


**SURVEY**

# State of the Industry

**T**he 2015 *Auto Laundry News* State of the Industry Survey was conducted through the mailing of questionnaires to a random selection of vendors to the car care industry. The information in this report results from an analysis of data provided by respondents nationwide.

While not quite reaching the performance levels of two years ago, current survey participants report improvements over last year's numbers. Overall, 77 percent of respondents report average sales growth of 17 percent over the previous year. This compares to 71 percent who were able to increase sales by an average of 14 percent last year. The comparable percentages two years ago were 79 and 18 respectively. In the Equipment Manufacturers subcategory, 86 percent of respondents report average sales growth of 20 percent (see graphic below). That is better than last year when 78 percent saw an advance of 16 percent but still short of two years ago when 91 percent grew sales by an average of 23 percent. However, as can be seen in Table 1 on page 40, in the Manufacturers subcategory — including equipment and chemicals, but excluding distributors — 100 percent of respondents report an increase in sales, a distinction achieved by the Manufacturers/Distributors subcategory two years ago and by none last year. With 83 percent reporting an average increase in sales of 21 percent, Chemical Manufacturers fared the best (see graphic below), improving on their performance both last year and the year before that when, in both years in a show of consistency, 75 percent of respondents in his subcategory reported sales growth of 13 percent on average.

Though the ratios have changed, equipment sales in all categories — tunnel, self-serve, and in-bay automatic — adhere to last year's apportionment, going predominantly to refurbished facilities as opposed to new builds. The graphic on page 40 provides details. 

**EMPLOYEE COUNT GROWTH/DECLINE 2014 TO 2015**

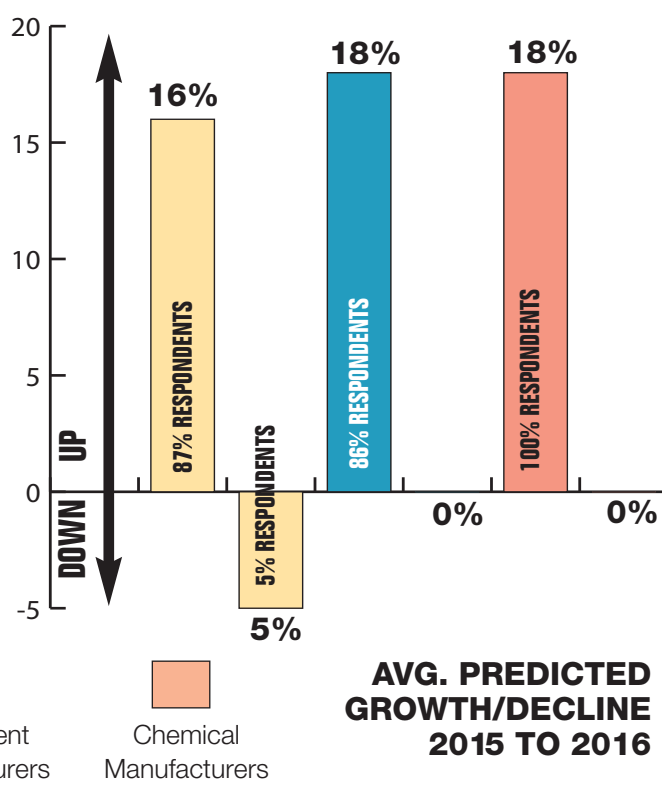
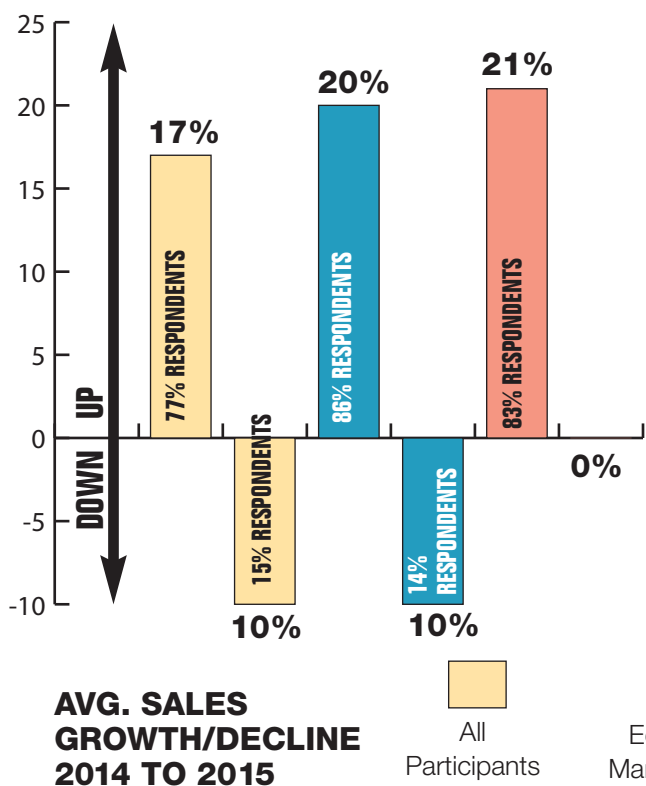
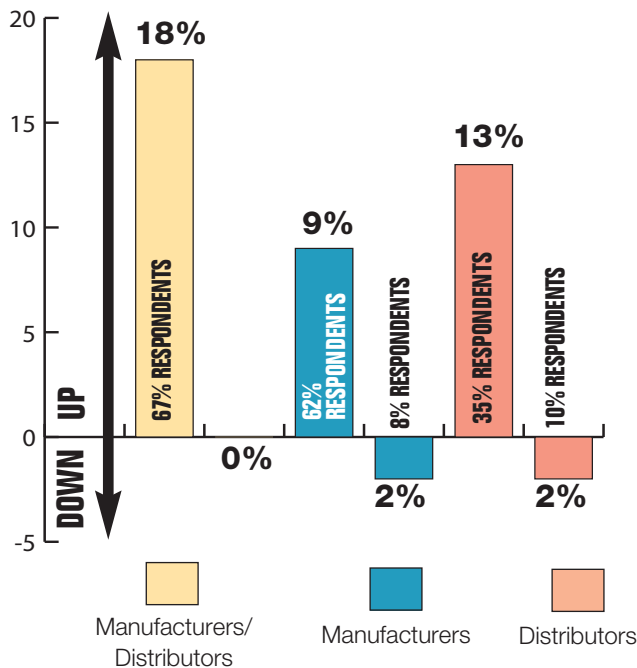
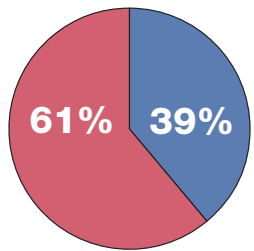
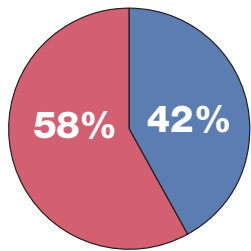


