



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, 2005, there were approximately 16,485 fast lubes in operation. Overall, the industry's store count grew by 1.5 percent between March 1, 2004 and March 1, 2005.
- 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, 1 percent from 2002-2003, and 1.8 percent from 2003-2004.
- This year, the fast lube industry will record gross sales of approximately \$7.87 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 206 facilities last year, a growth rate of 2.9 percent. NOTE: Not all this growth was represented by new facility construction; most of the growth was accomplished by acquisition or the addition of formerly independent lubes to an oil company signage program.
- Of the 59 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 and Mr. Lubie moved from the Associated List to the Fast Lube Chains List.
- Oil company signage programs grew by a combined 152 facilities last year. Valvoline Express Care and Mobil 1 Lube Express recorded the biggest growth.

Oil Change-Plus Facts:

- There was one new chain listed on this year's oil change-plus list — Great American Tire & Auto Service Center.
- In all, 51 chains made this year's oil change-plus list.
- Of the 50 chains listed on both last year's list and this year's list, 14 added facilities, 11 closed or sold facilities and 25 chains remained unchanged.

TOP FAST LUBE CHAINS OPERATING IN 2005

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

| 2005 Rank | 2004 Rank | Facility Signage/ Company Headquarters | Independent/ Company Owned | Franchised | Total Operating 2/28/05 | Add't. Stores Projected By 12/31/05 | Growth Since 2/29/04 |
|--------------|-----------|---|----------------------------------|--------------|-------------------------------|--|----------------------------|
| 1 | 1 | Jiffy Lube, TX | 407 | 1,758 | 2,165 | 60 | -1% |
| 2 | 2 | Pennzoil 10-Minute Oil Change, TX | 887 | 0 | 887 | * | 0% |
| 3 | 3 | Valvoline Instant Oil Change, KY | 359 | 401 | 760 | 29 | 3% |
| 4 | 4 | Texaco Xpress Lube, CA | 466 | 0 | 466 | 50 | 10% |
| 5 | 6 | Valvoline Express Care, KY | 366 | 0 | 366 | 61 | 21% |
| 6 | 5 | Kwik Kar, TX | 360 | 0 | 360 | 10 | 1% |
| 7 | 7 | Shell Rapid Lube, TX | 275 | 0 | 275 | * | 0% |
| 8 | 9 | Citgo Lube, OK | 205 | 0 | 205 | 25 | 7% |
| 9 | 8 | Grease Monkey, CO | 3 | 198 | 201 | 20 | 1% |
| 10 | 12 | Mobil 1 Lube Express (includes Mobil Lube Express/Exxon Superflo Fast Lube), VA | 186 | 0 | 186 | * | 54% |
| 11 | 11 | Express Oil Change, AL | 35 | 115 | 150 | * | 1% |
| 12 | 10 | Phillips TropArtic Fast Lube, OK | 123 | 0 | 123 | 12 | -19% |
| 13 | 13 | SpeeDee Oil Change & Tune-Up, LA | 0 | 111 | 111 | 6 | 0% |
| 14 | 14 | American LubeFast, GA | 68 | 0 | 68 | 4 | 5% |
| 15 | 17 | EZ Lube Fast Oil Change Experts, CA | 55 | 0 | 55 | 20 | 20% |
| 16 | 15 | Oil Can Henry's, OR | 5 | 49 | 54 | 8 | 6% |
| 17 | 16 | Speed Lube, IL | 48 | 0 | 48 | 0 | 0% |
| 18 | 19 | 76 Express Lube, TX | 40 | 0 | 40 | * | -9% |
| | 20 | Oil Changers, CA | 40 | 0 | 40 | 10 | -2% |
