

TOPS IN THE FAST LUBE INDUSTRY

(as published in March 2003 issue of *National Oil & Lube News*)

The chains with the most growth on this year's TOPS list shared one thing in common — most were branded oil company programs.

While technically not new to the TOPS list, the 'new' Mobil Lube Express program will combine the Mobil Lube Express and Exxon Superflo Fast Lube programs into a single entity.

The GM Goodwrench Quick Lube program is replacing the dealership-located Quick Lube Plus program.

The 28 chains at the bottom of our TOPS list collectively added one new facility during the last year.

TOP FAST LUBE CHAINS OPERATING IN 2003

2003 Rank	2002 Rank	Facility Signage/ Company Headquarters	Independent/ Company Owned	Franchised	Total Operating 2/28/03	Add't. Stores Projected By 12/31/03	Growth Since 2/28/02
1	1	Jiffy Lube, TX	444	1,737	2,181	125	-2%
2	2	Pennzoil 10-Minute Oil Change, TX	837	0	837	*	4%
3	4	Valvoline Instant Oil Change, KY	365	353	718	62	5%
4	5	Kwik Kar, TX	345	0	345	27	8%
5	3	Texaco Xpress Lube, TX	306	0	306	*	†
6	3	Shell Rapid Lube, TX**	275	0	275	*	†
7	9	Valvoline Express Care, KY	230	0	230	100	70%
8	6	Grease Monkey, CO	12	200	212	25	-12%
9	10	Citgo Lube, OK	164	0	164	40	26%
10	7	Phillips TropArtic Fast Lube, OK	163	1	164	12	4%
11	8	Express Oil Change, AL	12	128	140	15	1%
12	11	SpeeDee Oil Change & Tune-Up, LA	1	113	114	4	-6%
13		Mobil Lube Express/Exxon Superflo Fast Lube, VA	75	0	75	*	††
14	12	American LubeFast, GA	65	0	65	5	0%
15	13	Oil Can Henry's, OR	5	44	49	10	-8%
16	14	Speed Lube, IL	48	0	48	*	0%
17	15	Lube Stop, OH	44	0	44	1	0%
18	19	EZ Lube Fast Oil Change Experts, CA	41	0	41	7	14%
19	21	76 Express Lube, TX	40	0	40	15	33%
20	17	LubePro's, IL	15	24	39	0	-3%
21	18	Oil Changers, CA	37	0	37	20	0%
22	20	Victory Lane Quick Oil Change, MI	5	30	35	12	0%
23	22	Uncle Ed's Oil Shoppe, MI	29	0	29	0	0%
24	23	Oil Express, IL	15	12	27	*	0%
25	24	Oilstop Drive-Thru Lube Center, CA	10	15	25	4	14%
26	25	ExpressWay Drive Thru Lube Center, CT	20	0	20	2	0%
	26	Indy Lube, IN	3	17	20	3	0%
	28	Terrible Herbst, NV	20	0	20	3	0%
29	31	Performance Plus Quick Lube, MI	13	6	19	4	12%
	29	Precision Lube Express, VA	0	19	19	0	0%
31		GM Goodwrench Quick Lube, MI	18	0	18	*	NEW
32	30	Wonder Lube, WI	17	0	17	*	-6%
33	32	Grease Spot, IL	16	0	16	0	0%
34	33	Avis Lube Fast Oil Change Center, TX	15	0	15	2	0%
35	34	FAS Lube 10 Minute Oil Change, OH	14	0	14	2	-7%
	37	Mr. Good Lube, NJ	14	0	14	0	0%
37	40	Fast Eddie's Oil Change, MI	13	0	13	0	0%
	42	LUBExpress, NJ	13	0	13	2	8%
	44	QuikStop Oil Change, KY	11	2	13	2	8%
40	43	QuickChange, OH	12	0	12	4	0%
	46	Sprint Lube, OH	12	0	12	2	20%

