

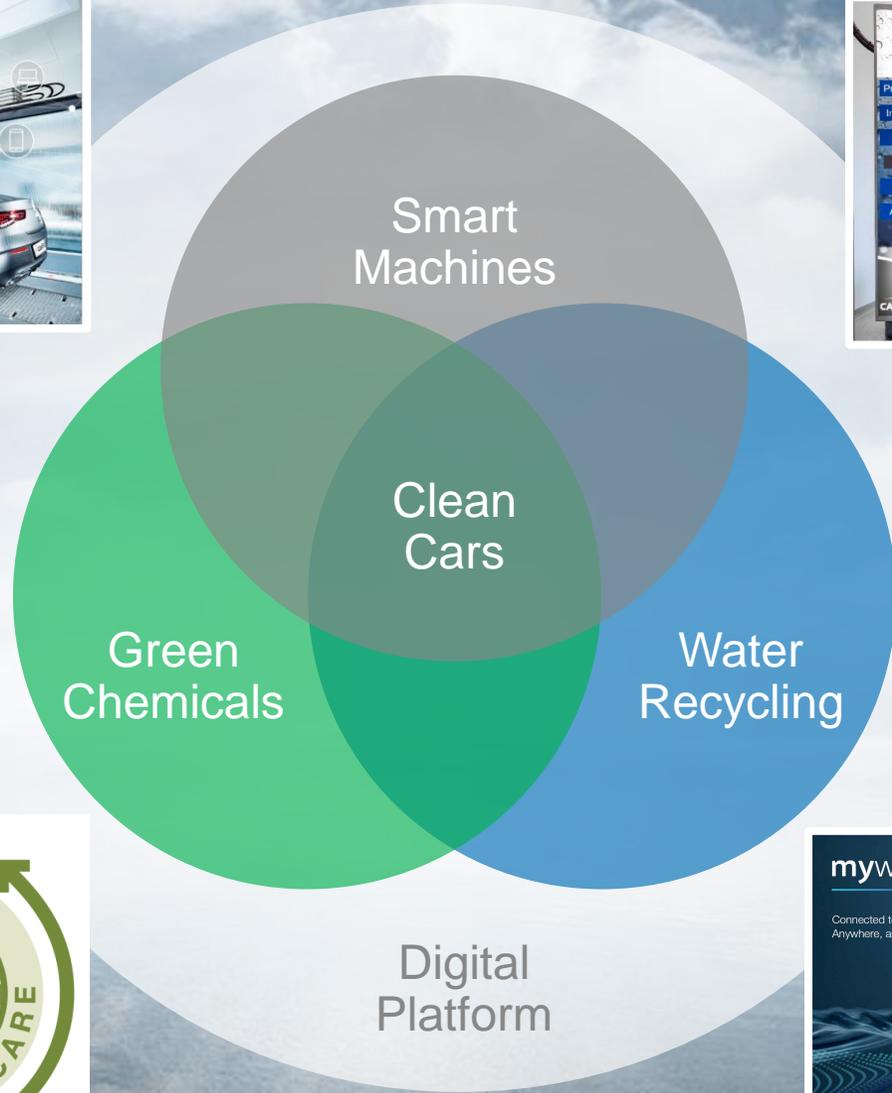


Driving customer success in the car wash business: Sustainability and digitalization

Dr. Ralf Koeppe CEO/CTO, Andreas Pabst CFO

Deutsches Eigenkapital Forum Frankfurt | 28. – 30. November 2022

Our Mission: Sustainable Car Wash



Clean Cars? #askWashTec

We serve global and local customers

Mobility Hubs



Retail



Automotive



Wash centers



WashTec is the partner of international mobility hub operators, standardizing sustainable car wash in Europe, North America, Asia