| 20 | 21 | The Lube Stop, OH | 38 | 0 | 38 | 3 | 0% |
| | 22 | LubePro's, IL | 17 | 21 | 38 | * | 3% |
| 22 | 29 | GM Goodwrench Quick Lube, MI | 35 | 0 | 35 | 20 | 75% |
| 23 | 18 | Victory Lane Quick Oil Change, MI | 5 | 28 | 33 | 7 | -27% |
| 24 | 23 | Uncle Ed's Oil Shoppe, MI | 29 | 0 | 29 | 1 | 0% |
| | 25 | Performance Plus Quick Lube, MI | 23 | 6 | 29 | 2 | 12% |
| 26 | 24 | Oil Express National, IL | 15 | 12 | 27 | 0 | 0% |
| 27 | | The Oil Exchange, MI*** | 24 | 0 | 24 | * | NEW |
| 28 | 25 | Oilstop Drive-Thru Lube Center, CA | 11 | 11 | 22 | 5 | -15% |
| | 27 | ExpressWay Drive Thru Lube Center, CT | 22 | 0 | 22 | * | 5% |
| | 27 | Super-Lube, FL | 22 | 0 | 22 | 0 | 5% |
| 31 | 29 | Terrible Herbst, NV | 20 | 0 | 20 | 2 | 0% |
| 32 | 31 | Wonder Lube, WI | 17 | 0 | 17 | 0 | 0% |
| 33 | 32 | Grease Spot, IL | 16 | 0 | 16 | 0 | 0% |
| 34 | 33 | FAS Lube 10 Minute Oil Change, OH | 15 | 0 | 15 | 1 | 0% |
| 35 | 34 | 5-Minute Oil Change, LA | 14 | 0 | 14 | 4 | 0% |
| | 34 | Avis Lube Fast Oil Change Center, TX | 14 | 0 | 14 | 1 | 0% |
| | 34 | QuickChange, OH | 10 | 4 | 14 | 2 | 0% |
| 38 | 38 | Fast Eddie's Oil Change, MI | 13 | 0 | 13 | 0 | 0% |
| | 38 | Master Xpress Lube Center, IN | 13 | 0 | 13 | * | 0% |
| | ** | Mr. Lubie, IN | 13 | 0 | 13 | 1 | 8% |
| | 38 | QuikStop Oil Change, KY | 11 | 2 | 13 | 3 | 0% |
| | 38 | Time-It Lube, LA | 13 | 0 | 13 | 0 | 0% |
| 43 | 34 | Mr. Good Lube-New Jersey's Oil Change Center, NJ | 12 | 0 | 12 | 1 | -14% |
| | 43 | LUBExpress, NJ | 12 | 0 | 12 | 2 | 9% |
| | 45 | Duke of Oil, IN | 12 | 0 | 12 | 0 | 33% |
| 46 | 45 | UMC dba Speedy Lube/Zap Lube/Hi-Tech Lube, NY | 11 | 0 | 11 | 1 | 22% |
| 47 | | Big Ray's Quick Lube, MI | 10 | 0 | 10 | * | NEW |
| | 44 | Super Lube, TX | 10 | 0 | 10 | 0 | 0% |
| | 45 | Xpress Lube, TX | 10 | 0 | 10 | 0 | 11% |
| 50 | 45 | Lube 'n Go, TX | 9 | 0 | 9 | 0 | 0% |
| | 57 | National Lube Express, TX | 9 | 0 | 9 | 1 | 50% |
| 52 | 45 | Mr. Oil Change, NY | 8 | 0 | 8 | 0 | -11% |
| | 52 | Skill Lube 10-Minute Oil Change, AL | 8 | 0 | 8 | 0 | 0% |
| 54 | 53 | DeGreve Oil Change, IL | 7 | 0 | 7 | 0 | 0% |
| | 53 | Grease Pro Express Lube, FL | 7 | 0 | 7 | 1 | 0% |
| | 53 | Mr. Fast Lube, AR | 7 | 0 | 7 | 0 | 0% |
| | 53 | Texas Oil X Change, TX | 7 | 0 | 7 | 1 | 0% |
| 58 | | Bradzoil 10 Minute Oil Change, TX | 6 | 0 | 6 | * | NEW |
| | 57 | Oil Experts, IL | 6 | 0 | 6 | 0 | 0% |
| TOTAL | | | 4,489 | 2,716 | 7,205 | 374 | |

*Projection unavailable **Former associated chain ***Also operates two Mobil 1 Lube Express centers for a total of 26

Valvoline Express Care added 63 facilities between March 1, 2004 and March 1, 2005. In 2001 when it debuted on the TOPS list, the chain included 50 facilities.

Mobil 1 Lube Express recorded the largest growth during the 12-month period between March 1, 2004 and March 1, 2005, adding 65 facilities for a growth rate of 54 percent.

The Oil Exchange was our highest debuting lube chain, with 26 total facilities (including two Mobil 1 Lube Express centers).

