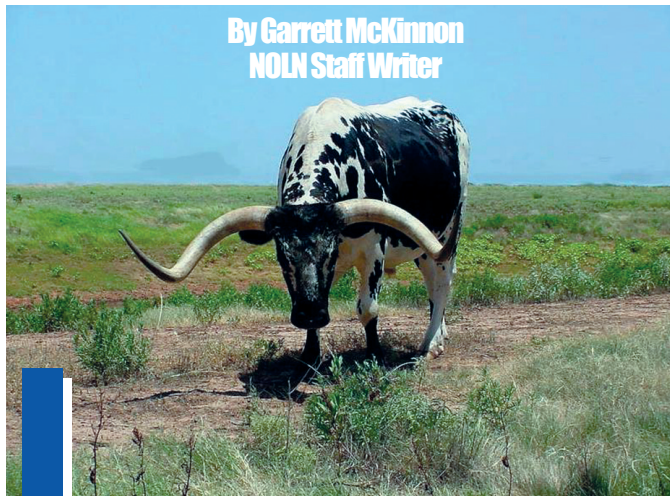


2001 TOPS in the Industry Listing Shows Fast Lubes are still 'Bullish'

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Investing in the stock market is a nerve-racking exercise. One day you're up, the next you're down. One minute your broker's calling you with the best dot-com stock ever to hit the market, the next minute you're calling his boss hoping to have him ushered to the unemployment line as the stock craters. No, the stock market, especially these days, is not for the faint of heart.

The fast lube industry is much like the stock market in some ways. During the 1990s, the lube business, like the stock market, was on a wild bull ride. Fast lube facilities were popping up on street corners everywhere faster than dandelions in a vegetable garden. In one year alone, according to statistics compiled by *National Oil & Lube News*, the lube industry grew, as far as facility counts are concerned, by 12 percent. That would be a good return in the stock market, but for an industry to grow by that much is incredible.

Keeping tabs on the lube industry is what we at NOLN do. It's our jobs. Much like a broker carefully watching a stock, we keep a close eye on the fast lube business. As part of that, every year we conduct a survey of the top fast lube chains in the industry to create a ranking of the biggest fast lube chains, a list that we call TOPS in the Industry. Our purpose — to record the growth, or lack thereof, that those chains have experienced. Why do we do this? In short, we do it so that you, the fast lube operator, will know what other fast lube companies are doing. Did Chain X add stores last year or sell off stores? Did XYZ Lube get bought out last year? Many of the lube chains identified in this survey are your competitors, and it is important to know how they are doing.

But we don't stop there. We also ascertain the total fast lube population in the United States. This lets us calculate if that population has grown, as it did by such leaps and bounds during the 1990s, or declined.

To track down all fast lube chains in the United States, we contact more than 100 fast lube companies. We compile the data and present it to you, the reader.

Before we begin examining the figures reported in our TOPS list, it is necessary to explain a few of the things we do. We define a fast lube as any facility where a fast oil change and preventive maintenance services are performed as one of the prime focuses of the business. Today, though, many of these facilities do not match the traditional description of a fast lube, that is a multi-bay, stand-alone facility with pits and a roll-in/roll-out layout. We define a fast lube chain as a group of six or more stores owned by the same owner/company or facilities bearing identical or similar signage. The main thing we look at is the importance that fast, convenient oil change services play in the overall success of the business. As it turns out, this played a major role in the reassignment of a couple of companies on our TOPS lists. More on that later.

Also, it is necessary to explain that the figures we publish are the figures that were reported to us. Unlike the U.S. Census people, we are not able to go door-to-door to every fast lube in the country. That's why we rely on fast lube companies to report their facility counts to us. If they exaggerated, shame on them.

A couple of lube chains refused to respond to our requests for information about their chain. Their loss, we suppose. Fortunately, they account for less than 20 stores in all.

We also need to note that in a few instances, fast lube chains share the signage of a larger chain. For example, several independent lube chains in our survey wear Pennzoil 10-Minute Oil Change signage. In these instances, we recognize the smaller chain in our sur-

vey and subtract those numbers from the larger chain's figures, noting that we have done so in the TOPS list. Also, several of the larger chains that share signage with smaller chains have requested that we not include the smaller chains in our ranking.

If we failed to list a chain of six or more stores, it was inadvertent. Please contact us and we will certainly make sure you're included next year.

