

2008 TOPS in the INDUSTRY STUDY

A publication of *National Oil & Lube News*

TOP 56 FAST LUBE CHAINS OPERATING IN 2008

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

2008 Rank	2007 Rank	Facility Signage/ Company Headquarters	Independent/ Company Owned	Franchised	Total Operating 2/29/08	Add't. Stores Projected By 12/31/08	Growth Since 2/28/07
1	1	Jiffy Lube, TX	246	1,903	2,149	40	-1%
2	2	Pennzoil 10-Minute Oil Change, TX	887	0	887	*	0%
3	3	Valvoline Instant Oil Change, KY	262	546	808	38	2%
4	4	Texaco Xpress Lube, CA	502	0	502	25	0%
5	6	Kwik Kar, TX	389	0	389	5	2%
6	5	Valvoline Express Care, KY	379	0	379	25	-6%
7	7	Mobil 1 Lube Express, VA	314	0	314	*	11%
8	8	Shell Rapid Lube, TX	275	0	275	*	0%
9	9	CITGO Lube, TX	200	0	200	10	-3%
10	10	Grease Monkey, CO	3	188	191	18	0%
11	11	ConocoPhillips Lube Shop, TX	181	0	181	*	0%
12	12	Express Oil Change & Service Center, AL	59	106	165	21	3%
13	13	Speedee Oil Change & Tune-Up, LA	4	113	117	6	4%
14	14	EZ Lube Fast Oil Change Experts, CA	84	0	84	12	6%
15	15	American LubeFast, GA	75	0	75	2	4%
16	16	Oil Can Henry's, OR	12	60	72	15	7%
17	17	GM Goodwrench Quick Lube, MI	59	0	59	0	0%
18	18	Victory Lane Quick Oil Change, MI	5	44	49	5	0%
19	19	Super-Lube, FL	31	17	48	13	17%
20	20	Lube Stop "The Oil Change Experts," OH	37	0	37	3	0%
21	21	Oil Changers, CA	36	0	36	*	-3%
22	22	LubePro's, IL	15	19	34	3	0%
23	23	Speed Lube, IL	31	0	31	0	0%
24	24	Performance Plus Quick Lube, MI	23	7	30	0	3%
25	25	Uncle Ed's Oil Shoppe, MI	29	0	29	0	0%
26	26	Oilstop Drive-Thru Oil Center, CA	11	13	24	4	0%
27	27	ExpressWay Drive Thru Lube Center, CT	23	0	23	*	0%
28	28	Oil Express, IL	14	9	23	1	0%
29	30	Prompto 10-Minute Oil Change, ME	22	0	22	*	5%
30	32	5-Minute Oil Change, LA	19	0	19	2	19%
31	29	Terrible Herbst, NV	19	0	19	0	-17%
32	33	Express Lube, TX	15	0	15	3	0%
33	34	FASLube Oil Change Center, OH	15	0	15	0	0%
34	35	Grease Spot, IL	15	0	15	0	0%
35	36	QuickChange, OH	12	3	15	0	0%
36	40	Duke of Oil, IL	14	0	14	1	8%
37	37	Fast Eddie's Oil Change, MI	14	0	14	0	0%
38	39	Avis Lube Fast Oil Change Center, TX	13	0	13	0	0%
39	41	LUBExpress, NJ	13	0	13	1	0%
40	42	Mr. Lubie, IN	13	0	13	0	0%
41	43	QuikStop Oilube, KY	10	3	13	2	0%
42	45	Time-It Lube, LA	13	0	13	0	8%
43	44	Mr. Good Lube-New Jersey's Oil Change Center, NJ	12	0	12	1	0%
44	46	Grease Pro Express Lube, FL	11	0	11	2	0%
45	47	Lube 'n Go, TX	11	0	11	*	0%
46	52	FastTrack Quicklube, NY	10	0	10	0	25%
47	56	The Lube Center, MD	10	0	10	*	43%
48	50	National Lube Express, TX	9	0	9	2	0%
49	51	Super Lube, TX	9	0	9	0	0%
50	49	UMC dba Speedy Lube/Zap Lube/Hi-Tech Lube, NY	9	0	9	0	-18%
51	54	DeGreve Oil Change, IL	7	0	7	0	0%
52	55	Mr. Fast Lube, AR	7	0	7	0	0%
53	53	Texas Oil X Change, TX	7	0	7	1	-13%
54	57	Bradzoil 10 Minute Oil Change, TX	6	0	6	0	0%
55	58	Brahler Lube Center, IL	6	0	6	0	0%
56	59	Toot n' Totum, TX	6	0	6	0	0%
TOTAL			4,513	3,031	7,544	261	

*Projection unavailable

The only change in rank among our top 10 chains occurred between Kwik Kar and Valvoline Express Care. Kwik Kar moved into fifth place on our list, while Express Care slipped to sixth.