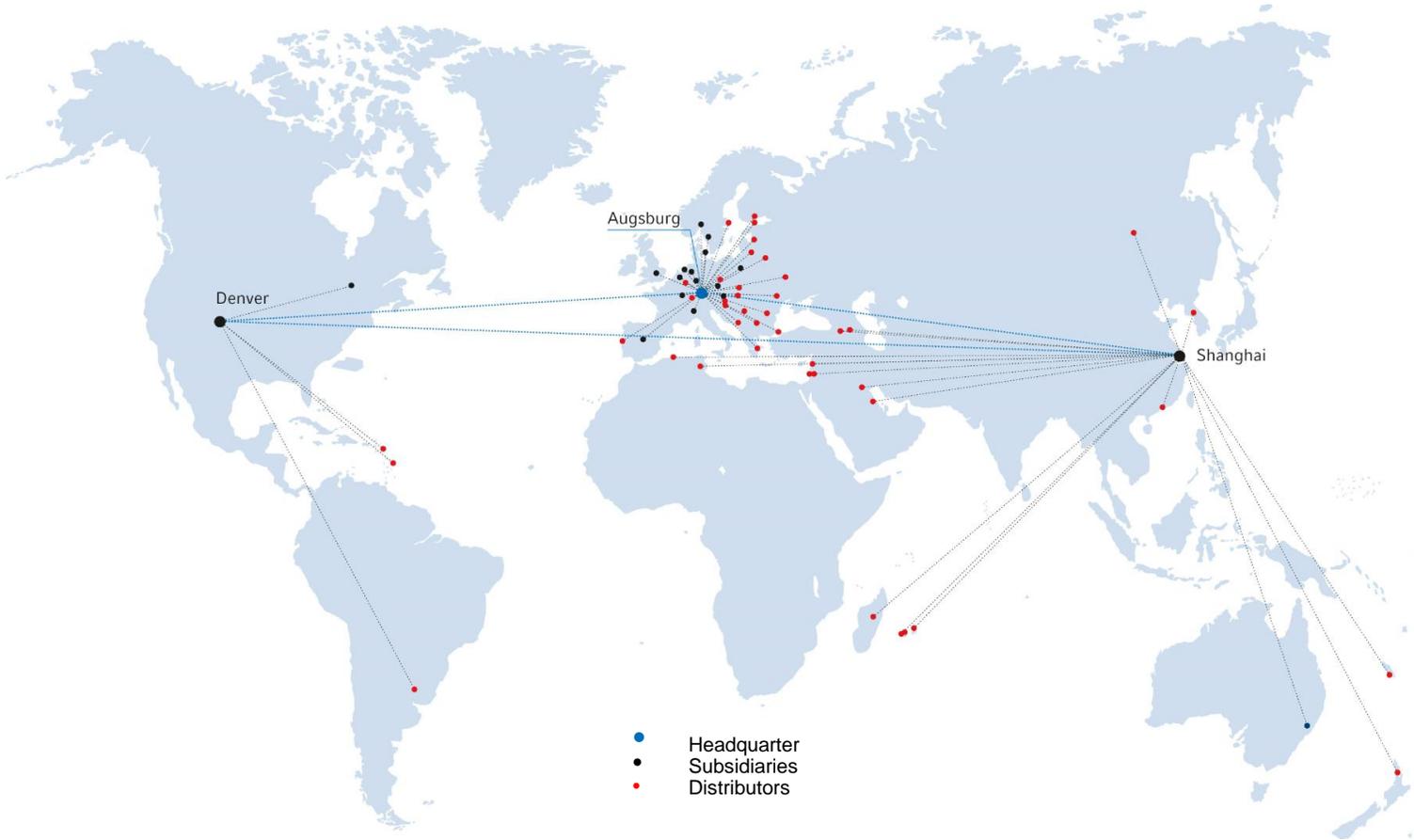
We are entrepreneurs at WashTec: Our goal no 1 customer benefit is driving sustainable growth and profitability



We are professionals in our area of expertise, set ourselves the highest standards and are constantly developing our skills.



WashTec is world market leader with an installed base of 40,000 units.



