



Auto Service

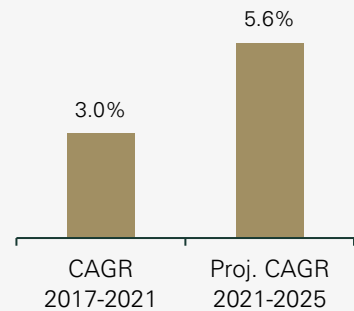
Defensive sector supported by a growing base of vehicles in operation and increasing average vehicle age

2.3%

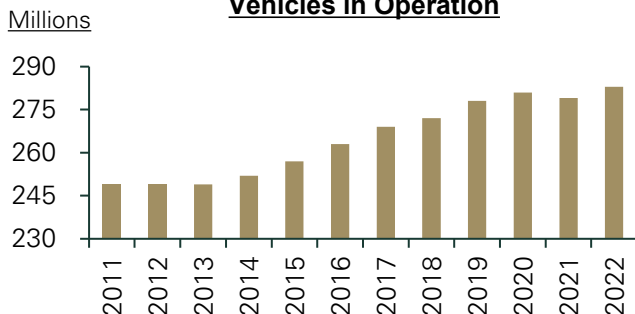
OF TOTAL ABR
(as of June 30, 2022)

- 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

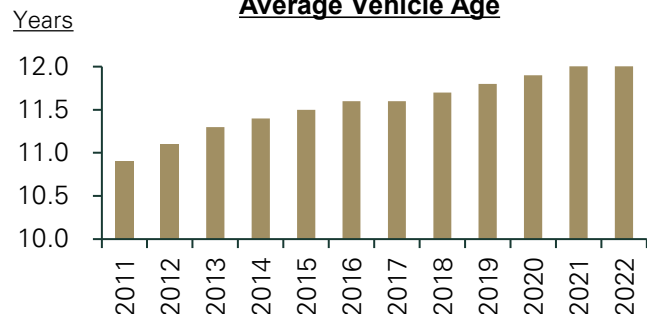
Industry Sales Growth



Vehicles in Operation



Average Vehicle Age



Note: All data and charts sourced from the 2023 Autocare Factbook.