

Keeping it clean: Environmentally friendly car washes are a key growth area

IBISWorld Industry Report OD5235 Car Wash and Detailing Services in Australia

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2 About this Industry

2	Industry Definition
2	Main Activities
2	Similar Industries
2	Additional Resources

3 Industry at a Glance

4 Industry Performance

4	Executive Summary
4	Key External Drivers
5	Current Performance
7	Industry Outlook
10	Industry Life Cycle

12 Products & Markets

12	Supply Chains
12	Products & Services
13	Demand Determinants

14	Major Markets
15	International Trade
16	Business Locations

18 Competitive Landscape

18	Market Share Concentration
18	Key Success Factors
18	Cost Structure Benchmarks
20	Basis of Competition
20	Barriers to Entry
21	Industry Globalisation

22 Major Companies

22	Magic Hand Car Wash Franchisor Pty Ltd
----	--

24 Operating Conditions

24	Capital Intensity
25	Technology & Systems
25	Revenue Volatility

26	Regulation & Policy
26	Industry Assistance

27 Key Statistics

27	Industry Data
27	Annual Change
27	Key Ratios

28 Jargon & Glossary

About this Industry

Industry Definition

Operators in the industry are primarily engaged in washing, waxing and detailing automotive vehicles, including passenger cars, trucks, vans

and trailers. The industry excludes companies that predominantly provide automotive repair and maintenance services.

Main Activities

The primary activities of this industry are

Automotive and trailer washing

Automotive and trailer detailing (cleaning, polishing and waxing)

Self-service car washes

Mobile car washes

In-bay automatic car washes

Conveyor tunnel car washes

The major products and services in this industry are

Conveyor tunnel washes

In-bay automatic car washes

Manual car wash services

Mobile car wash services

Self-service bays

Similar Industries

G4000 Fuel Retailing in Australia

Firms in this industry sell automotive fuel or lubricating oils at the retail level, typically at a service station.

S9412 Motor Vehicle Body, Paint and Interior Repair in Australia

Companies in this industry repair, panel beat and spray paint smashed or damaged automotive vehicles. They also replace, repair and tint automotive glass.

S9419 Motor Vehicle Engine and Parts Repair and Maintenance in Australia

Operators in this industry provide repair and maintenance services for car engines and other interior parts.

X0014 Automotive Industry in Australia

Operators in this industry encompass the whole automotive supply chain, including car wash and detailing service providers.

Additional Resources

For additional information on this industry

www.acwa.net.au

Australian Car Wash Association

www.carwashmagazine.com.au

Car Wash Magazine

www.carwashworld.com.au

Carwash World

Industry at a Glance

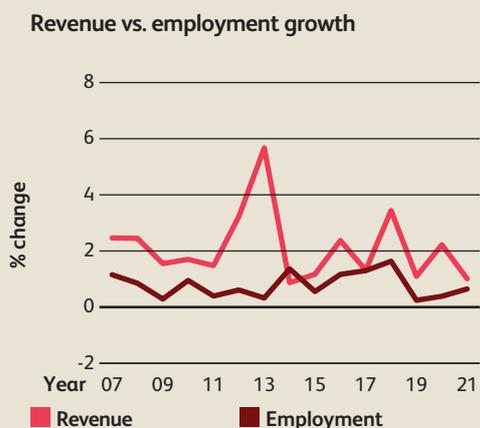
Car Wash and Detailing Services in 2014-15

Key Statistics Snapshot



Market Share
 Magic Hand Car Wash Franchisor Pty Ltd **7.8%**

p. 22



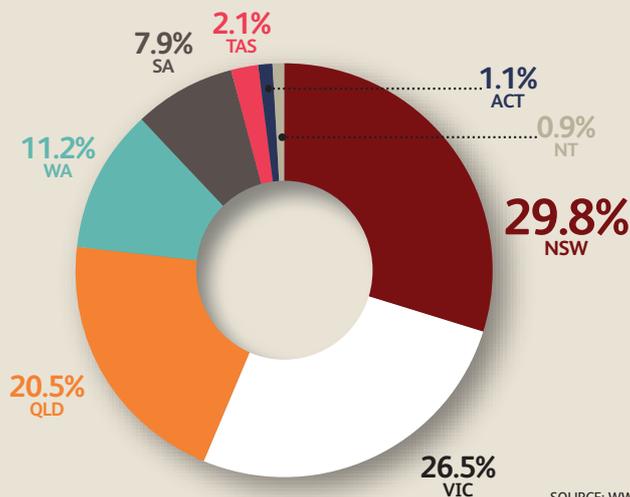
SOURCE: WWW.IBISWORLD.COM.AU

Key External Drivers

- Number of motor vehicles
- Real household discretionary income
- Availability of water
- Average weekly hours worked
- Average age of vehicle fleet

p. 4

Establishments



SOURCE: WWW.IBISWORLD.COM.AU

Industry Structure

Life Cycle Stage	Mature	Regulation Level	Medium
Revenue Volatility	Low	Technology Change	Medium
Capital Intensity	Medium	Barriers to Entry	Medium
Industry Assistance	Low	Industry Globalisation	Low
Concentration Level	Low	Competition Level	High

FOR ADDITIONAL STATISTICS AND TIME SERIES SEE THE APPENDIX ON PAGE 27

Industry Performance

Executive Summary | Key External Drivers | Current Performance
Industry Outlook | Life Cycle Stage

Executive Summary

The Car Wash and Detailing Services industry has gone through a period of growth over the past five years. Early in the period, water restrictions and consumers' environmental awareness regarding the effects of washing vehicles at home drove consumers to industry operators. Strong new car sales have also supported the industry's growth, as consumers with new cars are more likely to pay for expensive washing and detailing. Industry revenue is forecast to grow by a compound annual rate of 2.5% over the five years through 2014-15, to reach \$526.8 million. Although the high volume of new car sales assisted industry growth over the past five years, a slowdown in sales in 2014-15 is projected to result in more subdued industry revenue growth of 1.2% for the year.

The drought between 2002-03 and 2009-10 resulted in harsh water restrictions being introduced, which prevented consumers from washing their vehicles at home. While water restrictions have since been relaxed, consumers have become accustomed to outsourcing their car washing and have continued to do so, particularly in using in-bay automatic washes and self-service bays. The industry has benefited significantly from these trends, in

addition to growing environmental awareness regarding the superior water efficiency and chemical treatment in industry operators' car washes. The industry has also been helped by rising discretionary incomes and consumers becoming more time-conscious, which has driven them to move away from washing vehicles at home.

Similar trends are expected over the next five years. In-bay automatic washes and conveyor tunnel washes are expected to become more popular, and the industry will become automated to an even greater extent. Increasing urbanisation is expected to take some of the polish off industry revenue growth as consumers drive their cars less frequently. However, there is strong possibility that El Nino weather patterns will return. This will result in dry conditions and the potential implementation of more stringent water restrictions. Further, consumers are expected to become more concerned about the detrimental environmental effects of washing vehicles at home. Consequently, industry revenue is forecast to rise by a slightly slower compound annual rate of 2.1% over the next five years, to reach \$584.1 million in 2019-20.

Key External Drivers

Number of motor vehicles

Demand for car-wash and detailing services depends on the size of the motor vehicle fleet. As more vehicles are purchased and driven, demand for washing and detailing increases. The number of motor vehicles registered in Australia is projected to increase in 2014-15, presenting an opportunity for the industry to boost revenue.

Real household discretionary income

Demand for car washes and detailing is contingent on discretionary income. When consumers have more discretionary income, they can devote more funds towards getting their vehicle

washed professionally rather than washing it themselves. Discretionary income is expected to rise in 2014-15.

Availability of water

There is an inverse relationship between water availability and demand for car-washing and detailing services. When water availability declines, consumers are more restricted in their water use and are less able to wash their own cars, forcing them to use the industry's services. Water availability is expected to increase in 2014-15, presenting a threat to industry revenue as water restrictions are relaxed and consumers can more easily wash their own cars.

Industry Performance

Key External Drivers continued

Average weekly hours worked

When consumers are working more hours, they have less available leisure time. Consequently, they are more likely to pay for their car to be washed than to do it themselves. A slight rise in average weekly hours worked and a consequent fall in the availability of leisure time are expected to bode well for the industry in 2014-15.

Average age of vehicle fleet

Consumers are more likely to get new

vehicles professionally washed and detailed, preferring to keep their new high-value purchases in perfect condition. When the average age of the vehicle fleet declines, the composition of vehicles on the road trends towards newer cars, meaning more consumers can be expected to use the industry's services. The average age of the vehicle fleet is projected to remain stable in 2014-15.



