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THE FUTURE OF STUDENT LAUNDRY

ZUBE INVESTORS PACK 2026

WWW.STUDENTLAUNDRY.CO.UK

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EFFORTLESS LAUNDRY SOLUTIONS

THE ALL IN ONE PROVIDER:

COLLECT > **WASH** > DRY > **FOLD** > DELIVER

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INTRODUCTION

Zube, an award winning, disruptive, tech start-up, which aims to revolutionise the UK's outdated student and PBSA (Purpose Built Student Accommodation) laundry market, by connecting students, universities, schools, colleges and PBSA operators with an advanced network of Purpose Built Student Laundries (PBSL).

This innovative SaaS based project features IoT-enabled laundry lockers, AI-powered logistics, electric vehicles/ eCargo delivery bikes, eco-friendly laundry technology machines, bio degradable detergents, sustainable laundry production facilities, processes & infrastructures.

The initiative also supports well-being, education inequality, clean water initiatives and mental health awareness, making it an ideal choice for students, universities and PBSA operators.

A student-led model:

The organization is dedicated to aligning its efforts with the needs and values of the student community.



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Student Laundry

www.studentlaundry.co.uk

CURRENT CHALLENGES

Market research & the latest GSL index data indicate that laundry is now almost at tipping point - a notable concern for students & Purpose-Built Student Accommodation providers.

- 1. Student Surveys:** Laundry services frequently appear among top concerns, including issues of availability and costs
- 2. Focus Groups:** Students report frustration with time spent on laundry, especially during peak usage
- 3. Market Research:** Inadequate laundry options are linked to reduced resident satisfaction and retention rates
- 4. Feedback Platforms:** Dissatisfaction with laundry services is commonly noted in online reviews



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STUDENT PAIN POINTS:

Time Management:

Students often struggle to find time in their busy schedules to complete laundry tasks, leading to added stress.



Affordability:

The expenses associated with laundry and dry-cleaning services can accumulate quickly, impacting students' budgets.



Delays:

Students frequently experience delays when utilizing laundry facilities, which can disrupt their schedules.



Quality Issues:

Inconsistent washing and drying performance can negatively affect the overall laundry experience.



Limited Access:

Prescribed washer and dryer rations (75:1 bed IIRC) mean that at times of peak demand availability becomes frustratingly limited.



Lack of Additional Services:

There is a notable demand for services like duvet and bedding laundry, dry cleaning, and care for specialized garments, including feather and down-filled coats, 'hand wash' only & 'do not tumble dry' items.



MARKET GAP:

The market currently features outdated laundry service providers that frequently lack quality, premium garment care options, innovation, and adaptability. This gap presents an opportunity for Zube to introduce an innovative approach.



CURRENT FRUSTRATIONS FOR PBSA OPERATORS:



✓ Modernisation:

Inefficient and outdated laundry machines.

✓ Frequent Machine Breakdowns:

Regular maintenance and repairs are inconvenient.

✓ Limited Nationwide Solutions:

Few providers offer comprehensive UK coverage.

✓ High Energy Costs:

Increased operational costs and environmental concerns are significant.

✓ Space Utilisation:

Valuable building space is occupied by laundry facilities.

✓ Regulatory Compliance:

Stricter fire safety and health regulations demand attention.

✓ Negative Resident Feedback:

Poor laundry quality and a lack of customization often lead to lower tenant satisfaction, adversely affecting PBSA reputation and retention rates.



COMPETITOR LANDSCAPE

Zube provides laundry solutions for students and Purpose Built Student Accommodation (PBSA) operators, focusing on sustainability and technology.

- 1. The existing PBSA laundry market** mainly relies on outdated machines, leading to high resource use and low satisfaction, which increases the need for more efficient options and user convenience.
- 2. Traditional laundrettes** often have limited self-service features and lack modern technology, with some not prioritizing environmental responsibility.
- 3. Domestic washing machines** within HMOs and higher-end assets (such as studio apartments), can be resource-intensive and prone to breakdowns leading to high maintenance costs.
- 4. Laundry apps** often deal with higher costs and subcontractor reliance, leading to inconsistent service and delays. In contrast, Zube maintains its own infrastructure, ensuring reliable service and accountability.





