



Annual Network Report
Fast Food & QSR

1st January - 31st December 2023

www.gapmaps.com

Fast Food & QSR

Australia Annual Network Report

Record population growth, cost of living pressures and declining real retail sales defined 2023 for the Australian consumer. However, total Food and Beverage sales increased by over 10%*, or 4.2% after removing inflation. Australians continued to dine out and takeaway.

Absorbing the growing demand, **a net new 227 outlets** were opened by major restaurant chains in 2023, according to the 2023 GapMaps Fast Food and QSR annual report which tracks the largest 31 brands within the sector.

The report reveals a number of brands are continuing to expand; the eight fastest growing brands opened a net new 184 locations. This included major expansions from large chains such as KFC, Hungry Jack's and Pizza Hut as well as the continued build out of the Zambrero, GyG and Grill'd networks.

The two largest store networks, Subway and McDonald's, continued to open stores, 27 and 25 new stores respectively. However, both brands continued to optimise their networks and exited several locations, resulting in a net new store growth of five locations for each brand.

New store growth was spread across the country. While growth areas continued to provide opportunity for major brands, the continue development of Entertainment and Leisure Precincts (ELPs) within major Shopping Centres remains an opportunity for a number

of the emerging brands. In addition, the ability of each store network to effectively service the AUD 7.6 Billion Food Delivery sector remains a consideration in store expansion and optimisation.

Entering 2024, the majority of Australians now have a significantly greater choice of Quick Service Restaurants. While over 75% of all Australians have lived within 3km of a Subway and McDonald's for a number of years, now close to **52% of all Australians can access 10 or more QSR brands within 3km of home**. The access to these brands varies significantly across each capital city as brands in suburban settings typically cluster in or around major shopping centres. As part of the 2023 annual report, GapMaps maps this variation in brand access across major capital cities and allows clients to explore this analysis in detail within the GapMaps platform.

GapMaps track the location of over 1,500 brands within Australia and this provides insights on where brands are clustering and the observable expansion and optimisation strategies of each brand. In addition, GapMaps has partnered with CommBank iQ to provide insight on the real spending habits of consumers at a local level, including on food delivery spending. This detailed analysis of supply and demand within the sector empowers GapMaps users to better understand, optimise and grow their store networks.

*as measured by the ABS retail sales series on Cafes', restaurants and takeaway food services for the 12 months to December 2023.



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Australia Annual Network Report

Brands Tracked

31

Locations

7,040

Stores Opened*

407

Stores Closed*

180

		Total Stores	Last 12 Months*			Accessibility
			Openings	Closures	Net Change	Share of total Australian residents living within 3km of a store:
Major QSR (5 Brands):		3,823	123	68	+55	85%
Subway		1,227	27	22	+5	79%
McDonald's		1,031	25	20	+5	78%
KFC		785	38	3	+35	71%
Hungry Jack's		459	19	2	+17	54%
Red Rooster		321	14	21	-7	41%
Pizza (3 Brands):		1,138	54	45	+9	78%
Dominos		736	25	37	-12	74%
Pizza Hut		270	24	5	+19	43%
Crust		132	5	3	+2	28%
Other QSR (18 Brands)		1,639	174	52	+122	69%
Zambrero		233	30	5	+25	30%
Oporto		191	19	9	+10	28%
Guzman y Gomez		186	27	1	+26	29%
Grill'd		169	16	-	+16	28%
Nando's		138	-	12	-12	26%
Roll'd		103	5	7	-2	18%
Noodle Box		98	12	-	+12	16%
Schnitz		74	7	3	+4	15%
Mad Mex		66	6	3	+3	14%
Chicken Treat		59	6	1	+5	6%
Betty's Burgers		58	5	-	+5	13%
Carl's Jr		46	8	1	+7	6%
FishBowl		43	10	-	+10	9%
Rashays		39	6	-	+6	7%
Taco Bell		39	6	1	+5	8%
Burrito Bar		39	2	1	+1	5%
Patty Smiths		33	3	8	-5	6%
El Jannah		25	6	-	+6	8%
Sushi (5 Brands)		440	56	15	+41	44%
Sushi Hub		164	37	3	+34	27%
Sushi Sushi		157	11	10	+1	21%
Hero Sushi		50	8	1	+7	11%
Sushi Train		46	-	1	-1	9%
Sushi Jiro		23	-	-	n.a.	5%
Total (31 Brands)		7,040	407	180	+227	87%

* Opening dates as per listing on company website, actual store opening dates may vary. Where possible store relocations (e.g. within the same Shopping Centre) are not included as an opening/closure.