Current Performance

The Car Wash and Detailing Services industry has grown over the past five years, as consumers have increasingly chosen to use the industry's services rather than wash their vehicle at home. Over the past decade, water restrictions and environmental awareness have prevented consumers from washing their vehicles at home. The trend of using automatic washes and self-service bays has continued even as water

restrictions have been relaxed. Consumers are increasingly outsourcing their household tasks, including car washing. The industry has also benefited from rising new car sales over the past five years, because consumers are more likely to wash new cars regularly. Industry revenue is therefore forecast to rise by a compound annual rate of 2.5% over the five years through 2014-15, to reach \$526.8 million. Growth of 1.2% is forecast for 2014-15.

Industry participation

More industry operators are automating their processes. Consumers are increasingly using self-service bays, in-bay automatic washes and conveyor tunnel washes rather than more expensive manual washing and detailing. These popular services do not require

direct labour inputs, resulting in only minor growth in industry employment over the past five years. The workforce composition is changing, with operators and managers of automated equipment beginning to replace lower paid workers that manually wash and detail vehicles.

Industry Performance

Industry participation continued

This has caused the average wage to grow over the past five years, particularly as more professional workers tend to have full-time work, rather than the typically part-time work of manually washing cars. The number of industry establishments

has increased as demand for car-wash and detailing services has grown. Many of these new operators have been characterised by self-service bays, although mobile operators have begun to entrench their position in the industry.

Water restrictions

The crippling drought that ravaged many parts of Australia between 2002-03 and 2009-10 resulted in significant water restrictions being put into place across much of the country. Although restrictions varied between states, at-home DIY car washing was either banned or restricted to windows and headlights during the worst parts of the drought. Commercial car-washing businesses generally adapted well to the severe water restrictions, adopting water recycling technology and marketing their adherence to industry water standards.

Water restrictions resulted in the industry continuing to grow during the global financial crisis, while other industries faltered. The worst of the had

drought passed in most parts of Australia by 2009-10, and it was officially declared over in early 2012 when Agriculture Minister Joe Ludwig announced that drought support would cease in the remaining affected areas of New South Wales. Despite easing water restrictions as the drought has ended, consumers have continued to use the industry's services. Consumers have become accustomed to getting their car washed in automated machinery or doing it themselves at self-service bays. In addition, the industry continues to benefit from its position as an efficient user of water, particularly compared with washing vehicles at home.

Environmental awareness

Washing vehicles at home has further drawbacks beyond high water usage. One of the biggest drivers of industry demand has been increased awareness of the impact of pollutants in stormwater drains from cars that are washed on streets or pavements. The Australian Car Wash Association has found that wastewater from residential car washing significantly contributes to stormwater pollution as it runs off into waterways from stormwater drains. This pollution includes grease, oil, detergents, and metals such as zinc and lead that find their way into freshwater creeks, lakes and rivers.

Commercial car washes have marketed

their eco-friendly services, which involve special high-pressure hoses with small jets that require less water and recycle most of the water used. Car washes are also required to have a trade waste licence, which ensures that harmful pollutants are trapped in sedimentation pits and that all wastewater is channelled directly into the sewers, where it is treated and cleaned under strict regulation enforced by the various states' environmental protection agencies. Consumers have become increasingly aware of the environmental benefits of using the industry's services, and demand has increased as a result.

Industry Performance

New car sales

Consumers are more likely to have their vehicle washed by more expensive manual operators when they have new vehicles. Over the past five years, new car sales have remained strong, rebounding from the global financial crisis as the high Australian dollar over much of the period made new cars more affordable, and as consumers transitioned to fuel-efficient

small cars. The high rate of new car sales has also increased the total number of vehicles on the road. Consequently, strong new car sales have added to industry revenue. However, an expected slowdown in 2014-15 as the Australian dollar depreciates and consumer sentiment weakens is expected to result in slightly slower industry revenue growth.

Outsourcing tasks

Households are increasingly outsourcing chores and activities. The level of outsourcing has been growing over the past decade, primarily driven by increased female participation in the workforce and busier lifestyles. When combined with rising incomes and a higher number of dual-income households, this has resulted in households outsourcing more unpaid work tasks. While this trend principally applies to entertainment, food, personal

services and tourism, car washing and detailing has also been affected. Consumers have been willing to pay more to have their vehicles washed outside of the home, placing a greater premium on maximising their leisure time. In conjunction with sound economic conditions over the past five years and increased automation of car washing, which has limited wage costs, profit margins have expanded slightly.

Industry Outlook

The Car Wash and Detailing Services industry is expected to continue growing over the next five years, but at a slightly slower pace than in the previous five years. Consumers are expected to become increasingly aware of the environmental effects of washing their vehicles at home, which will drive consumers to use industry services. Increasing automation throughout the industry will allow for greater service volumes and healthy profit margins. However, changes in the geographical distribution of the major cities, which are expected to become denser and more urbanised, will be to the detriment of the industry as people drive their cars less frequently. Overall, industry revenue is forecast to grow by a



compound annual rate of 2.1% over the next five years, to reach \$584.1 million in 2019-20.

Industry Performance

Industry participation

The industry's car-washing processes are expected to become more automated over the next five years. Consumers will increasingly use self-service bays, in-bay automatic washes and conveyor tunnel washes. With new car sales expected to slow, more consumers are expected to choose these types of washes over manual washing and detailing, resulting in employment

growing at a much slower rate than revenue. The number of employees per establishment is expected to fall as a result of rising automation, with establishment numbers forecast to grow at a compound annual rate of 1.4% over the next five years. The industry's average wage is projected to remain stable, with only a minor workforce compositional change expected.

Geographical distribution

The trend towards increased urbanisation and high-density, inner-city living is expected to result in consumers driving their vehicles less frequently. While the number of vehicles on Australian roads is still projected to grow strongly, consumers are expected to drive less kilometres each year and substitute cars for alternative forms of transport. Public transport use, and other environmentally friendly modes of travel such as bicycles, are expected to

play bigger roles in Australia's cities. This will affect demand for car washing and detailing over the next five years. As Australians increasingly leave their vehicles in the garage, they will be less inclined to use the industry's services - particularly higher value services like manual washing and detailing. Therefore, increasing urbanisation is expected to subdue industry revenue growth over the next five years.

Water and environment

Awareness about the environmental impact of stormwater pollution and water use from at-home car washing is expected to grow over the next five years. Car washes have been successfully positioning themselves as eco-friendly alternatives to home car washing and as more convenient for consumers. All commercial car-wash operations must have a valid Trade Waste Agreement with the relevant water authority to assist in governing the discharge of effluent in the sewerage system. The Australian Car Wash Association has encouraged operators to comply with the voluntary Water Safety Rating scheme, and governments may require its mandatory adherence if drought conditions return.

According to the Bureau of Meteorology in March 2015, there is a

Water restrictions helped the industry to continue growing during the global financial crisis

50% chance of El Nino forming in Australia in 2015, as weather patterns are trending towards El Nino and away from La Nina. The formation of El Nino can be expected to lead to drier weather conditions and, potentially, more stringent water restrictions over the next five years. Such restrictions are expected to benefit the industry, as consumers that wash their vehicles at home will have their ability to perform these tasks reduced.

Industry Performance

Profitability and market power

In general, the industry is expected to sustain relatively healthy profit margins as it remains in the mature phase of its life cycle. While competition among operators is intense, the overheads of self-service and automatic car wash operators are low due to their low dependence on labour. Many operators have made significant investment in the latest touch-free technology over the past five years and will reap the rewards over the next five. Car-wash cafes that are labour dependent and spend a large percentage of their revenue on wages will be the most exposed to fluctuations in demand, particularly as their services are typically

more expensive than automated washes.

The industry is expected to remain highly fragmented over the next five years. While some consolidation has occurred over the past decade as franchise operations have grown from small-scale operations into national companies, no individual operator has excessive market share or power. The industry will continue to be characterised by a fragmented array of services. A large share of the industry's car washes will be held by fuel retailers like BP, Caltex and Coles Express, though not to a degree that inhibits competition from savvy independents.

Industry Performance

Life Cycle Stage

There has been only modest growth in industry participation over the past decade

The industry's products are familiar and there is a high level of market penetration

Industry value added has increased at a rate below GDP growth



Industry Performance

Industry Life Cycle

This industry
is **Mature**

The Car Wash and Detailing Services industry is in the mature phase of its life cycle, typified by a high level of market penetration and a high degree of familiarity with the industry's products and services. While the industry is highly fragmented, its customers and markets have remained largely unchanged. The rate of technological change, while unspectacular, has led to a high level of automation, water saving devices and recycling facilities.