OPPORTUNITIES

This situation presents an opportunity for innovative laundry solutions that can enhance both the student experience and operational efficiencies for their accommodation providers.

WHY CHOOSE ZUBE?

✓ Extensive Network of PBSL:

Zube offers a comprehensive network of (PBSL) Purpose-Built Student Laundries, ensuring nationwide coverage and consistent quality across locations.

✓ Convenience for Students:

Our services are designed to provide ease, value and accessibility, allowing students to focus on their studies without the hassle of laundry logistics.

✓ Additional Premium Services:

Zube offers duvet and bedding laundry, dry cleaning, and delicate item care for 'do not tumble dry' and hand wash only items.

✓ Flexible Laundry Subscription Plans:

Our choice of flexible subscription plans accommodates varying student lifestyles and budgets, promoting user engagement and satisfaction.

✓ ESG Policies:

Zube's environmental, social, and governance (ESG) policies align with the values of both students and PBSA operators, a commitment to sustainability and well-being.

✓ Student-Led Model:

Our operations prioritize student input and feedback, ensuring our services are tailored to meet their preferences and needs.

✓ Regulatory Compliance:

Zube provides a comprehensive solution that includes collection, cleaning, and delivery, streamlining the laundry process while enhancing overall service efficiency.

✓ Increased Revenue & Asset Value

Our partnership provides opportunities for earnings through various commission structures, including multiple subscription and pay-as-you-go models, as well as ZUBE commercial short-term rental turnover. This framework enables operators to leverage additional revenue streams effectively.

MARKET INSIGHTS:

Parents prioritize affordability, reliability, and eco-friendliness in their decisions, presenting an opportunity for targeted marketing of convenient laundry solutions for their children.

Specialised high value premium add on services and uplifts are frequently purchased by international students.



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SERVICES AND PRICING PLANS



Market research indicates that over 80% of students are willing to subscribe to a better, more convenient & sustainable laundry service.

SERVICE OFFERINGS:

✓ Subscription Options

A variety of flexible laundry subscription plans to suit individual budgets allowing them to pre-pay for services for their entire term, resulting in potential savings.

✓ Pay-As-You-Go Services

Pay as-you-go service for those who prefer the flexibility of only paying for laundry services as they use them - allowing access to on-demand solutions only when needed.

✓ Additional Premium Services:

Duvet and bedding laundry, dry cleaning, steam ironing and delicate item care options for 'do not tumble dry' and 'hand wash' only items.

✓ Zube for Parents:

This initiative enables parents to pre-pay for their child's laundry needs, while also providing access to exclusive offers and incentives.

ZUBE Mega Deals & Extras:



GROWTH AND ROLL OUT PLAN



STRATEGIC OVERVIEW:

Zube's growth strategy focuses on establishing a scalable operational model that allows national PBSA operators to centralise their multi-site laundry contracts with a single service provider, offering convenience and consistent service quality.

SCALABILITY AND LONG-TERM IMPACT:

Phase 1: North East (Newcastle, Durham, Sunderland, Teesside)

The Newcastle prototype will serve as a blueprint for future expansions and replication into additional cities.

Phase 2: North West (2026)