Fast Lube Chains

Now for the numbers. We found 70 fast lube chains matching our criteria this year, up from 69 last year. Looking at the chart of names, you're probably scratching your head as you see five new chains listed. Let me explain. There were 69 fast lube chains listed last year. Two of those, Sticker Stop Vehicle and Simoniz 10 Minute Oil Change, were determined to be what we call Oil Change Plus (OC+) facilities and were moved to the OC+ list. Again, more on that ranking list later.

The Texaco Star Lube chain was completely rebadged to Texaco Xpress Lube signage during the past year, as well. That leaves one chain unaccounted for. Surprisingly, it is the only chain on our list that was bought out last year. That chain is Master Lube.

Master Lube was a San Antonio, Texas-based fast lube company with 20 facilities. However, the company was sold to an investment group late last year and, sources tell us, is being sold off store by store in piecemeal fashion to other lube operators.

The 70 chains we listed account for 6,431 total facilities, that's a net increase of 132 stores from last year's total. Overall, the chains listed grew by 2 percent since last February. Industry-wide, from February 29, 2000 to February 28 of this year, the industry's facility growth rate was 3 percent. It would appear, then, that the lube industry is almost fully mature in many markets, a statement backed up by a chain-by-chain analysis of our TOPS listing.

During the past year, for instance, 28 fast lube chains reported adding stores, while 10 reported losing stores. Twenty-seven reported no change in the number of stores they operate. In contrast, the previous 12 months resulted in a much bigger growth period for lube chains, as 34 chains added

stores, 8 lost stores and 23 were unchanged from the previous year.

The top 10 fast lube chains, which account for a total of 5,254 fast lube facilities, added a net of 72 stores last year, a growth rate of 1 percent.

The big winner in the additional-store race last year was Valvoline Instant Oil Change (VIOC), which added 29 new facilities to its stable last year. The biggest decliner was Grease Monkey, which closed or sold 26 facilities last year.

Surprisingly, Jiffy Lube was unchanged from the previous year, a consequence, no doubt, of the merger with Q Lube in 1999. As part of that merger, which added considerably to Jiffy Lube's numbers last year, many company-owned stores were sold, explaining the dip in Jiffy Lube's company-owned population: to 480 stores from 540 the previous year.

In terms of percentage growth, 76 Express Lube was the big gainer, growing 50 percent from last year's totals. The company now has 30 facilities. Not far behind was California-based EZ Lube, which grew 26 percent last year, breaking into the top 20 with 34 facilities.

The biggest 'bears' in percentage terms were Car Spa Express Lube, which declined 36 percent (two stores), and Precision Lube Express, which declined 28 percent (eight stores).

Oil companies that offer signage/license agreements had a good year. Valvoline's Express Care chain of badged independent stores debuted with 50 facilities this year. Phillips TropArtic Fast Lube increased its store count by 14 percent, Citgo Lube increased by 13 percent and Exxon Superflo Fast Lube increased by 4 percent.

Other notables on our TOPS list include Alabama-based Express Oil Change, which moved up two spots on our ranking to the eighth spot. Express Oil Change currently has 128 facilities in operation, and grew 19 percent since last February.

Indy Lube also grew last year, by 21 percent (seven facilities). Oilstop Drive-Thru Oil Change Centers, in their second year of franchising, grew by 27 percent (four facilities). Finally, Florida-based Super-Lube, which sold 50 stores to American LubeFast two years ago, is busy expanding again.

The company grew 13 percent to 18 total facilities during this reporting period.

Many fast lube chain operators focused on keeping their stores as profitable as possible last year, and did not add any stores to their chains.

Is consolidation a thing of the past in the lube industry? It's doubtful. More likely, the larger fast lube chains that have experienced phenomenal growth the last few years worked in 2000 to strengthen their operations. Look for lube company consolidation to return in full force later this year or in 2002.

Also worth mentioning is the fact that 40 percent of the stores that our TOPS chains operate are comprised of franchised units. Clearly, large companies like Jiffy Lube and VIOC are renewing their focus on franchised operations. Essentially, even though the large companies may have thousands of stores, many of those stores are franchised by independent businessmen. The lube industry, through all its growth, is keeping the entrepreneurial spirit that has seen it grow to the force it is today.

