PROFESSIONAL CARWASHING INDUSTRY REPORT

A comprehensive independent survey brought to you by the professional carwashing industry’s leading publication.
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All carwash types
Conveyor carwashes
In-Bay Automatic carwashes
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Strong Growth Forecasted For Carwash Industry

As carwash competition surges today, many owners and operators maintain focus on short-term gains and protecting the P&L statement. While setting ambitious business goals, such as generating new business, maintaining car counts and steadily expanding your business and its services, is recommended, it is also good to step back from the day-to-day and see which trends and issues affect owners and operators.

The professional carwash market is currently experiencing staggering growth, which is fueled by consumers with more disposable income and investors who are interested in our industry’s minimal labor, high volume and quick return on investment business models. According to IBISWorld Industry Report 8119a: Car Wash & Auto Detailing in the US, our industry’s annual revenue over a five-year period through 2016 is anticipated to increase at an annualized rate of 3.1 percent. And, according to the report, annual growth in this market will continue through 2021 at an estimated 1.7 percent.

We are now excited to offer you our survey report on the professional carwash industry. This survey was completed by carwash owners and operators and serves as a benchmark for your business.

Rich DiPaolo
Group Editorial Director/Editor in Chief
rich@grandviewmedia.com
Thank You to our Sponsors

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Study Methodology

Professional Carwashing & Detailing (PC&D) conducted a comprehensive national survey of carwash operators between March and July 2016.

The questionnaire was administered using the online survey platform Qualtrics. Respondents were recruited using PC&D subscriber and third-party B2B lists. In addition, the survey was promoted through a survey link via PC&D’s Facebook, LinkedIn and website, Carwash.com.

To qualify for the survey, respondents had to be operators of either a Conveyor, In-Bay Automatic (IBA) or Self-Serve carwash business. Of the 788 individuals who initially responded to the survey, 444 qualified to complete the questionnaire.

Each qualified respondent was asked a series of general questions regarding his/her operating practices, financials and business profile. Additionally, respondents were asked questions specific to their carwash type (Conveyor, IBA and Self-Serve). In all, over 100 questions were asked and answered by study participants.

The overall margin of error for this survey is 4.4% at a 95% confidence interval, although segment-specific questions with smaller sample sizes have larger margins of error. Due to rounding, some percentages may not add up to 100%.
Operator and Carwash Profiles
Sixty-one percent of people who participated in this survey categorized themselves as an owner/partner in their business, while another 9% were either a CEO, president or vice president of their company. The remaining respondents categorized themselves as managers. Manager responses range from area managers and general managers to site managers and sales managers.

Almost one in five (18%) of the carwash operators participating in this survey are relatively new to the business, having opened their first carwash within the last two years. However, about a quarter (24%) of respondents reported opening their first carwash between three to nine years ago.

A large segment, 58%, say they have been in the carwash business for 10 or more years.

Location Types
Presence of competition within the market area is almost universal, according to operators. Participants recorded at least 96% of carwashes compete with at least one type of carwash. Just under half (46%) of operators have from one to five competitors of any type in their market area, while 23% indicate their operation competes with six to 10 carwashes. Just over a quarter (27%) of respondents are situated in heavily competitive environments with 11 or more carwashes operating in their market area.

When it comes to locale, 29% of operators say their carwash is located in a “small town” or “rural” area, while another 30% feel “medium size city” best describes the area in which their business is located. Four out of 10 survey participants report their carwash operates in either a “suburb of a major city” (21%) or a “major city/metropolitan area (19%).”

IBA and Self-Serve carwashes (41% and 37%, respectively) were more likely to be located in a “rural” or “small town” setting. This contrasts to only 17% of Conveyor operators who reported their business was based in a “rural” or “small town” location.

Customer Demographics
In terms of customer demographics, 12% of operators report their typical customer is either “lower class” or “lower-middle class.” Respondents indicated 51% of their customer base is middle class, while 33% say their typical customers are “upper-middle class” or “upper class.” Conveyor operators were slightly more likely to characterize their customer base as upper-middle or upper class.

Industry Trends and Outlook
Carwash operators are generally positive about the year-to-year improvement in their businesses from 2014 to 2015, with 28% reporting their annual car count was “much greater” in 2015 than in 2014 and another 44% indicating their annual car count was “greater” in 2015 than the previous year.