Fast Food & QSR

City Comparison

	Total Stores
Major QSR (5 Brands):	3,823
Subway	1,227
McDonald's	1,031
KFC	785
Hungry Jack's	459
Red Rooster	321
Pizza (3 Brands):	1,138
Dominos	736
Pizza Hut	270
Crust	132
Other QSR (18 Brands)	1,639
Zambrero	233
Oporto	191
Guzman y Gomez	186
Grill'd	169
Nando's	138
Roll'd	103
Noodle Box	98
Schnitz	74
Mad Mex	66
Chicken Treat	59
Betty's Burgers	58
Carl's Jr	46
FishBowl	43
Rashays	39
Taco Bell	39
Burrito Bar	39
Patty Smiths	33
El Jannah	25
Sushi (5 Brands)	440
Sushi Hub	164
Sushi Sushi	157
Hero Sushi	50
Sushi Train	46
Sushi Jiro	23
Total (31 Brands)	7,040

	Store Count: By Major City					
	Sydney	Melbourne	Brisbane	Perth	Adelaide	Other
Major QSR (5 Brands):	629	691	450	384	227	1,442
Subway	180	219	147	125	87	469
McDonald's	202	192	111	84	51	391
KFC	154	145	86	55	42	303
Hungry Jack's	58	83	50	63	43	162
Red Rooster	35	52	56	57	4	117
Pizza (3 Brands):	264	156	161	100	45	412
Dominos	142	93	106	63	36	296
Pizza Hut	74	36	45	22	7	86
Crust	48	27	10	15	2	30
Other QSR (18 Brands)	359	331	226	205	81	437
Zambrero	15	16	23	50	24	105
Oporto	97	18	13	6	12	45
Guzman y Gomez	43	26	38	12	9	58
Grill'd	28	49	25	27	5	35
Nando's	14	52	21	28	5	18
Roll'd	28	33	7	12	3	20
Noodle Box	-	13	30	11	12	32
Schnitz	6	44	3	1	-	20
Mad Mex	38	11	2	7	-	8
Chicken Treat	2	-	-	39	-	18
Betty's Burgers	16	15	8	4	4	11
Carl's Jr	3	15	7	-	7	14
FishBowl	25	9	5	-	-	4
Rashays	19	4	5	-	-	11
Taco Bell	6	9	11	4	-	9
Burrito Bar	-	2	21	-	-	16
Patty Smiths	2	8	7	4	-	12
El Jannah	17	7	-	-	-	1
Sushi (5 Brands)	109	159	37	33	23	79
Sushi Hub	65	33	16	15	11	24
Sushi Sushi	4	101	7	18	5	22
Hero Sushi	27	3	3	-	-	17
Sushi Train	13	-	10	-	7	16
Sushi Jiro	-	22	1	-	-	-
Total (31 Brands)	1,361	1,337	874	722	376	2,370

	Net Change*: Last 12 Months: By Major City						
	Sydney	Melbourne	Brisbane	Perth	Adelaide	Other	Total
Major QSR (5 Brands):	+8	+18	-9	+5	+6	+27	+55
Subway	-	+7	-5	-2	-1	+6	+5
McDonald's	-2	-1	-	+3	+2	+3	+5
KFC	+8	+9	+1	+1	+3	+13	+35
Hungry Jack's	+4	+5	-	+3	+1	+4	+17
Red Rooster	-2	-2	-5	-	+1	+1	-7
Pizza (3 Brands):	+4	-8	+4	+3	+1	+5	+9
Dominos	-1	-10	+1	-	+1	-3	-12
Pizza Hut	+2	+2	+3	+3	-	+9	+19
Crust	+3	-	-	-	-	-1	+2
Other QSR (18 Brands)	+20	+29	+14	+24	-1	+36	+122
Zambrero	+4	+7	+1	+6	+1	+6	+25
Oporto	+1	+2	-	+1	-1	+7	+10
Guzman y Gomez	+2	+4	+6	+2	+1	+11	+26
Grill'd	+4	+4	+1	+6	-	+1	+16
Nando's	-1	-5	-	-4	-	-2	-12
Roll'd	-2	-1	-	+1	-	-	-2
Noodle Box	-	+4	+2	+3	-	+3	+12
Schnitz	-	+2	-	-	-	+2	+4
Mad Mex	+3	+2	-1	-	-	-1	+3
Chicken Treat	-	-	-	+4	-	+1	+5
Betty's Burgers	+1	-	-	+3	-	+1	+5
Carl's Jr	-	+2	-	-	-	+5	+7
FishBowl	+4	+3	+3	-	-	-	+10
Rashays	+1	+3	+1	-	-	+1	+6
Taco Bell	-	+1	+1	+1	-	+2	+5
Burrito Bar	-	-1	+1	-	-	+1	+1
Patty Smiths	+1	-1	-1	+1	-2	-3	-5
El Jannah	+2	+3	-	-	-	+1	+6
Sushi (5 Brands)	+13	+6	+3	+2	+3	+14	+41
Sushi Hub	+10	+5	+3	+4	+3	+9	+34
Sushi Sushi	+1	+1	-	-2	-	+1	+1
Hero Sushi	+2	-	-	-	-	+5	+7
Sushi Train	-	-	-	-	-	-1	-1
Sushi Jiro	-	-	-	-	-	-	-
Total (31 Brands)	+45	+45	+12	+34	+9	+82	+227