Oil Change Plus Chains

Consumers today have a variety of options from which to choose when searching for routine automotive

maintenance. Companies like Wal-Mart with their Tire & Lube Express and Firestone with their Tire & Service Centers offer alternative competition to fast lube oil changes. However, everyone knows that Wal-Mart and Firestone are not in business to primarily change oil. For companies like these, oil changes are an add-on, many times even a loss-leader designed to attract customers who they hope will purchase more expensive services.

As we discussed previously, we term these companies OC+, and have a separate ranking for them. However, because NOLN only tracks fast lube facilities, we do not have a total industry population for OC+ chains, just the total number of stores reported to us.

In looking at the OC+ chains, keep in mind that many of the six chains new to our list this year are chains that are not necessarily new, but that we are including for the first time. AutoNation, for instance, is a nationwide chain of used-vehicle dealerships. However, the company recently decided to increase its presence in the automotive service and maintenance aftermarket, meaning they now fit the bill as an OC+ chain.

A surprising fact about the OC+ ranking is that even with all the new

companies, the total number of stores in those chains only increased by 173, or 1 percent. Take out the new chains, and the number of OC+ facilities actually declines. Some of that decline is due to the closure of 233 Montgomery Ward Auto Express facilities. The bad news for Montgomery Ward, though, could mean new customers for fast lubes. What is most interesting, however, is the OC+ chains that are adding oil change services to their menus in more and more facilities.

Let's take Wal-Mart for example, again. In 2000, about 1,200 of Wal-Mart's 2,522 stores performed oil changes. This year, 1,350 of the company's 2,590 stores perform oil changes. Clearly, Wal-Mart, like many other companies, is increasing the use of oil change facilities in their company stores.

Midas, too, is following this example. Last year, 1,500 of Midas' 1,850 stores performed oil changes. This year, 1,750 of the company's 1,840 stores do. Even though the company's store population declined by 10 facilities, the percentage of stores that offer oil changes actually increased.

Another thing to note is the continued decline in the number of traditional garages. Shell Auto Care last year reported 900 garage/service stations in operation. This year, that number declined a whopping 33 percent to 600. Clearly, garages are falling out of favor as service facilities.

Several OC+ companies reported significant gains in their store populations. Arizona-based Brake Masters grew by 38 percent last year to 72 total facilities, and Triton Car Wash Management, through a combination of mergers and acquisitions, grew 62 percent, adding 26 carwash/fast lubes to their existing 16 facilities.

A couple of final notes regarding OC+ companies. Much of the facility growth from these companies appears to be coming from the company level. Though the total store population grew only 1 percent, the number of franchised stores actually declined by a little less than 1 percent.

Finally, although major automakers have long included lube facilities like GM's Goodwrench Quick Lube Plus and Chrysler's Mopar Xpress Lube with their dealership's service departments, several are now pursuing convenient stand-alone automotive service facilities far from their dealerships. Take Ford, for instance. New to our list this year are the Quick Lane service facilities that Ford generally operates several miles from its dealers. As of February 28, there were 75 Ford

Quick Lane service centers.

Foreign Chains

Many U.S. fast lube and OC+ companies are quickly discovering gold in the emerging automotive markets of foreign countries. This year, we found that 11 lube and/or OC+ companies that have facilities open outside the United States (see chart page 28). Three of the chains (Car X Auto Service, Jiffy Lube and Ford Fast Lane) are new to our list, while six of the remaining eight have experienced at least some, if not truly significant, growth during the past year.

Texaco's Star Lube program is still going strong outside the U.S., with 85 stores open around the world. Last year, there were only 15. Furthermore, Jiffy Lube is actively seeking franchisees outside U.S. borders. They have opened 38 foreign facilities in a little more than a year.

What Does it All Mean

In analyzing the figures that we've acquired for our TOPS ranking, several things come to mind. First of all, the days of large-scale U.S. expansion through new-facility construction by many lube companies is probably a thing of the past. These days, many markets are already near the saturation point. In others, it takes a truly committed lube operator to invest in a facility that already has well-established competition surrounding it. For most lube companies, expansion will be accomplished through a combination of franchising and purchasing smaller chains and/or independent fast lubes.

That's not to say that the number of lube facilities in the country will not continue to increase. Many smaller towns are just now being exposed to the fast lube concept, and plenty of markets remain where clean, well-run and efficient organizations can do well amidst their competition.

Also, many lube companies are finding fresh untapped markets in foreign countries. Though cultural barriers often exist, foreign markets, many of them with strong, emerging economies, are areas that may become increasingly important in the future.