Assessments of year-to-year revenue comparisons are virtually identical to car counts. Twenty-eight percent of carwash
operators say their total revenue was “much greater” in 2015 versus 2014 while 45% report their total revenue was “greater” in 2015 than in 2014.

Over a quarter (27%) of carwash operators say they plan to launch or purchase another carwash location within the next 12 months. Moreover, 35% reported that they are on the fence (“maybe”) regarding expanding their business with an additional unit over the next year.

Conveyor operators seem to be slightly more aggressive with their expansion goals as 72% responded “yes” or “maybe” to the question of whether they plan to launch or purchase another carwash within the next 12 months. By contrast, only about one-half (51%) of IBA and Self-Serve carwash operators either plan or are considering adding another carwash location to their business over the same time frame.

Revenue and Operating Costs
While reported car count volumes vary across all carwash operations and types, the average total car counts in 2015 for an individual location is 63,457. The average 2015 total car count for Conveyor locations is 79,334. In-Bay Automatic locations have an average 2015 total car count of 40,581, while Self-Serve carwash locations average 45,608 for 2015’s total car count.

The 2015 gross revenue per car reported across carwashes of all types range from over $22 to as low as less than $1. The average gross revenue per car for 2015 for all carwash types is $9.58.

Conveyor operators report an average gross revenue per car for 2015 of $11.11, while the 2015 average gross revenue per car for in-bay automatics is $8.59. Self-Serve carwashes have an average gross revenue per car of $7.57.

The 2015 total revenue per carwash location, including all carwash services and ancillary profit centers, across all carwash types ranged anywhere from $450 to over $25 million. The average 2015 total revenue per carwash location for all carwash types was $1.3 million.

Conveyor carwashes have an average total revenue per carwash location of $1.8 million. IBA operators report a total revenue per carwash location of $278,455, while the average 2015 total revenue per carwash location for Self-Serve carwashes is $223,000.

When it comes to total operating cost for a carwash location in 2015, operators report a wide range, from over $7.2 million to less than $1,500 per year. Across all carwash types, the average 2015 total operating cost for a single carwash location is $566,000.
When it comes to major operating expenses as a percentage of total operating costs, among carwashes of all types (Conveyor, IBA and Self-Serve) labor averages 33% of total annual operating costs, while chemicals costs average 20%. Water costs average 18% and electricity averages 17% of the total annual cost to operate a carwash. These percentage averages vary slightly across the different carwash types.

**Trends**

Overall, the number of full-time and part-time employees vary widely amongst the different type of carwashes in the industry. Breaking it down by segment, 38% of IBA operators say they do not currently employ any full-time workers and similarly, 34% of Self-Serve carwash operators report not having any full-time personnel.

In contrast, 99% of Conveyor carwash operators employ at least one full-time worker, with almost half (46%) of Conveyor washes having a full-time employee count of 10 or more workers. Similar to full-time employee counts, Conveyor operators are also much more likely than IBA or Self-Serve operators to have part-time workers on staff, with 92% of Conveyor businesses employing at least one or more part-time workers versus only 75% of IBA or Self-Serve carwashes.

**Marketing and Promotions Activities**

Almost four out of five (79%) Conveyor operators currently offer loyalty programs. However, IBA carwashes are less likely to use this promotion, with just over half (52%) saying they use loyalty programs. Self-Serve carwashes are least likely to use loyalty programs. Within the Self-Serve carwash segment, only 40% indicate they employ this type of customer-reward initiative.

Overall, 55% of carwash operators surveyed in this study say their business has a website and of these, about a quarter (25%) offer products and/or services for sale online (e-commerce).

Of the Conveyor operators that report having a company website, 76% report it is an active website, while 42% of Self-Serve operators and 32% of IBA operators say their businesses have a web presence.
### Percentage of Water Recycled/Reclaimed
- **41%**
- 72% of Conveyor Operators reclaim at least 10% of their used water.
- 49% of IBA carwashes report 0% water recycling.
- 49% of Self-Serve carwashes report 0% water recycling or reclaiming at all.

