



National OIL & LUBE NEWS

About NOLN's 2006 TOPS in the Fast Lube Industry Rankings:

Published in March, the TOPS ranking lists the top fast oil change 'chains' — those companies operating six or more like-branded facilities — by the number of lube shops each operates. This year, the 57 chains that made the list operate a grand total of 7,411 facilities, or nearly 45 percent of the total U.S. fast lube population.

In addition to the TOPS fast lube list, NOLN ranks the top "oil change-plus" chains, which are those companies that offer oil changes, but generally not as business' primary focus. We also rank 'associated' chains, or those companies that operate six or more stores that wear signage of a larger operation, and foreign chains, which are those U.S.-based companies with a sizable overseas presence.

Fast Lube Industry Facts:

- As of March 1, 2006, there were approximately 16,884 fast lubes in operation. Overall, the industry's store count grew by 2.4 percent between March 1, 2005 and March 1, 2006.
- The fast lube industry's overall store count grew by 5 percent from 1998 to 1999, 3.5 percent from 1999 to 2000, 3 percent from 2000 to 2001, 1 percent from 2001 to 2002, 1 percent from 2002 to 2003, 1.8 percent from 2003 to 2004, and 1.5 percent from 2004 to 2005.
- For 2006, the fast lube industry will record gross sales of approximately \$8.21 billion.
- Estimates are that 45 percent of households still change their own oil (DIY), while 55 percent of households pay to have their oil changed (DIFM).
- Estimates are that traditional fast lubes account for 28 percent of the installed, or DIFM, market. Dealerships are the second-largest segment of the installed market, with approximately 25 percent market share.

Fast Lube Chain Facts:

- Overall, the chains listed in our TOPS ranking added 206 facilities last year, a growth rate of 2.9 percent. Note that much of this growth was accomplished via acquisition of existing lube facilities.
- Of the 57 chains ranked in our TOPS list, 22 added facilities during the past year, 10 sold or closed facilities and 23 remained unchanged from last year's rankings. There were two new chains on this year's list.
- Regional chains like EZ Lube, Oil Can Henry's, Victory Lane Quick Oil Change, Super-Lube and Terrible Herbst added a combined total of 63 facilities to their operations during the past year.

Miscellaneous Lube Chain Facts:

- Petro:Lube is the largest truck lube chain, with 60 facilities located adjacent to Petro truck stops. Speedco Truck Lube is second with 35 facilities.
- Mr. Lube is the largest Canadian fast lube chain, with 88 facilities open and plans to open an additional 66 during the next five years.

Oil Change-Plus Chain Facts:

- The number of chains making our oil change-plus ranking declined to 43 from last year's total of 51.
- Overall, the 43 chains on this year's list operate a combined 14,135 facilities, which is down from last year's figure of 15,376. Much of the more than 1,200-facility difference can be traced to the fact that DaimlerChrysler has, for the time being, shuttered its Mopar Xpress Lube program.
- The largest facility growth was credited to Quick Lane, Ford's dealership fast lube program, which reported an increase of 86 facilities.
- Of the 43 chains on this year's list, 18 added facilities during the previous year, six closed or sold stores and 18 reported no changes. One chain, Toyota's Express Lube/Express Lube Plus, was reported incorrectly last year. Though the company does have 1,214 dealerships, only 786 of those are certified to do quick oil changes, not all 1,214.