Industry value added (IVA) measures an industry's contribution to the overall economy. IVA is forecast to rise by a compound annual 1.6% over the 10 years through 2019-20, underperforming real GDP growth of a compound annual 2.7% over the same period. While this means that the industry's contribution to the economy

is shrinking, IVA is still posting growth as the industry's market penetration has pushed it towards maturity.

Demand for car wash services has been increasing over the past five years due to the increased convenience and greater array of budget and luxury options. With environmental regulations restricting residential car washing, the customer base for the industry is likely to grow in the next five years. To appeal to consumers, industry operators have begun offering more value added products and services. These include drying towels, vacuum cleaners, floor mats and air fresheners for self-service customers. Furthermore, companies with full-service and conveyor-type car washes have begun offering Wi-Fi access with attached cafes and plush waiting rooms for their customers.

Products & Markets

Supply Chain | Products & Services | Demand Determinants
 Major Markets | International Trade | Business Locations

Supply Chain

KEY BUYING INDUSTRIES

- I4626 **Taxi and Limousine Transport in Australia**
 Taxi and limousine operators have to ensure their vehicles are in good condition for customers, leading to greater use of the industry's services.

- Z **Consumers**
 Consumers are the largest source of demand for the industry's services.

KEY SELLING INDUSTRIES

- C1851 **Soap and Cleaning Compound Manufacturing in Australia**
 The Soap and Cleaning Compound Manufacturing industry supplies large quantities of soap and waxing agents that are required for commercial car washes.

- D2811 **Water Supply in Australia**
 The Water Supply industry supplies water for commercial car wash activities.

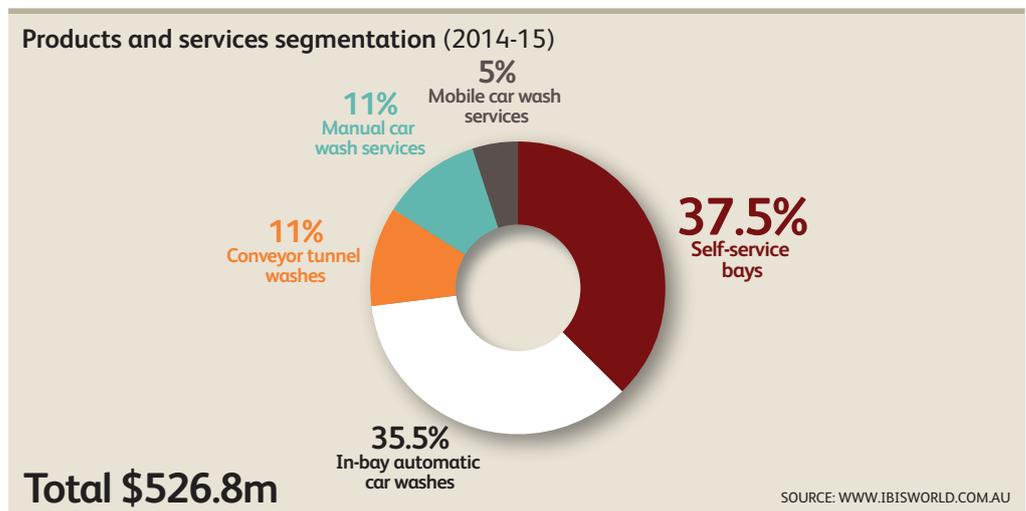
Products & Services

The type of services provided by the industry generally fit into three main categories: self-service, manual and automatic. There are a number of minor segments within these main categories. For example, automatic car washes include both conveyor tunnel washes and in-bay automatic car washes, which can be further divided into friction and touch-free services. It has become more common for car wash operators to provide more than one car wash service and additional services, such as vacuum stations and attendants that provide full detailing services.

Self-service bays

Self-service bays are typically card- or coin-operated and give the customer a set

amount of time to wash their own car. Self-service bays allow the customer to choose the amount of time allocated to rinse, scrub and polish the car. During the washing process, cars are housed in a large undercover bay with cleaning equipment including a foam brush and high-pressure hose. Vacuum stations are also usually available on the site. Self-service bays are the closest substitute to at-home DIY car washing and are often preferred due to their superior and more water-efficient equipment. Self-service bays using recycled water became particularly popular in some states due to water restrictions caused by the drought, which limited the amount of water that could be used for washing cars. A relaxation of water restrictions over the



Products & Markets

Products & Services continued

past five years has resulted in a product share decline for the segment, as more consumers who previously used self-service bays are able to wash their vehicles at home.

In-bay automatic car washes

In-bay automatic car washes are usually divided into two categories: friction, which uses either plastic brushes or synthetic cloth strips to clean the vehicle; or touch-free, which uses high-pressure hoses and detergent. Touch-free operations have become more popular with car owners over the past decade due to the potential damage that friction brushes can cause. Most in-bay automatic car washes are located in service stations.

In-bay automatic car washes use a lot of water. When severe water restrictions were in place, car wash operators had to invest in water recycling systems to ensure these washes met the restrictions. These investments, coupled with the relaxation of water restrictions as Australia moves away from a drought, have resulted in significant revenue share growth for the segment over the past five years.

Conveyor tunnel washes

A typical conveyor tunnel wash uses stationary equipment, with the vehicle moving through the tunnel on a conveyor system. A number of different services are available, including an express wash, wax or undercarriage wash. Some conveyor tunnel wash operators also provide attendants to provide interior and exterior detailing on completion of the tunnel wash. The high cost of investing in conveyor tunnel wash equipment and the popularity of other car washes has resulted

in a revenue share decline for the segment over the past five years.

Manual car wash services

The most labour-intensive form of car wash and detailing services is one provided manually by a car wash service attendant. Many operators of manual car wash and detailing services have tapped into Australia's cafe culture and provide a cafe next to the car wash, meaning customers can wait in comfort. These operators tend to provide the bulk of the industry's detailing services and generate more revenue per customer than automated car washes. Strong new car sales have led to product share growth for this segment, as many consumers want to keep their new vehicles in optimal condition.

Mobile car wash services

Mobile car wash service operators travel directly to the car owner's residence or business. Most mobile car wash enterprises provide their own power, water tanks and pressure cleaners and promote their superior convenience over other services. Due to the labour-intensive and customised nature of mobile services, they tend to be the most expensive for consumers. Mobile car wash services are particularly suited to the franchise model. Franchisers like Jim's Cleaning Services and Car Care have grown throughout Australia using the mobile car wash model, and have contributed to revenue share growth for the segment over the past five years. Customers call a central number and the closest available franchisee is sent to out to provide the car cleaning and detailing service.

Demand Determinants

One of the most important determinants of industry demand is the number of registered vehicles on the road. This determines the potential size of the market the industry can serve. Therefore, the strong growth in motor vehicle

numbers over the past five years has expanded the industry's potential market, and ultimately resulted in growing demand. The age profile of vehicles is also a factor, as consumers are more likely to spend money on having newer

Products & Markets

Demand Determinants continued

vehicles washed and detailed. A declining average vehicle age means there are more new vehicles on the road that are likely to have more money spent on them by their owners for car washes and detailing.

The other main factor driving demand over the past decade has been environmental awareness, both perceived and forced. Drought-related water restrictions that were in place in many parts of Australia during the 2000s meant that at-home car washing was effectively banned or severely restricted in some markets. This boded well for the industry as car owners were forced to outsource the service to water-efficient commercial car washes that promoted water recycling. Even

though the most severe water restrictions have ceased, efficiency is now ingrained in the consciousness of many Australians and therefore the industry continues to benefit from the period of drought.

The level of discretionary income also affects demand for the industry's services. Rising discretionary incomes over the past five years have led to a general trend among households to outsource services that have traditionally been performed at home, as consumers have more money to spend on non-essential car wash and detailing services. Rising income also provides consumers with the opportunity to have their cars washed more frequently.

Major Markets

Households are the industry's largest market. Vehicle owners with higher incomes tend to have their vehicles washed and detailed more frequently, and are more willing to pay for expensive manual services. In contrast, vehicle owners with lower incomes generally wash their vehicles less frequently and are more likely to use inexpensive self-service bays. The industry also generates revenue from the private and government sectors.