Oil Change Plus companies may not be experiencing the same growth in facility numbers as fast lube companies, but more and more of them are turning to oil changes as an additional service they can offer their customers, meaning more and more competition.

It is the independent lube operator who appears to have accomplished the most growth during the last year.

U.S.-BASED OPERATIONS RANKED BY NUMBER OF FOREIGN FACILITIES

| Rank | Facility Signage | Facilities |
|------|-----------------------------------|--------------|
| 1 | Midas Auto System Experts, IL | 850 |
| 2 | Precision Tune Auto Care, VA | 201 |
| 3 | Car X Auto Service, IL | 138 |
| 4 | Xpress Lube (Texaco), TX | 85 |
| 5 | Jiffy Lube, TX | 38 |
| 6 | Pep Boys, PA | 36 |
| | Fast Lane (Ford), MI | 36 |
| 8 | Speedee Oil Change & Tune-Up, LA | 28 |
| | Meineke Discount Muffler, NC | 28 |
| 10 | Grease Monkey, CO | 22 |
| 11 | Pennzoil 10-Minute Oil Change, TX | 7 |
| | TOTAL | 1,469 |

Texaco's Xpress Lube/Star Lube program continues to enjoy much success overseas. As of Feb. 28, 2001, the company had 85 facilities open overseas. On Feb. 29, 2000, the company had only 15 facilities open.

Jiffy Lube saw its initial international franchise offerings gather much attention from potential foreign investors. The company opened 38 franchises outside the United States during the last 12 months.