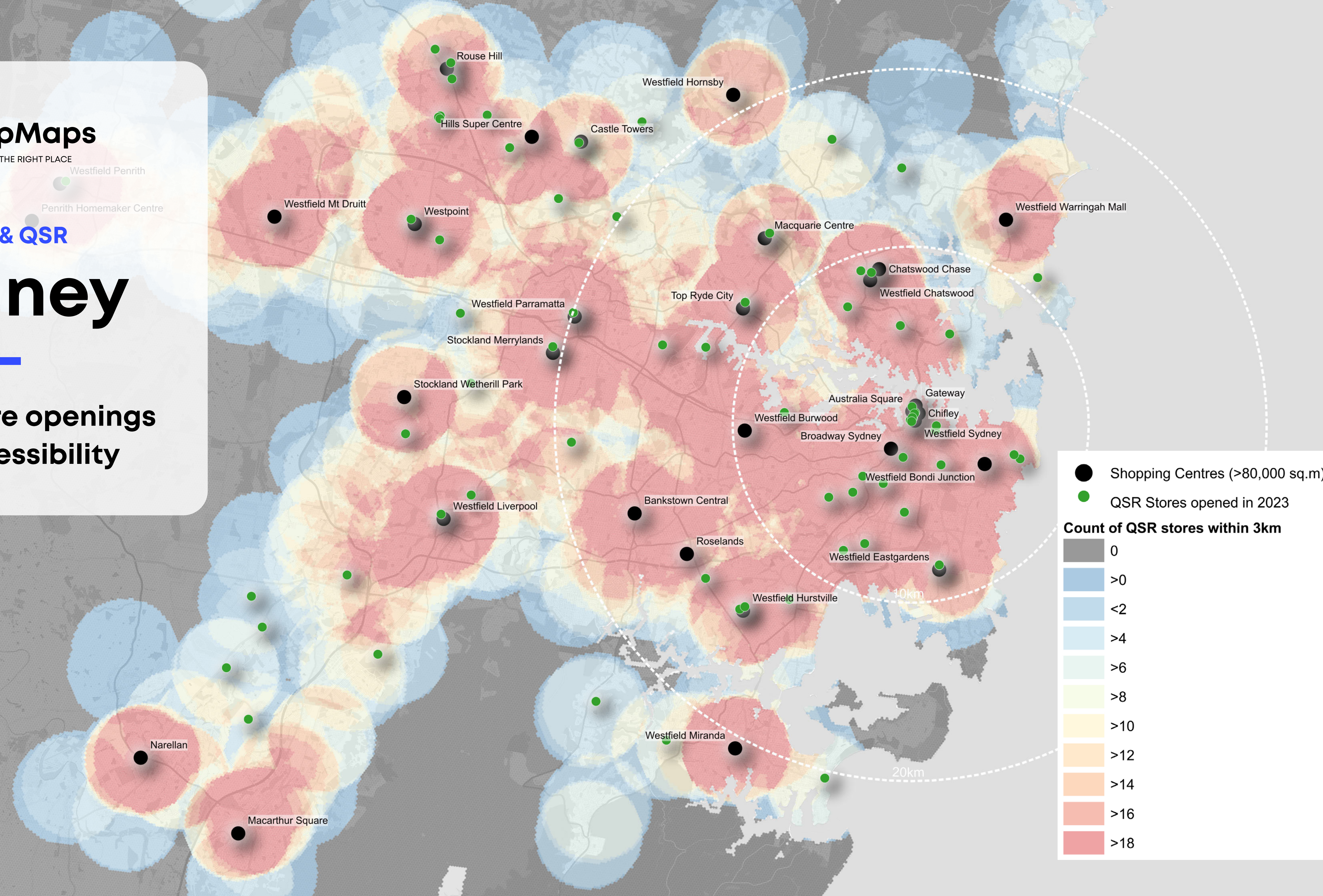
* Opening dates as per listing on company website, actual store opening dates may vary. Where possible store relocations (e.g. within the same Shopping Centre) are not included as an opening/closure.