40,000 machines in operation, washing 3 million cars/day



Around 1,800 employees thereof 500+ own service technicians



Global footprint with own structures plus sales partner in about 80 countries



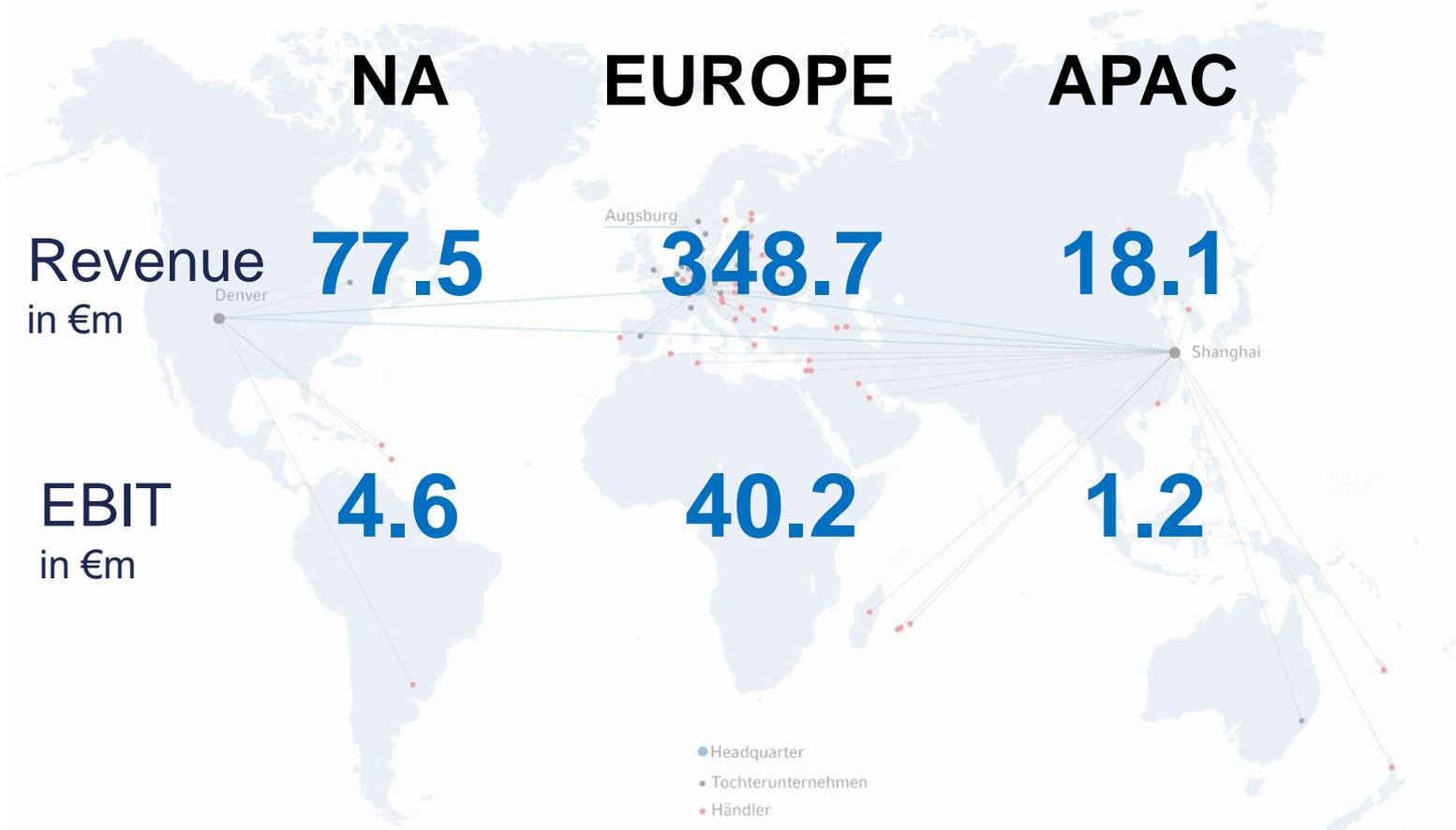
50 years of innovation leadership



Sustainable profits & high cash flows



Revenue and EBIT share by regions



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Car wash as a resilient & sustainable business model

Equipment and Service

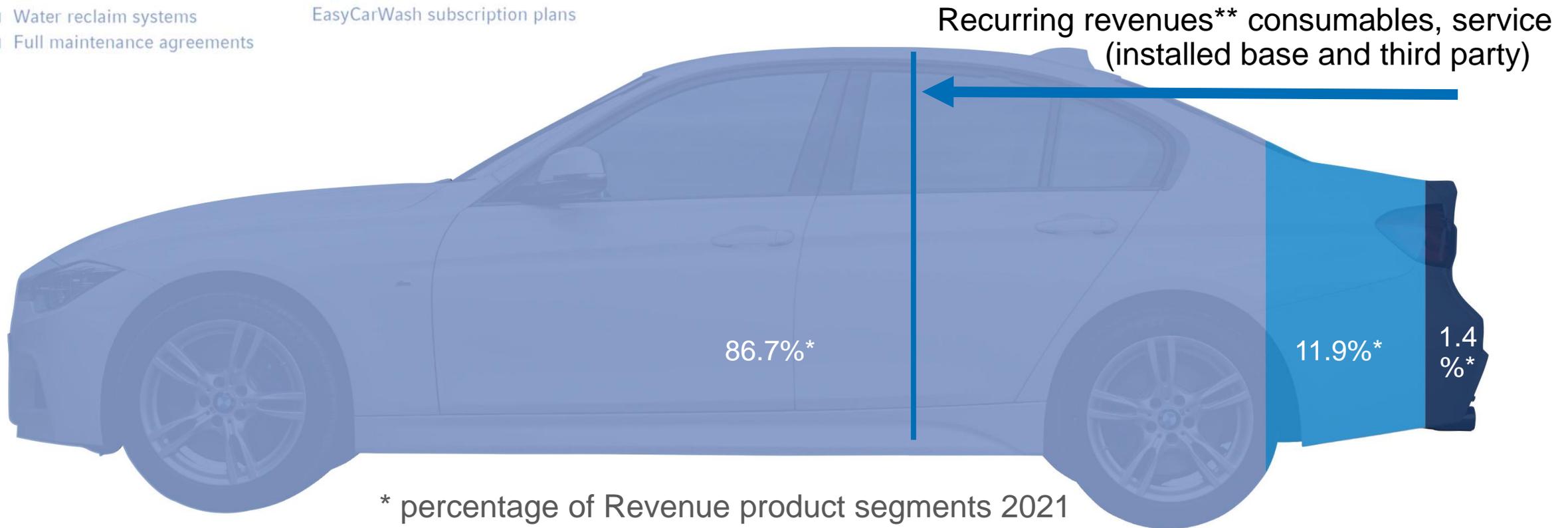
- Roll-over wash equipment
- Self-service wash equipment
- Commercial vehicle wash equipment
- Wash tunnels
- Water reclaim systems
- Full maintenance agreements
- On-call service maintenance agreements
- Service projects and upgrades
- Spare parts
- Digital solutions such as EasyCarWash subscription plans