The largest overall growth was recorded by Mobil 1 Lube Express, while the largest percentage growth was recorded by Maryland-based The Lube Center.

Louisiana-based 5-Minute Oil Change continues to rebound from damage caused by Hurricanes Katrina and Rita, posting 19 percent growth this year.

In all, 16 of the 56 facilities on this year's list reported adding or opening new facilities during the preceding 12 months.

TOP OIL CHANGE-PLUS BUSINESSES OPERATING IN 2008

2008 Rank	2007 Rank	Facility Signage/ Company Headquarters	Independent/ Company Owned	Franchised	Total Operating 2/29/08	Total that Change Oil 2/29/08	Growth Since 2/28/07
1	1	Wal-Mart Tire & Lube Express, AR	4,189	0	4,189	2,450	5%
2	2	Goodyear Gemini Automotive Care, OH	750	1,250	2,000	2,000	4%
3	3	Midas Auto Service Experts, IL	91	1,432	1,523	1,523	-2%
4	4	Firestone Complete Auto Care, IL	1,480	0	1,480	1,480	3%
5		Sears, IL*	871	0	871	871	NEW
6	6	Meineke Car Care Center, NC	2	835	837	800	2%
7	5	Motorcraft Fast Lube (Ford), MI	770	0	770	770	-9%
8	7	Toyota Express Lube/Toyota Express Lube Plus, CA	1,229	0	1,229	767	0%
9	8	Monroe Muffler Brake & Service, NY**	720	0	720	720	3%
10	9	Pep Boys, PA	562	0	562	553	-5%
11	11	Quick Lane Tire & Auto Center (Ford), MI	450	0	450	450	0%
12	10	Tires Plus Total Car Care, FL	422	0	422	422	-13%
13	12	Tuffy Auto Service Center/Car X Auto Service, OH	33	370	403	403	-3%
14	13	Big O Tires, CO	0	541	541	350 ***	0%
15	14	Precision Tune Auto Care, VA	4	289	293	293	-5%
16	15	AutoNation, FL	0	257	257	257	0%
17	16	All Tune & Lube, MD****	1	237	238	238	0%
18	17	Econo Lube N' Tune & Brakes, CA	20	170	190	190	-5%
19		ExpertTire, IL	98	0	98	98	NEW
20	19	Brake Masters, AZ	50	38	88	88	2%
	20	CarMax, VA	88	0	88	88	16%
22	18	Lee Myles Transmissions & AutoCare, NJ	0	70	70	70	-23%
	22	Strauss Discount Auto, NJ	88	0	88	70	1%
24	21	Merlin 200,000 Mile Shops, IL	9	50	59	59	-16%
25		Wheel Works, IL	46	0	46	46	NEW
26	23	Tilden Car Care Centers, NY****	0	45	45	45	-17%
27	26	Quality Tune-Up Shop, CA****	2	37	39	39	-3%
28	28	Auto-Lab, MI	0	37	37	37	23%
29	28	Milex Complete Auto Care, IL	36	0	36	36	6%
30	29	Conrad's Tire Express & Total Car Care, OH	30	0	30	30	0%
	29	Tunex Complete Car Care, UT	2	28	30	30	0%
32	32	Top Value Car & Truck Service Center, MI	8	20	28	28	0%
33	46	Mister Car Wash/Detail Lube Center, TX	26	0	26	26	271%
34	33	Sun Devil Auto, AZ	24	0	24	24	0%
35	34	Wash Depot/Simoniz Car Wash, MA	76	0	76	21	0%
36	35	Commercial Tire, ID	31	0	31	20	0%
		Kmart, IL	1,300	0	1,300	20	NEW
38	27	King Bear Auto Service Centers, NY****	2	15	17	17	-51%
39	36	Rapid Service Center/Master Auto Care, KS	16	0	16	16	0%
40	24	Tuneup Masters, TX	15	0	15	15	-69%
41	37	Alton's Tires Total Car Care, WA	13	0	13	13	0%
	38	Carnett's Car Washes, GA	7	10	17	13	18%
43	39	Tune Up Plus, FL	11	0	11	11	0%
44	41	Car Spa, TX	14	0	14	10	0%
	42	Delta Sonic Carwash/Sonic Lube, NY	28	0	28	10	11%
46	42	LMC Carwash & Lube, NY****	8	0	8	8	-11%
	45	Car Care Clinic, MS	8	0	8	8	0%
48	45	Pronto Lube, TX	7	0	7	7	0%
	46	Scrub-A-Dub, WI	13	0	13	7	0%
50	41	Regal Car Wash & Lube, AZ	20	0	20	6	-33%
TOTAL			13,670	5,731	19,401	15,553	