TOP FAST LUBE CHAINS OPERATING IN 2003

2003 Rank	2002 Rank	Facility Signage/ Company Headquarters	Independent/ Company Owned	Franchised	Total Operating 2/28/03	Add't. Stores Projected By 12/31/03	Growth Since 2/28/02
42	48	Car Spa Express Lube, TX	10	0	10	*	11%
	51	Super Lube, TX	10	0	10	0	11%
	47	Time-It Lube, LA	10	0	10	0	0%
45	55	Dr. Lube, MI	9	0	9	0	13%
	41	Duke of Oil, IL	9	0	9	0	-25%
	49	Lube 'n Go, TX	9	0	9	0	0%
	45	Mr. Oil Change, NY	9	0	9	*	-18%
	52	UMC dba Speedy Lube/Zap Lube/Hi-Tech Lube, NY	9	0	9	1	0%
	53	Zip Lube, NM	9	0	9	0	0%
51	54	Car Care Center, GA	8	0	8	0	0%
	56	Mr. Fast Lube, AR	5	3	8	0	0%
	61	Skill Lube 10-Minute Oil Change, AL	8	0	8	0	14%
54	63	DeGreve Oil Change, IL	7	0	7	0	17%
	65	Grease Pro Express Lube, FL	7	0	7	2	17%
	62	Texas Oil X Change, TX	7	0	7	2	0%
57	64	Finish Line Express Lube, TN	6	0	6	*	0%
	60	Oil Experts, IL	6	0	6	0	-14%
	68	Rapid Oil Change, TX	6	0	6	*	0%
TOTAL			3,938	2,704	6,642	515	

* Projection not available.

** Represents stores wearing Shell Rapid Lube signage or contracted to convert. Some facilities may be wearing Texaco Xpress Lube signage until conversion is completed.

† Part of the Texaco Xpress Lube chain in 2002. Chain had 720 facilities as 2/28/02.

†† Represents Mobil Lube Express and Exxon Superflo Fast Lube; the separate programs are being combined.

DID YOU KNOW...

In all, 59 companies on our TOPS ranking accounted for a total of 6,642 stores. These companies added 51 independent or company owned facilities during the last year and 33 franchised facilities, a total of 84 new fast lubes. That's an overall growth rate of 1.3 percent.

TOP ASSOCIATED CHAINS OPERATING IN 2003

2003 Rank	Facility Signage/Associated Chain/ Company Headquarters	Total Operating 2/28/03	Additional Stores Projected By 12/31/03	Growth Since 2/28/02
1	Southern Express Lubes (35 Mobil Lube Express/10 Texaco Xpress Lube), FL	45	*	2%
2	Super-Lube (Pennzoil 10-Minute Oil Change), FL	21	1	5%
3	Mr. Lubie (Phillips TropArtic Fast Lube), IN	15	0	0%
	Pioneer Quick Lube (Pennzoil 10-Minute Oil Change), MI	15	1	7%
	Speed Lube 10-Minute Oil Change (Pennzoil 10-Minute Oil Change), IL	15	0	0%
6	Fast Change Lube & Oil (Pennzoil 10-Minute Oil Change), KY	13	*	0%
7	Amerilube Oil Change Center (6 Valvoline Express Care/2 Amerilube Oil Change), WV	8	0	14%
8	Pit Stop "500" (Pennzoil 10-Minute Oil Change), IL	7	0	-22%
9	National Lube Express (Pennzoil 10-Minute Oil Change), FL	6	*	0%

* Projection not available.

These chains are independent chains associated with larger fast lube chains listed on main TOPS listing.

Most of the chains in this year's associated list are part of the Pennzoil 10-Minute Oil Change program.