Chemicals

- Detergents
- Care products
- Special products

Operations business and others

- WashTec Carwash Management
- WashTec Financial Services (financing and leasing solutions)



Global car wash markets – basic data and market position

CAR WASH MARKET

	Europe	North America	Asia/Pacific	Others
Numbers of cars ¹	337 Mio.	326 Mio.	469 Mio.*	195 Mio.
Installed base	>55,000	>50,000	~40,000	~2,500
Market growth ²	➔	↗	↗	➔
Market stage	Volume markets demanding regarding quality and convenience	Volume markets more new sites/convenience – oriented	CN: >90% hand wash/ AUS, NZ see core Europe JP, KOR not contestible	(<1%)

¹) UNECE, eurostat, etc. 2019
²) Market development, WT estimate

CAR WASH MARKET POTENTIAL³ / 2030 Vision (CMD April 2022)

*thereof 300 Mio. cars in China (2021)
https://autonews.gasgoo.com/china_news/70019540.html

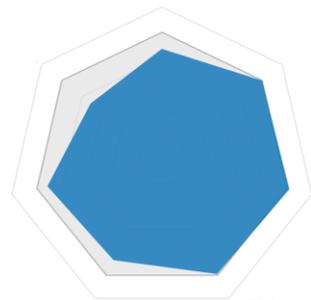
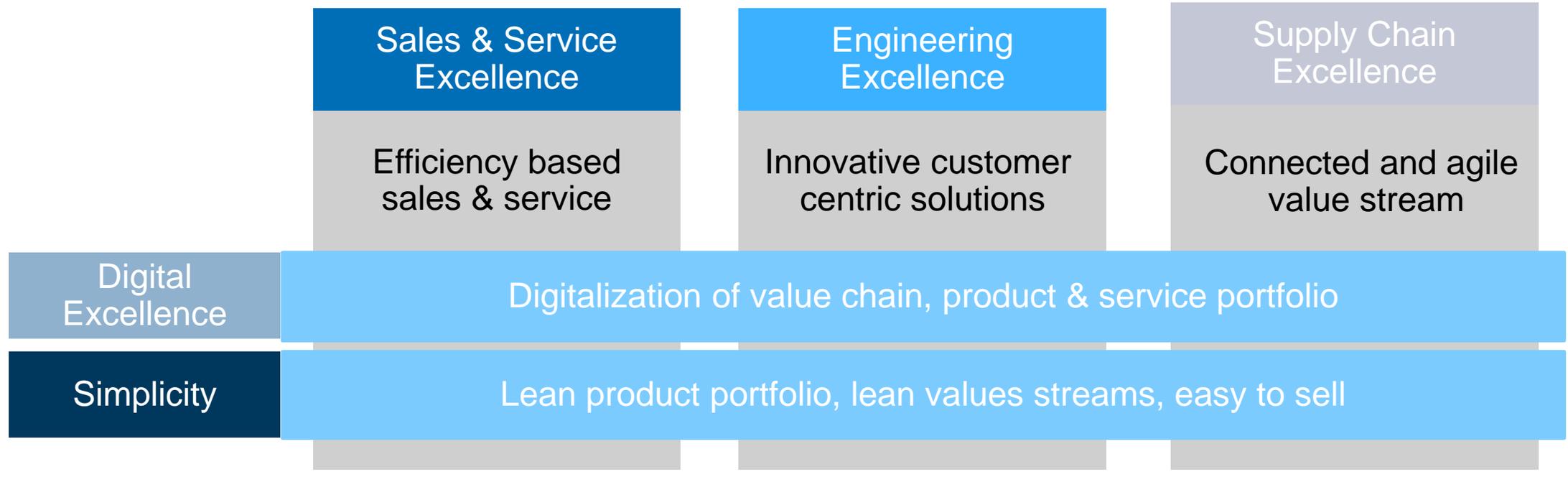
	Europe	North America	Asia/Pacific	Others	Global
Total potential (Mio. EUR)	1,380	1,710	1,010	300	4,450
Actual market (Mio. EUR)	980	1180	490	100	2,410
WashTec sales (Mio. EUR)	349 / 435	77 / 230	18 / 135	included in Europe	431* / 800
WashTec market share	34%* / 35-40%	7-10% / 15-20%	4% / 10-20%	~5%	