### Wages
- **$15.39**
  - Average hourly wage for managers

- **$10.86**
  - Average hourly wage for on-line workers

- **$9.32**
  - Average starting hourly wage for on-line workers

### Number of Full-Time and Part-Time Employees
- **21% Full-time, 19% Part-time**

### How long ago did you open your first carwash?
- **9%**
  - Less than 1 year

- **9%**
  - 1-2 years

- **7%**
  - 3-5 years

- **17%**
  - 6-9 years

- **17%**
  - 10-15 years

- **15%**
  - 16-20 years

- **26%**
  - Over 20 years
### Important Industry Issues

<table>
<thead>
<tr>
<th>Rank</th>
<th>Industry Issue</th>
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<td>Rank 2</td>
<td>Utility Fees</td>
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<td>Rank 3</td>
<td>Equipment Issues</td>
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<td>Rank 3</td>
<td>Personnel Issues</td>
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<tr>
<td>Rank 5</td>
<td>Competition</td>
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<tr>
<td>Rank 6</td>
<td>U.S. Economy</td>
</tr>
<tr>
<td>Rank 7</td>
<td>Water Regulations</td>
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<tr>
<td>Rank 8</td>
<td>Crime</td>
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### Busiest Season

<table>
<thead>
<tr>
<th>Season</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Spring</td>
<td>33%</td>
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<tr>
<td>Summer</td>
<td>36%</td>
</tr>
<tr>
<td>Autumn</td>
<td>3%</td>
</tr>
<tr>
<td>Winter</td>
<td>29%</td>
</tr>
</tbody>
</table>

### Predicted Revenue Growth (Year over Year)

- **66% Stay about the same**
- **27% Decrease**
- **7% increase**

### Growth Plans

**Do you plan to launch or purchase another carwash within the next year?**

- **38% Yes**
- **35% No**
- **27% Maybe**

### Active Website

- **45% No**
- **55% Yes**
Social Media Usage

- Facebook: 61%
- None: 34%
- Yelp: 27%
- Groupon: 22%
- Google+: 15%
- LinkedIn: 15%
- Twitter: 15%
- YouTube: 12%
- Instagram: 7%
- Foursquare: 4%
- LivingSocial: 4%
- Pinterest: 4%

Facebook is the #1 Social Media Platform for Carwash Operators.
Overview of Conveyor Operators

According to our survey, most Conveyor carwash operators own either one (48%) or two (21%) locations that use a Conveyor system. Some Conveyor operators also own or operate another type of carwash, with 22% reporting they operate/own a Self-Serve carwash business and 17% indicating they also own or operate a carwash that uses an IBA system.

Almost two-thirds (64%) of Conveyor operators have Conveyor competition close by, with 25% reporting their nearest competitor is less than one mile away and 39% saying their closest competitor is from two to four miles away. In the study, 22% reported their closest competing Conveyor carwash was between five and 10 miles away, but only 10% indicated they have no Conveyor competition within 11 miles from their operation.

Not only do Conveyor operators often have at least one other close-by Conveyor competitor, but they also frequently indicate that their overall market area has penetration in competitor numbers as well as in proximity. Almost half (48%) have one to three other Conveyor carwashes also chasing local market-share, while a quarter (25%) have from four to six competitors offering a Conveyor system to their area’s car driving customer base.
Pricing, Packages and Service

A quarter (25%) of Conveyor operators charge $5 or less for a basic or exterior-only carwash, 25% charge $6 for a basic wash and another 24% charge either $7 or $8 for their location’s basic exterior job. About one-fourth, (24%) of Conveyor operators indicated their basic exterior-only carwash cost $9 or more.

As could be expected, the most inclusive/largest wash package averages substantially more than the basic version. For inclusive washes, only 5% of operators report their most comprehensive package is $10 or less. From there, 33% say their top-drawer carwash package is from $11 to $15, and 30% of Conveyor operators indicate a high-end package at their carwash costs from $16 to $20. At the most expensive end of the spectrum, 30% of Conveyor operators have their largest wash package priced at $21 or more. For over a quarter (27%) of Conveyor operators, the best-selling wash package is priced at $10 or less. Most commonly noted, 37% price their best-selling carwash between $11 and $15, while 16% of Conveyor operators have a $16 to $20 price range for their best-selling package. Still, 17% had higher-end pricing of $21 or more for their Conveyor wash’s best-selling package.