TOP 70 FAST LUBE CHAINS OPERATING IN 2001

| 2001 Rank | 2000 Rank | Facility Signage/ Company Headquarters | Independent/ Company Owned | Franchised | Total Operating 2/28/01 | Additional Stores Projected By 12/31/01 | Growth Since 2/29/00 |
|-----------|-----------|---|----------------------------------|--------------|-------------------------------|--|----------------------------|
| 1 | 1 | Jiffy Lube, TX | 480 | 1,663 | 2,143 | 120 | 0% |
| 2 | 2 | Pennzoil 10-Minute Oil Change, TX (903 total*) | 812 | 0 | 812 | 40 | 1% |
| 3 | 3 | Texaco Xpress Lube, TX | 753 | 0 | 753 | 80 | 2% |
| 4 | 4 | Valvoline Instant Oil Change, KY | 366 | 279 | 645 | ** | 6% |
| 5 | 5 | Kwik Kar, TX | 281 | 0 | 281 | 27 | -3% |
| 6 | 6 | Grease Monkey, CO | 33 | 152 | 185 | 15 | -12% |
| 7 | 7 | Phillips TropArtic Fast Lube, OK | 144 | 0 | 144 | 25 | 14% |
| 8 | 10 | Express Oil Change, AL | 12 | 116 | 128 | 12 | 19% |
| 9 | 9 | Citgo Lube, OK | 125 | 0 | 125 | 32 | 13% |
| | 8 | SpeeDee Oil Change & Tune-Up, LA | 7 | 118 | 125 | 6 | 4% |
| 11 | 11 | American LubeFast, GA | 65 | 0 | 65 | 35 | 2% |
| 12 | n/a | Valvoline Express Care, KY | 50 | 0 | 50 | 65 | NEW |
| 13 | 12 | Speed Lube, Highland, IL | 48 | 0 | 48 | ** | -2% |
| 14 | 13 | Oil Can Henry's, OR | 2 | 45 | 47 | 6 | 2% |
| 15 | 14 | Lube Stop, OH | 43 | 0 | 43 | 2 | -2% |
| 16 | 15 | Southern Express Lubes (includes 8 Texaco Xpress Lubes***), FL (42 total) | 34 | 0 | 34 | 2 | 2% |
| 17 | 16 | LubePro's, IL | 15 | 26 | 41 | 2 | 8% |
| 18 | 16 | Oil Changers, CA | 36 | 0 | 36 | 10 | -5% |
| 19 | 18 | Indy Lube, IN | 25 | 10 | 35 | 20 | 21% |
| 20 | 22 | EZ Lube, CA | 34 | 0 | 34 | 6 | 26% |
| | 18 | Victory Lane Quick Oil Change, MI | 8 | 26 | 34 | 2 | 17% |
| 22 | 27 | 76 Express Lube, CA | 30 | 0 | 30 | 4 | 50% |
| 23 | 18 | Uncle Ed's Oil Shoppe, MI | 29 | 0 | 29 | ** | 0% |
| 24 | 23 | Oil Express, IL | 15 | 11 | 26 | 1 | 0% |
| | 26 | Performance Plus Quick Lube, MI | 26 | 0 | 26 | 2 | 8% |
| | 25 | Superflo Fast Lube (Exxon), VA | 26 | 0 | 26 | ** | 4% |
| 27 | 18 | Precision Lube Express, VA | 0 | 21 | 21 | 6 | -28% |
| 28 | 27 | ExpressWay Drive Thru Oil Change, CT | 20 | 0 | 20 | 5 | 0% |
| 29 | 35 | Oilstop Drive-Thru Oil Change Center, CA | 10 | 9 | 19 | 10 | 27% |