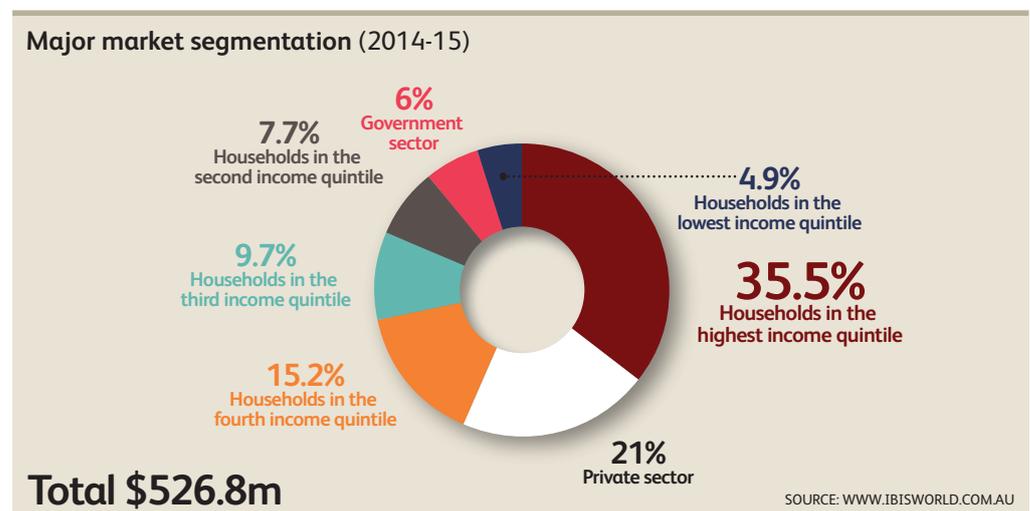
Households in the highest income quintile

Vehicle owners in this segment tend to

spend more of their income on manual washing and detailing services, which are generally more expensive than automated car washes. These vehicle owners are also more likely to own high-value vehicles, and place greater importance on keeping these vehicles in optimal condition. The segment has remained stable in its revenue share over the past five years.

Households in the fourth income quintile

Vehicle owners in this segment are similar to the highest income earners, but are less likely to own high-value vehicles. These vehicle owners are likely to use a



Products & Markets

Major Markets continued

combination of manual washing and detailing services and in-bay or conveyor tunnel automatic washes. High new car sales have been driven by this income quintile. Consequently, these vehicle owners have made greater use of the industry's services over the past five years, resulting in a revenue share gain.

Households in the third income quintile

Households in the third income quintile are less likely to own new vehicles and place greater importance on spending their income on essential items, rather than discretionary services like car washes. Despite this, strong new car sales of cheaper vehicles like fuel-efficient small cars has resulted in consumers within this quintile demanding more car washes and detailing services. Therefore, this segment has undergone a revenue share gain over the past five years.

Households in the second income quintile

Households in this income quintile are less likely to own new vehicles and generally wash their vehicles less frequently, as their income does not allow for it. These vehicle owners are less likely to use manual car washing services, and are more likely to use in-bay automatic washes or self-service bays. Relaxed water restrictions have enabled these households to wash their vehicles at home more frequently, resulting in a decline in revenue share over the past five years.

Households in the first income quintile

Similar to the second income quintile, households in this segment are less likely to own new vehicles they want to keep in

perfect condition, while their income does not allow frequent washes. They are also less likely to own a vehicle at all, preferring to use relatively cheaper public transport. Vehicles owners in this segment use self-service bays more than any other industry service. The greater ability to wash vehicles from home due to relaxed water restrictions has caused a revenue decline for the segment over the past five years.

Private sector

Companies in the private sector often need their fleet vehicles washed and detailed. While the services used generally depend on the type of company, the segment is most likely to use in-bay and conveyor tunnel automatic washes. Large logistics companies with their own fleets of vehicles generally have their own wash facilities at a depot and do not use commercial car washes. The main demand from industry, therefore, comes from small delivery vehicles and vans, and passenger vehicles used as corporate cars and by car services. The resources boom has resulted in more company vehicles being driven on the road, leading to greater revenue share for the segment over the past five years.

Government sector

Vehicle fleets are managed by all levels of government. While similar to the private sector, the government sector largely owns passenger vehicles, which provide strong demand for the industry's services. However, due to the smaller size of the segment, the government sector's revenue share is much lower, and has decreased over the past five years due to rising vehicle ownership among households.

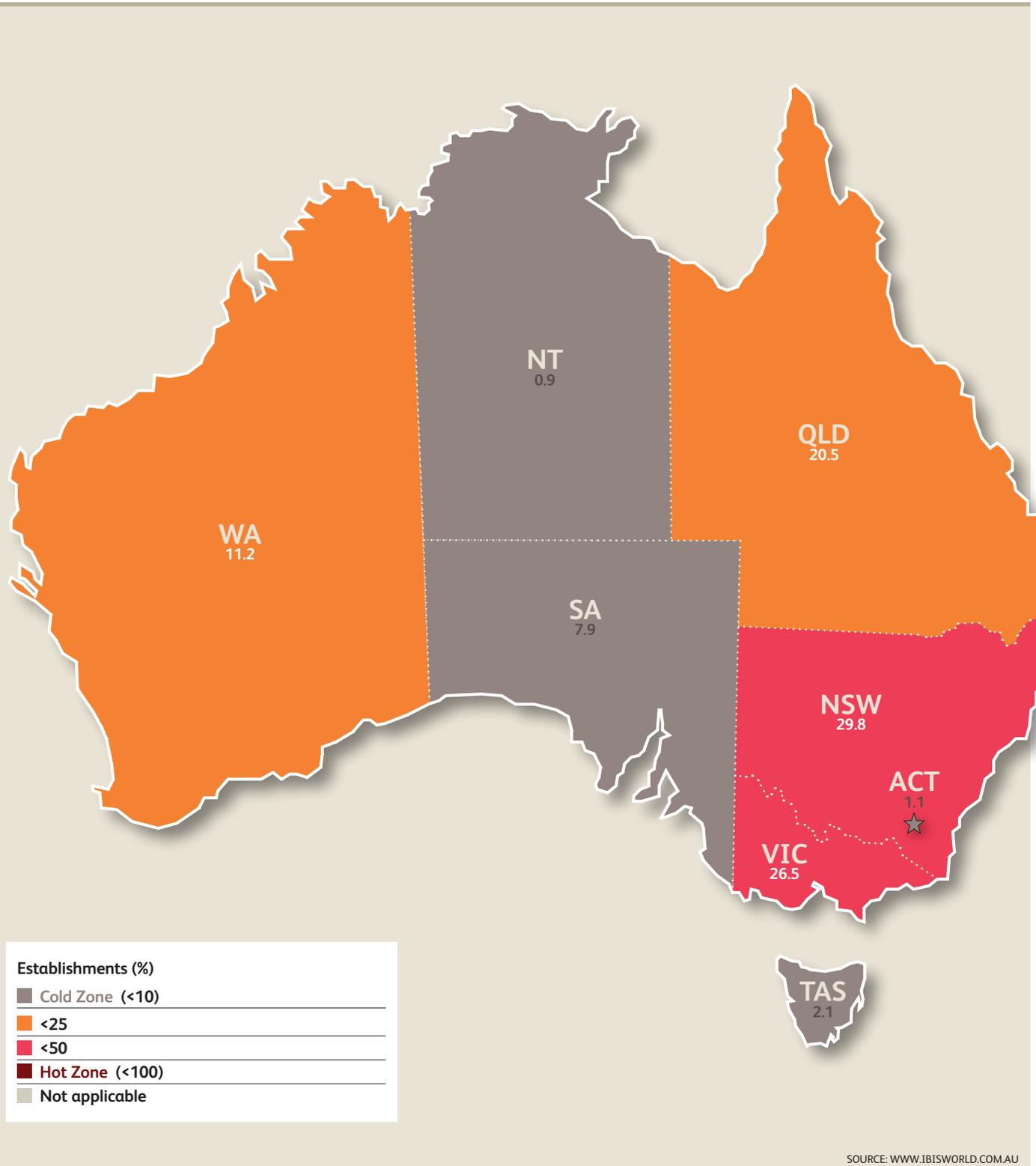
International Trade

The Car Wash and Detailing Services industry is service based, and therefore international trade is not a feature of the

industry. Although international tourists do use the industry's services, these are not recorded as imports or exports.

Products & Markets

Business Locations 2014-15

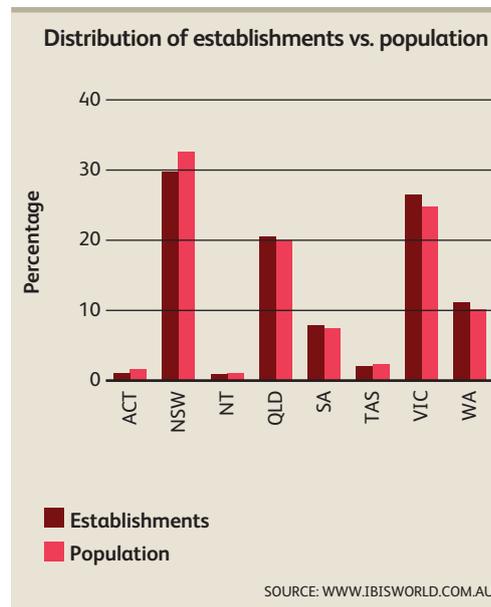


Products & Markets

Business Locations

In general, the location of car wash and detailing businesses is highly correlated with population and car ownership distribution. This means the states with the greatest number of car wash establishments are Victoria, New South Wales and Queensland. The industry first developed in Victoria and this has become its stronghold in terms of car wash businesses per capita. A high rate of car ownership in Victoria relative to New South Wales has also contributed to this. The industry's biggest player in terms of total revenue, Magic Hand Car Wash, started in Victoria and grew quickly in the state.