The top five features included in the best-selling wash packages, according to Conveyor operators, are undercarriage wash (80%), sealer wax (77%), foam polish (76%), wheel treatment (73%) and spot-free rinse (71%).

Many Conveyor operators also say their best-selling wash package includes exterior protectant (67%), bug removal (67%), clear-coat treatment (65%), polish wax (56%) and whitewall cleaning (39%).

About half (48%) of Conveyor carwashes have an on-site detail center, but just under a quarter (23%) offer lobby sales/extensive vending or food/beverage (22%). Almost one in five (17%) have a Self-Serve carwash available at their primary Conveyor business.

Other profit centers cited by Conveyor operators at their primary business included quick lube/oil changes (15%), a convenience store (14%), gasoline sales (14%), an In-Bay Automatic wash (8%) and a pet wash (4%).
### Carwash Types

- **Exterior-only conveyor**: 32%
- **Flex-service conveyor**: 24%
- **Full-service conveyor**: 20%
- **Express exterior conveyor**: 4%

### Tunnel and Conveyor Length

<table>
<thead>
<tr>
<th>Length</th>
<th>Percentage of Operators</th>
</tr>
</thead>
<tbody>
<tr>
<td>120 feet or more</td>
<td>43%</td>
</tr>
<tr>
<td>110-119 feet</td>
<td>33%</td>
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<tr>
<td>100-109 feet</td>
<td>16%</td>
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<tr>
<td>99-89 feet</td>
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<td>80-89 feet</td>
<td>11%</td>
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<td>70-79 feet</td>
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<tr>
<td>50-59 feet</td>
<td>2%</td>
</tr>
<tr>
<td>49 feet or less</td>
<td>9%</td>
</tr>
</tbody>
</table>

### Additional Conveyor Features

- Surveillance System: 87%
- Cash Management Computerized or Point-of-Sale: 82%
- Water Reclaim: 70%
- Spot-Free or RO System: 62%
- Automatic Tellers: 48%
- RFID: 48%
- VFD: 34%

### Customer Conveniences

- 59% of express exterior carwashes feature free vacuums.
- 38% of full-service conveyor carwashes offer an exterior-only lane.

### Full-Time and Part-Time Employees

- **Full-time**: 31%
- **Part-time**: 31%
- 16+ employees: 7%
- 11-15 employees: 5%
- 7-10 employees: 19%
- 3-6 employees: 19%
- 0-2 employees: 17%

### Full-Time and Part-Time Employees by Length

- **0% - 49 Feet**: 17%
- **50 - 99 Feet**: 16%
- **100 - 119 Feet**: 16%
- **120 Feet or More**: 15%

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*Professional Carwashing & Detailing: Industry Report | 15*
IBA Data

Sponsored by
Overview of IBA operators

The majority (57%) of In-Bay Automatic (IBA) operators have one location, while about another quarter either own two (13%) or three (13%) locations. Most In-Bay Automatic operators have one IBA system (67%) per location, another 18% report two IBA systems operating at one location, and 10% indicate there are three or four IBA units at their location.

Only about one third (32%) of IBA operators report their location is a stand-alone operation. Almost nine out of 10 (86%) say their location is open seven days a week.

When it comes to “green” features or processes that IBA operators are using, 64% report having energy efficient lighting, while 36% reclaim/reuse water, another 38% employ VFD technologies and 31% indicate some type of reduced water usage program in place.

Pricing and Packages

When it comes to pricing, 36% of IBA operators say their basic wash costs $5 or less per car and 27% report their basic carwash to be $6. Another 14% have a $7 pricing for an IBA wash and 11% price their basic IBA wash product at $8. Only 10% of IBA operators price their basic wash at $9 or more.

In contrast to the basic wash, 18% of IBA operators indicate their most expensive/comprehensive carwash is priced from $15 to $23 or more. About half (48%) of IBA operations have priced their most expensive wash at $10-$12, and 26% report the cost for a comprehensive IBA wash is $9 or less.

