

2011 TOPS in the INDUSTRY RANKINGS

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About NOLN's 2011 Tops in the Fast Lube Industry Rankings

Published in March, the Tops in the Fast Lube Industry Rankings 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 53 chains that made the fast lube list operated a grand total of 6,913 facilities, or just more than 43 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 (those companies that operate six or more stores that wear signage of a larger operation), U.S.-based foreign chains (those U.S.-based companies with a sizable overseas fast lube presence) and truck lube chains that primarily service commercial trucks.

Fast Lube Industry Facts:

- As of March 1, 2011, there were approximately 16,716 fast lube facilities in operation in the United States (as characterized by those facilities that derive a majority of their annual gross sales from quick oil change and other preventive automotive maintenance service). Overall, the industry's facility population increased by approximately 1.1 percent (approximately 185 facilities) between March 1, 2010 and March 1, 2011.
(Source: NOLN estimate based on internal database.)
- For 2011, the fast lube industry will record gross sales of approximately \$9.027 billion, an increase of nearly \$100 million from last year. *(Source: NOLN estimate based on 2011 Tops figures and sales data from 2010 Fast Lube Operators Survey.)*
- The average fast lube customer changes his or her motor oil every 4,419 miles. *(Source: 2010 Fast Lube Operators Survey)*
- Between 2008 and 2010, only 3 percent of installed customers extended their oil change intervals. *(Source: Frost & Sullivan)*
- In 2010, 75.4 percent of all automotive service events were attributed to the installed market. *(Source: IMR Inc.)*
- The average age of U.S. passenger cars and light trucks stands at 10.2 years, and U.S. drivers are keeping their vehicles an average of nearly 50 months, a 10 percent increase from 2008. *(Source: R.L. Polk)*

Fast Lube Chain Facts:

- Castrol's Premium Lube Express branded program expanded 29 total shops last year.
- CITGO's Mystik Service Center program expanded by 24 total shops for a 400 percent growth rate, which moved the chain from 50th position to 23rd in just 12 months.
- Two fast lube chains were added to our list: North Carolina-based Snappy Lube, a company with nearly 30 stores, and Wisconsin-based Fast Track Oil Change Center with 12 stores.
- Three companies dropped off our list: New York-based FastTrack, whose 12 shops were purchased piecemeal by other companies; Illinois-based Brahler lube Center, which sold one store and dropped to five total, keeping them just under the minimum for inclusion on our list; and Texas Oil X-Change, which was purchased by a major franchise company.

Oil Change-Plus Chain Facts:

- Fifteen of the 51 chains on the oil change-plus list recorded an increase in store population, led by TBC Retail, which grew by an impressive 45 facilities.
- Seventeen chains on the oil change-plus list were unchanged from last year.
- Three new chains were added this year: Big 10 Tire Stores (84 facilities), Honest-1 Auto Care (25 facilities) and Woodie's Auto Service (seven facilities).

TOP 53 FAST LUBE CHAINS OPERATING

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

The chains on this year's list operate a total of 6,913 facilities, a figure that reflects a decline in facility population of less than 1 percent from last year.

Overall, CITGO's Mystik Service Center expanded 24 total shops for a 400 percent growth rate.

Two new companies made this year's list — Snappy Lube and Fast Track Oil Change Center.

Of the 53 chains listed on this year's and last year's rankings, nearly 75 percent either grew or remained unchanged.