The 7,205 facilities represented in our TOPS list account for nearly 44 percent of the fast lube population.

TOP OIL CHANGE-PLUS BUSINESSES OPERATING IN 2005

Thanks to the rapid expansion of its Tire & Lube Express program, Wal-Mart now tops the list of our oil-change plus chains.

Dealership-based lube facilities like DaimlerChrysler's Mopar Xpress Lube continue to grow, adding 85 more centers between March 1, 2004 and March 1, 2005.

Milex Tune-Up & Brake recorded the highest percentage growth, adding a total of seven new facilities.

Though Regal Car Wash continues to operate 15 carwash facilities, the company closed three of its lube shops.

| 2005 Rank | 2004 Rank | Facility Signage/ Company Headquarters | Independent/ Company Owned | Franchised | Total Operating 2/28/05 | Total that Change Oil 2/28/05 | Growth Since 2/29/04 |
|--------------|-----------|--|-------------------------------|--------------|----------------------------|-------------------------------------|----------------------------|
| 1 | 3 | Wal-Mart Tire & Lube Express, AR | 3,035 | 0 | 3,035 | 1,969 | † |
| 2 | 1 | Goodyear Gemini Automotive Care/Just Tires, OH | 1,800 | 0 | 1,800 | 1,800 | 0% |
| 3 | 2 | Midas Auto Service Experts, IL | 73 | 1,542 | 1,615 | 1,615 | -5% |
| 4 | 4 | Firestone Tire & Service Center, IL | 1,443 | 0 | 1,443 | 1,443 | 1% |
| 5 | 5 | Toyota Express Lube/Toyota Express Lube Plus, CA | 0 | 1,115 | 1,115 | 1,115 | 7% |
| 6 | 7 | DaimlerChrysler Mopar Xpress Lube, MI | 0 | 1,000 | 1,000 | 1,000 | 9% |
| 7 | 6 | Motorcraft Fast Lube (Ford), MI | 0 | 980 | 980 | 980 | 0% |
| 8 | 8 | Meineke Car Care Center, NC | 2 | 842 | 844 | 784 | -1% |
| 9 | 10 | Monroe Muffler Brake & Service, NY* | 613 | 0 | 613 | 613 | 8% |
| 10 | 9 | Pep Boys, PA | 595 | 0 | 595 | 584 | 0% |
| 11 | 11 | Tires Plus Total Car Care, FL | 489 | 3 | 492 | 492 | -8% |
| 12 | 13 | Big O Tires, CO | 0 | 569 | 569 | 355 ** | -1% |
| 13 | 14 | Precision Tune Auto Care, VA | 0 | 320 | 320 | 320 | -6% |
| 14 | 15 | Quick Lane (Ford), MI | 301 | 0 | 301 | 301 | 8% |
| 15 | 12 | AutoNation, FL | 0 | 285 | 285 | 285 | † |
| 16 | 16 | All Tune & Lube, MD | 1 | 250 | 251 | 251 | 0% |
| 17 | 17 | Tuffy Auto Service Center, OH | 14 | 236 | 250 | 250 | 0% |
| 18 | 18 | Econo Lube N' Tune & Brakes, CA | 21 | 320 | 341 | 219 | 0% |
| 19 | 19 | Car-X Auto Service, IL | 23 | 157 | 180 | 180 | 2% |
| 20 | 20 | Tuneup Masters, TX | 105 | 0 | 105 | 105 | 0% |
| 21 | 21 | Brake Masters, AZ | 44 | 38 | 82 | 82 | 6% |
| 22 | 22 | Merlin Muffler & Brake, IL | 4 | 67 | 71 | 71 | -1% |
| 23 | 24 | Strauss Discount Auto, NJ | 103 | 0 | 103 | 67 | 20% |
| 24 | 23 | Tilden Complete Car Care Centers, NY | 0 | 60 | 60 | 60 | -3% |
| 25 | 25 | CarMax, VA | 59 | 0 | 59 | 59 | 23% |
| 26 | 26 | Quality Tune Up Shop, CA | 1 | 37 | 38 | 38 | -7% |
| 27 | 27 | Tunex Automotive Specialists, UT | 1 | 30 | 31 | 31 | 7% |
| 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 | 0% |
| 30 | 30 | King Bear Auto Service Center, NY | 23 | 0 | 23 | 23 | -8% |
| | 33 | Sun Devil Auto, AZ | 24 | 0 | 24 | 23 | 21% |
| 32 | 31 | Oasis Car Wash Inc., TX | 28 | 0 | 28 | 20 | 0% |
| | 31 | Commercial Tire, ID | 31 | 0 | 31 | 20 | 0% |
| 34 | 36 | Milex Tune-Up & Brakes, IL | 19 | 0 | 19 | 19 | 58% |
| 35 | | Great American Tire & Auto Service Center, CO | 14 | 0 | 14 | 14 | NEW |
| 36 | 35 | Wash Depot, MA | 64 | 0 | 64 | 13 | 0% |
| 37 | 34 | Mace Car Wash/Mace Truck Wash, NJ | 54 | 0 | 54 | 12 | -14% |
| 38 | 37 | Mister Car Wash/Detail Lube Center, TX | 11 | 0 | 11 | 11 | 0% |
| | 37 | Tune Up Plus, FL | 11 | 0 | 11 | 11 | 0% |
| 40 | 39 | Car Spa, TX | 12 | 0 | 12 | 10 | 11% |
| 41 | 39 | StickerStop, TX | 9 | 0 | 9 | 9 | 0% |
| | 42 | Delta Sonic Carwash/Sonic Lube, NY | 27 | 0 | 27 | 9 | 13% |
| 43 | 43 | Pronto Lube, TX | 7 | 0 | 7 | 7 | 0% |
| | 43 | Carwash Headquarters, TX | 11 | 0 | 11 | 7 | 0% |
| | 43 | Car Care Clinic, MS | 7 | 0 | 7 | 7 | 0% |
| | 43 | Car Care Center, GA | 7 | 0 | 7 | 7 | 0% |
| | 43 | Scrub-A-Dub Oil Change Center, WI | 7 | 0 | 7 | 7 | 0% |
| 48 | 39 | Regal Car Wash & Lube, AZ | 15 | 0 | 15 | 6 | -33% |
| | 48 | Exhaust Pro, KY | 0 | 6 | 6 | 6 | 0% |
| | 48 | Auto Quick, GA | 6 | 0 | 6 | 6 | 0% |
| | 48 | Jim Paris Tire City, CO | 6 | 0 | 6 | 6 | 0% |
| TOTAL | | | 9,154 | 7,877 | 17,031 | 15,376 | |