* full-line stores only
 ** also dba Speedy Auto Service by Monroe, Mr. Tire, and Tread Quarters Discount Tires
 *** estimate
 **** figures obtained by third-party source

Wal-Mart Tire & Lube Express continues to thrive as the nation's largest oil change chain, growing by 5 percent during the past year and nearing the 2,500-facility mark

While Sears certainly isn't a new oil change-plus chain, more stores are now adding maintenance to their service menus.

The Tires Plus chain, along with Expert Tire and Wheel Works (two chains new to this year's list) are all owned by Firestone, but operated separately from the company's main Complete Auto Care stores.

Kmart isn't completely out of the auto service business. After ending its relationship with Penske Auto Centers, Kmart now reports that 20 of its stores are once again offering automotive maintenance services to customers.

TOP ASSOCIATED CHAINS OPERATING IN 2008

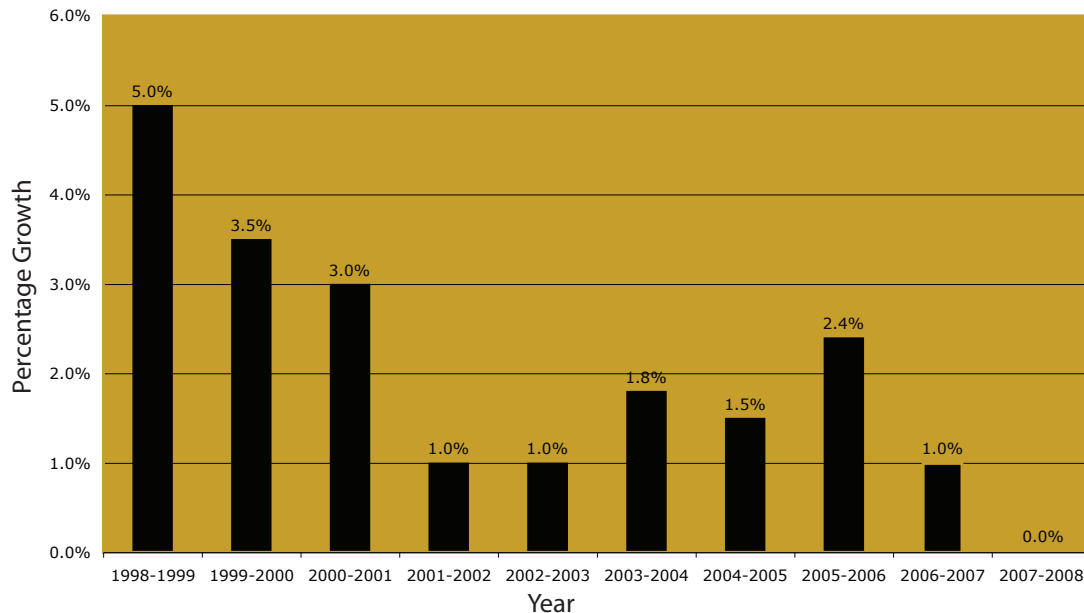
2008 Rank	Facility Signage/Associated Chain/ Company Headquarters	Total Operating 2/29/08	Additional Stores Projected By 12/31/08	Growth Since 2/28/07
1	North Florida Lubes (48 Texaco Xpress Lubes, 1 Shell Rapid Lube), FL	49	0	20%
2	Southern Express Lube (37 Mobil Lube Express, 9 Shell Rapid Lubes), FL	46	3	-4%
3	Fast Change Lube & Oil (Pennzoil 10-Minute Oil Change), KY	20	4	18%
4	Pioneer Quick Lube (Pennzoil 10-Minute Oil Change), MI	19	*	36%
5	Speed Lube 10-Minute Oil Change (Pennzoil 10-Minute Oil Change), IL	17	1	0%
6	Express Automotive Group (Texaco Xpress Lube), TX	11	1	10%
7	Automasters of Asheboro (Valvoline Express Care), NC	9	0	NEW
	Sayle Oil Co. (Shell Rapid Lube), MS	9	0	NEW