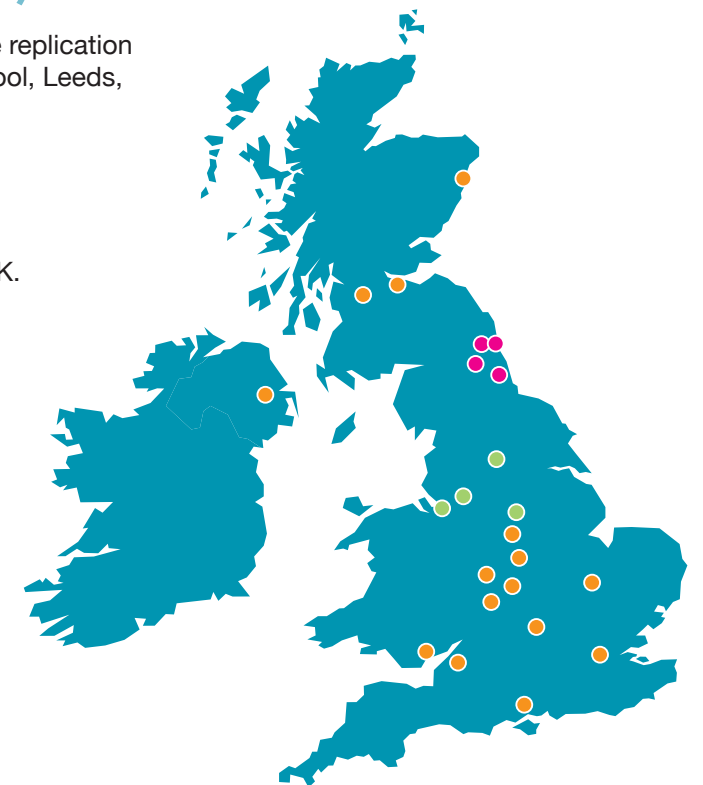
Insights from Newcastle will guide the replication of this model into Manchester, Liverpool, Leeds, and Sheffield.

Phase 3: UK

Full roll out & replication across the UK.

Phase 4: Global

Foreign markets



TARGET MARKETS

1. Students

Direct service for the students showing all ways they can use the service

2. PBSA Partnerships

Working with PBSA developers and operators

3. University Partnerships

Working directly with universities providing their accommodation managers and departments with essential laundry services

4. Boarding Schools and Colleges Partnerships

Providing outsourced laundry services for their operational needs

5. Private Student Landlord Partnerships

Providing external laundry facilities for landlords

6. Zube for Parents

A subscription service for parents all owing them to pay of front for a entire terms laundry and save.

COLLECTION & DELIVERY OPTIONS

Zube Kiosk

A fully manned drop and pick up point within PBSA reception areas and university student unions



Mobile Van kiosk

A mobile drop off & collection van kiosk which can be tracked by the Zube App



Student Accommodation

Collection and delivery direct to their student accommodation



Zube Locker

Secure student lockers for laundry drop off & collection which can be operated by a security pin and the Zube App



ZUBE Manned Kiosk
ZUBE Mobile Van Kiosk
Reception Drop-off and Pick-up
Zube Laundry Locker Installation

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REVENUE FORECAST

125,000 students (Newcastle, Durham, Sunderland & Teeside)

3% market share = 3750 students

Average order value £15 (per student including vat)

30 weeks student term time (210 days)

Scenario 1 Student uses Zube every 7 days (30 orders per annum)

$30 \times £15 = £450 \times 3850$ (£1,687,500) annual turnover

$3750 \times 30 = 112,500$ orders per year

Scenario 2 Student uses Zube every 10 days (21 orders per annum)

$21 \times £15 = £315 \times 3750$ (£1,181,250) annual turnover

$3750 \times 21 = 78,750$ orders per year

Scenario 3 Student uses Zube every 14 days (15 orders per annum)

$15 \times £15 = £225 \times 3750$ (£843,750) annual turnover

$3750 \times 15 = 56,250$ orders per year

Zube Commercial - £90,000 per year turnover plus vat

✓ Overview:

- Our Business Plan is centered around the Zube Financial Forecast Model, projected over 3 years.
- The model is realistic, simple, and robust, focusing on the SaaS nature of Zube's business.
- It uses market size, competitor analysis, and market share predictions to forecast revenue.

✓ Revenue Forecast Assumptions:

- Based on a North East Regional model, serviced from the existing Lemington base.
- The model will be updated annually and includes plans for expansion from Year 3.
- Key assumptions include a fixed student market size of 125,000 in the North East, market share growth from 3% in Year 1 to 6% in Year 3, and a price of £15 per transaction.

