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CANADIAN CARWASH ASSOCIATION



MARCH 2009

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INDUSTRY FORUM



HIT IT OUT OF THE PARK AGM and Networking Event

The Annual General Meeting of the Canadian Carwash Association will be held Thursday, April 23, 2009 at the Playdium in Mississauga, ON. The event includes a dinner, social event and networking. Join us for a night of hitting it out of the park at spring training in the batting cages, strike it big in the bowling lanes or simply enjoy an opportunity to network with fellow carwash operators and key suppliers to the carwash industry. A notice of the meeting will be mailed to all CCA members and details and registration information is available on our website www.canadiancarwash.ca or call the National Office at 416-239-0339.

CCA AT CARWACS

Plan now to attend our professional development workshops or drop by our booth at the 2009 CARWACS shows in Toronto March 10 & 11 at the Toronto Congress Centre, Toronto and in Calgary May 12-13 at the Calgary Telus Convention Centre. For registration and show information visit www.carwacs.com or call 1-877-585-4033.



4Q RESULTS 2008

Wash Volume Report

National results for the fourth quarter of 2008 reveal that 882 carwashes reported wash volumes of 4,363,662 cycles; average quarterly revenues per site of \$37,128 and average revenues per cycle of \$7.50. Average cycles per site dropped by 9% to 4,947 over last year. Total wash cycles figures represent a 5% decrease in wash cycles from the fourth quarter of 2007 and a 5% decrease in average revenues per site, and a decrease of 5% in total carwash revenues per site. The average revenue per cycle did increase 5.4% from fourth quarter 2007 to 2008 (see table).

However, regional variances for total cycles show that the Greater Toronto Region was down 20.3% while the rest of the province of Ontario matched the national average decrease of 13%. British Columbia increased by 8% over last year, Alberta was down 9.7% and the Prairies were just above the national average decrease at 11.1%. Quebec overall was down 16.8% while the Atlantic region was down 11.1%.

The annual number of total wash cycles dropped 13.2% from 24,417,248 in 2007 to 21,188,150 in 2008.

The WVR program provides participants with both national and regional reports on a quarterly basis showing

FIVE YEAR SUMMARY OF 4TH QUARTER RESULTS

QUARTER	SITES	TOTAL CYCLES	TOTAL REVENUE	AVERAGE REVENUE PER CYCLE	AVERAGE REVENUE PER SITE	AVERAGE CYCLES PER SITE
Q4 2008	882	4,363,662	\$32,746,686	\$7.50	\$37,128	4,947
Q4 2007	880	4,835,193	\$34,437,836	\$7.12	\$39,134	5,495
Q4 2006	892	5,429,526	\$36,679,134	\$6.76	\$41,120	6,087
Q4 2005	907	5,429,446	\$34,276,710	\$6.31	\$37,791	5,986
Q4 2004	887	5,258,036	\$32,225,826	\$6.13	\$36,331	5,928

monthly wash volumes by participant (number of wash cycles) and aggregate revenues, average revenue per wash, trend information, wash and industry totals, including benchmarking data for carwash sites and companies. The reports assist participants to determine market share and industry performance. Reports are prepared in 14 regions of the country.

CCA Wash Volume Reports allow participating members to compare their carwash operations performance with that of other similar operators both locally and nationally, identify seasonal variations, assess the performance of their business, understand how the overall carwash market is performing and make informed decisions regarding new locations or expansion. The program is provided at no cost to participating CCA members.

The Canadian Carwash Association's (CCA) market research program for its members provides reliable data, collected and analyzed by Kent Marketing Services Limited, on the carwash industry in Canada. The Wash Volume Report (WVR) program, launched in 2004 and developed exclusively for the CCA, gives members the ability to monitor data to determine if their sales are being influenced by site selection, marketing, weather or other economic factors.

NEW MEMBERS

- NORTHERN OASIS CAR WASH LTD, CHETWYND, BC
- WONDER WASH CAR WASH, HUNTSVILLE, ON
- MARANDY'S CAR TRUCK WASH, SMITHERS, BC
- GARRY CAR WASH, TORONTO, ON
- EAST HAMILTON AUTO SERVICE, HAMILTON, ON
- 1192981 ONTARIO LTD, RICHMOND HILL, ON
- PALM SPRINGS CARWASH, BRADFORD, ON