Currently Western Australia is exhibiting the fastest growth in the industry. Economic growth fuelled by the resources boom in Western Australia has given households access to greater incomes. Car owners in that state are able to splash out more on vehicle-



related cleaning and maintenance, although the resources boom is beginning to slow.

Competitive Landscape

Market Share Concentration | Key Success Factors | Cost Structure Benchmarks
Basis of Competition | Barriers to Entry | Industry Globalisation

Market Share Concentration

Level
Concentration in this industry is **Low**

The industry has a low level of market share concentration. IBISWorld expects that the top four operators account for less than 20% of industry revenue. The highly fragmented nature of the industry can be explained by the relatively low barriers to entry, along with the industry's highly competitive nature. A large number of car wash establishments are run as family businesses. Some operators own more than one car wash establishment,

typically all held in a certain state, territory or geographic region. While there are limited economies of scale to be gained from owning and operating more than one car wash, knowledge of the industry can assist with opening additional locations. The industry has consolidated to a small degree over the past five years though. Franchised establishments are becoming more common, as are operators with more than one establishment.

Key Success Factors

IBISWorld identifies 250 Key Success Factors for a business. The most important for this industry are:

Business expertise of operators

The industry is largely made up of small, privately owned operators, thereby making acquired knowledge on how to run day-to-day activities and deal with industry issues a key success factor.

Proximity to key markets

Proximity to arterial and busy roads and intersections is essential to industry success. The volume of passing traffic is a key determinant of the success of a car wash business.

Having a loyal customer base

Car wash operators compete on the basis of providing superior value and customer service, thereby making attracting and retaining a loyal customer

base crucial to success.

Access to the latest available and most efficient technology and techniques

Car washes with the most up-to-date technology will attract more customers and can charge higher prices. It also reduces the dependence on labour, thereby boosting the bottom line by lowering fixed costs.

Environmental awareness

The industry is subject to stringent environmental restrictions on water usage and effluent, and generates demand from the effect of environmental regulations on clients. Successful firms tend to promote an environmentally aware image and service.

Cost Structure Benchmarks

The Car Wash and Detailing Services industry is highly fragmented, offering different services based on varying business models. The industry's cost structure is therefore highly divergent, with segments such as automatic car washes requiring virtually no labour and high capital, while the mobile segment is highly labour intensive with lower capital investment.

Profit

Industry profit is estimated to account for 8.6% of revenue in 2014-15. While revenue growth has been minor over the past five years, the industry has

maintained healthy profit margins due to its low dependence on labour and growth in technology and systems. The majority of industry revenue is derived from automatic in-bay car washes and self-service bays that require little or no human involvement except for that of the customer. Furthermore, the emphasis on the environmental impact of home washing and growth in eco-friendly car washes have boded well for demand and, consequently, industry profitability.

Purchases

Purchases are expected to account for the largest share of industry costs, and

Competitive Landscape

Cost Structure Benchmarks continued

comprise cleaning and washing agents such as soaps, detergent, waxing and rinsing aids. Automated car washes have sophisticated machinery and equipment installed but do not require frequent replacement. Purchase costs have stayed relatively constant over the past five years.

Wages

Wages are estimated to account for 18.6% of revenue, down marginally from 2009-10. The bulk of industry revenue is generated from automated or self-service sources, and this ratio has grown over the past five years. As consumers use capital-intensive services, the industry's wage costs have fallen. Specialised detailing or mobile car wash services require much higher human involvement, but account for only a small portion of industry revenue. Workers that provide manual car wash services tend to work on a part-time basis, causing the industry's low average wage.

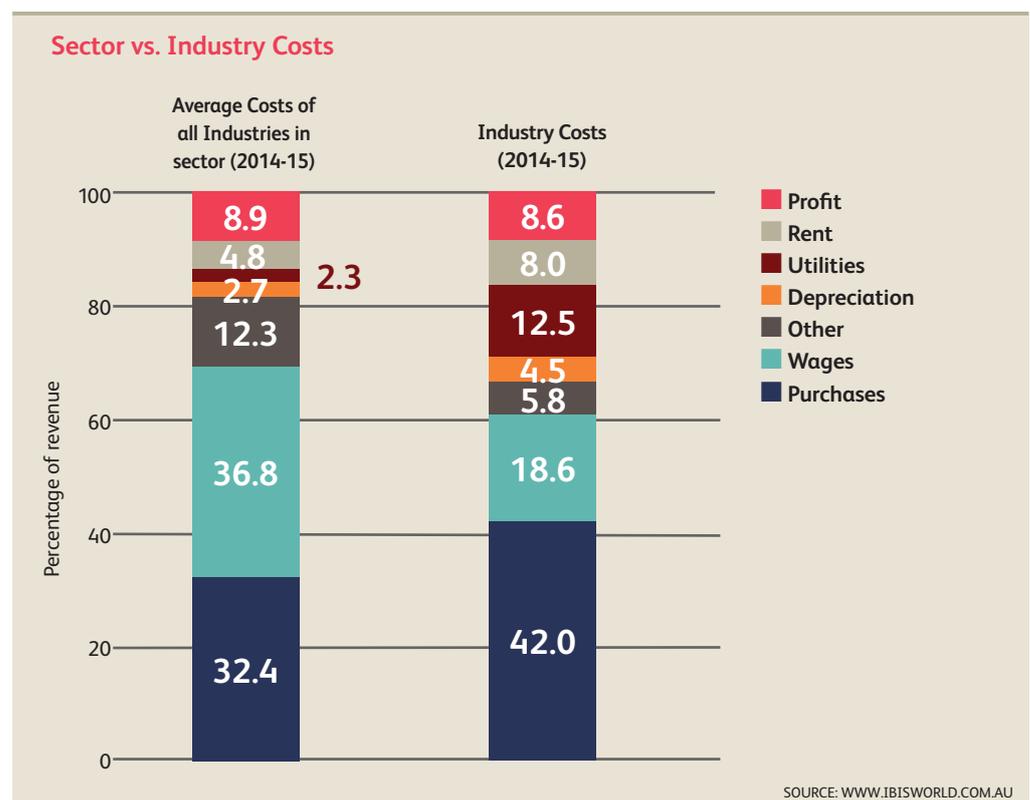
Rent and utilities

The industry is subject to high rent and

utility costs due to the primacy of location and dependence on water. The Australian Car Wash Association estimates that commercial car washes can use up to 50 litres of water per vehicle, with highly automated or technically advanced systems using even less water. Given Australia's highly restrictive water use policy, most car washes are required to abide by the Car Wash Water Saver Rating Scheme. Rent and utilities costs have remained relatively stable as a portion of revenue over the past five years.

Depreciation and other expenses

Depreciation costs make up a significant portion of revenue, as high capital investment is required for automated car wash equipment. There has been a rising level of capital investment over the past five years in line with the move towards increasingly automated washing and payment systems, resulting in expanding depreciation expense. Other expenses include marketing, insurance, security and administration.



Competitive Landscape

Basis of Competition

Level & Trend
 Competition in this industry is **High** and the trend is **Steady**

The Car Wash and Detailing Services industry is highly competitive due to its highly fragmented nature. Many small, independent operators compete on the basis of location, price and the type of services offered, while external competition comes in the form of factors pushing consumers to wash their vehicles at home.

Internal competition

The major point of competition within the industry is location and traffic visibility, particularly for conveyor tunnel, automated bay and manual self-serve bay car washes. Operators providing these services are generally similar in nature, and many consumers are likely to visit the operator in closest proximity to their home or work. These operators also compete on price, as consumers will often opt to use the service that is the most cost-effective. Local car washes can attempt to gain customer loyalty by offering discounts

and vouchers to local residents as a means of retention.

Car washes may offer additional services such as catering for specialist vehicle types (e.g. trucks and trailers) and offering oil and lube changes. Furthermore, more companies are providing Wi-Fi and cafe services and revamping their waiting rooms to differentiate themselves. Some car washes are located in proximity to other automotive care service providers (e.g. mechanical repair and body shops).

