



GapMaps

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2021 Annual Network Report

Café

1st January - 31st December 2021
Australia



Introduction

Welcome to another edition of the Annual Network Report for Australia's Café Sector. Every year GapMaps brings you unique insights on the changing competitive landscape in this sector. Quarterly snapshots are also released by GapMaps throughout the year.

Our data represents the most updated view of physical network locations in Australia. Our aim is to empower you with the insights you need to make better decisions, faster.

GapMaps is a leading provider of location intelligence services in Australia, Middle East and Asia. We provide our clients with the tools necessary to develop and refine their network strategies and make fact-based assessments regarding network growth opportunities.

NETWORK SUMMARY

1 JAN 2022

18 Brands Tracked

2,031 Locations

166 Stores Opened*

69 Stores Closed*

	Total Stores	Last 12 Months			Last 3 Months		
		Openings	Closures	Net Change	Openings	Closures	Net Change
Boost Juice	314	27	-	+27	13	-	+13
The Coffee Club	260	16	5	+11	7	1	+6
Donut King	232	9	12	-3	3	4	-1
Gloria Jean's	183	3	-	+3	-	-	-
Muffin Break	178	18	8	+10	-	-	-
Chatime	138	26	6	+20	7	2	+5
Gong Cha	117	32	-	+32	12	-	+12
Jamaica Blue	107	9	6	+3	2	3	-1
Zarraffa's Coffee	75	4	3	+1	1	-	+1
Top Juice	69	8	7	+1	3	-	+3
Hudsons Coffee	63	1	11	-10	-	4	-4
Dome Coffee	59	1	2	-1	-	-	-
Starbucks	59	6	-	+6	1	-	+1
Degani	55	3	5	-2	2	2	-
The Coffee Emporium	35	-	3	-3	-	-	-
Muzz Buzz	34	2	-	+2	-	-	-
Cibo	29	-	1	-1	-	1	-1
Stellarossa	24	1	-	+1	-	-	-
Total (18 Brands)	2,031	166	69	+97	51	17	+34

*12 months to 1 January 2022

STORE COUNT BY CITY

1 JAN 2022

	No. Cities	Population (Mil.)	Boost Juice	The Coffee Club	Donut King	Gloria Jean's	Muffin Break	Chattime	Gong Cha	Jamaica Blue	Zaffran's Coffee	Top Juice	Hudsons Coffee	Dome Coffee	Starbucks	Degani	The Coffee Emporium	MUZZ BUZZ	Cibo	Stellariosa	
Australia	126	25.7	314	260	232	183	178	138	117	107	75	69	63	59	59	55	35	34	29	24	
Tier 1	> 1 Million	5	16.6	229	166	129	138	125	121	103	72	38	60	44	43	54	49	22	31	27	15
Greater Sydney	1	5.4	72	28	62	71	24	51	52	20	1	50	9	-	24	4	19	-	-	-	
Greater Melbourne	1	5.2	61	33	33	32	43	41	21	11	-	8	16	-	16	39	1	1	-	-	
Greater Brisbane	1	2.6	34	62	24	18	15	13	17	5	33	2	7	-	14	5	2	-	-	15	
Greater Perth	1	2.1	37	37	7	11	35	6	5	33	4	-	5	43	-	1	-	30	-	-	
Greater Adelaide	1	1.4	25	6	3	6	8	10	8	3	-	-	7	-	-	-	-	-	27	-	
Tier 2	200,000-1 Mil.	6	2.2	36	34	28	15	11	13	10	11	18	8	6	1	5	1	6	-	1	3
Gold Coast	1	0.6	12	12	5	4	2	5	5	1	14	1	2	-	5	1	-	-	-	2	
Australian Capital Territory	1	0.4	8	8	8	-	1	5	2	-	-	3	1	-	-	-	-	-	-	-	
Newcastle	1	0.3	3	1	6	5	1	2	-	5	1	1	2	-	-	-	-	-	-	-	
Wollongong	1	0.3	4	2	1	3	2	1	1	2	-	2	-	-	-	-	6	-	-	-	
Sunshine Coast	1	0.3	7	9	4	3	3	-	1	3	3	1	-	-	-	-	-	-	1	1	
Greater Hobart	1	0.2	2	2	4	-	2	-	1	-	-	-	1	1	-	-	-	-	-	-	
Tier 3*	100-200,000	7	1.0	16	23	20	5	12	3	3	8	8	-	6	1	-	4	4	-	-	1
Townsville	1	0.2	2	6	6	-	3	-	-	1	4	-	1	-	-	1	2	-	-	-	
Geelong	1	0.2	3	1	1	2	1	1	-	-	-	-	-	-	-	2	1	-	-	-	
Cairns	1	0.2	3	4	4	-	2	-	1	2	2	-	2	-	-	-	-	-	-	-	
Greater Darwin	1	0.1	2	7	2	2	2	2	2	-	-	-	1	1	-	-	-	-	-	-	
Ballarat	1	0.1	3	-	1	1	1	-	-	1	-	-	1	-	-	1	-	-	-	-	
Toowoomba	1	0.1	2	3	3	-	1	-	-	3	2	-	-	-	-	-	1	-	-	1	
Tier 4	50-100,000	11	0.7	12	15	15	7	15	1	1	9	6	-	3	2	-	-	1	-	-	4
Tier 5	20-50,000	38	1.1	15	9	23	12	10	-	-	3	2	-	3	4	-	1	2	2	-	-
Tier 6	10-20,000	59	0.8	4	8	16	5	4	-	-	2	2	-	-	2	-	-	-	-	1	1
Other	n.a.	3.3	2	5	1	1	1	-	-	2	1	1	1	6	-	-	-	1	-	-	