| 30 | 31 | Super-Lube, FL | 18 | 0 | 18 | 3 | 13% |
| | 30 | Wonder Lube, WI | 18 | 0 | 18 | 0 | 0% |
| 32 | 35 | Avis Lube Fast Oil Change Center, TX | 16 | 0 | 16 | 2 | 7% |
| | 31 | FAS Lube 10 Minute Oil Change, OH | 16 | 0 | 16 | 0 | 0% |
| | 31 | Grease Spot, IL | 16 | 0 | 16 | ** | 0% |
| | 31 | Mr. Lubie, IN | 16 | 0 | 16 | 0 | 0% |
| 36 | 35 | Oil X-Change, IL | 0 | 15 | 15 | ** | 0% |
| | 35 | Speed Lube, Decatur, IL | 15 | 0 | 15 | 1 | 0% |
| 38 | 45 | Amerilube Oil Change Center, WV | 13 | 0 | 13 | 0 | 8% |
| | 42 | Fast Change Lube & Oil, KY | 13 | 0 | 13 | 2 | 0% |
| | 42 | Fast Eddie's Oil Change, MI | 13 | 0 | 13 | 0 | 0% |
| | 35 | Pioneer Quick Lube, MI | 13 | 0 | 13 | 0 | -13% |
| 42 | 42 | Duke of Oil, IL | 12 | 0 | 12 | 1 | -8% |
| | 45 | Mr. Good Lube, NJ | 12 | 0 | 12 | 2 | 0% |
| | 45 | Mr. Oil Change, NY | 12 | 0 | 12 | 0 | 0% |
| | 45 | QuickChange, OH | 12 | 0 | 12 | 2 | 0% |
| 46 | n/a | Sprint Lube, OH | 10 | 0 | 10 | 3 | NEW |
| 47 | 41 | Car Spa Express Lube, FL | 9 | 0 | 9 | 2 | -36% |
| | 49 | Lube 'n Go, TX | 9 | 0 | 9 | 1 | 0% |
| | 49 | Pit Stop "500", IL | 9 | 0 | 9 | 0 | 0% |
| | 49 | Pronto Lube, TX | 9 | 0 | 9 | 0 | 0% |
| | 55 | QuikStop, KY | 7 | 2 | 9 | 2 | 13% |
| | 55 | Super Lube, TX | 9 | 0 | 9 | 0 | 13% |
| | 49 | Time-It Lube, LA | 9 | 0 | 9 | 0 | 0% |
| | 55 | Zip Lube, NM | 9 | 0 | 9 | 0 | 13% |
| 55 | 49 | Dr. Lube, MI | 8 | 0 | 8 | 0 | -11% |
| | 55 | LUBExpress, NJ | 8 | 0 | 8 | 2 | 0% |
| | 55 | Lubrication Specialist, FL | 8 | 0 | 8 | 0 | 0% |
| | 61 | Mr. Fast Lube, AR | 6 | 2 | 8 | 0 | 14% |
| | 55 | UMC dba Speedy Lube/Zap Lube/Hi-Tech Lube, NY | 8 | 0 | 8 | 1 | 0% |
| 60 | n/a | Castrol Car Care, GA | 7 | 0 | 7 | 1 | NEW |
| | 61 | DeGreve Oil Change, IL | 7 | 0 | 7 | 0 | 0% |
| | 66 | National Lube Express, TX | 7 | 0 | 7 | 0 | 17% |
| | 61 | Oil Experts, IL | 6 | 1 | 7 | 0 | 0% |
| | 61 | Quick Lube, TX | 3 | 4 | 7 | 3 | 0% |
| | 66 | Rapid Oil Change, TX | 7 | 0 | 7 | 0 | 17% |
| | 61 | Skill Lube 10-Minute Oil Change, AL | 7 | 0 | 7 | 0 | 0% |
| | 66 | Texas Oil X Change, TX | 7 | 0 | 7 | 1 | 17% |
| 68 | n/a | Finish Line Express Lube, TN | 6 | 0 | 6 | 2 | NEW |
| | 66 | King Lube, GA | 6 | 0 | 6 | 0 | 0% |
| | n/a | Kwikoil, TN | 6 | 0 | 6 | 0 | NEW |
| | | TOTAL | 3,931 | 2,500 | 6,431 | 566 | |