TOP FAST LUBE CHAINS OPERATING IN 2006

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

2006 Rank	2005 Rank	Facility Signage/ Company Headquarters	Independent/ Company Owned	Franchised	Total Operating 2/28/06	Add't. Stores Projected By 12/31/06	Growth Since 2/28/05
1	1	Jiffy Lube, TX	281	1,883	2,164	80	0%
2	2	Pennzoil 10-Minute Oil Change, TX	887	0	887	*	0%
3	3	Valvoline Instant Oil Change, KY	302	476	778	25	2%
4	4	Texaco Xpress Lube, CA	502	0	502	75	8%
5	5	Valvoline Express Care, KY	387	0	387	45	6%
6	6	Kwik Kar, TX	368	0	368	10	2%
7	7	Shell Rapid Lube, TX	275	0	275	*	0%
8	10	Mobil 1 Lube EXPRESS (includes Mobil Lube Express/Exxon Superflo Fast Lube)** , VA	237	0	237	*	27%
9	8	CITGO Lube, TX	203	0	203	30	-1%
10	9	Grease Monkey, CO	3	185	188	20	-6%
11	n/a	ConocoPhillips Lube Shop, TX	163	0	163	20	0%
12	11	Express Oil Change, AL	50	110	160	19	7%
13	13	Speedee Oil Change & Tune-Up, LA	0	115	115	2	4%
14	15	EZ Lube Fast Oil Change Experts, CA	74	0	74	20	35%
15	14	American LubeFast, GA	69	0	69	3	1%
16	16	Oil Can Henry's, OR	7	55	62	16	15%
17	22	GM Goodwrench Quick Lube, MI	59	0	59	8	69%
18	17	Speed Lube, IL	48	0	48	*	0%
	23	Victory Lane Quick Oil Change, MI	6	42	48	10	45%
20	28	Super-Lube, FL	27	13	40	10	82%
21	20	Lube Stop or The Lube Stop, OH	37	0	37	2	-3%
	18	Oil Changers, CA	37	0	37	*	-8%
23	20	LubePro's, IL	15	19	34	2	-11%
24	24	Uncle Ed's Oil Shoppe, MI	29	0	29	*	0%
25	24	Performance Plus Quick Lube, MI	20	8	28	1	-3%
26	27	The Oil Exchange, MI***	25	0	25	3	4%
27	28	Oilstop Drive-Thru Oil Center, CA	11	13	24	3	9%
28	26	Oil Express, IL	13	10	23	2	-15%
	31	Terrible Herbst, NV	23	0	23	*	15%
30	28	ExpressWay Drive Thru Lube Center, CT	22	0	22	*	0%
31	32	Wonder Lube, WI	17	0	17	0	0%
32	35	5-Minute Oil Change, LA	16	0	16	3	14%
33	34	FAS Lube 10 Minute Oil Change, OH	15	0	15	1	0%
	33	Grease Spot, IL	15	0	15	0	-6%
35	38	Fast Eddie's Oil Change, MI	14	0	14	0	8%
	35	QuickChange, OH	13	1	14	2	0%
37	35	Avis Lube Fast Oil Change Center, TX	13	0	13	1	-7%
	43	Duke of Oil, IL	13	0	13	0	8%
	47	Express Lube, TX	13	0	13	2	30%
	38	Master Xpress Lube Center, IN	13	0	13	3	0%
	38	Mr. Lubie, IN	13	0	13	1	0%
	38	QuikStop Oil Change, KY	11	2	13	*	0%
	38	Time-It Lube, LA	13	0	13	*	0%
44	43	LUBExpress, NJ	12	0	12	1	0%
	43	Mr. Good Lube-New Jersey's Oil Change Center, NJ	12	0	12	1	0%
46	46	UMC dba Speedy Lube/Zap Lube/Hi-Tech Lube, NY	11	0	11	*	0%
47	54	Grease Pro Express Lube, FL	10	0	10	2	43%
48	50	Lube 'n Go, TX	9	0	9	2	0%
	50	National Lube Express, TX	9	0	9	1	0%
	47	Super Lube, TX	9	0	9	*	-10%
51	n/a	Fast Track, NY	8	0	8	0	NEW
	54	Texas Oil X Change, TX	8	0	8	1	14%
53	54	DeGreve Oil Change, IL	7	0	7	0	0%
	54	Mr. Fast Lube, AR	7	0	7	0	0%
55	58	Bradzoil 10 Minute Oil Change, TX	6	0	6	0	0%
	58	Oil Experts, IL	6	0	6	*	0%
	n/a	Toot n' Totum, TX	6	0	6	*	NEW
TOTAL			4,479	2,932	7,411	427	

*Projection unavailable

The 7,411 facilities represented in our TOPS rankings account for nearly 45 percent of the overall fast lube population.