* Projection unavailable

U.S.-BASED LUBE OPERATIONS RANKED BY NUMBER OF FOREIGN FACILITIES IN 2008

2008 Rank	Facility Signage/Company Headquarters	Total Operating 2/29/08	Growth Since 2/28/07
1	Midas Auto Service Experts, IL	1,023	-1%
2	Mobil 1 Centers, VA	793	621%
3	Texaco/Caltex Xpress Lube (ChevronTexaco), CA	460	-5%
4	Precision Tune Auto Care, VA	99	21%
5	Pennzoil 10-Minute Oil Change, TX	98	85%
6	SpeedDee Oil Change & Tune-Up, LA	65	25%
7	Grease Monkey, CO	50	14%
8	Meineke Car Care Centers, NC	48	12%
9	Jiffy Lube, TX	45	5%
TOTAL		2,681	

Fast Lube Industry Overall Facility Growth Rate



About NOLN's 2008 Tops in the Fast Lube Industry Study:

Published in March, the Tops Study 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 56 chains that made the fast lube list operate a grand total of 7,544 facilities, or just more than 44 percent of the total U.S. fast lube population.

In addition to the fast lube list, NOLN ranks the top "oil change-plus" chains, which are those companies that offer oil changes, but generally not as the primary focus of the business (i.e. tire stores, mass-merchant retailers, carwashes, etc.). 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, 2008, there were approximately 17,016 fast lube facilities in operation in the United States** (as characterized by those facilities whose primary business model revolves around providing quick oil change and other preventive automotive maintenance as their core service offering). Overall, the industry's store count declined by less than 0.2 percent between March 1, 2007 and March 1, 2008.

Source: NOLN estimate based on internal database.

- **For 2008, the fast lube industry will record gross sales of approximately \$8.87 billion.**

Source: NOLN estimate based on 2008 Tops figures and sales data from 2007 Fast Lube Operators Survey.

- Estimates are that as many as 70 percent of all oil changes are performed at installed locations like fast lubes and oil change-plus facilities. That figure is estimated to increase to 80 percent within the next decade.

Source: Larry Solomon, Strategic Resources, Inc.

- The average consumer changes his or her motor oil every 3,800-4,000 miles.

Source: NPD Group 2008 Consumer Outlook

- Studies indicate that as many as 65 percent of all lube customers are women.

Source: Automotive Oil Change Association/WSI Marketing Research Consumer Survey.

- Nearly six in 10 consumers say they follow auto manufacturers' recommendations regarding oil change intervals.

Source: NPD Group.

Fast Lube Chain Facts:

- **Overall, the 56 chains listed in our TOPS ranking had a net decrease of 11 facilities**, one of the rare times we have seen such an occurrence on our Tops Ranking. However, when excluding stores owned by the three chains removed from the list, the number of net facilities actually increased.
- Of the 56 fast lube chains ranked in our TOPS list, 16 added facilities during the past year, seven sold or closed facilities, and 33 remained unchanged from last year.
- Mid-size chains, those operating between 30 and 175 facilities, recorded the most growth during the preceding 12 months. Of the 13 chains fitting this category, seven recorded growth; only one recorded a decline in facility population.

Miscellaneous Lube Chain Facts:

- Canada's largest fast lube chain is Mr. Lube, with 90 facilities open.
- With 51 facilities now open, Speedco Truck Lube is gaining ground on Petro:Lube, a division of Petro Truck Stops, in the race to be the nation's largest dedicated truck lube chain. In 2007, Speedco Truck Lube reported 48 facilities open, with 35 open in 2006. Petro:Lube reports 61 facilities open, a figure unchanged from last year.

Oil Change-Plus Chain Facts:

- Wal-Mart Tire & Lube Express remains the largest single provider of oil changes in the country, with 2,450 facilities open.
- **The number of oil change-plus chains making our ranking climbed to 50 from last year's mark of 48.** Overall, the 50 chains on this year's list operate a combined 15,553 facilities that perform oil changes, up more than 900 facilities from last year's mark of 14,607. However, much of that increase comes with the addition of Sears, whose 871 full-line stores are reportedly adding more auto maintenance services.
- Two chains were removed from the oil change-plus list. California-based Tuneup Masters ceased operation, while Mace Carwash shuttered all but a few of its lube facilities.
- Of the 46 chains on this year's oil change-plus list that were also listed last year, 13 reported adding facilities while 15 reported closing or selling facilities that perform oil changes.



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