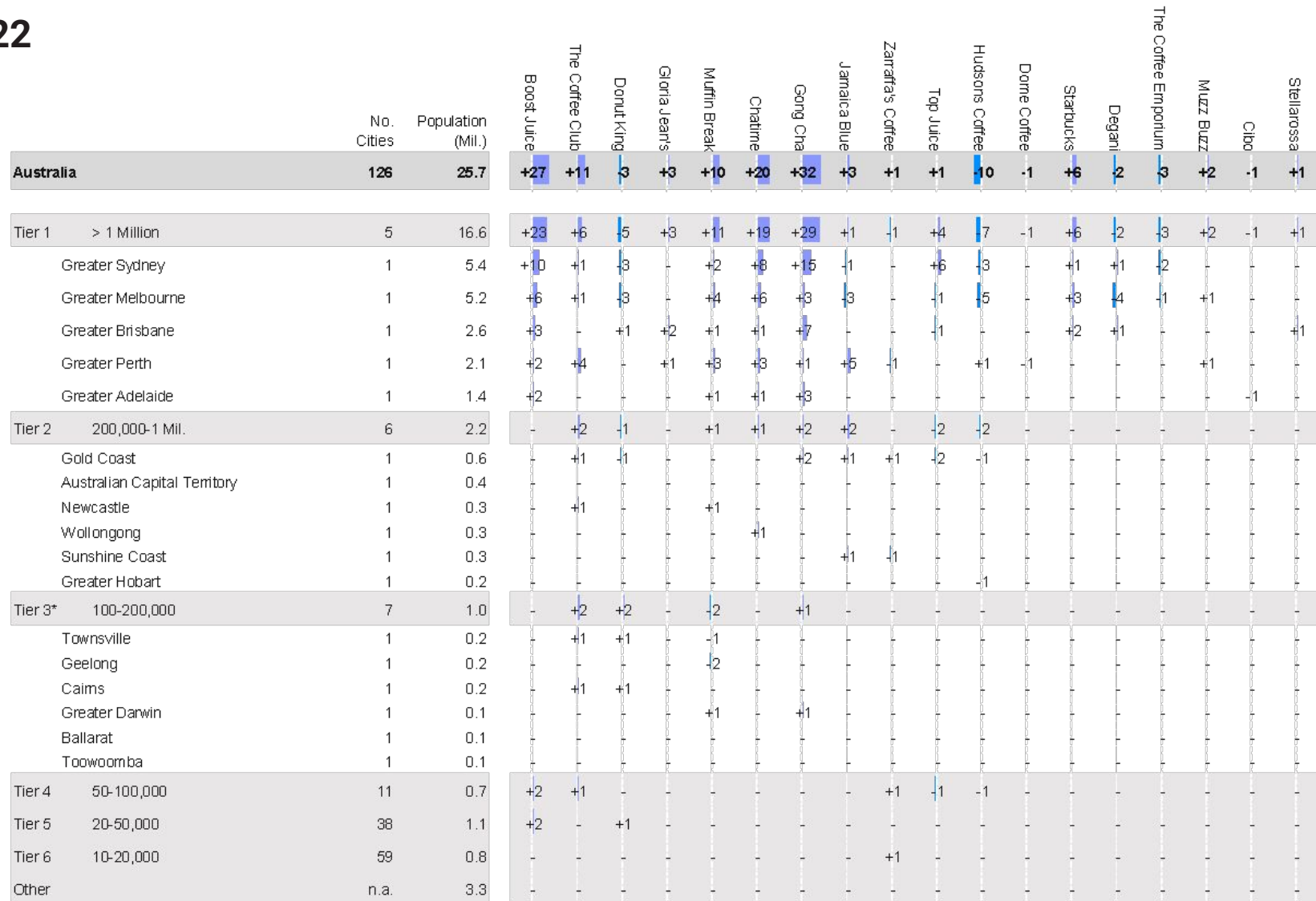
STORES PER MILLION RESIDENTS BY CITY

1 JAN 2022

		No. Cities	Population (Mil.)	Boost Juice	The Coffee Club	Donut King	Gloria Jean's	Muffin Break	Chattime	Gong Cha	Jamaica Blue	Zarrafa's Coffee	Top Juice	Hudsons Coffee	Dome Coffee	Starbucks	Degani	The Coffee Emporium	Muzz Buzz	Cibo	Stelliossa
Australia		126	25.7	12.2	10.1	9.0	7.1	6.9	5.4	4.6	4.2	2.9	2.7	2.5	2.3	2.3	2.1	1.4	1.3	1.1	0.9
Tier 1	> 1 Million	5	16.6	13.8	10.0	7.8	8.3	7.5	7.3	6.2	4.3	2.3	3.6	2.7	2.6	3.3	3.0	1.3	1.9	1.6	0.9
	Greater Sydney	1	5.4	13.4	5.2	11.6	13.2	4.5	9.5	9.7	3.7	0.2	9.3	1.7	-	4.5	0.7	3.5	-	-	-
	Greater Melbourne	1	5.2	11.8	6.4	6.4	6.2	8.3	7.9	4.1	2.1	-	1.6	3.1	-	3.1	7.6	0.2	0.2	-	-
	Greater Brisbane	1	2.6	13.3	24.2	9.4	7.0	5.9	5.1	6.6	2.0	12.9	0.8	2.7	-	5.5	2.0	0.8	-	-	5.9
	Greater Perth	1	2.1	17.4	17.4	3.3	5.2	16.5	2.8	2.4	15.5	1.9	-	2.4	20.2	-	0.5	-	14.1	-	-
	Greater Adelaide	1	1.4	18.2	4.4	2.2	4.4	5.8	7.3	5.8	2.2	-	-	5.1	-	-	-	-	-	19.6	-
Tier 2	200,000-1 Mil.	6	2.2	16.6	15.7	12.9	6.9	5.1	6.0	4.6	5.1	8.3	3.7	2.8	0.5	2.3	0.5	2.8	-	0.5	1.4
	Gold Coast	1	0.6	19.7	19.7	8.2	6.8	3.3	8.2	8.2	1.6	22.9	1.6	3.3	-	8.2	1.6	-	-	-	3.3
	Australian Capital Territory	1	0.4	18.5	18.5	18.5	-	2.3	11.6	4.6	-	-	7.0	2.3	-	-	-	-	-	-	-