For the best-selling/most popular package, 59% of IBA operators price a single wash from between $6 and $10. Another 23% say their best-selling package costs between $11 and $15, while only 6% report their most popular package is priced $16 or over. At the low end of the spectrum, 12% of IBA operators price their best-selling package for $5 and under.
### Additional Profit Centers

- **Self-Serve Carwash**: 55%
- **None Of These**: 19%
- **Detailing Center**: 17%
- **Quick Lube/Oil Change**: 17%
- **Conveyor Carwash**: 12%
- **Gas Station**: 12%
- **Convenience Store**: 10%
- **Other**: 10%
- **Pet Wash**: 10%
- **Lobby Sales/Extensive Vending**: 5%
- **Coin Laundry**: 5%
- **Self-Storage**: 2%

### Number of IBA Locations by Type

- **Friction**:
  - 6+ miles: 3%
  - 5 miles: 6%
  - 4 miles: 0%
  - 3 miles: 0%
  - 2 miles: 5%
  - 1 mile: 0%
- **Hybrid**:
  - 6+ miles: 5%
  - 5 miles: 2%
  - 4 miles: 2%
  - 3 miles: 5%
  - 2 miles: 14%
  - 1 mile: 14%
- **Touchless**:
  - 6+ miles: 27%
  - 5 miles: 36%
  - 4 miles: 36%
  - 3 miles: 12%
  - 2 miles: 5%
  - 1 mile: 11%

### Vending Products Offered

- **Towels**: 74%
- **Prepackaged Air Fresheners**: 69%
- **Window Cleaner**: 69%
- **Protectant**: 55%
- **Carpet/Upholstery Cleaners**: 40%
- **Liquid Fragrances**: 38%
- **Air**: 26%
- **Snacks/Beverages**: 21%
- **None**: 17%
- **Other**: 5%

### Nearest IBA Competitor

- **Under 1 mile**: 32%
- **2 to 4 miles**: 46%
- **5 to 7 miles**: 15%
- **8 to 10 miles**: 5%
- **11+ miles**: 2%
### Number of Vacuums

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<td>4-6</td>
<td>37%</td>
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<td>7-10</td>
<td>15%</td>
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<tr>
<td>11+</td>
<td>12%</td>
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</table>

### Average Vacuum Prices

- **Price Per Vacuum Cycle**: $0.25 - 3.00
- **Average Charge for Single Vacuum Cycle**: $1.25
- **Average Monthly Revenue Per Individual Vacuum**: $182.50
- **Average Price for an Additional Vacuum Cycle**: $0.85

### Average Vacuum Operating Time

- **Average Vacuum Operating Time**: 3.9 minutes
Self-Serve Data

Sponsored by
Overview of Self-Serve Operators
The majority (58%) of Self-Serve operators are single-location businesses, while another 20% report operating two Self-Serve carwashes. One fifth (20%) of Self-Serve operators have from three to seven Self-Serve units and 2% indicate they have 11 or more Self-Serve carwashes.

More than 43% of Self-Serve operators also have an IBA system at their Self-Serve location, and 87% report their Self-Serve carwash is open seven days a week.

The presence of specific revenue collection formats is varied across Self-Serve operators. Cash/coin payment (75%) and last coin alert (69%) are most prevalent, while a credit/debit card system is used by 48% of Self-Serve carwashes and 25% accept token payments.

Almost all (94%) Self-Serve carwashes have personnel attending their location at least a few hours a day. An on-site attendant working between one and three hours a day is reported at 26% of Self-Serve locations, while another 26% of Self-Serve carwashes keep personnel on duty from four to seven hours a day.

Over one-third (36%) of operators staff an attendant between eight and 12 hours a day and most (76%) Self-Serve operators also safeguard their carwash business with a security camera system.

Pricing
Self-Serve start up prices ranged from less than $1 to $10, with the average being $2.82. Minutes of start-up operation varied widely as well, from just over one minute to 10 minutes and an average of just over four minutes of initial running time.

Across all Self-Serve operations, the average monthly revenue per Self-Serve bay was $4,200.

The availability of vacuums at Self-Serve carwashes is universal (100%) with about half (47%) reporting one to five vacuums on location, and just over half (52%) saying they have six or more vacuums for customer use at their Self-Serve business.