³) Including Equipment, Service, Chemicals

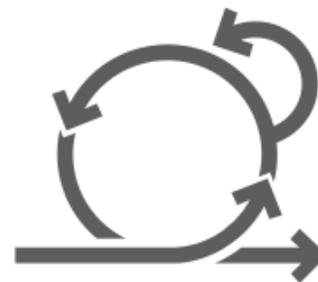
Source: WashTec market intelligence *consolidated number / base



WashTec process excellence ensuring business effectiveness and efficiency



KPI Spyder



Scrum, Agile, Product Owner



CC BY-SA 3.0 <https://de.wikipedia.org/wiki/Wertstrommanagement>

Lean Production:
VSM, VSD, VSP



We are committed to integrating sustainability into our business model

The WashTec Sustainability Program
sustainability@washtec



1. Comprehensive sustainability reporting
2. Prepared for EU Taxonomy and Corporate Sustainability Reporting Directive (CSRD)
3. [WashTec Sustainability Report 2021](#)





Innovation & leadership in sustainable car wash

Digital
Transformation
Connectivity &
Smart Services



Green Car Care – Own tailored made Chemicals for advanced cleaning results and eco-friendliness

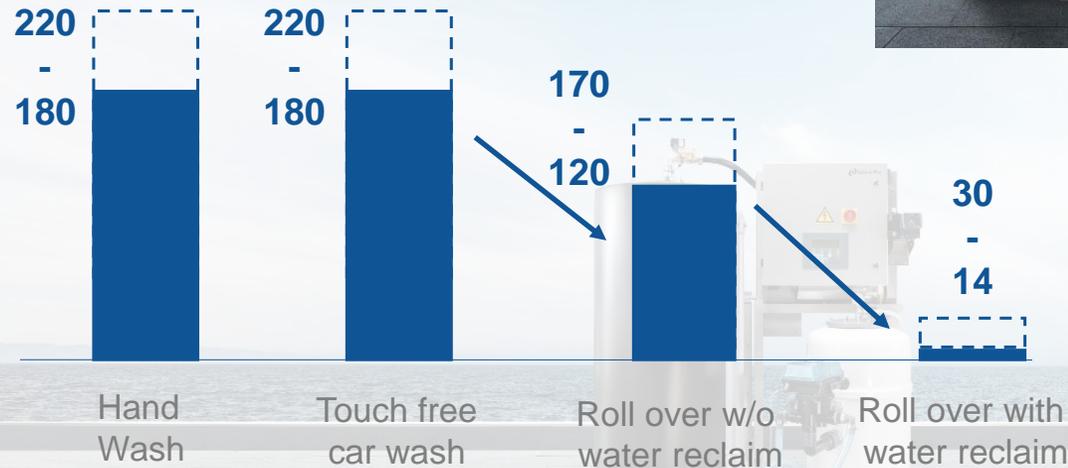
Sustainable along the entire value chain from the selection of raw materials to production and product use to waste prevention and recycling.



Embedding sustainability in our customers business model

Water retreatment

Water consumption of fresh water
(in liters per wash)*



* Sources: www.tankstellenmesse.de, WashTec estimate, www.bund-bremen.net

WashTec AquaPur Modular



Green Car Care

Reduction of consumption to the necessary

Optimized use of materials and energy

Nature-compatible material cycles

Sustainable product operation

Chemicals based on natural resources



Water circulation and retreatment



CO2 neutral operations



WashTecs' SmartCare – the first digital carwash machine

Remote connectivity and diagnostics

Individual control of all settings:
pricing, chemical dosing or washing
programs

Wash program configuration simple
and perfectly adaptable to the
wash business.

Intelligent control:
For maximum wash quality,
speed and revenue

Customizable



Global Tunnel Program based on 2 scalable world platforms

SoftLine 1



Robust and forgiving workhose

High conveyor speed & high throughput

Markets North America, Asia

SL1 & SL2



SoftLine 2



Premium wash quality

Minimum length thanks to LinearTechnology

Markets Europe, North America, Australia



mywashtec.com

Connected to your business.
Anywhere, anytime.



my.carwash



my.shop



my.EasyCarWash



my.SmartSite

WashTec
CLEAN CARS®

mywashtec.com is **THE NEW PLATFORM** that gives our customers access to **WashTec's digital offers**.

mywashtec.com thus forms the bridge to the digital services ...



my.carwash

Gain efficiency insights thanks to smart, data-driven reports about your connected machines



my.EasyCarWash

Thanks to subscriptions, you can increase your wash business and profit regardless of the weather and increase customer loyalty.