	Newcastle	1	0.3	8.8	2.9	17.7	14.7	2.9	5.9	-	14.7	2.9	2.9	5.9	-	-	-	-	-	-	-
	Wollongong	1	0.3	14.2	7.1	3.8	10.7	7.1	3.8	3.8	7.1	-	7.1	-	-	-	-	21.4	-	-	-
	Sunshine Coast	1	0.3	26.3	33.8	15.0	11.3	11.3	-	3.8	11.3	11.3	3.8	-	-	-	-	-	-	3.8	3.8
	Greater Hobart	1	0.2	8.4	8.4	16.7	-	8.4	-	4.2	-	-	-	4.2	4.2	-	-	-	-	-	-
Tier 3*	100-200,000	7	1.0	16.7	24.0	20.9	5.2	12.5	3.1	3.1	8.4	8.4	-	6.3	1.0	-	4.2	4.2	-	-	1.0
	Townsville	1	0.2	11.3	34.0	34.0	-	17.0	-	-	5.7	22.7	-	5.7	-	-	5.7	11.3	-	-	-
	Geelong	1	0.2	18.2	6.1	6.1	12.1	6.1	6.1	-	-	-	-	-	-	-	12.1	6.1	-	-	-
	Cairns	1	0.2	19.3	25.8	25.8	-	12.9	-	6.4	12.9	12.9	-	12.9	-	-	-	-	-	-	-
	Greater Darwin	1	0.1	13.6	47.5	13.6	13.6	13.6	13.6	13.6	-	-	-	6.8	6.8	-	-	-	-	-	-
	Ballarat	1	0.1	28.1	-	9.4	9.4	9.4	-	-	9.4	-	-	9.4	-	-	9.4	-	-	-	-
	Toowoomba	1	0.1	18.9	28.4	28.4	-	9.5	-	-	28.4	18.9	-	-	-	-	-	9.5	-	-	9.5
Tier 4	50-100,000	11	0.7	16.0	20.1	20.1	9.4	20.1	1.3	1.3	12.0	8.0	-	4.0	2.7	-	-	1.3	-	-	5.3
Tier 5	20-50,000	38	1.1	13.4	8.0	20.5	10.7	8.9	-	-	2.7	1.8	-	2.7	3.6	-	0.9	1.8	1.8	-	-
Tier 6	10-20,000	59	0.8	4.8	9.6	19.2	6.0	4.8	-	-	2.4	2.4	-	-	2.4	-	-	-	-	1.2	1.2
Other		n.a.	3.3	0.6	1.5	0.3	0.3	0.3	-	-	0.6	0.3	0.3	0.3	1.8	-	-	-	0.3	-	-

NET STORE CHANGE BY CITY

12 MONTHS TO 1 JAN 2022



166 STORE OPENINGS

12 MONTHS TO 1 JAN 2022

Brand	Suburb	State
