



National OIL & LUBE NEWS

About NOLN's TOPS in the Industry Survey...

Every March, *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 company 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.

The "Associated" list includes those fast lubes that are owned by a single company or individual, but that wear the signage of a larger company.

And finally, the "Foreign" list includes those American-owned lube operations that have established a sizable presence overseas.

Fast Lube Industry Facts:

- As of March 1, 2004, there were approximately 16,241 fast lubes in operation. Overall, the industry's store count grew by 1.8 percent between March 1, 2003 and March 1, 2004.
- The fast lube industry's store counts grew by 5 percent from 1998-1999, 3.5 percent from 1999-2000, 3 percent from 2000-2001, 1 percent from 2001-2002 and 1 percent from 2002-2003.
- This year, the fast lube industry will record gross sales of approximately \$7.89 billion.
- Currently, the percentage breakdown of the installed oil change market versus the do-it-yourself (DIY) oil change market is approximately 55 percent installed and 45 percent DIY.
- The fast lube industry holds approximately 27 percent of the installed market. Dealerships hold approximately 25 percent.

Fast Lube Chain Facts:

- Overall, the chains listed by our TOPS survey added 357 facilities last year, a growth rate of 5.4 percent. NOTE: Not all this growth was not represented by new facility construction; some growth was accomplished by acquisition or the addition of formerly independent lubes to an oil company signage program.

- Of the 58 chains on our TOPS list, 22 added facilities, seven sold or closed facilities and 26 remained unchanged from 2003. There were three new chains on this year's list.

- Oil company signage programs grew by a combined 305 facilities last year. Texaco Xpress Lube and Valvoline Express Care recorded the biggest growth.

Oil Change-Plus Facts:

- There were four new chains listed on this year's oil change-plus list — Toyota Express Lube/Toyota Express Lube Plus, Monroe Muffler Brake & Service, Milex Tune-up & Brakes, and Carwash Headquarters.

- In all, 50 chains made this year's oil change-plus list. In 2003, only 45 chains made the list.

- Of the 46 chains listed on both last year's list and this year's list, 13 added facilities, 10 closed or sold facilities and 23 chains remained unchanged.

Texaco Xpress Lube recorded the biggest growth between March 1, 2003 and March 1, 2004. In that time, the signage program added 116 facilities.

The signage programs offered by ExxonMobil grew by 61 percent last year, with 46 lube facilities joining.

Super-Lube re-joined the TOPS list; last year the chain was partnered with the Pennzoil 10-Minute Oil Change program and was listed on the "Associated" lube chains list.

TOP FAST LUBE CHAINS OPERATING IN 2004

(LIST INCLUDES ONLY THOSE OPERATIONS REPORTING SIX OR MORE FACILITIES)