Fast Food & QSR

Sydney

New store openings and accessibility



Fast Food & QSR

Sydney

New store openings and accessibility

		Total Stores			Last 12 Months*			Accessibility
					Openings	Closures	Net Change	Share of city residents living within 3km of a store:
Major QSR (5 Brands):		629			19	11	+8	93%
Subway		180			2	2	-	85%
McDonald's		202			2	4	-2	89%
KFC		154			10	2	+8	85%
Hungry Jack's		58			4	-	+4	52%
Red Rooster		35			1	3	-2	35%
Pizza (3 Brands):		264			11	7	+4	92%
Dominos		142			6	7	-1	89%
Pizza Hut		74			2	-	+2	73%
Crust		48			3	-	+3	58%
Other QSR (18 Brands)		359			32	12	+20	83%
Zambrero		15			4	-	+4	20%
Oporto		97			7	6	+1	71%
Guzman y Gomez		43			3	1	+2	40%
Grill'd		28			4	-	+4	31%
Nando's		14			-	1	-1	20%
Roll'd		28			-	2	-2	29%
Noodle Box		-			-	-	-	0%
Schnitz		6			1	1	-	10%
Mad Mex		38			4	1	+3	41%
Chicken Treat		2			-	-	-	3%
Betty's Burgers		16			1	-	+1	20%
Carl's Jr		3			-	-	-	2%
FishBowl		25			4	-	+4	21%
Rashays		19			1	-	+1	20%
Taco Bell		6			-	-	-	10%
Burrito Bar		-			-	-	-	0%
Patty Smiths		2			1	-	+1	3%
El Jannah		17			2	-	+2	29%
Sushi (5 Brands)		109			15	2	+13	66%
Sushi Hub		65			11	1	+10	53%
Sushi Sushi		4			1	-	+1	6%
Hero Sushi		27			3	1	+2	33%
Sushi Train		13			-	-	-	16%
Sushi Jiro		-			-	-	n.a.	0%
Total (31 Brands)		1,361			77	32	+45	96%