External competition

The major point of external competition for the industry comes from consumers washing their cars at home, rather than using the industry's services. Consumer goods can also act as an alternative to using the industry's services, with turtle wax and other polish products aiming to provide a different option to receiving a professional car wash and detail.

Barriers to Entry

Level & Trend
 Barriers to Entry in this industry are **Medium** and **Steady**

Barriers to entry in the Car Wash and Detailing Services industry are moderate. The initial level of capital investment is the biggest impediment to potential players. The industry's largest player, Magic Hand Car Wash, operates a franchising model with the average set-up cost estimated to be over \$200,000. However, set-up costs vary significantly depending on the type of service offered, as the mobile and self-service segments are significantly less capital-intensive than the highly automated conveyor tunnel and in-bay automatic car wash segments.

Barriers to entry relating to factors such as skills, inputs and regulation are minimal. The majority of workers in the industry are unskilled. New entrants have to abide by self-regulated environmental

Barriers to Entry checklist

Competition	High
Concentration	Low
Life Cycle Stage	Mature
Capital Intensity	Medium
Technology Change	Medium
Regulation & Policy	Medium
Industry Assistance	Low

SOURCE: WWW.IBISWORLD.COM.AU

policies, particularly with regard to water usage and chemical waste. While the highly fragmented nature of the industry suggests that the power of incumbent players is not daunting, the existence of a large number of car washes might deter potential entrants for fear of operating in a cluttered and mature market.

Competitive Landscape

Industry Globalisation

Level & Trend
Globalisation in this industry is **Low** and the trend is **Steady**

The Car Wash and Detailing Services industry has a low level of globalisation. The industry exclusively services the domestic market, with no international

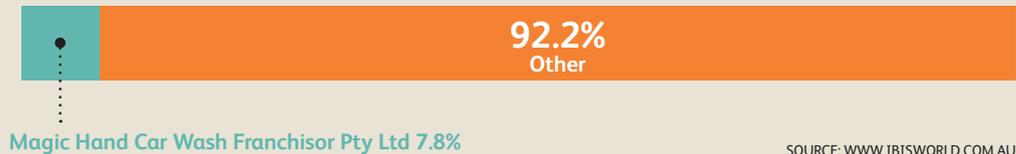
trade or evidence of foreign ownership outside of major oil companies that oversee car washes in petrol stations, such as BP Australia.

Major Companies

Magic Hand Car Wash Franchisor Pty Ltd | Other Companies

Major players

(Market share)



SOURCE: WWW.IBISWORLD.COM.AU

Player Performance

Magic Hand Car Wash Franchisor Pty Ltd
Market share: 7.8 %

Magic Hand Car Wash Franchisor Pty Ltd is the biggest provider of hand car-wash services in Australia and the industry's biggest player in terms of total revenue. Magic Hand Car Wash was founded in Melbourne in 1994 and is based on the idea of combining a car wash with a cafe. Magic Hand Car Wash has grown through a franchise model and currently has over 40 locations in Victoria, Queensland, South Australia, Western Australia and Tasmania. The company washes over 600,000 cars each year.

The company specialises in providing manual car wash and detailing services. For this reason, its labour costs are higher than those of automatic car wash operators. The number of Magic Hand Car Wash franchises grew quickly in the early half of the 2000s as cafe-style car washes became popular, although the company has realised diminishing returns to growth. A Magic Hand Car Wash franchise typically costs over \$200,000 to establish.

Financial performance

IBISWorld expects that combined revenue for Magic Hand Car Wash's

Magic Hand Car Wash - total franchise revenue*

Year	Revenue (\$ million)	(% change)
2009-10	31.6	9.3
2010-11	33.5	6.0
2011-12	36.0	7.5
2012-13	38.2	6.1
2013-14	39.8	4.2
2014-15	41.1	3.3

*Estimate

SOURCE: IBISWORLD

franchises increased by a compound annual rate of 5.4% over the five years through 2014-15, resulting in a small market share gain. Discretionary income for consumers grew over the five years and new car sales grew strongly. Consumers devoted more of their income towards the upkeep of their new vehicles, and Magic Hand Car Wash is well placed to satisfy these requirements as it provides upmarket, premium car-wash and detailing services.

Other Companies

The Car Wash and Detailing Services industry is highly fragmented, with only one major player with a market share greater than 5.0%. The range of services provided by operators in the industry contributes to the low level of market concentration as some operators specialise in a certain type of car wash. Other significant players include BP Australia, which operates 50 automated

Superwash sites, along with Mpower Franchising, which is the parent company of mobile detailer Car Care Australia.

BP Australia Investments Pty Ltd

Estimated market share: 4.9 %

BP Australia Investments Pty Ltd is a fully owned subsidiary of major oil company BP PLC. There are about 1,400 BP service

Major Companies

Other Companies continued

stations in Australia. The ownership structure of BP sites varies from company owned, to franchise, to distributor owned. BP operates in the Car Wash and Detailing Services industry through its automated car wash brand, BP Superwash, of which there are 50 throughout Australia. BP also has a large number of self-serve car washes at its fuel retailing sites. The company has a particularly strong car wash presence in Western Australia, where 18 of the company's 50 Superwash sites are located.

Mpower Franchising Pty Ltd

Estimated market share: 3.3 %

Mpower Franchising Pty Ltd is the

parent company of Car Care Australia Pty Ltd, a major franchiser of mobile car washing and detailing services. With over 200 franchises across Australia, Car Care has the largest network of sites in the industry. The franchise model offers convenience for both franchisees and customers as car owners are able to call a central phone number and be allocated the closest available franchisee. Due to the convenience and full detailing services Car Care franchisees offer, services are priced at the premium end of the market. Depending on the state, a full detail service can cost more than \$200.

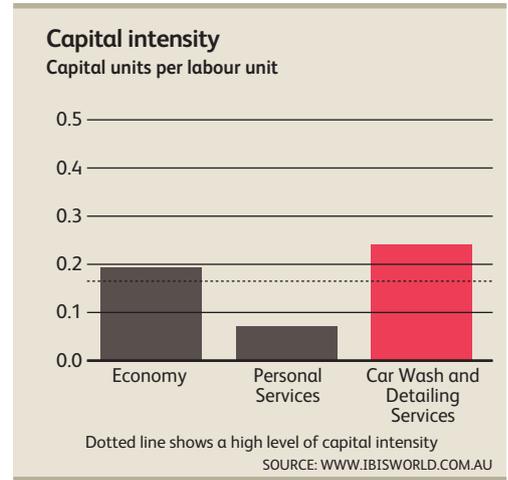
Operating Conditions

Capital Intensity | Technology & Systems | Revenue Volatility
 Regulation & Policy | Industry Assistance

Capital Intensity

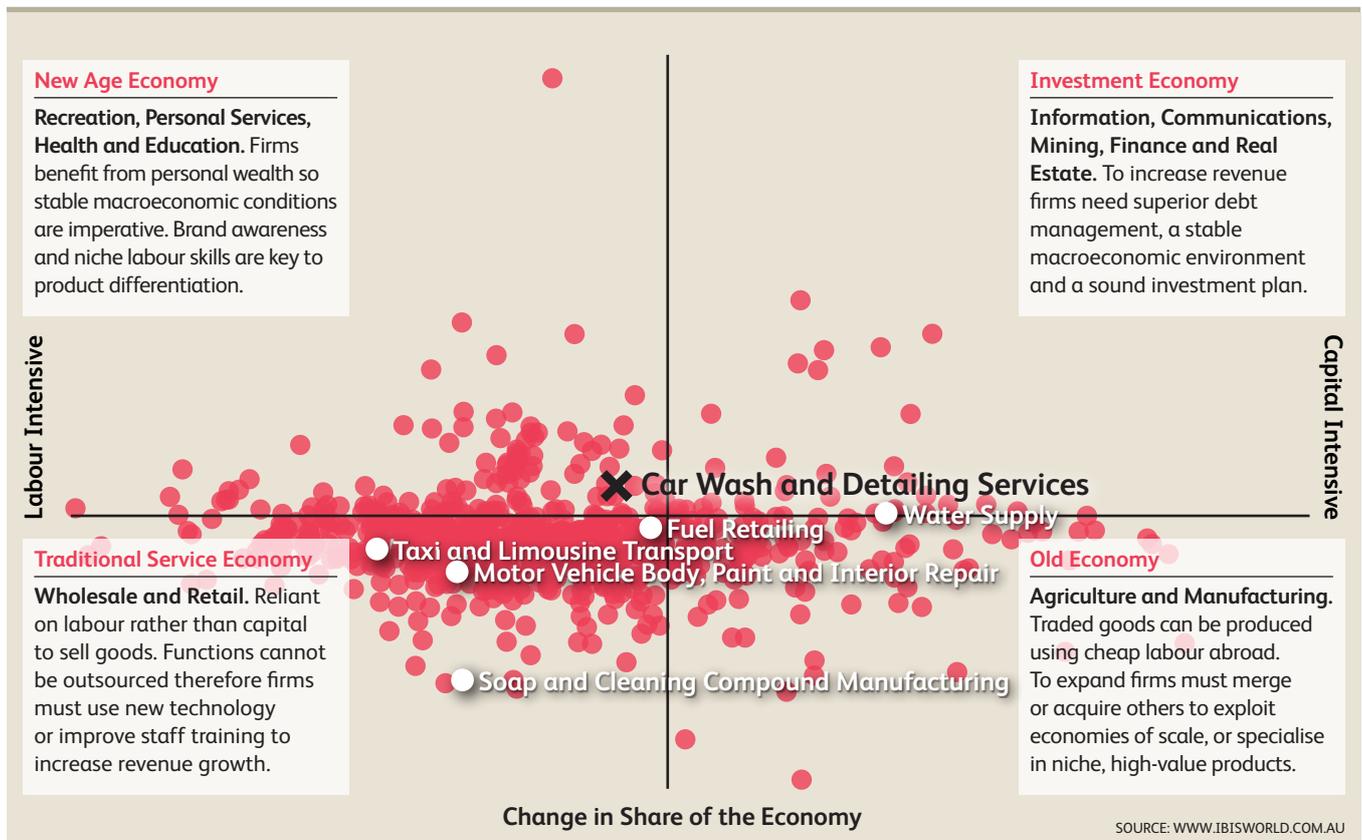
Level
 The level of capital intensity is **Medium**