Prices per vacuum cycle varied widely among Self-Serve carwashes. The minimum charge was $0.50, while the maximum reported cost was $4.00. Price per vacuum cycle averaged $1.38 across all Self-Serve carwashes, and the average duration in minutes per vacuum cycle was just over four minutes.
### Additional Profit Centers

- IBA Carwash: 51%
- Detailing Center: 26%
- None of These: 26%
- Conveyor Carwash: 15%
- Quick Lube/Oil Change: 13%
- Lobby Sales/Extensive Vending: 11%
- Pet Wash: 6%
- Coin Laundry: 4%
- Convenience Store: 4%
- Gas Station: 2%
- Other: 2%
- Self-Storage: 2%

### Products Offered

- Towels: 74%
- Window Cleaner: 74%
- Protectant: 68%
- Prepackage Air Fresheners: 64%
- Carpet/Upholstery Cleaners: 49%
- Liquid Fragrances: 49%
- Air: 28%
- Snacks and Beverages: 28%
- None: 6%
- Other: 2%
Brighten your car wash with panels from Extrutech Plastics, Inc. Manufacturing American-made PVC panels for 25 years, Extrutech Plastics, Inc. is an ISO 9001-2008 certified manufacturer of bright white wall and ceiling panels that install quickly with no exposed fasteners, providing a smooth, easy-to-clean surface. Panels are available in 12”, 16” and 24” widths, cut to the inch lengths up to 20 feet and have a Class A rating for smoke and flame. Colored panels, corrosion-proof PVC doors, suspended ceiling panels and trims are also available to cover your wall and ceiling needs.

Extrutech’s new Stay-in-Place Concrete Form System will brighten the interior of any building. These panels provide a hard, durable surface that protects your walls and are easy to clean. The panels are water and corrosion-proof and will not rust, rot or flake. They are available in 6” and 8” thicknesses and are two feet wide. These panels are provided as custom-cut kits and are available up to 20 feet long.

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One of the most important decisions you’ll make when investing in a car wash is choosing the right company to help you build your business. You want a company with experience, expertise, top quality car wash equipment and a strong reputation. Motor City Wash Works offers you all of this and more. We can help you every step of the way in building your unique car wash brand.

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In addition to providing the best equipment in the business, our team can assist you throughout the entire process of building your business. Over the years, we’ve grown to become one of the industry’s most respected leaders and are trusted by numerous satisfied customers across the U.S.

Contact us today for readily available and affordable car wash products and services. We truly are your one-stop resource for all your car wash needs.

PECO Car Wash Systems manufactures premium carwash systems customized to meet the needs of any location. As an industry leader in providing equipment and resources carwashers need to be successful with over 50 years of experience, PECO has gained the reputation around the world for providing high quality systems at a competitive price.

PECO uses stainless steel for structural components — it’s stronger, lasts longer and is easier to maintain. We also use premium stainless steel hardware that won’t rust. We use thicker material and oversized tubing. We don’t just use the minimum — we build equipment that is stronger and designed to last. PECO combines equipment to save space and energy. We optimize water jet placement to conserve water. We use components that are reliable and easy to maintain. We engineer equipment that reaches areas that other equipment misses. PECO has a staff of engineers, service professionals and a complete parts department ready to assist you. We have a global distributor network with hundreds of car wash professionals to provide the local support you need. We build it stronger, smarter and more dependable because it’s simply the right thing to do … making us the most HELPFUL brand in car washing!
WashCard Systems has been the leader in the payment industry for over 25 years. As the leader, we have the confidence and infrastructure to continue to lead and innovate new solutions for many years to come. We work directly with business operators to ensure they are fitted with the necessary software and equipment needed to succeed. We aim to improve the consumer experience from start to finish.

Every customer, location, and region is different, which is why we offer many different options and features that will suit your business. Our team works to understand your needs, and we offer solid solutions to help your business grow. We have helped businesses build, connect, and transform successful venues all around the world.

Whether you are just looking for hardware or software, or if you need help in your marketing game, WashCard can help you. We do each job out of our Minnesota office as a custom build made to fit each and every bay our equipment goes into. No matter your need, number of locations, or different kinds of hardware, we work directly with you to figure out how we can help your business simply DO MORE.
Professional Carwashing & Detailing has been serving the needs of car care owners and operators since 1976. In digital and print, our editors research and write about the industry’s trends and issues. Our content serves the market seven days a week. PC&D as well as Carwash.com offer compelling content that you need in order to be successful in this competitive market.

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