2004 Rank	2003 Rank	Facility Signage/ Company Headquarters	Independent/ Company Owned	Franchised	Total Operating 2/29/04	Add't. Stores Projected By 12/31/04	Growth Since 2/28/03
1	1	Jiffy Lube, TX	419	1,768	2,187	60	>1%
2	2	Pennzoil 10-Minute Oil Change, TX	887	0	887	*	6%
3	3	Valvoline Instant Oil Change, KY	351	390	741	55	3%
4	5	Texaco Xpress Lube, CA	422	0	422	100	38%
5	4	Kwik Kar, TX	355	0	355	13	3%
6	7	Valvoline Express Care, KY	303	0	303	72	32%
7	6	Shell Rapid Lube, TX	275	0	275	*	0%
8	8	Grease Monkey, CO	4	195	199	19	-6%
9	9	Citgo Lube, OK	192	0	192	25	17%
10	10	Phillips TropArtic Fast Lube, OK	152	0	152	15	-7%
11	11	Express Oil Change, AL	25	123	148	14	6%
12	13	Mobil Lube Express/Exxon Superflo Fast Lube/Mobil 1 Lube Express, VA	121	0	121	*	61%
13	12	SpeeDee Oil Change & Tune-Up, LA	0	111	111	5	-3%
14	14	American LubeFast, GA	65	0	65	4	0%
15	15	Oil Can Henry's, OR	5	46	51	12	4%
16	16	Speed Lube, IL	48	0	48	0	0%
17	18	EZ Lube Fast Oil Change Experts, CA	46	0	46	10	12%
18	22	Victory Lane Quick Oil Change, MI	6	39	45	6	29%
19	19	76 Express Lube, TX	44	0	44	15	10%
20	21	Oil Changers, CA	41	0	41	13	11%
21	17	The Lube Stop, OH	38	0	38	0	-14%
22	20	LubePro's, IL	15	22	37	1	-5%
23	23	Uncle Ed's Oil Shoppe, MI	29	0	29	0	0%
24	24	Oil Express National, IL	15	12	27	0	0%
25	25	Oilstop Drive-Thru Lube Center, CA	11	15	26	4	4%
27	26	ExpressWay Drive Thru Lube Center, CT	21	0	21	*	5%
29	31	Super-Lube, FL	21	0	21	1	0%
29	26	GM Goodwrench Quick Lube, MI	20	0	20	24	11%
31	26	Terrible Herbst, NV	20	0	20	3	0%
31	32	Wonder Lube, WI	17	0	17	0	0%
32	33	Grease Spot, IL	16	0	16	0	0%
33	35	FAS Lube 10 Minute Oil Change, OH	15	0	15	0	7%
34	34	5-Minute Oil Change, LA	14	0	14	4	NEW
34	34	Avis Lube Fast Oil Change Center, TX	14	0	14	1	-7%
35	35	Mr. Good Lube-New Jersey's Oil Change Center, NJ	14	0	14	1	0%
40	40	QuickChange, OH	10	4	14	2	17%
38	37	Fast Eddie's Oil Change, MI	13	0	13	0	0%
37	37	Master Xpress Lube Center, IN	13	0	13	*	NEW
37	37	QuikStop Oil Change, KY	11	2	13	3	0%
40	40	Sprint Lube, OH	13	0	13	2	8%
42	42	Time-It Lube, LA	13	0	13	0	30%
43	37	LUBExpress, NJ	11	0	11	2	0%
44	42	Super Lube, TX	10	0	10	0	0%
45	45	Dr. Lube, MI	9	0	9	1	0%
45	45	Duke of Oil, IN	9	0	9	0	0%
45	45	Lube 'n Go, TX	9	0	9	1	0%
45	45	Mr. Oil Change, NY	9	0	9	0	0%
45	45	UMC dba Speedy Lube/Zap Lube/Hi-Tech Lube, NY	9	0	9	0	0%
45	45	Xpress Lube, TX	9	0	9	0	NEW
45	45	Zip Lube, NM	9	0	9	0	0%
52	51	Skill Lube 10-Minute Oil Change, AL	8	0	8	0	0%
53	54	DeGreve Oil Change, IL	7	0	7	0	0%
54	54	Grease Pro Express Lube, FL	7	0	7	1	0%
51	51	Mr. Fast Lube, AR	7	0	7	0	-13%
54	54	Texas Oil X Change, TX	7	0	7	1	0%
57	57	National Lube Express, TX	6	0	6	2	0%
57	57	Oil Experts, IL	6	0	6	*	0%
TOTAL			4,266	2,733	6,999	494	

*Projection unavailable

For 2003, we recorded 59 lube chains that operated a total of 6,642 fast lubes, 357 less than the 2004 total of 6,999.

Goodyear Gemini Automotive Care jumped into the top spot on our Oil Change-Plus list after supplying figures for both company-owned and independent centers.

Toyota Express Lube/Toyota Express Lube Plus debuted on this year's list, another sign of auto dealerships' entry into the routine maintenance market.

Quick Lane, Ford's dealership-owned, off-site routine maintenance center program, grew by 35 percent during the last year, adding 72 facilities.

Both Car Spa and Car Care Center were moved to the Oil Change-Plus list from the Fast Lube list after their owners suggested that the chains more closely met the criteria for Oil Change-plus facilities.