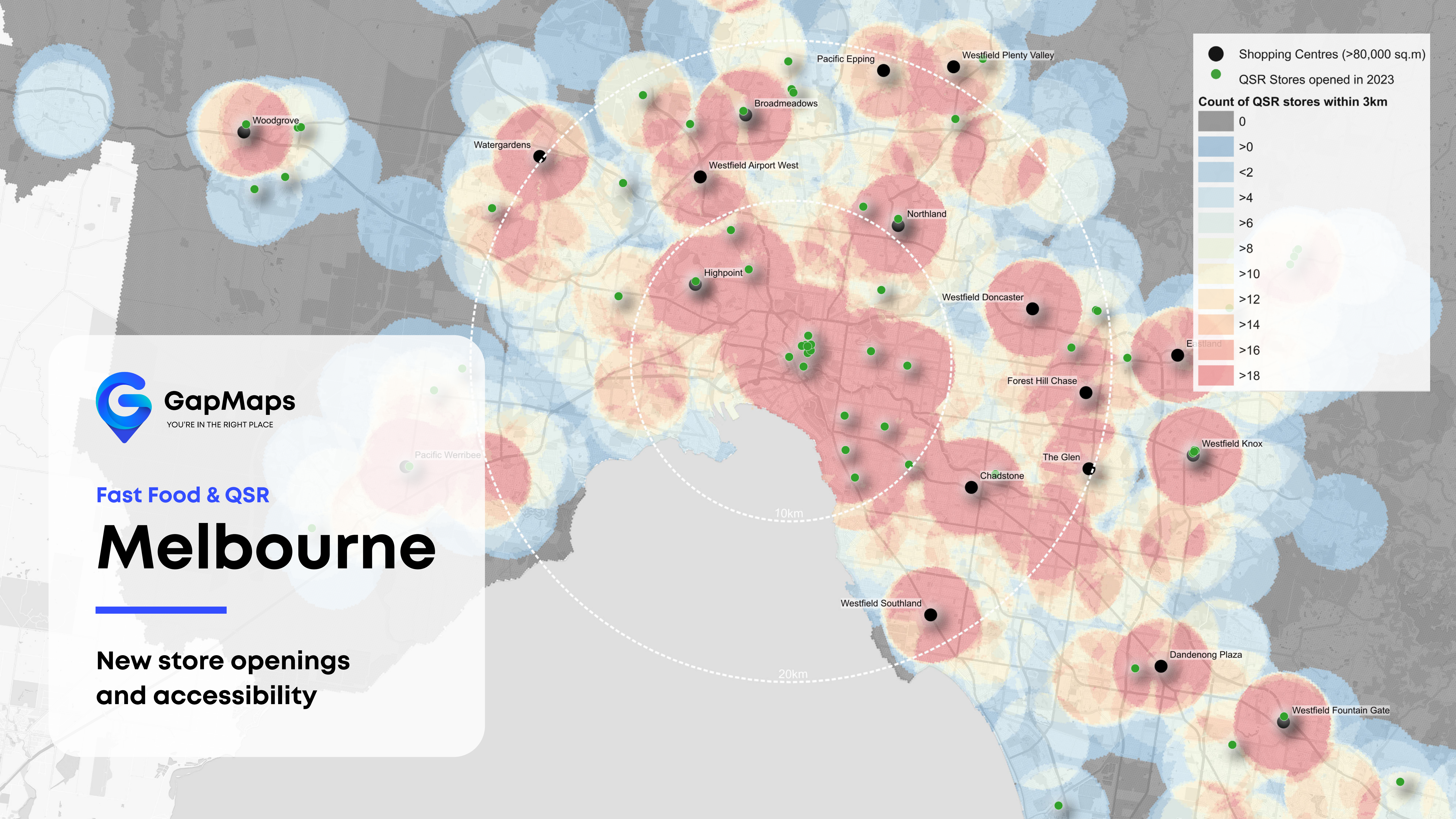
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Fast Food & QSR

Melbourne

New store openings
and accessibility



Fast Food & QSR

Melbourne

New store openings and accessibility

	Total Stores
Major QSR (5 Brands):	691
Subway	219
McDonald's	192
KFC	145
Hungry Jack's	83
Red Rooster	52
Pizza (3 Brands):	156
Dominos	93
Pizza Hut	36
Crust	27
Other QSR (18 Brands)	331
Zambrero	16
Oporto	18
Guzman y Gomez	26
Grill'd	49
Nando's	52
Roll'd	33
Noodle Box	13
Schnitz	44
Mad Mex	11
Chicken Treat	-
Betty's Burgers	15
Carl's Jr	15
FishBowl	9
Rashays	4
Taco Bell	9
Burrito Bar	2
Patty Smiths	8
El Jannah	7
Sushi (5 Brands)	159
Sushi Hub	33
Sushi Sushi	101
Hero Sushi	3
Sushi Train	-
Sushi Jiro	22
Total (31 Brands)	1,337

Last 12 Months*

Openings	Closures	Net Change
26	8	+18
7	-	+7
5	6	-1
9	-	+9
5	-	+5
-	2	-2
8	16	-8
4	14	-10
4	2	+2
-	-	-
41	12	+29
7	-	+7
2	-	+2
4	-	+4
4	-	+4
-	5	-5
3	4	-1
4	-	+4
3	1	+2
2	-	+2
-	-	-
-	-	-
2	-	+2
3	-	+3
3	-	+3
1	-	+1
-	1	-1
-	1	-1
3	-	+3
14	8	+6
6	1	+5
8	7	+1
-	-	-
-	-	-
-	-	n.a.
89	44	+45

Accessibility

Share of city residents living within 3km of a store:

94%
89%
88%
81%
64%
54%
83%
77%
41%
33%
77%
20%
17%
31%
43%
49%
29%
15%
46%
15%
0%
20%
14%
12%
3%
11%
2%
9%
8%
67%
31%
64%
4%
0%
23%
94%

* Opening dates as per listing on company website, actual store opening dates may vary. Where possible store relocations (e.g. within the same Shopping Centre) are not included as an opening/closure.

Want to learn more?

Contact Us



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