The Car Wash and Detailing Services industry exhibits a moderate level of capital intensity. IBISWorld estimates the industry invests \$0.24 in capital for every dollar spent on wages. Capital intensity varies between firms according to the facilities of a car wash. Conveyor tunnel and in-bay automatic washes require much higher levels of capital outlay as the services provided rely on the equipment used - it is either used by the customer or is fully automated machinery. Full service providers and detailers have higher wage costs, as there is a significant labour component involved. Capital intensity has increased over the past five years, as industry operators look to capitalise on the



efficiencies afforded by automation and self-serve car washes.

Tools of the Trade: Growth Strategies for Success



Labour Intensive

Capital Intensive

X Car Wash and Detailing Services

● Fuel Retailing

● Water Supply

● Taxi and Limousine Transport

● Motor Vehicle Body, Paint and Interior Repair

● Soap and Cleaning Compound Manufacturing

Operating Conditions

Technology & Systems

Level
The level of Technology Change is **Medium**

The Car Wash and Detailing Services industry has been the beneficiary of various technological developments over the past decade. Perhaps the most important progress made in the Australian context has been in improvements in water efficiency of machines. This is particularly important due to strictly imposed water restrictions in some parts of Australia. Most advanced car wash machines now recycle up to 85% of the water they use and use less water than the average shower. It is important for recycling systems to be able to control bacteria, as automatic equipment can be particularly sensitive to water particle size. Coupled

with more energy efficient equipment, these advancements have helped operators significantly reduce their environmental footprint.

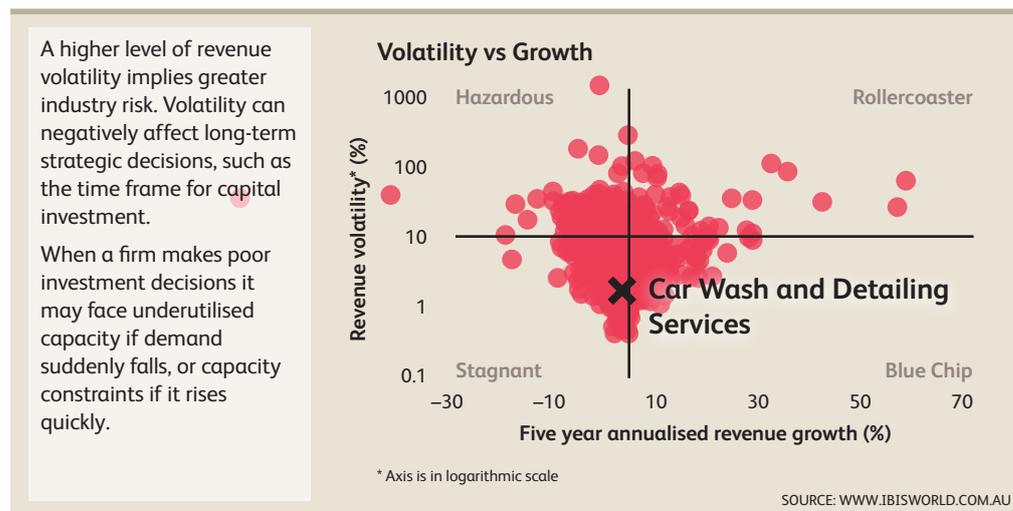
In response to the concerns of car owners surrounding vehicle damage caused by friction-based brushes, touch-free technology is now employed by many car wash operators. Touch-free technology uses high-pressure water jets and chemical integration to clean the vehicle, so that there is no physical contact by wash equipment. These improvements have led to increased productivity, a reduction in operating costs and less of a reliance on labour inputs throughout the industry.

Revenue Volatility

Level
The level of Volatility is **Low**

The industry has a low level of revenue volatility. While some external factors can lead to spikes or lulls in revenue, the high degree of car ownership in Australia underpins demand for the industry's services. The number of motor vehicles on Australian roads has increased significantly over the past five years, leading to steady demand growth for the

industry. The availability of water has similarly increased though, providing consumers with greater means to wash their vehicles at home rather than within the industry's facilities. The general consistency of these trends has led to consistency in demand for car wash and detailing services, ultimately resulting in low revenue volatility.



Operating Conditions

Regulation & Policy

Level & Trend

The level of Regulation is **Medium** and the trend is **Increasing**

The level of regulation in the industry is increasing and is likely to intensify further over the next decade. To date, most regulation has been self-enforced as the industry has sought to uphold its reputation and stay ahead of the curve relating to environmental awareness. Car wash operators can apply to obtain a Water Safety Rating that is approved by the federal water efficiency label and Smart Approved WaterMark.

All commercial car wash operations must have a valid Trade Waste Agreement with the relevant water authority. This agreement governs the safe discharge of trade waste effluent into the sewerage system. Trade waste discharged by car washes is considered medium to high risk due to the chemicals

it contains. Typically, operators must lodge an application that describes the water's treatment prior to entering the sewerage system and a list of the hazardous chemicals used.

Over the past five years the Fair Work Ombudsman has focused on the industry's industrial relations. A number of manual car wash operators have been accused of under-paying casual workers. In 2009, Reiquin Pty Ltd and its director Richard Timothy Reid were fined \$207,900 for underpaying staff at the Royal Melbourne Car Wash in Melbourne. In late 2012, the Fair Work Ombudsman announced it was seeking prosecution of Crystal Carwash Cafe Pty Ltd for underpaying workers at a string of Sydney car wash sites.

Industry Assistance

Level & Trend

The level of Industry Assistance is **Low** and the trend is **Steady**

The industry does not receive any direct assistance from the federal or state governments. The industry is supported by the Australian Car Wash Association, which lobbies on behalf of car wash and detailing businesses and provides

information and assistance to members. Although it does not administer the standard, the association played an active role in the development and implementation of the Water Saver Rating system.