Table 1	Sales Growth 2014 vs. 2015		Sales Forecasts 2015 vs. 2016	
	Increase	Decrease	Increase	Decrease
<b>Manufacturers/Distributors</b>	50%	33%	100%	0%
<b>Avg. % Increase/Decrease</b>	27	8	18	0
<b>Manufacturers</b>	100%	0%	100%	0%
<b>Avg. % Increase/Decrease</b>	14	0	14	0
<b>Distributors</b>	75%	20%	85%	10%
<b>Avg. % Increase/Decrease</b>	16	18	16	5

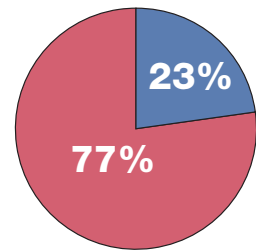
**2015 EQUIPMENT SALES TO:**



TUNNEL EQUIPMENT

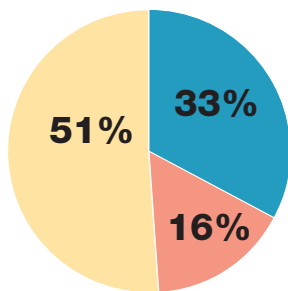
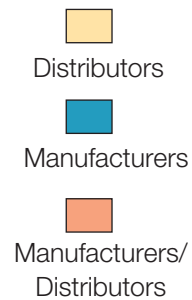
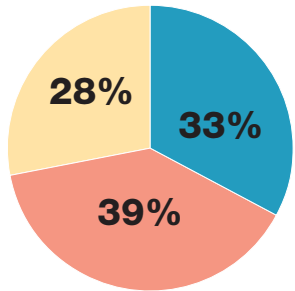
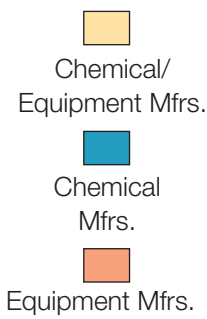


SELF-SERVE EQUIPMENT



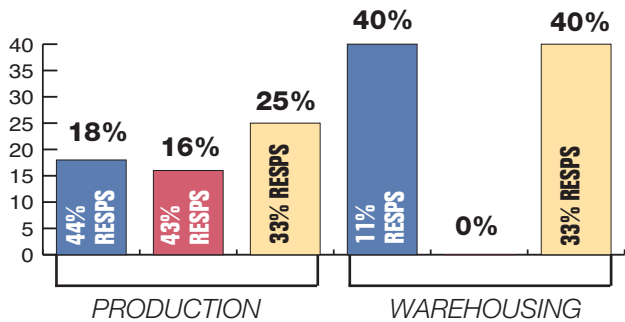
AUTOMATIC EQUIPMENT

**RESPONSE POOL COMPOSITION**



■ All Manufacturers ■ Equipment Manufacturers ■ Chemical Manufacturers

Avg. Production/Warehousing Capacity Increase **2014 to 2015**



Avg. Future Production/Warehousing Capacity Increase (projected) **2015 to 2016**

