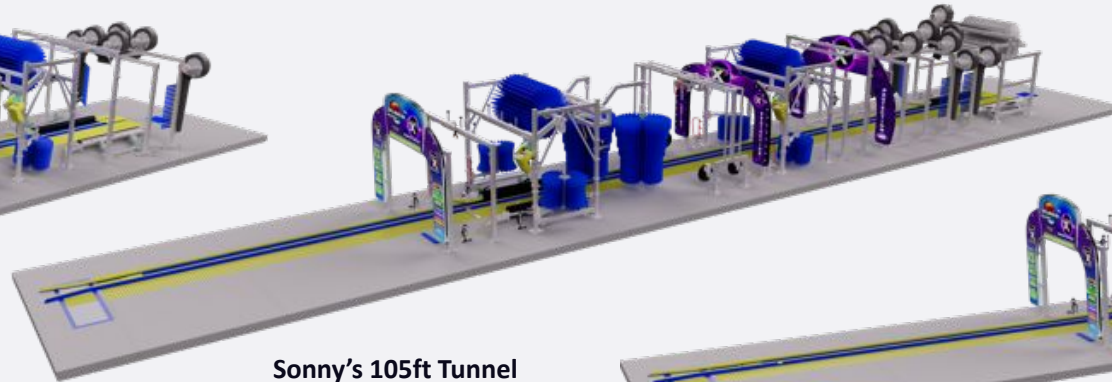
1. Estimate 1.25 cars per/hour/foot
2. Don't turn customers away
3. **Make hay when the sun shines**

Proforma Determines Peak Hour

1. Physical variables such as precipitation, traffic, demographics, and visibility
2. Site variables include package pricing, service offering, and hours of operation.
3. **PROFORMAS DO NOT** account for tremendous marketing and management talent, lack thereof, or unanticipated weather patterns and economic changes.



Sonny's 60ft Tunnel
 $60\text{ft} \times 1.25 = 75\text{ CPH}$



Sonny's 105ft Tunnel
 $105\text{ft} \times 1.25 = 131\text{ CPH}$



Sonny's 140ft Tunnel
 $140\text{ft} \times 1.25 = 175\text{ CPH}$

CAR WASH SHOW EUROPE 2023

WASH MORE CARS

Car Wash Equipment: 101

Equipment

Chemistry

Water

Backroom

Vacuums

Controls

Hybrid (Friction & Touchless)

~~Friction~~

~~Touchless~~

Why Hybrid Wash Tunnel?

1. Better wash quality for a broader range of vehicles, more consistently, at a lower cost
2. Utilizes chemistry and utilities more efficiently to increase profit margin