Key Statistics

Industry Data

	Revenue (\$m)	Industry Value Added (\$m)	Establishments	Enterprises	Employment	Exports	Imports	Wages (\$m)	Domestic Demand
2005-06	430.1	141.9	2,813	2,263	4,419	--	--	87.2	N/A
2006-07	440.7	144.0	2,854	2,298	4,470	--	--	89.4	N/A
2007-08	451.5	147.7	2,855	2,303	4,508	--	--	91.2	N/A
2008-09	458.5	142.1	2,908	2,321	4,521	--	--	91.3	N/A
2009-10	466.3	152.3	2,936	2,342	4,564	--	--	92.6	N/A
2010-11	473.2	151.2	2,964	2,360	4,582	--	--	92.6	N/A
2011-12	488.5	155.4	2,980	2,382	4,610	--	--	93.9	N/A
2012-13	516.2	163.9	3,009	2,390	4,625	--	--	96.8	N/A
2013-14	520.7	165.6	3,056	2,413	4,688	--	--	97.9	N/A
2014-15	526.8	167.2	3,099	2,432	4,714	--	--	98.2	N/A
2015-16	539.3	167.0	3,165	2,476	4,769	--	--	99.0	N/A
2016-17	546.4	169.2	3,178	2,492	4,831	--	--	100.4	N/A
2017-18	565.2	175.3	3,248	2,513	4,910	--	--	102.4	N/A
2018-19	571.4	176.5	3,264	2,525	4,922	--	--	102.8	N/A
2019-20	584.1	179.0	3,315	2,536	4,941	--	--	103.7	N/A

Annual Change

	Revenue (%)	Industry Value Added (%)	Establishments (%)	Enterprises (%)	Employment (%)	Exports (%)	Imports (%)	Wages (%)	Domestic Demand (%)
2006-07	2.5	1.5	1.5	1.5	1.2	N/A	N/A	2.5	N/A
2007-08	2.5	2.6	0.0	0.2	0.9	N/A	N/A	2.0	N/A
2008-09	1.6	-3.8	1.9	0.8	0.3	N/A	N/A	0.1	N/A
2009-10	1.7	7.2	1.0	0.9	1.0	N/A	N/A	1.4	N/A
2010-11	1.5	-0.7	1.0	0.8	0.4	N/A	N/A	0.0	N/A
2011-12	3.2	2.8	0.5	0.9	0.6	N/A	N/A	1.4	N/A
2012-13	5.7	5.5	1.0	0.3	0.3	N/A	N/A	3.1	N/A
2013-14	0.9	1.0	1.6	1.0	1.4	N/A	N/A	1.1	N/A
2014-15	1.2	1.0	1.4	0.8	0.6	N/A	N/A	0.3	N/A
2015-16	2.4	-0.1	2.1	1.8	1.2	N/A	N/A	0.8	N/A
2016-17	1.3	1.3	0.4	0.6	1.3	N/A	N/A	1.4	N/A
2017-18	3.4	3.6	2.2	0.8	1.6	N/A	N/A	2.0	N/A
2018-19	1.1	0.7	0.5	0.5	0.2	N/A	N/A	0.4	N/A
2019-20	2.2	1.4	1.6	0.4	0.4	N/A	N/A	0.9	N/A

Key Ratios

	IVA/Revenue (%)	Imports/Demand (%)	Exports/Revenue (%)	Revenue per Employee (\$'000)	Wages/Revenue (%)	Employees per Est.	Average Wage (\$)	Share of the Economy (%)
2005-06	32.99	N/A	N/A	97.33	20.27	1.57	19,732.97	0.01
2006-07	32.68	N/A	N/A	98.59	20.29	1.57	20,000.00	0.01
2007-08	32.71	N/A	N/A	100.16	20.20	1.58	20,230.70	0.01
2008-09	30.99	N/A	N/A	101.42	19.91	1.55	20,194.65	0.01
2009-10	32.66	N/A	N/A	102.17	19.86	1.55	20,289.22	0.01
2010-11	31.95	N/A	N/A	103.27	19.57	1.55	20,209.52	0.01
2011-12	31.81	N/A	N/A	105.97	19.22	1.55	20,368.76	0.01
2012-13	31.75	N/A	N/A	111.61	18.75	1.54	20,929.73	0.01
2013-14	31.80	N/A	N/A	111.07	18.80	1.53	20,883.11	0.01
2014-15	31.74	N/A	N/A	111.75	18.64	1.52	20,831.57	0.01
2015-16	30.97	N/A	N/A	113.08	18.36	1.51	20,759.07	0.01
2016-17	30.97	N/A	N/A	113.10	18.37	1.52	20,782.45	0.01
2017-18	31.02	N/A	N/A	115.11	18.12	1.51	20,855.40	0.01
2018-19	30.89	N/A	N/A	116.09	17.99	1.51	20,885.82	0.01
2019-20	30.65	N/A	N/A	118.21	17.75	1.49	20,987.65	0.01

Jargon & Glossary

Industry Jargon

CONVEYOR TUNNEL WASH Tunnel washes use a conveyor to move the vehicle through a series of fixed cleaning mechanisms.

DETAILING The cleaning, polishing and waxing of the outside and inside of a motor vehicle. It can also include the rejuvenation of the vehicle's surfaces.

IN-BAY AUTOMATIC CAR WASH A type of car wash where the vehicle remains stationary while an automatic machine cleans it.

IBISWorld Glossary

BARRIERS TO ENTRY High barriers to entry mean that new companies struggle to enter an industry, while low barriers mean it is easy for new companies to enter an industry.

CAPITAL INTENSITY Compares the amount of money spent on capital (plant, machinery and equipment) with that spent on labour. IBISWorld uses the ratio of depreciation to wages as a proxy for capital intensity. High capital intensity is more than \$0.333 of capital to \$1 of labour; medium is \$0.125 to \$0.333 of capital to \$1 of labour; low is less than \$0.125 of capital for every \$1 of labour.

CONSTANT PRICES The dollar figures in the Key Statistics table, including forecasts, are adjusted for inflation using the current year (i.e. year published) as the base year. This removes the impact of changes in the purchasing power of the dollar, leaving only the 'real' growth or decline in industry metrics. The inflation adjustments in IBISWorld's reports are made using the Australian Bureau of Statistics' implicit GDP price deflator.

DOMESTIC DEMAND Spending on industry goods and services within Australia, regardless of their country of origin. It is derived by adding imports to industry revenue, and then subtracting exports.

EMPLOYMENT The number of permanent, part-time, temporary and casual employees, working proprietors, partners, managers and executives within the industry.

ENTERPRISE A division that is separately managed and keeps management accounts. Each enterprise consists of one or more establishments that are under common ownership or control.

ESTABLISHMENT The smallest type of accounting unit within an enterprise, an establishment is a single physical location where business is conducted or where services or industrial operations are performed. Multiple establishments under common control make up an enterprise.

EXPORTS Total value of industry goods and services sold by Australian companies to customers abroad.

IMPORTS Total value of industry goods and services brought in from foreign countries to be sold in Australia.

INDUSTRY CONCENTRATION An indicator of the dominance of the top four players in an industry. Concentration is considered high if the top players account for more than 70% of industry revenue. Medium is 40% to 70% of industry revenue. Low is less than 40%.

INDUSTRY REVENUE The total sales of industry goods and services (exclusive of excise and sales tax); subsidies on production; all other operating income from outside the firm (such as commission income, repair and service income, and rent, leasing and hiring income); and capital work done by rental or lease. Receipts from interest royalties, dividends and the sale of fixed tangible assets are excluded.

INDUSTRY VALUE ADDED (IVA) The market value of goods and services produced by the industry minus the cost of goods and services used in production. IVA is also described as the industry's contribution to GDP, or profit plus wages and depreciation.

INTERNATIONAL TRADE The level of international trade is determined by ratios of exports to revenue and imports to domestic demand. For exports/revenue: low is less than 5%; medium is 5% to 20%; and high is more than 20%. Imports/domestic demand: low is less than 5%; medium is 5% to 35%; and high is more than 35%.

LIFE CYCLE All industries go through periods of growth, maturity and decline. IBISWorld determines an industry's life cycle by considering its growth rate (measured by IVA) compared with GDP; the growth rate of the number of establishments; the amount of change the industry's products are undergoing; the rate of technological change; and the level of customer acceptance of industry products and services.

NONEMPLOYING ESTABLISHMENT Businesses with no paid employment or payroll, also known as nonemployers. These are mostly set up by self-employed individuals.

PROFIT IBISWorld uses earnings before interest and tax (EBIT) as an indicator of a company's profitability. It is calculated as revenue minus expenses, excluding interest and tax.

VOLATILITY The level of volatility is determined by averaging the absolute change in revenue in each of the past five years. Volatility levels: very high is more than $\pm 20\%$; high volatility is $\pm 10\%$ to $\pm 20\%$; moderate volatility is $\pm 3\%$ to $\pm 10\%$; and low volatility is less than $\pm 3\%$.

WAGES The gross total wages and salaries of all employees in the industry. Benefits and on-costs are included in this figure.

At IBISWorld we know that industry intelligence is more than assembling facts

It is combining data with analysis to answer the questions that successful businesses ask

Identify high growth, emerging & shrinking markets
Arm yourself with the latest industry intelligence
Assess competitive threats from existing & new entrants
Benchmark your performance against the competition
Make speedy market-ready, profit-maximising decisions



Who is IBISWorld?

We are strategists, analysts, researchers, and marketers. We provide answers to information-hungry, time-poor businesses. Our goal is to provide real world answers that matter to your business in our 500 Australian industry reports. When tough strategic, budget, sales and marketing decisions need to be made, our suite of Industry and Risk intelligence products give you deeply-researched answers quickly.

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