2011 Rank	2010 Rank	Facility Signage/ Company Headquarters	Independent/ Company Owned	Franchised	Total Operating 2/28/11	Add't. Stores Projected By 12/31/11	Growth Since 2/28/10
1	1	Jiffy Lube, TX	0	1,963	1,963	50	-1%
2	3	Valvoline Instant Oil Change, KY	257	615	872	25	3%
3	2	Pennzoil 10-Minute Oil Change, TX	750†	0	750	*	n/a
4	5	Kwik Kar, TX	390	0	390	5	1%
5	4	Havoline xpress lube, CA**	350	0	350	*	n/a
6	6	Valvoline Express Care, KY	342	0	342	23	2%
7	7	Mobil 1 Lube Express, VA	330	0	330	*	3%
8	11	ConocoPhillips Lube Shop, TX	186	0	186	*	0%
	12	Express Oil Change & Service Center, AL	76	110	186	15	8%
	10	Grease Monkey, CO	0	186	186	10	-4%
11	9	CITGO Fast Lube, TX	179	0	179	15	-10%
12	8	Shell Rapid Lube, TX	175†	0	175	*	n/a
13	13	Oil Can Henry's, OR	28	60	88	2	1%
14	16	Castrol Premium Lube Express, NJ	81	0	81	*	56%
15	14	EZ Lube Fast Oil Change Experts, CA	74	0	74	0	0%
16	15	American LubeFast, GA	73	0	73	0	0%
17	18	Super Lube, FL	31	19	50	1	43%
18	17	Lube Stop, OH	37	0	37	2	0%
19	19	LubePro's, IL	15	19	34	5	0%
	19	Oil Changers, CA	15	19	34	5	0%
	21	Victory Lane Quick Oil Change, MI	3	31	34	3	6%
22	23	Speed Lube, IL	31	0	31	0	0%
23	50	Mystik Service Center, TX	30	0	30	7	400%
24	21	Performance Plus Quick Lube, MI	29	0	29	0	-9%
		Snappy Lube, NC	29	0	29	2	NEW
	24	Uncle Ed's Oil Shoppe, MI	29	0	29	0	0%
27	25	Take 5 Oil Change, LA	25	0	25	2	4%
28	26	Oilstop Drive-Thru Oil Center, CA	11	12	23	3	5%
29	26	Express Lube, TX	22	0	22	2	0%
30	26	Prompto 10-Minute Oil Change, ME	21	0	21	*	-5%
	29	Terrible Herbst, NV	21	0	21	0	0%
32	30	FASLube Oil Change Center, OH	16	0	16	0	7%
33	30	Fast Eddie's Oil Change, MI	15	0	15	0	0%
	39	Lube 'n Go, TX	15	0	15	*	36%
	30	Oil Express, IL	8	7	15	0	0%
36	33	Time-It Lube, LA	14	0	14	0	0%
37	36	Duke of Oil, IN	13	0	13	0	0%
	33	Grease Spot, IL	13	0	13	0	-7%
	33	QuickChange, OH	11	2	13	0	-7%
40	37	Avis Lube Fast Oil Change Center, TX	12	0	12	0	0%
		Fast Track Oil Change Center, WI	12	0	12	0	NEW
42	39	Grease Pro Express Lube, FL	11	0	11	0	0%
	39	The Lube Center "10 Minute Oil Change," MD	11	0	11	0	0%
44	43	National Lube Express, TX	10	0	10	0	0%
	43	QuikStop Oilube, KY	10	0	10	0	0%
46	45	Super Lube, TX	9	0	9	0	0%
	45	UMC dba Speedy Lube/Zap Lube, NY	9	0	9	0	0%
48	39	Mr. Good Lube 10 Minute Oil Change, NJ	8	0	8	0	-27%
49	48	Mr. Fast Lube, AR	7	0	7	0	0%
	47	Mr. Lubie, IN	7	0	7	0	-13%
	48	Prontolube, TX	7	0	7	0	0%
52	50	Bradzoil 10 Minute Oil Change, TX	6	0	6	0	0%
	50	Toot n' Totum, TX	6	0	6	1	0%
		TOTAL	2,945	3,043	6,913	178	

* Projection unavailable

** Texaco Xpress Lube in process of reimaging to Havoline xpress lube

† estimate

n/a not applicable

TOP OIL CHANGE-PLUS CHAINS OPERATING

TBC Retail Group (dba Tire Kingdom, NTB, Merchant's Tire and Big O Tires) grew by 45 facilities.

Fifteen of the 51 chains on the oil change-plus list recorded an increase in store population.