CAR WASH SHOW EUROPE 2023

WASH MORE CARS

Car Wash Equipment: 101



Equipment

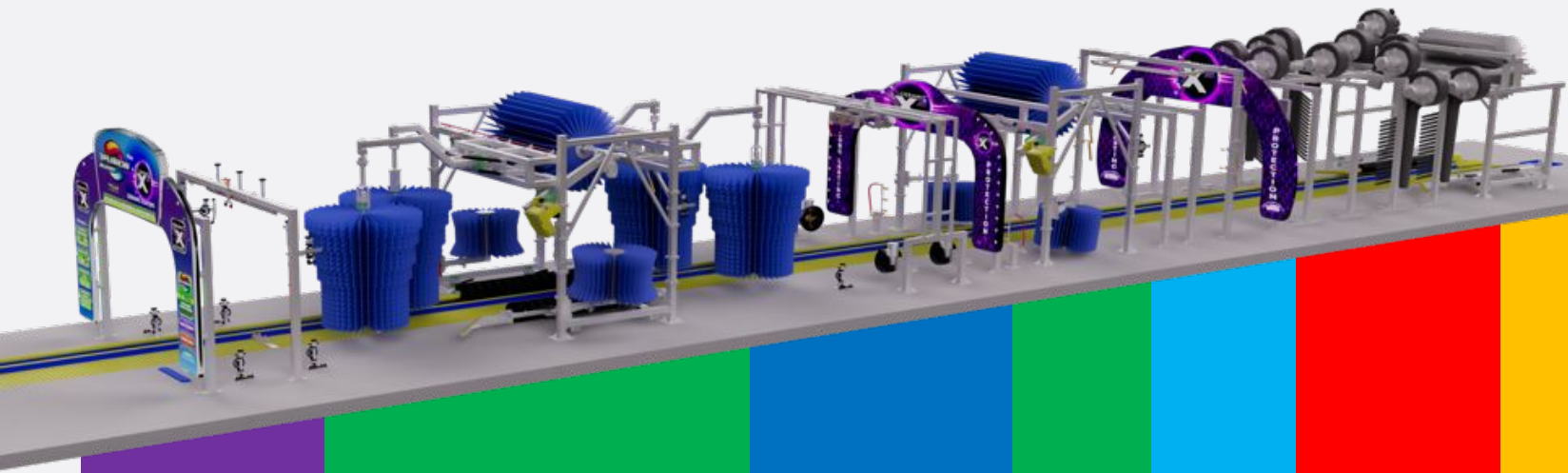
Chemistry

Water

Backroom

Vacuums

Controls



Chemical Application:

- Multidirectional
- CTA's & Bumper

First Friction Wash:

- Wraps, Side Washers
- Tire Brush
- Grill Brush
- Top Brush or FTB Mitter

High Pressure Wash:

- Pivoting and Oscillating
- Zero-Degree Impingement
- Spinner/OMNI/Pendulum

Second Friction Wash:

- Side Washers
- Top Brush or STS Mitter

Rinse:

- 4-Step Process
- Wet-environment Dryers
- Rinse the Vehicle Dry

Drying:

- 1HP / CPH
- Direct Air
- Gators
- Buff-n-Dry
- Tire Dressing

Pro Tip

1. Use signage to confirm applications
2. Use LED lighting to enhance the perceived value



CAR WASH SHOW EUROPE 2023

WASH MORE CARS

Car Wash Equipment: 101



Equipment

Chemistry

Water

Backroom

Vacuums

Controls

Considerations to Refine Customer Experience & Differentiate Your Brand

Stainless or Aluminum



Over/Under or Wash Belt Conveyor



Detailing: Now, Future, or Never



CAR WASH SHOW EUROPE 2023

WASH MORE CARS

Car Wash Chemistry: 101

Equipment

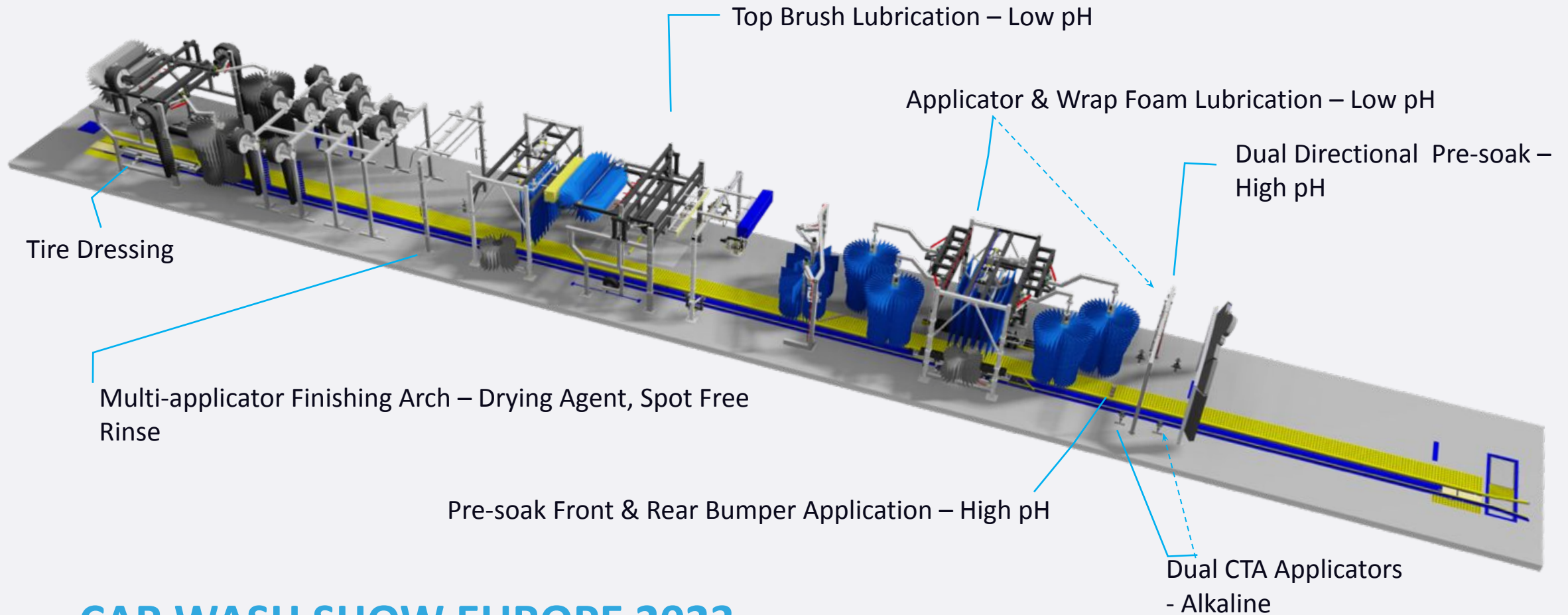
Chemistry

Water

Backroom

Vacuums

Controls



CAR WASH SHOW EUROPE 2023

Car Wash Chemistry: 101

Equipment

Chemistry

Water

Backroom

Vacuums

Controls

Layer Applications for a Visibly Superior Shine



CAR WASH SHOW EUROPE 2023

MAKE CARS SHINE

Car Wash Chemistry: 101

Equipment

Chemistry

Water

Backroom

Vacuums

Controls

Craft Wash Packages to Raise Average Ticket

The screenshot shows the Papa Bear Car Wash website with a navigation bar and five craft wash packages. Each package includes a price for a single wash and a monthly price for the Bear Club membership.

Package Name	Single Wash Price	Bear Club Price (per month)	Includes
GRAPHENE XTREME	\$32	\$49.99	Includes everything plus Graphene Xtreme
CERAMIC SHIELD	\$27	\$39.99	Includes Fusion Paint Sealant plus Ceramic X
FUSION PAINT SEALANT	\$22	\$29.99	Includes Fusion Paint Sealant, Prime Wax, Rain Repellent, and Spot Free Rinse
HOT WAX	\$17	\$24.99	Includes Hot Wax, Tire Shine, Rain Repellent, and Spot Free Rinse
TIRE SHINE	\$12	\$19.99	Includes Basic Wash

Watch Papa Bear Car Wash Case Study



Car Wash Water: 101



Equipment

Chemistry

Water

Backroom

Vacuums

Controls

Treat Water to Elevate Wash Quality & Reduce Chemical Consumption



Water Testing

A Great Wash Starts With Great Water



Water Reclaim

Reduce water and sewer costs by 60%* or more



R.O. Spot-Free

Eliminate unsightly water spots



Water Softeners

Optimize Your Water to Work With Your Chemistry and Equipment

CAR WASH SHOW EUROPE 2023

OPTIMIZE EVERY DROP

Car Wash Back Room: 101

Equipment

Chemistry

Water

Backroom

Vacuums

Controls



Control Chemistry, Air, and Water Distribution to Unlock Operational Efficiency



CAR WASH SHOW EUROPE 2023

UNLOCK OPERATIONAL EFFICIENCY

Car Wash Vacuums: 101



Equipment

Chemistry

Water

Backroom

Vacuums

Controls

Free and no good, is
NO GOOD!

- Process peak hour in 5-min.
- 150cph / 5min = 30 Vacuum spaces.

Layout

Producers

- Sufficient suction when all stations are in use.
- Multiple units in the system for redundant performance during maintenance.

- Nozzles & accessories to speed customers through.
- Towels & other amenities to elevate customer experience.
- Color coordinate with brand.

