



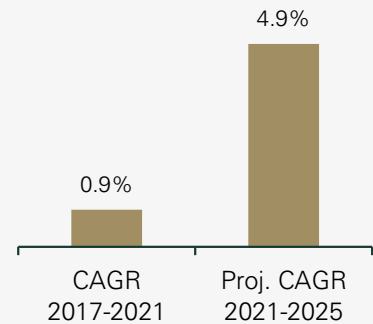
Car Wash

Growth sector benefitting from large base of vehicles in operation and consumer preference for “do it for me” services

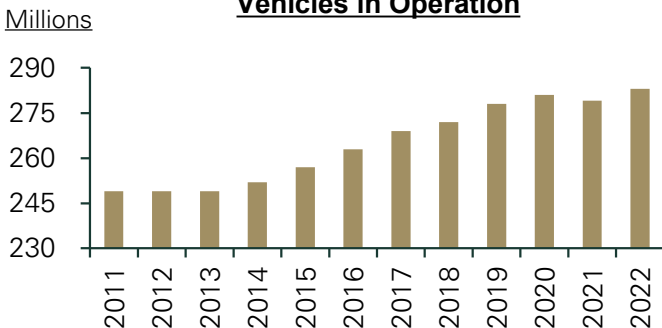
16.8%
OF TOTAL ABR
(as of September 30, 2023)

- 1) Focus on automated, express-style tunnel car washes
- 2) Consumer demand for speed, quality and convenience supporting sector growth
- 3) Subscription models and technology investments driving profitability and certain environmental benefits
- 4) Institutional capital consolidating fragmented industry generates real estate investment opportunities for Getty

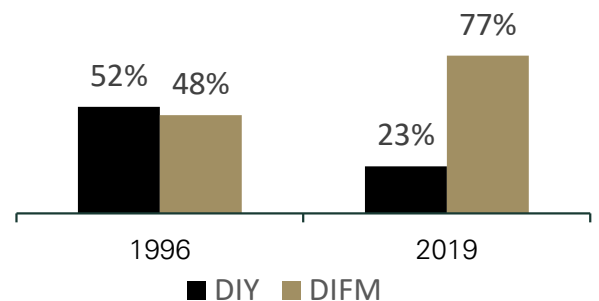
Industry Sales Growth



Vehicles in Operation



Consumer Preference (DIY vs. DIFM)



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