BOOST JUICE	Macquarie Park	NSW
BOOST JUICE	Sydney	NSW
BOOST JUICE	Southbank	VIC
BOOST JUICE	Adelaide Airport	SA
BOOST JUICE	Joondalup	WA
BOOST JUICE	Eaton (WA)	WA
BOOST JUICE	North Sydney	NSW
BOOST JUICE	Dee Why	NSW
BOOST JUICE	Baulkham Hills	NSW
BOOST JUICE	Northmead	NSW
BOOST JUICE	Jamisonstown	NSW
BOOST JUICE	Tarneit	VIC
BOOST JUICE	Morningside	QLD
BOOST JUICE	Rowville	VIC
BOOST JUICE	Bundoora (Vic.)	VIC
BOOST JUICE	Mildura	VIC
BOOST JUICE	Edmondson Park	NSW
BOOST JUICE	Gawler (SA)	SA
BOOST JUICE	Herston	QLD
BOOST JUICE	Mackay	QLD
BOOST JUICE	Fortitude Valley	QLD
BOOST JUICE	Bathurst	NSW
BOOST JUICE	Midland	WA
BOOST JUICE	Westmead	NSW
BOOST JUICE	Belrose	NSW
BOOST JUICE	Sunbury	VIC
BOOST JUICE	Cheltenham (Vic.)	VIC
THE COFFEE CLUB	Mermaid Waters	QLD
THE COFFEE CLUB	Brisbane Airport	QLD
THE COFFEE CLUB	Cairns City	QLD
THE COFFEE CLUB	Bundaberg Central	QLD
THE COFFEE CLUB	Yamanto	QLD
THE COFFEE CLUB	Cannington	WA
THE COFFEE CLUB	Tweed Heads South	NSW
THE COFFEE CLUB	Brisbane Airport	QLD
THE COFFEE CLUB	Brisbane Airport	QLD
THE COFFEE CLUB	Wickham (NSW)	NSW
THE COFFEE CLUB	Madeley	WA
THE COFFEE CLUB	East Victoria Park	WA
THE COFFEE CLUB	Perth (WA)	WA
THE COFFEE CLUB	Frankston	VIC
THE COFFEE CLUB	Cranebrook	NSW
THE COFFEE CLUB	Thuringowa Central	QLD