SUMMARY:

Our model is simple, robust, and conservative, with significant growth potential post-Year 1.

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5-YEAR GROWTH FORECAST (STUDENT SEGMENT)

Report Focus: This report outlines the projected 5-year growth trajectory for Zube Student Laundry, focusing exclusively on the student laundry market segment in the North East region.

1. Executive Summary

This forecast projects significant growth for Zube Student Laundry over the next five years. Based on a conservative, linear increase in market penetration, the number of student customers is forecast to grow from 3,750 in Year 1 to 10,625 in Year 5.

This translates to a substantial rise in annual gross revenue from student services, projected to increase from £1.18 million in Year 1 to £3.35 million in Year 5.

This represents a Compound Annual Growth Rate (CAGR) of approximately 29.7% for both student numbers and revenue over this period, underscoring a strong and steady market expansion.

2. Key Forecasting Assumptions

The projections in this report are based on the following core assumptions:

- **Total Addressable Market (TAM):**
A fixed student population of 125,000 in the North East region.
- **Service Usage:**
Based on “Scenario 2” - an average of 21 orders per student per academic year.
- **Average Order Value (AOV):**
Constant at £15 (inclusive of VAT) per order.
- **Revenue Per Student:**
£315 per annum (21 orders x £15 AOV).
- **Market Share Growth (Student Segment):**
 - Year 1: 3.00%
 - Year 2: 4.50% (+1.50 pp YoY)
 - Year 3: 6.00% (+1.50 pp YoY)
 - Year 4: 7.25% (+1.25 pp YoY - conservative adjustment)
 - Year 5: 8.50% (+1.25 pp YoY - conservative adjustment)

3. 5-Year Student Growth Projections

The table below details the year-on-year forecast for key student segment metrics:

Year	Market Share %	Number of Students	Annual Gross Revenue from Students (£)
1	3.00%	3,750	1,181,250
2	4.50%	5,625	1,771,875
3	6.00%	7,500	2,362,500
4	7.25%	9,063	2,854,688
5	8.50%	10,625	3,346,875

(Note: Number of students for Y4 (9062.5) is based on precise calculation and rounded for display. Revenue figures are rounded to the nearest £ for Y4 & Y5 in this table for readability).





4. Visualized Growth Trajectory

Chart 1: Projected Growth in Number of Student Customers (Years 1-5)

