

# Car Wash Equipment (VoC Survey)

## Market and customer assessment within Car Wash Equipment market in North America

### BUSINESS SITUATION

An American manufacturer of fluid handling equipment wanted to ascertain the market outlook and market structure of the North American car equipment market and analyze their positioning in the market against their competitors based on customer's preferences and buying behavior.

### SOLUTION FRAMEWORK

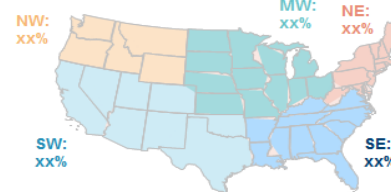
- To support the client's needs, Aranca conducted desk research on North American car equipment market covering following aspects:
  - Market size, market segmentation, key trends and growth projections
  - Industry value chain, supply-side assessment, competitive benchmarking and end-use market overview
- Aranca conducted primary research (~15 telephonic interviews with key competitors, industry association officials and experts; telephonic survey with ~200 key customers (distributors and car wash operators)) for assessing the Voice of Customer (VoC), which includes:
  - The client's product perception and market positioning vis-à-vis five key competitors
  - Key insights on customer's buying behavior and factors that influence their decision making
  - Customer's relationship with OEMs and potential reaction to changes in current offerings in the market

### SAMPLE ANALYSIS TEMPLATES

#### Region-Wise Demand For Car-Wash Systems

US: Region-wise Demand for Car-wash Systems

2017 | Figures in %

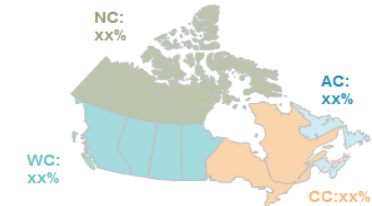


NW: North-West, MW: Mid-West, NE: North-East, SE: South-East, SW: South-West

- SW:** The region accounts for the highest demand and is set to witness the highest growth rate due to new infrastructure development.
- NE:** The region generates a quarter of overall demand; higher uptake of in-bay car washes
- SE:** This region will continue to grow owing to development of new neighbourhoods.
- MW:** Illinois and Indiana are the key drivers of demand.
- NW:** Demand in this market is low due to the cold weather which makes for difficult working conditions.

Canada: Region-wise Demand for Car-wash Systems

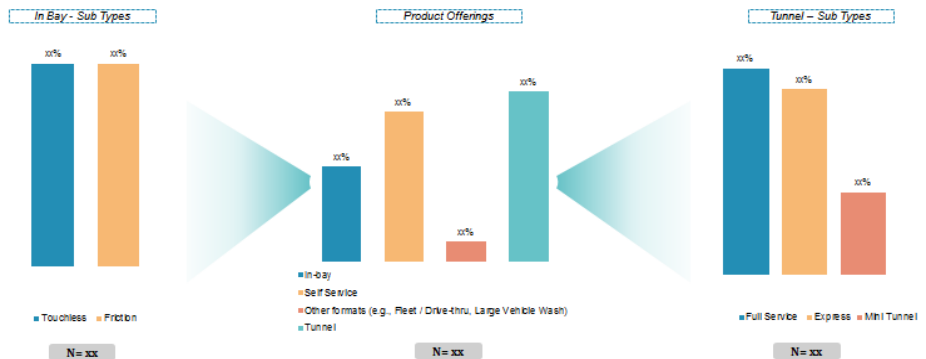
2017 | Figures in %



NC: Northern Canada, WC: Western Canada, CC: Central Canada, AC: Atlantic Canada

- CC:** This region generates the highest demand due to the population density in the provinces of Quebec and Ontario.
- WC:** Demand is expected to increase in this region due to greater infrastructure development. Primarily, Calgary would generate increased demand due to a population influx and low penetration rate of car washes.
- AC:** Key demand in this region arises from Nova Scotia and New Brunswick.
- NC:** There is very low demand here due to the sparse population and few infrastructure developments.

#### Segmentation By Type Of Car Wash Equipment System



- Most of the operators who responded to the survey had touchless as well as friction in-bay car wash equipment.
- In case of tunnel – operators primarily had full service and express car wash equipment types.