



Auto Service

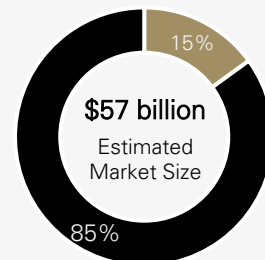
Defensive sector supported by a growing base of vehicles in operation and increasing average vehicle age

1.9%

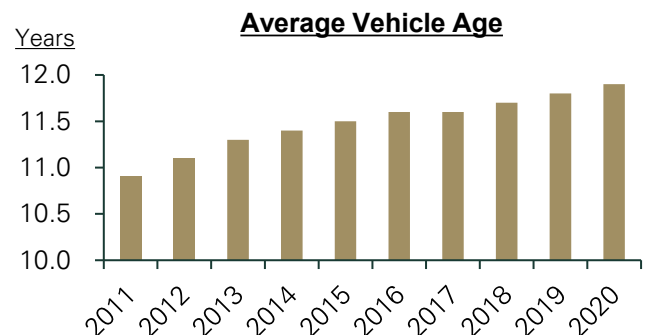
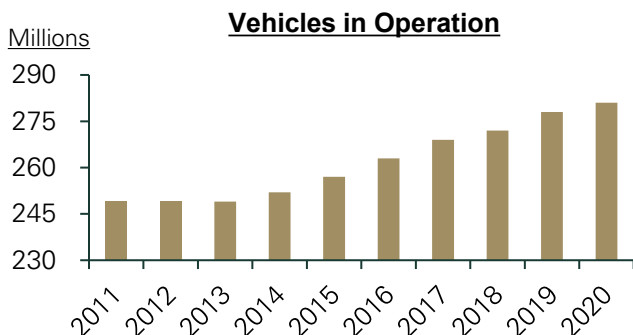
OF TOTAL ABR
(as of September 30, 2021)

- 1) Broad sector, includes preventative maintenance and total car care (tires, brakes, oil), as well as collision and repair
- 2) Demand is generally needs-based and resistant to economic downturns
- 3) Increasing vehicle complexity also driving demand for "do it for me" services
- 4) Fragmented industry offers consolidation opportunity for operators, and real estate investment opportunities for Getty

Industry Market Share



■ Top 10 Companies ■ Other



Note: All data and charts sourced from the 2021 Autocare Factbook. Industry Market Share reflects Automotive Maintenance sector which includes oil changes, preventative maintenance and total car care (brakes, heating and cooling systems, exhaust and tires).