Three new chains were added to list: Big 10 Tire Stores, Honest-1 Auto Care and Woodie's Auto Service.

Seventeen chains on the oil change-plus list were unchanged from last year and 16 saw declines in service center population, led by Midas and Walmart.

2011 Rank	2010 Rank	Facility Signage/ Company Headquarters	Independent/ Company Owned	Franchised	Total Oil Change Facilities 2/28/11	Growth Since 2/28/10
1	1	Walmart Tire & Lube Express, AR ¹	2,450	0	2,450	-3%
2	2	Bridgestone Retail Operations, LLC, IL ²	2,149	0	2,149	2%
3	3	Goodyear Tire & Service Network Outlets, OH	1,834	0	1,834	-4%
4	4	Midas Auto Service Experts, IL ³	102	1,389	1,491	-6%
5	5	TBC Retail Group, FL ⁴	820	425	1,245	4%
6	6	Meineke Car Care Center, NC ⁵	17	899	916	-1%
7	7	Sears Auto Centers, IL	850	0	850	0%
8	7	Aamco Transmissions & Total Car Care, PA	0	837	837	-2%
9	10	Monro Muffler Brake & Service, NY ⁶	739	0	739	<1%
10	11	Pep Boys, PA	614	0	614	5%
11	12	Quick Lane Tire & Auto Center (Ford), MI	0	600	600	5%
12	13	Tuffy/Car X Auto Service Center, OH	30	359	389	-6%
13	14	Precision Tune Auto Care, VA	20	244	264	-1%
14	15	AutoNation, FL	0	242	242	-2%
15	16	All Tune & Lube, MD ⁷	1	208	209	0%
16	17	CarMax, VA	104	0	104	4%
17	18	Brake Masters, AZ	56	35	91	2%
18		Big 10 Tire Store, AL	84	0	84	NEW
19	21	Christian Brothers Automotive, TX	3	80	83	26%
19		Lithia Motors, Inc., OR	0	83	83	-2%
21	20	Purfect Auto Service, CA	0	73	73	-9%
22	25	VIP Parts, Tires & Service, ME	56	0	56	0%
23	26	Brakes Plus Complete Auto Service, CO	55	0	55	4%
23		Merlin 200,000 Mile Shops, IL	10	45	55	-7%
25	23	Strauss Discount Auto, NJ	48	0	48	-19%
26	27	Lee Myles Transmissions & AutoCare, NJ	0	44	44	0%
27	28	Auto-Lab Complete Car Care Center, MI	0	43	43	5%
28	29	Tire-Rama, MT	40	0	40	0%
29	22	Tilden Your Total Car Care Center, NY	0	35	35	-44%
30	32	Commercial Tire, ID	34	0	34	0%
31	33	Conrad's Tire Express & Total Car Care, OH	31	0	31	0%
32	30	Milex Complete Auto Care, IL	0	30	30	-19%
33	34	Tunex Complete Car Care, UT	0	28	28	8%
34	35	Sun Devil Auto, AZ ⁷	27	0	27	8%
35		Honest-1 Auto Care, AZ	0	25	25	NEW
36	36	Mister Hotshine Carwash & Lube Center, AZ	24	0	24	0%
37	31	Quality Tune-Up Shops, CA ⁸	8	14	22	-15%
38	38	Wash Depot/Simoniz Car Wash, MA	21	0	21	0%
39	37	Lentz USA Automotive Service Centers, MI	10	9	19	-17%
40	39	King Bear Auto Service Centers, NY ⁷	2	15	17	0%
41	40	City Garage, TX	16	0	16	0%
42	41	Tune Up Plus/Quality Car Care/Harris Tire Service, VA	15	0	15	25%
43	41	Car Care Clinic, MS	13	0	13	8%
44	41	Danny's Family Car Wash, AZ	12	0	12	0%
45	44	Delta Sonic Car Wash/Sonic Lube, NY	11	0	11	0%
46	45	Car Spa, TX	10	0	10	0%
	45	LMC Carwash & Lube, NY	10	0	10	0%
	45	Mr. Clean Car Wash, GA	0	10	10	0%
49	48	Raffield Tire-Master, GA	8	0	8	0%
	50	Savannah Tire Brake & Alignment, GA	8	0	8	33%
51		Woodie's Auto Service, NC	7	0	7	NEW
TOTAL			10,349	5,772	16,121	

¹ estimate

² dba Firestone Complete Auto Care, Tires Plus Total Car Care, Expert Tire and Wheel Works.