Due to the sell off of 60 company-owned stores, Jiffy Lube's net store growth from Feb. 2000 to Feb. 2001 was zero.

Oil company-badged fast lube chains had a good year, with Phillips TropArtic, Citgo and 76 all seeing double-digit store growth.

Valvoline's Express Care lube chain was the highest-debuting company on our list with 50 facilities.

Oilstop continues to grow through franchising, while Super-Lube, a year after selling 50 facilities to American LubeFast, is busy growing again, adding two new stores during the past 12 months.

A pair of Tennessee lube companies, Finish Line Express Lube and Kwikoil, rounded out five new lube chains that made our TOPS list this year.

*Includes smaller chains that appear on this chart ** Projection not available ***Included in Texaco Xpress Lube total

Crunching through the numbers, non-chain lube facilities experienced a growth rate of more than 3 percent last year, well above the chain-store growth rate of 2 percent. Through a combination of excellent customer service and marketing savvy, independent operators appear to be more than holding their own in the lube market.

from here? Will it be a 'bear' ride or a 'bull' ride? One thing is for sure. Though the lube industry's 'bull' ride may not be going quite as fast or as strong as it was 10 years ago, the industry is still growing — more than can be said for the current stock market it seems — and lube operators across the country are still prospering. ♦

Where will the lube industry grow

TOP OIL CHANGE PLUS BUSINESSES OPERATING IN 2001

| 2001 Rank | 2000 Rank | Facility Signage/ Company Headquarters | Independent/ Company Owned | Franchised | Total Operating 2/28/01 | Total that Perform O/C | Growth Since 2/29/00 |
|-----------|-----------|---|----------------------------------|--------------|-------------------------------|---------------------------------|----------------------------|
| 1 | 1 | GM Goodwrench Quick Lube Plus, MI | 4,500 | 0 | 4,500 | 4,500 | 0% |
| 2 | 2 | Midas Auto System Experts, IL | 10 | 1,830 | 1,840 | 1,750 | 17% |
| 3 | 3 | Firestone Tire & Service Center, TN | 1,401 | 0 | 1,401 | 1,401 | 3% |
| 4 | 4 | Wal-Mart Tire & Lube Express, AR | 2,590 | 0 | 2,590 | 1,350 | 13% |
| 5 | 5 | Motorcraft Fast Lube (Ford), MI | 1,000 | 0 | 1,000 | 1,000 | 0% |
| 6 | 6 | DaimlerChrysler Mopar Xpress Lube, MI | 944 | 0 | 944 | 944 | -3% |
| 7 | 8 | Goodyear "Gemini" Auto Service Center, Just Tires, Brad Regan, OH | 801 | 0 | 801 | 801 | -1% |
| 8 | 9 | Penske Auto Center, MI | 670 | 0 | 670 | 670 | 2% |
| 9 | 10 | Meineke Discount Muffler, NC | 23 | 843 | 866 | 648 | 4% |
| 10 | 11 | Pep Boys, PA* | 628 | 0 | 628 | 618 | 0% |
| 11 | 7 | Shell Auto Care, TX | 600 | 0 | 600 | 600 | -33% |
| 12 | n/a | AutoNation, FL | 400 | 0 | 400 | 400 | NEW |
| 13 | 12 | Precision Tune Auto Care, VA | 0 | 387 | 387 | 380 | -7% |
| 14 | 13 | Big O Tires, CO | 3 | 459 | 462 | 270 | 0% |
| 15 | 14 | All Tune & Lube, MD* | 0 | 238 | 238 | 238 | -10% |
| 17 | 17 | Tuffy Auto Service Center, OH | 7 | 231 | 238 | 238 | 16% |
| 17 | 15 | Econo Lube N' Tune & Brakes, CA | 25 | 185 | 210 | 210 | -13% |
| 18 | 18 | Winston Tires, CA | 200 | 0 | 200 | 200 | -1% |
| 19 | 19 | Car-X Auto Service, IL | 53 | 132 | 185 | 185 | 0% |
| 20 | 21 | ARCO Smogpros, CA | 125 | 0 | 125 | 125 | 0% |
| 21 | 20 | Tuneup Masters, TX | 122 | 0 | 122 | 122 | -9% |
| 22 | n/a | Quick Lane (Ford), MI | 75 | 0 | 75 | 75 | NEW |
| 23 | 25 | Brake Masters, AZ | 36 | 36 | 72 | 72 | 38% |
| 24 | 22 | Merlin Muffler, IL | 7 | 58 | 65 | 62 | 0% |
| 25 | 23 | Tilden Car Care Centers, NY | 1 | 59 | 60 | 60 | 0% |
| 26 | 24 | Strauss Discount Auto, NJ | 91 | 0 | 91 | 54 | -2% |
| 27 | 27 | Triton Car Wash Mgmt. dba Oasis Car Wash & Lube Center & Simoniz Wash Depot, MA | 108 | 0 | 108 | 42 | 62% |
| 28 | n/a | Car Max, VA | 40 | 0 | 40 | 40 | NEW |
| 29 | n/a | Top Value Car & Truck Service Center, MI | 7 | 32 | 39 | 39 | NEW |
| 30 | 26 | King Bear, NY | 34 | 0 | 34 | 34 | 3% |
| 31 | n/a | Tunex Automotive Specialists, UT | 2 | 23 | 25 | 25 | NEW |
| 32 | 28 | Quality Tune Up, CA** | 5 | 16 | 21 | 21 | 0% |
| | 28 | XPert Tune, TN | 21 | 0 | 21 | 21 | 0% |
| 34 | n/a | Sun Devil Auto, AZ | 19 | 0 | 19 | 19 | NEW |
| 35 | 31 | Mace Car Wash, NJ | 57 | 0 | 57 | 15 | 0% |
| 36 | 32 | Commercial Tire, ID | 28 | 0 | 28 | 14 | 0% |
| | 32 | Tune Up Plus, FL | 14 | 0 | 14 | 14 | 0% |
| 38 | 35 | Exhaust Pro, KY | 0 | 9 | 9 | 9 | 0% |
| | 37 | Mister Car Wash/Detail Lube, TX | 9 | 0 | 9 | 9 | 29% |
| | n/a | StickerStop, TX | 9 | 0 | 9 | 9 | 0% |
| 41 | 30 | Rapid Brake & Muffler, KS | 17 | 0 | 17 | 8 | 0% |
| 42 | 36 | Delta Sonic Carwash/Sonic Lube, NY | 21 | 0 | 21 | 7 | -13% |
| | 38 | Regal Car Wash & Lube, AZ | 23 | 0 | 23 | 7 | 17% |
| 44 | 38 | Auto Quick, GA | 1 | 5 | 6 | 6 | 0% |
| | n/a | Car Care Clinic, MS | 6 | 0 | 6 | 6 | NEW |
| | 38 | Scrub-A-Dub Quick Oil Change, WI | 6 | 0 | 6 | 6 | 0% |
| | | TOTAL | 14,739 | 4,543 | 19,282 | 17,324 | |

*From sources deemed reliable, but not verified by company

**Last year's figures

Companies like Midas and Wal-Mart showed large growth, though in this instance the growth was not so much in total store counts; rather it was in the number of facilities that actually offer oil changes.

The traditional service station continues to decline, as evidenced by the closure of 300 Shell Auto Care facilities.

Ford's off-site but dealership oriented Quick Lane service center program debuted with 75 facilities this year.

Brake Masters grew by 20 facilities from Feb. 2000 to Feb. 2001.

Carwash/lube chains continue to do well, especially Triton Carwash, the group that emerged from the merger of Oasis Car Wash and Wash Depot. The company now has 42 lube/wash facilities.

Despite the fact that the total number of facilities operated by OC+ chains on our list only grew by 147 stores during the last 12 months, the total number of facilities offering oil changes grew by 475.