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

**estimate

†company's facility total reported incorrectly for 2004

TOP ASSOCIATED CHAINS OPERATING IN 2005

| 2005 Rank | Facility Signage/Associated Chain/ Company Headquarters | Total Operating 2/28/05 | Additional Stores Projected By 12/31/05 | Growth Since 2/29/04 |
|-----------|---|----------------------------|---|-------------------------|
| 1 | Southern Express Lubes (40 Mobil Lube Express/9 Shell Rapid Lube), FL | 49 | * | 9% |
| 2 | Speed Lube 10-Minute Oil Change (Pennzoil 10-Minute Oil Change), IL | 15 | 0 | 0% |
| 3 | Fast Change Lube & Oil (Pennzoil 10-Minute Oil Change), KY | 14 | 2 | 8% |
| 4 | Pioneer Quick Lube (Pennzoil 10-Minute Oil Change), MI | 13 | 0 | -13% |
| 5 | Express Automotive Group (Texaco Xpress Lube), TX | 10 | 0 | 25% |
| 6 | Automasters of Asheboro (Valvoline Express Care), NC | 9 | 0 | 0% |
| 7 | Amerilube Oil Change Center (5 Valvoline Express Care/2 Amerilube Oil Change), WV | 7 | 0 | -13% |

* Projection not available.

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

| Rank | Facility Signage | Facilities |
|--------------|---|--------------|
| 1 | Midas Auto Service Experts | 990 |
| 2 | Texaco/Caltex Xpress Lube (ChevronTexaco), CA | 486 |
| 3 | Precision Tune Auto Care, VA | 84 |
| 4 | Pennzoil 10-Minute Oil Change, TX | 82 |
| 5 | Jiffy Lube, TX | 44 |
| 6 | SpeeDee Oil Change & Tune-Up, LA | 43 |
| 7 | Grease Monkey, CO | 39 |
| 8 | Meineke Car Care Centers, NC | 35 |
| TOTAL | | 1,803 |



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