The Conoco-Phillips Lube Shop program is a consolidation of the Phillips TropArtic Fast Lube program and the 76 Express Lube program.

California-based EZ Lube continues to grow at an impressive pace, adding 19 facilities during the past year, largely by acquisition.

Under new ownership, Super-Lube almost doubled in size during the past year, adding a total of 18 facilities.

Two new chains made this year's list: New York-based Fast Track with eight facilities and Texas-based Toot n' Totum with six facilities.

TOP OIL CHANGE-PLUS BUSINESSES OPERATING IN 2006

2006 Rank	2005 Rank	Facility Signage/ Company Headquarters	Independent/ Company Owned	Franchised	Total Operating 2/28/06	Total that Change Oil 2/28/06	Growth Since 2/28/05
1	1	Wal-Mart Tire & Lube Express, AR	3,800	0	3,800	2,000	2%
2	2	Goodyear Gemini Automotive Care, OH	1,865	0	1,865	1,865	4%
3	3	Midas Auto Service Experts, IL	70	1,545	1,615	1,615	0%
4	4	Firestone Tire & Service Center, IL	1,448	0	1,448	1,448	0%
5	8	Meineke Car Care Center, NC	2	839	841	825	5%
6	7	Motorcraft Fast Lube (Ford), MI	0	817	817	817	-17%
7	5	Toyota Express Lube/Toyota Express Lube Plus, CA	0	1,214	1,214	786	0%
8	9	Monroe Muffler Brake & Service, NY*	626	0	626	626	2%
9	10	Pep Boys, PA	593	0	593	582	0%
10	11	Tires Plus Total Car Care, FL	483	0	483	483	-2%
11	n/a	Tuffy/Car X, OH	32	397	429	429	0%
12	14	Quick Lane (Ford), MI	387	0	387	387	29%
13	12	Big O Tires, CO	0	569	569	355 **	0%
14	13	Precision Tune Auto Care, VA	0	330	330	330	3%
15	15	AutoNation, FL	0	278	278	278	-2%
16	16	All Tune & Lube, MD	1	259	260	260	4%
17	18	Econo Lube N' Tune & Brakes, CA	25	200	225	225	3%
18	20	Tuneup Masters, TX	105	0	105	105	0%
19	21	Brake Masters, AZ	46	37	83	83	1%
20	25	CarMax, VA	70	0	70	70	19%
	22	Merlin Muffler & Brake, IL	10	60	70	70	-1%
	23	Strauss Discount Auto, NJ	96	0	96	70	4%
23	24	Tilden Complete Car Care Centers, NY	0	68	68	68	13%
24	26	Quality Tune Up Shop, CA	2	38	40	40	5%
25	30	King Bear Auto Service Center, NY***	35	0	35	35	52%
26	34	Milex Tune-Up & Brakes, IL	34	0	34	34	79%
27	27	Tunex Complete Car Care, UT	4	27	31	31	0%
28	28	Top Value Car & Truck Service Center, MI	8	20	28	28	0%
29	30	Sun Devil Auto, AZ	24	0	24	23	0%
30	36	Wash Depot, MA	72	0	72	21	62%
31	32	Commercial Tire, ID	31	0	31	20	0%
	31	Oasis Car Wash Inc., TX	28	0	28	20	0%
	29	Rapid Service Center/Master Auto Care, KS	20	0	20	20	-23%
34	37	Mace Car Wash, NJ	48	0	48	12	0%
35	38	Tune Up Plus, FL	11	0	11	11	0%
36	40	Car Spa, TX	12	0	12	10	0%
37	41	Delta Sonic Carwash/Sonic Lube, NY	28	0	28	9	0%
	48	Regal Car Wash & Lube, AZ	9	0	9	9	50%
39	43	Car Care Clinic, MS	8	0	8	8	14%
40	38	Mister Car Wash/Detail Lube Center, TX	12	0	12	7	-36%
	43	Pronto Lube, TX	7	0	7	7	0%
	43	Scrub-A-Dub, WI	13	0	13	7	0%
43	48	Auto Quick, GA	6	0	6	6	0%
TOTAL			10,071	6,698	16,769	14,135	