TOP OIL CHANGE PLUS BUSINESSES OPERATING IN 2003

2003 Rank	2002 Rank	Facility Signage/ Company Headquarters	Independent/ Company Owned	Franchised	Total Operating 2/28/03	Total that Change Oil	Growth Since 2/28/03
1	2	Midas Auto Service Experts, IL	111	1,892	2,003	2,003	0%
2	3	Firestone Tire & Service Center, TN	1,300	0	1,300	1,300	
3	4	Wal-Mart Tire & Lube Express, AR	2,849	0	2,849	1,244	-17%
4	5	Motorcraft Fast Lube (Ford), MI	0	980	980	980	0%
5	6	DaimlerChrysler Mopar Xpress Lube, MI	915	0	915	915	0%
6	7	Meineke Car Care Center, NC	24	824	848	769	7%
7	8	Goodyear "Gemini" Auto Service Center, Just Tires, OH	654	0	654	654	-3%
8	10	Pep Boys, PA	629	0	629	616	0%
9		Tires Plus Total Car Care, FL	468	67	535	535	NEW
10	13	AutoNation, FL	0	374	374	374	2%
11	12	Precision Tune Auto Care, VA	0	350	350	350	-10%
12	14	Big O Tires, CO	8	528	536	325	8%
13	15	Tuffy Auto Service Center, OH	10	255	265	265	6%
14	16	Econo Lube N' Tune & Brakes, CA	25	200	225	225	-7%
15	17	All Tune & Lube, MD	0	223	223	223	-2%
16	19	Quick Lane (Ford), MI	208	0	208	208	34%
17	18	Car-X Auto Service, IL	30	149	179	179	-2%
18	21	ARCO Smogpros, CA	120	0	120	120	0%
19	20	Tuneup Masters, TX	115	0	115	115	-6%
20	23	Brake Masters, AZ	37	41	78	78	1%
21	24	Merlin Muffler & Brake, IL	9	60	69	67	5%
22	25	Tilden For Brakes Car Care Centers, NY	0	62	62	62	3%
23	26	Strauss Discount Auto, NJ	95	0	95	56	0%
24	27	CarMax, VA	42	0	42	42	11%
25	32	Quality Tune Up Shop, CA	4	37	41	41	95%
26	29	King Bear Auto Service Center, NY	33	0	33	33	14%
27	30	Tunex Automotive Specialists, UT	2	27	29	29	7%
28	28	Top Value Car & Truck Service Center, MI	8	20	28	28	-26%
29	31	Rapid Brake & Muffler/Master Muffler & Brake, KS	24	0	24	24	4%
30	34	Sun Devil Auto, AZ	19	0	19	19	0%
31	33	Oasis Car Wash Inc., TX	28	0	28	18	-10%
32	35	Commercial Tire, ID	28	0	28	14	0%
	39	Mace Car Wash, NJ	55	0	55	14	40%
34	37	Wash Depot, MA	57	0	57	13	0%
35	40	Mister Car Wash/Detail Lube Center, TX	11	0	11	11	22%
	38	Tune Up Plus, FL	11	0	11	11	0%
37	48	Regal Car Wash & Lube, AZ	9	0	9	9	50%
	41	StickerStop, TX	9	0	9	9	0%
39	43	Delta Sonic Carwash/Sonic Lube, NY	25	0	25	8	14%
	42	Exhaust Pro, KY	0	8	8	8	0%
41		Pronto Lube, TX	8	0	8	7	0%
42	44	Auto Quick, GA	6	0	6	6	0%
	45	Car Care Clinic/Quality Lube of Vicksburg, MS	6	0	6	6	0%
	47	Jim Paris Tire City, CO	6	0	6	6	0%
	49	Scrub-A-Dub Oil Change Center, WI	6	0	6	6	0%
TOTAL			8,004	6,097	14,101	12,025	

With the decision by GM not to support the 29-minute Quick Lube Plus program at its dealership network, Midas becomes the largest chain on our Oil Change-Plus list.

Wal-Mart closed nearly 250 of its Tire & Lube Express centers during the past year.

Ford added more than 50 Quick Lane service centers to its dealership network. Quick Lanes are similar to GM's Quick Lube program, but generally located on the dealer's lot, not off-site as with the GM program.

Though the carwash chains on the Oil Change-Plus list added eight new facilities, only four of those included new fast lubes. Mace Car Wash did add four new lube facilities to existing carwashes, but Oasis Car Wash closed lube facilities at two of its carwashes.

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

Rank	Facility Signage	Facilities
1	Xpress Lube (ChevronTexaco), FL	486
2	Pennzoil 10-Minute Oil Change, TX	72
3	Jiffy Lube, TX	44
4	Speedee Oil Change & Tune-Up, LA	35
5	Grease Monkey, CO	26
TOTAL		663

ABOUT NOLN'S TOPS IN THE INDUSTRY ISSUE...

Every March, the National Oil & Lube News publishes the results of its "TOPS In the Industry" facility-count survey, listing and ranking the top companies by the number of oil change facilities each of them operates. The "Fast Lube" list features companies that specialize in quick, convenient oil changes.

The "Oil Change Plus" list includes those companies that perform oil changes, but generally not as the primary focus of the business or not in a quick, convenient fashion.

For more information about NOLN's "TOPS" survey, and to update us on those operations that should be included in these counts, call:

1-800-796-2577

Other surveys available.