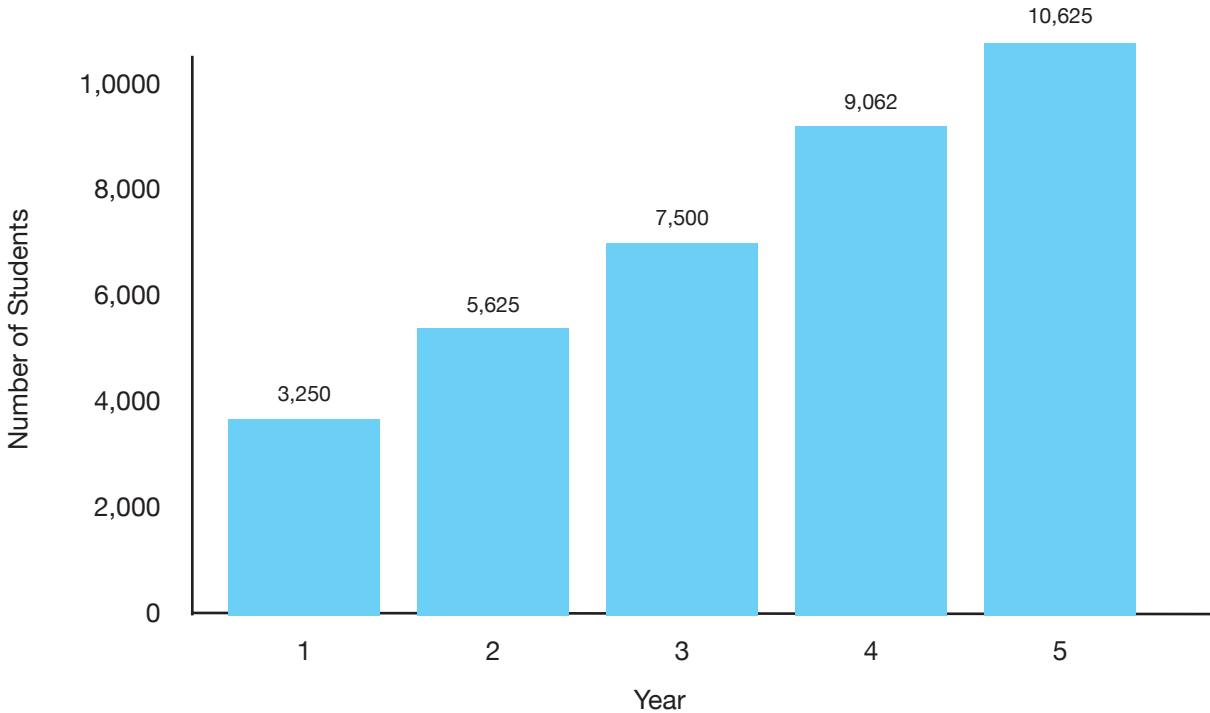
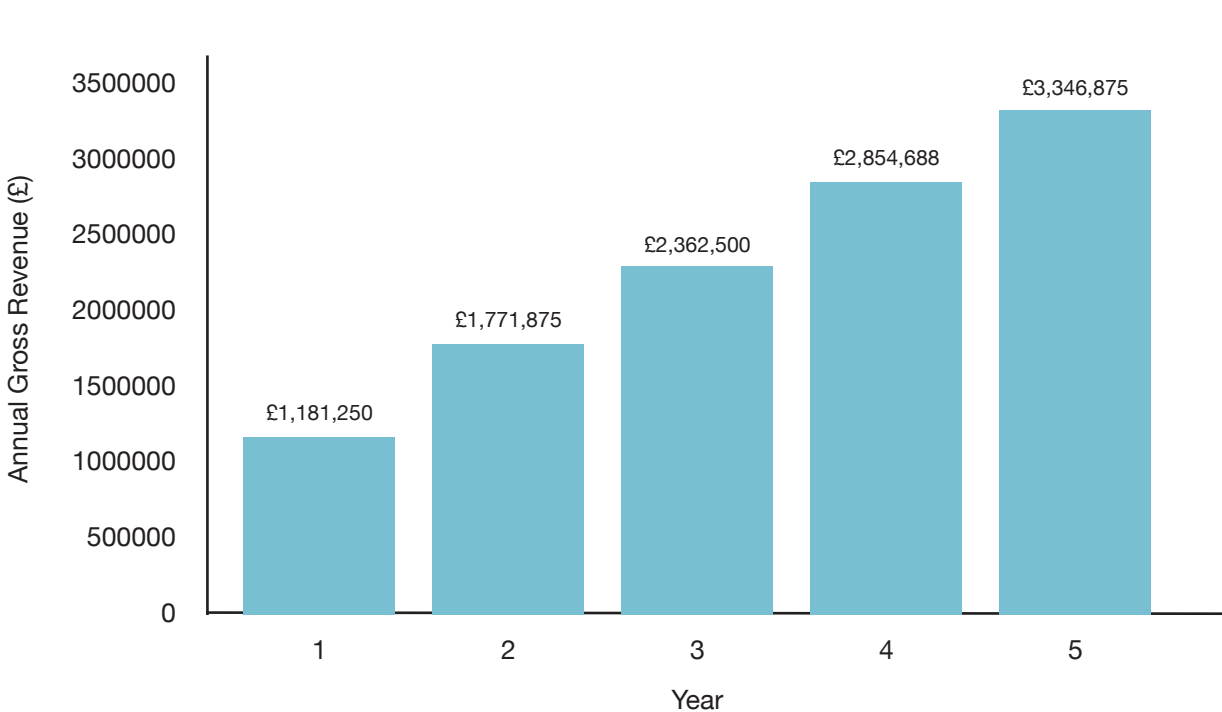