³ also dba as SpeedDee Oil Change & Tune-Up. Some stores co-branded.

⁴ dba Tire Kingdom, NTB-National Tire and Battery, Merchant's Tire and Auto Centers, and Big O Tires.

⁵ dba Econo Lube N' Tune & Brakes and Meineke Car Care Center. Some stores co-branded.

⁶ also dba Mr. Tire, TreadQuarters Discount Tire and Autotire Car Care Center.

⁷ figures obtained from third-party source

⁸ chain owned by two separate entities.

TOP ASSOCIATED CHAINS OPERATING				
2011 Rank	Facility Signage/Associated Chain/ Company Headquarters	Total Operating 2/28/11	Additional Stores Projected By 12/31/11	Growth Since 2/28/11
1	North Florida Lubes (**62 Texaco Xpress Lubes, 2 NFL Xpress Lubes), FL	64	*	7%
2	Southern Express Lube (37 Mobil Lube Express, 4 Shell Rapid Lubes), FL	41	0	-2%
3	Pioneer Quick Lube (Pennzoil 10-Minute Oil Change), MI	25	*	-11%
4	Fast Change Lube & Oil (Pennzoil 10-Minute Oil Change), KY	21	*	0%
5	Speed Lube 10-Minute Oil Change (Pennzoil 10-Minute Oil Change), IL	16	0	***
6	Lighthouse Lube (Mobil 1 Lube Express), WI	13	4	NEW
7	Express Automotive Group (**Texaco Xpress Lube), TX	11	*	0%
	Grease Lightning (7 Castrol Premium Lube Express, 1 Oil Doctor, 3 Grease Lightning), NY	11	7	NEW
9	Automasters of Asheboro (Valvoline Express Care), NC	9	*	0%
	Sayle Oil Co. (Shell Rapid Lube), MS	9	2	0%

* Projection unavailable ** Rebranding as Havoline xpress lubes during 2011-2012 *** Listed 17 last year; one does not change oil

U.S.-BASED LUBE CHAINS RANKED BY NUMBER OF FOREIGN FACILITIES		
2011 Rank	Facility Signage/Company Headquarters	Total Operating 2/28/11
1	Mobil 1 Centers, VA	2,081
3	Texaco/Caltex Xpress Lube (ChevronTexaco), CA	1,432
2	Midas Auto Service Experts, IL	940
4	Walmart Tire & Lube Express, AR	266
5	Precision Tune Auto Care, VA	82
6	Pennzoil 10-Minute Oil Change, TX	75
7	SpeeDee Oil Change & Tune-Up, LA	65
8	Grease Monkey, CO	61
9	Meineke Car Care Centers, NC	58
10	Jiffy Lube, TX	45
11	Aamco Transmissions, PA	15
	TOTAL	5,120

U.S.-BASED LUBE CHAINS RANKED BY NUMBER OF FOREIGN FACILITIES		
2011 Rank	Facility Signage/Company Headquarters	Total Operating 2/28/11
1	Mobil 1 Centers, VA	2,081
3	Texaco/Caltex Xpress Lube (ChevronTexaco), CA	1,432
2	Midas Auto Service Experts, IL	940
4	Walmart Tire & Lube Express, AR	266
5	Precision Tune Auto Care, VA	82
6	Pennzoil 10-Minute Oil Change, TX	75
7	SpeeDee Oil Change & Tune-Up, LA	65
8	Grease Monkey, CO	61
9	Meineke Car Care Centers, NC	58
10	Jiffy Lube, TX	45
11	Aamco Transmissions, PA	15
	TOTAL	5,120



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