my.shop

Order conveniently and at lightning speed: around the clock access to all products and spare parts - on personal terms



my.SmartSite

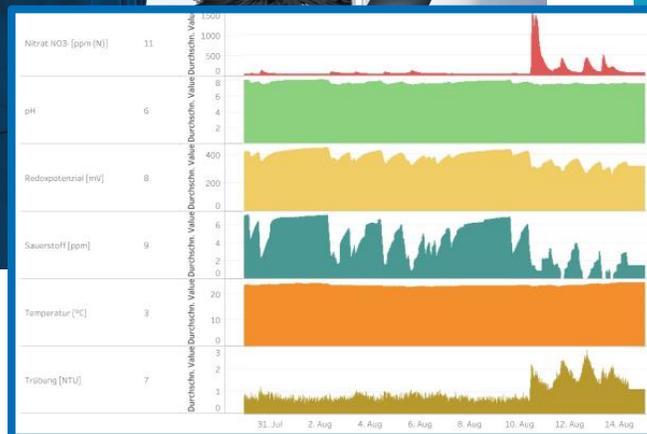
Control your wash park for more convenience and more profit



WashTec has the biggest own service network in core markets



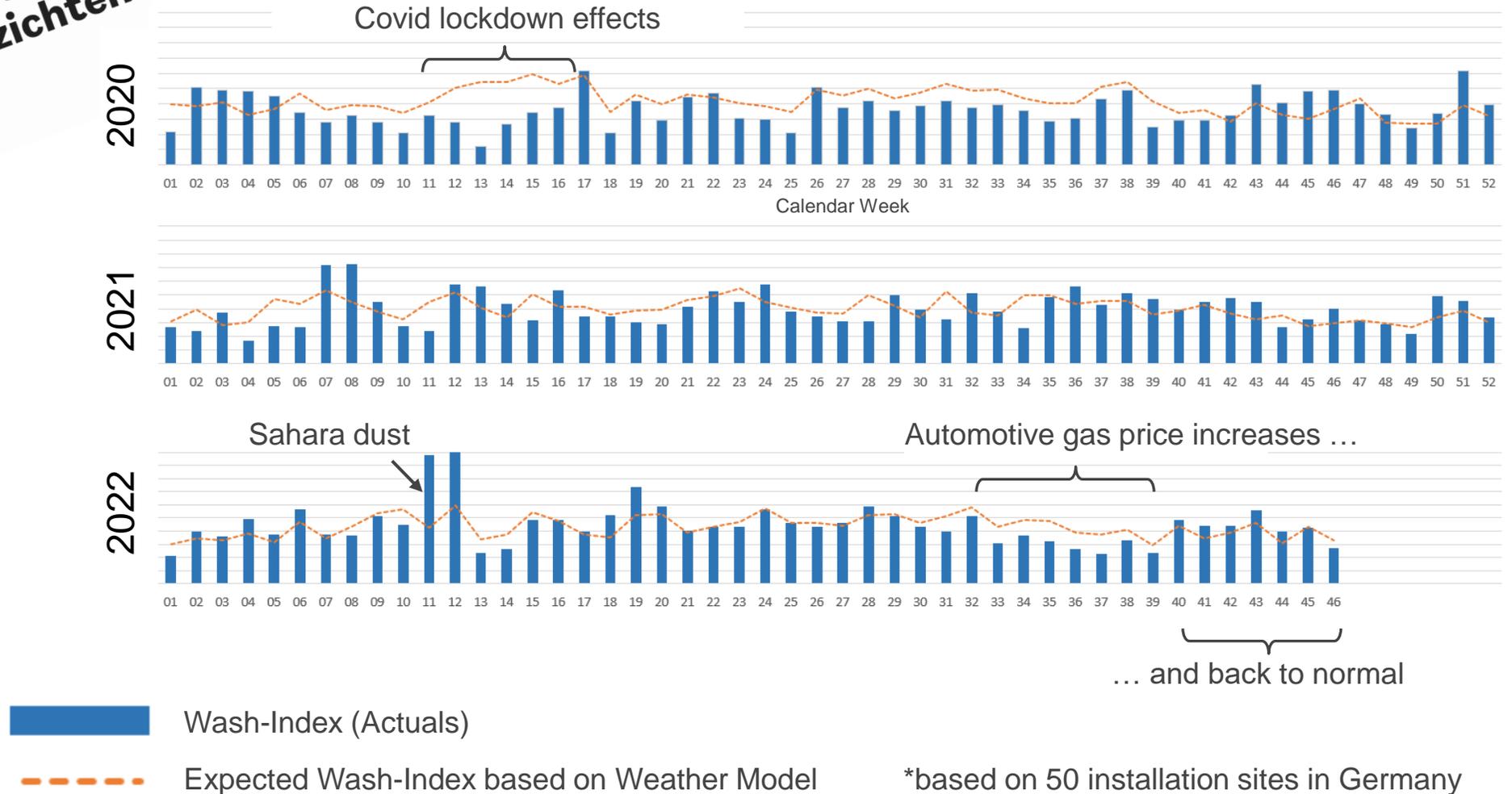
- Machines connected to service platform
- Full service contract with high uptimes of 98%+
- Call-out service & spare parts
- Digital solutions like EasyCarWash
- Awarded HSE organisation
- Management of sites



Our machines are connected and we have deep inside in consumer behavior.