TOP OIL CHANGE-PLUS BUSINESSES OPERATING IN 2004							
2004 Rank	2003 Rank	Facility Signage/ Company Headquarters	Independent/ Company Owned	Franchised	Total Operating 2/29/04	Total that Change Oil 2/29/04	Growth Since 2/28/03
1	7	Goodyear Gemini Automotive Care/Just Tires, OH	1,800	0	1,800	1,800	†
2	1	Midas Auto Service Experts, IL	73	1,624	1,697	1,697	†
3	3	Wal-Mart Tire & Lube Express, AR	2,906	0	2,906	1,430	15%
4	2	Firestone Tire & Service Center, IL	1,424	0	1,424	1,424	10%
5		Toyota Express Lube/Toyota Express Lube Plus, KY	1,046	0	1,046	1,046	NEW
6	4	Motorcraft Fast Lube (Ford), MI	0	980	980	980	0%
7	5	DaimlerChrysler Mopar Xpress Lube, MI	0	915	915	915	0%
8	6	Meineke Car Care Center, NC	5	846	851	789	-5%
9	8	Pep Boys, PA	595	0	595	584	-3%
10		Monroe Muffler Brake & Service, NY*	568	0	568	568	NEW
11	9	Tires Plus Total Car Care, FL	535	0	535	535	0%
12	10	AutoNation, FL	0	373	373	373	0%
13	12	Big O Tires, CO	1	573	574	360 **	11%
14	11	Precision Tune Auto Care, VA	0	340	340	340	-3%
15	16	Quick Lane (Ford), MI	280	0	280	280	35%
16	15	All Tune & Lube, MD	1	250	251	251	13%
17	13	Tuffy Auto Service Center, OH	13	237	250	250	-6%
18	14	Econo Lube N' Tune & Brakes, CA	19	200	219	219	-3%
19	17	Car-X Auto Service, IL	24	153	177	177	-1%
20	19	Tuneup Masters, TX	105	0	105	105	-9%
21	20	Brake Masters, AZ	38	39	77	77	-1%
22	21	Merlin Muffler & Brake, IL	4	68	72	72	7%
23	22	Tilden For Brakes Car Care Centers, NY	0	62	62	62	0%
24	23	Strauss Discount Auto, NJ	95	0	95	56	0%
25	24	CarMax, VA	48	0	48	48	14%
26	25	Quality Tune Up Shop, CA	4	37	41	41	0%
27	27	Tunex Automotive Specialists, UT	1	28	29	29	0%
28	28	Top Value Car & Truck Service Center, MI	8	20	28	28	0%
29	29	Rapid Brake & Muffler/Master Muffler & Brake, KS	26	0	26	26	8%
30	26	King Bear Auto Service Center, NY	25	0	25	25	-24%
31	31	Oasis Car Wash Inc., TX	28	0	28	20	11%
	32	Commercial Tire, ID	31	0	31	20	43%
33	30	Sun Devil Auto, AZ	20	0	20	19	0%
34	32	Mace Car Wash, NJ	55	0	55	14	0%
35	34	Wash Depot, MA***	57	0	57	13	0%
36		Milex Tune-Up & Brakes, IL	12	0	12	12	NEW
37	35	Mister Car Wash/Detail Lube Center, TX	11	0	11	11	0%
	35	Tune Up Plus, FL	11	0	11	11	0%
39	37	Regal Car Wash & Lube, AZ	20	0	20	9	0%
	37	StickerStop, TX	9	0	9	9	0%
		Car Spa Express Lube, TX	10	0	10	9	0%
42	39	Delta Sonic Carwash/Sonic Lube, NY	25	0	25	8	0%
43	41	Pronto Lube, TX	7	0	7	7	0%
		Carwash Headquarters, TX	10	0	10	7	NEW
	42	Car Care Clinic, MS	7	0	7	7	17%
		Car Care Center, GA	7	0	7	7	-13%
	42	Scrub-A-Dub Oil Change Center, WI	7	0	7	7	17%
48	39	Exhaust Pro, KY	0	6	6	6	-25%
	42	Auto Quick, GA	6	0	6	6	0%
	42	Jim Paris Tire City, CO	6	0	6	6	0%
TOTAL			9,983	6,751	16,734	14,795	

*also dba Speedy Auto Service, Kimmel Tire & Auto Center, Tread Quarters Discount Tire

**estimate

***figures from 2003; 2004 unavailable

†company's facility total reported incorrectly for 2003

TOP ASSOCIATED CHAINS OPERATING IN 2004

2004 Rank	Facility Signage/Associated Chain/ Company Headquarters	Total Operating 2/29/04	Additional Stores Projected By 12/31/04	Growth Since 2/28/03
1	Southern Express Lubes (36 Mobil Lube Express/9 Shell Rapid Lube), FL	45	*	0%
2	Pioneer Quick Lube (Pennzoil 10-Minute Oil Change), MI	15	0	0%
	Speed Lube 10-Minute Oil Change (Pennzoil 10-Minute Oil Change), IL	15	0	0%
4	Fast Change Lube & Oil (Pennzoil 10-Minute Oil Change), KY	13	*	0%
5	Mr. Lubie (Phillips TropArtic Fast Lube), IN	12	0	-20%
6	Automasters of Asheboro (dba Valvoline Express Care), NC	9	0	NEW
7	Express Automotive Group (Texaco Xpress Lube), TX	8	0	NEW
	Amerilube Oil Change Center (6 Valvoline Express Care/2 Amerilube Oil Change), WV	8	0	0%

* Projection not available.

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

Rank	Facility Signage	Facilities
1	Xpress Lube (ChevronTexaco), CA	486
2	Precision Tune Auto Care, VA	105
3	Pennzoil 10-Minute Oil Change, TX	80
4	Jiffy Lube, TX	44
5	SpeeDee Oil Change & Tune-Up, LA	43
6	Meineke Car Care Centers, NC	40
7	Grease Monkey, CO	34

TOTAL

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