*also dba Speedy Auto Service by Monroe, Mr. Tire, and Tread Quarters Discount Tires

**estimate

***figures obtained from third-party source

Goodyear added 65 Gemini Auto Care centers to its ranks this year, keeping it solidly in second place on the oil change-plus ranking.

Due in large part to the phenomenal growth of its Quick Lane lube program (which added 86 new facilities during the past year), fewer Ford dealers are participating in the Motorcraft Fast Lube program, which declined by 163 facilities. Ford has announced that it plans to build an additional 200 new Quick Lane facilities during 2006.

Wash Depot added eight carwash/fast lube facilities to its ranks during the past year, continuing the fast lube/carwash trend.

A number of oil change-plus chains were sold during the past year, either piecemeal or as a whole. Among those were: Mace Truck Wash, Great American Tire & Auto Service Center, Car Care Center, Exhaust Pro, StickerStop and Jim Paris Tire City.

Though the total number of oil change-plus chain facilities listed this year is more than 1,200 less than last year, the largest amount (1,000) can be attributed to the fact that DaimlerChrysler has temporarily discontinued its Mopar Xpress Lube program, reportedly so the program can be reviewed and relaunched in the same vein as GM's Goodwrench Quick Lube and Ford's Quick Lane programs. Combined, the 43 chains on this year's list added a total of 136 new oil change-plus facilities.

TOP ASSOCIATED CHAINS OPERATING IN 2006

2006 Rank	Facility Signage/Associated Chain/ Company Headquarters	Total Operating 2/28/06	Additional Stores Projected By 12/31/06	Growth Since 2/28/05
1	Southern Express Lube (40 Mobil Lube Express, 9 Shell Rapid Lubes), FL	49	*	0%
2	North Florida Lubes (33 Texaco Xpress Lubes, 1 Valvoline, 1 Shell), FL	35	*	n/a
3	Speed Lube 10-Minute Oil Change (Pennzoil 10-Minute Oil Change), IL	16	2	7%
4	Fast Change Lube & Oil (Pennzoil 10-Minute Oil Change), KY	14	3	0%
5	Pioneer Quick Lube (Pennzoil 10-Minute Oil Change), MI	13	1	0%
6	JCSC Services Inc. (8 Express Oil Change franchises, 3 Texaco Xpress Lubes), AL	11	*	n/a
7	Express Automotive Group (Texaco Xpress Lube), TX	10	*	0%
8	Automasters of Asheboro (Valvoline Express Care), NC	9	0	0%
9	Amerilube Oil Change Center (Valvoline Express Care), WV	6	*	-14%

* Projection unavailable

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

2006 Rank	Facility Signage/Company Headquarters	Total Operating 2/28/06	Growth Since 2/28/05
1	Midas Auto Service Experts, IL	1,034	4%
2	Texaco/Caltex Xpress Lube (ChevronTexaco), CA	486	0%
3	Precision Tune Auto Care, VA	110	31%
4	Pennzoil 10-Minute Oil Change, TX	82	0%
5	Mobil 1 Centers, VA	53	NEW
6	SpeeDee Oil Change & Tune-Up, LA	52	21%
7	Meineke Car Care Centers, NC	44	26%
8	Grease Monkey, CO	43	10%
9	Jiffy Lube, TX	42	-5%
	TOTAL	1,946	



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