KONSUMVERHALTEN
Wo die Deutschen sparsamer werden – und worauf sie nicht verzichten wollen
 Exklusiv von Melanie Bergemann
 13. September 2022
WirtschaftsWoche

A look into actual wash behaviour*





Dedicated to
eco-efficiency



The WashTec Sustainability Programm

Environmental sustainability

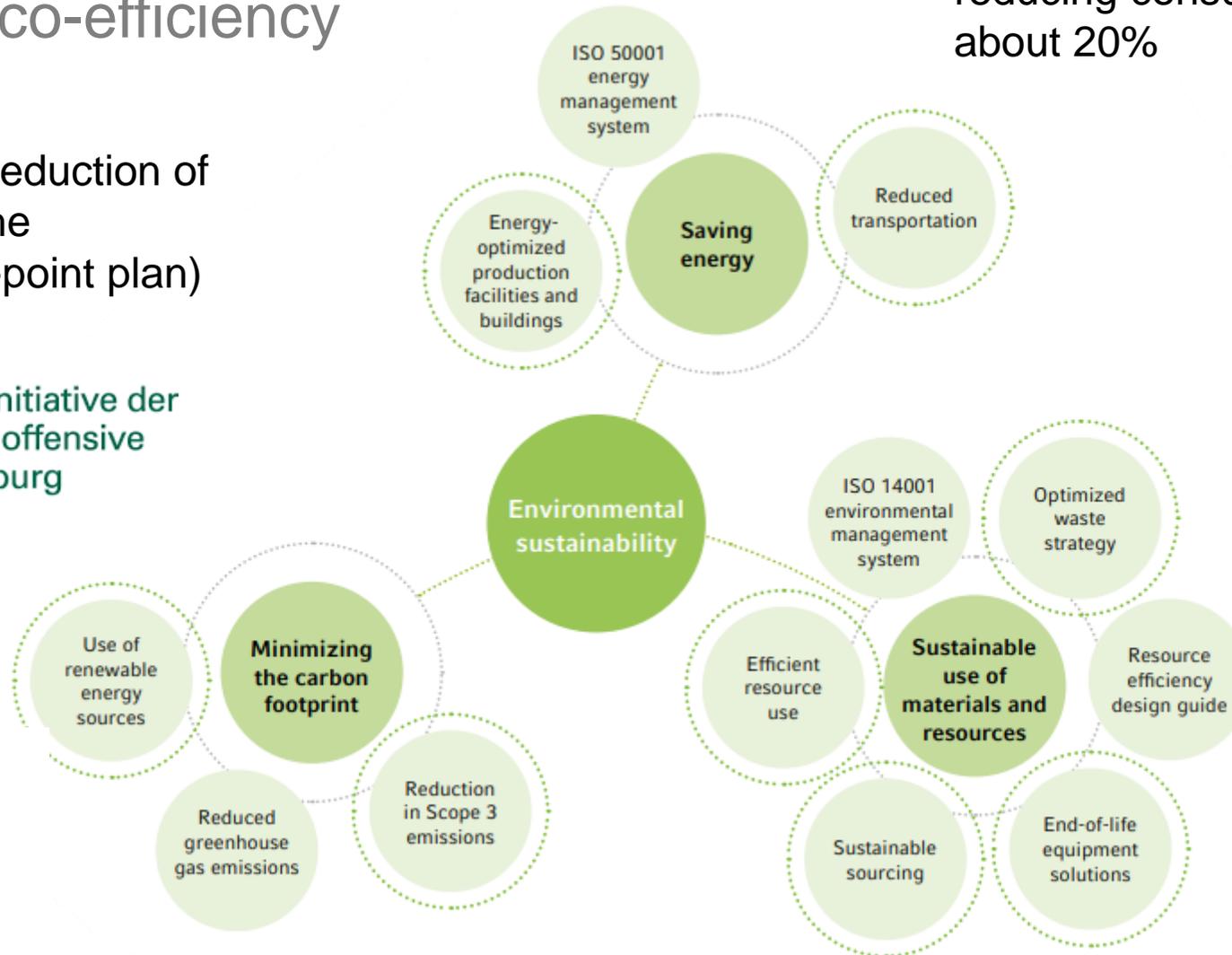
Dedicated to eco-efficiency

Contribution to the reduction of CO2 emissions in the Augsburg region (9-point plan)