Chart 2: Projected Growth in Annual Gross Revenue from Students (Years 1-5)



5. Key Insights & Commentary

- **Consistent Growth:**
The forecast demonstrates a consistent and robust year-on-year growth in both student acquisition and revenue generation.
- **Market Penetration:**
Achieving 8.5% market share by Year 5 indicates a solid foothold in the target North East student market.
- **Revenue Milestones:**
The projection shows student-generated revenue surpassing £2 million by Year 3 and on track to exceed £3.3 million by Year 5.
- **Scalable Model:**
With a constant AOV and revenue per student, growth is directly tied to market share expansion.
- **Conservative Outlook:**
The market share uplift in later years (Y4-Y5) is deliberately conservative, offering potential upside if expansion efforts or market adoption rates exceed these baseline assumptions.

6. Conclusion & Outlook

The 5-year forecast for Zube Student Laundry indicates a promising trajectory with significant growth potential within the North East student market. The projected increase to over 10,600 student customers and £3.35 million in annual gross revenue by Year 5 highlights a strong business case. Continued focus on achieving the targeted market share will be crucial for realizing this potential.

Disclaimer: This report is based on the assumptions outlined herein. Actual results may vary depending on market conditions, competitive landscape, and operational execution.



OUR COMMITMENT TO HYGIENE

Setting new standards in garment care, cleanliness, and environmental responsibility.

CERTIFIED HYGIENE EXCELLENCE

We take hygiene seriously - every garment that passes through our facility is treated with the utmost care and precision.

Our cleaning processes comply with Hohenstein-certified hygiene standards, ensuring that every item is professionally sanitized and safe for use. From down-filled jackets to delicate garments, our hygiene control systems eliminate bacteria, odours, and allergens without compromising fabric quality. Confidence in every clean. Our goal is not just to clean clothes, but to deliver true hygiene you can trust.

Using world-leading laundry and dry-cleaning technology, we continue to set new benchmarks for efficiency, hygiene, and cleaning performance - delivering results that redefine industry standards.



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SUSTAINABILITY



INTELLIGENT WATER MANAGEMENT

Water is one of our most valuable resources - and we treat it that way. Our facilities use advanced water recycling, purification, and filtration systems that significantly reduce consumption while maintaining world-class cleaning performance. This ensures both environmental responsibility and exceptional cleaning consistency.

Every drop counts. We clean smarter, not wastefully.

ENVIRONMENTAL RESPONSIBILITY

We're committed to reducing our environmental footprint through every step of our process.

- Eco-friendly detergents and biodegradable solvents
- Energy-efficient machinery and optimized wash cycles
- Reusable garment packaging and recycling programs

Our operations are continuously reviewed to meet the latest sustainability benchmarks, helping us contribute to a cleaner, greener future for our clients and our planet.

Clean garments, clean conscience.

SUSTAINABILITY IN ACTION

From resource management to waste reduction, every decision we make supports long-term environmental health. We partner with suppliers who share our vision of eco-responsible garment care, ensuring transparency, quality, and accountability at every level.

Sustainability isn't a trend – it's part of our DNA.



APPENDIX

✓ Partnerships

Zube collaborates with universities, colleges, schools, PBSA providers, and organizations like Student Minds to enhance sustainability and mental health support.

✓ B Corp Journey

Zube is currently seeking B Corp certification, demonstrating commitment to purposeful practices and an inclusive workplace.

✓ Water Management

Zube uses water recycling machines and filtration systems to minimize wastewater. Plans include rainwater collection and recycling technology to achieve a 20% reduction in water use by 2026.

✓ The Zube Foundation

The Zube Foundation offers scholarships and sponsorships to children in developing countries with educational barriers. Recipients later support their communities and address educational inequality.

✓ Giving Back

Student Minds, Zube Foundation, clean water initiatives.



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