Canopies

Filtration

- Point of use cyclone separators for large debris.
- Main separator for dust only.
- Piping and connections to eliminate catch points.

- Magnetic starters & VFDs to extend equipment life & improve experience.
- Software to reduce energy consumption.

Controls

CAR WASH SHOW EUROPE 2023

MAXIMIZE CUSTOMER EXPERIENCE

Car Wash Controls: 101



Equipment

Chemistry

Water

Backroom

Vacuums

Controls



1. License Plate Recognition (LPR) Camera
2. Digital Menus
3. VIP Lane (Compact Pay Station)
4. Pay Station
5. Digital Queue Cameras
6. Lighted Gate
7. Truck Bed Detection
8. LPR Smart Queue
9. Tunnel Controller
10. Smart Motor Controller
11. Exit Anti-Collision
12. Point of Sale & Cloud-Based Back Office
13. Failsafe Hotspot



CAR WASH SHOW EUROPE 2023

DRIVE BUSINESS FORWARD

Questions and Answers



Equipment

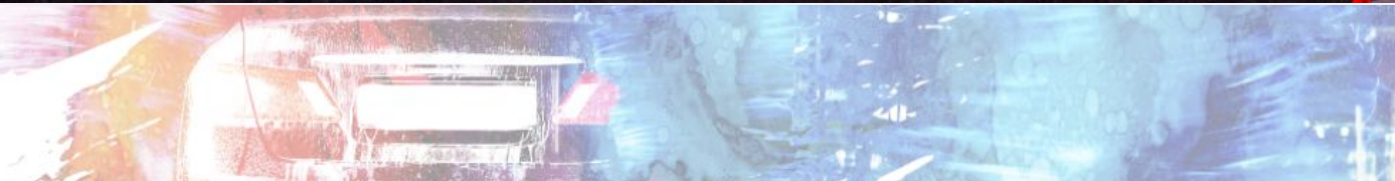
Chemistry

Water

Backroom

Vacuums

Controls



CAR WASH SHOW EUROPE 2023

*All project costs can vary significantly based on location specific factors.

Thank You!



Make CarWashing Easy™

Sonny's CarWash Consulting

Consulting

INVEST WITH CONFIDENCE

Sonny's CarWash College

College

MASTER YOUR TRADE

Sonny's CarWash Equipment

Equipment

WASH MORE CARS

Sonny's CarWash Controls

Controls

DRIVE BUSINESS FORWARD

Sonny's CarWash Backroom

Backroom

UNLOCK OPERATIONAL EFFICIENCY

Sonny's CarWash Chemistry

Chemistry

MAKE CARS SHINE

Sonny's CarWash Water

Water

OPTIMIZE EVERY DROP

Sonny's CarWash Vacuums

Vacuums

MAXIMIZE CUSTOMER EXPERIENCE

Sonny's CarWash Marketing

Marketing

WIN EVERY CUSTOMER

Sonny's CarWash Signage

Signage

INCREASE YOUR TICKET

Sonny's CarWash Services

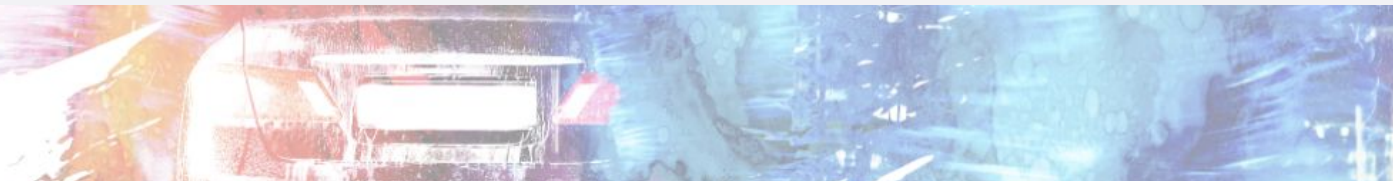
Service

LEVERAGE LOCAL SUPPORT

Sonny's CarWash Parts

Parts

KEEP ON WASHING



CAR WASH SHOW EUROPE 2023

*All project costs can vary significantly based on location specific factors.