Eine Initiative der klima offensive Augsburg

WashTec target
30% reduction CO2
CCF scope 1,2 in production countries



Energy taskforce
reducing consumption
about 20%



Initiatives driven by WashTec generation Z



Sustainable energy
and resource
program 2025





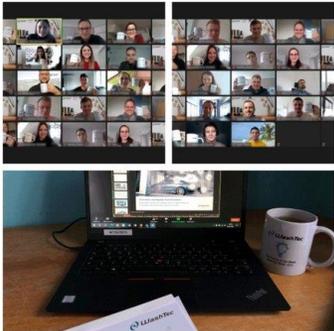
Care for people & culture



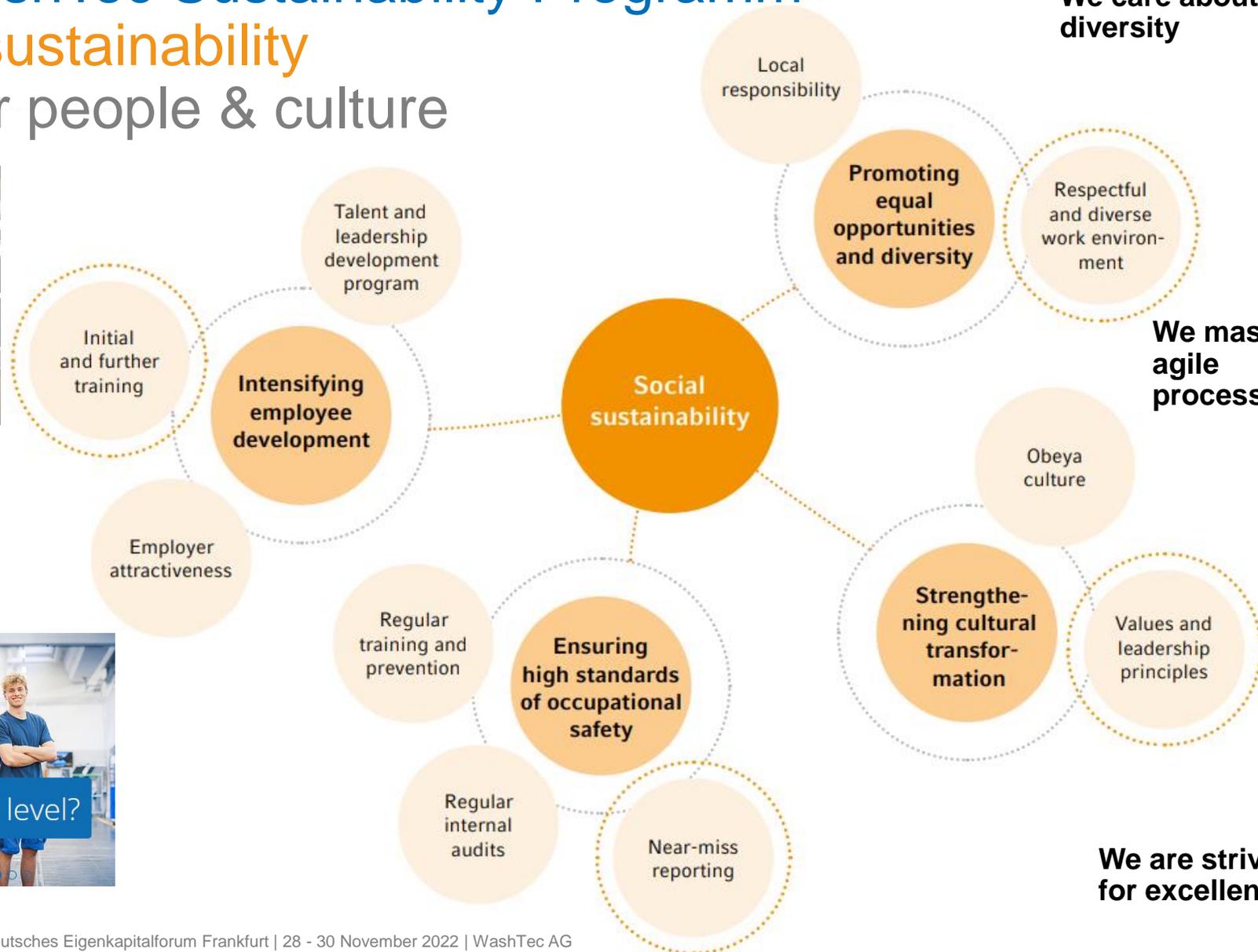
The WashTec Sustainability Programm

Social sustainability

Care for people & culture



We embrace the next generation



We care about diversity



We master agile process



We are striving for excellence





WashTec

CLEAN CARS®



Financial Calendar 2022/2023

Date	Event
March 30, 2023	Annual Report Financial press conference
May 4, 2023	Q1 Statement
May 15, 2023	Annual General Meeting
August 3, 2023	Half-yearly financial statement
November 2, 2023	Q3 Statement



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