Brand	Suburb	State
DONUT KING	Eastgardens	NSW
DONUT KING	Armadale (WA)	WA
DONUT KING	Penrith	NSW
DONUT KING	Toorina	NSW
DONUT KING	Wodonga	VIC
DONUT KING	Macquarie Fields	NSW
DONUT KING	Smithfield (Qld)	QLD
DONUT KING	Aitkenvale	QLD
DONUT KING	Yamanto	QLD
GLORIA JEAN'S	Sunnybank Hills	NSW
GLORIA JEAN'S	Karawara	WA
GLORIA JEAN'S	Springfield (Ipswich - Qld)	QLD
MUFFIN BREAK	Ringwood (Vic.)	VIC
MUFFIN BREAK	Kilburn	SA
MUFFIN BREAK	North Lakes	QLD
MUFFIN BREAK	Marsden Park	NSW
MUFFIN BREAK	Rouse Hill	NSW
MUFFIN BREAK	Joondalup	WA
MUFFIN BREAK	Cheltenham (Vic.)	VIC
MUFFIN BREAK	Ringwood (Vic.)	VIC
MUFFIN BREAK	Heatherton	VIC
MUFFIN BREAK	Keilor Park	VIC
MUFFIN BREAK	Narre Warren	VIC
MUFFIN BREAK	Pakenham	VIC
MUFFIN BREAK	Kotara	NSW
MUFFIN BREAK	Yarrowonga (NT)	NT
MUFFIN BREAK	Beechboro	WA
MUFFIN BREAK	Avoca (Qld)	QLD
MUFFIN BREAK	Karrinyup	WA
MUFFIN BREAK	Melbourne Airport	VIC

Brand	Suburb	State
GONG CHA	Macquarie Park	NSW
GONG CHA	Zetland	NSW
GONG CHA	Minto	NSW
GONG CHA	Punchbowl (Canterbury-Bankst	NSW
GONG CHA	Kilkenny	SA
GONG CHA	Merrylands	NSW
GONG CHA	Mount Ommaney	QLD
GONG CHA	Haymarket	NSW
GONG CHA	Forest Lake	QLD
GONG CHA	Sydney	NSW
GONG CHA	Helensvale	QLD
GONG CHA	Innaloo	WA
GONG CHA	Narellan	NSW
GONG CHA	Greenfield Park	NSW
GONG CHA	North Lakes	QLD
GONG CHA	Belmore	NSW
GONG CHA	Robina	QLD
GONG CHA	Campbelltown (NSW)	NSW
GONG CHA	North Ipswich	QLD
GONG CHA	Salisbury Downs	SA
GONG CHA	Fortitude Valley	QLD
GONG CHA	Elizabeth	SA
GONG CHA	Marsden Park	NSW
GONG CHA	Parramatta	NSW
GONG CHA	Sunshine (Vic.)	VIC
GONG CHA	Brunswick (Vic.)	VIC
GONG CHA	Richmond (Vic.)	VIC
GONG CHA	Sydney	NSW
GONG CHA	Springfield Central	QLD
GONG CHA	Calamvale	QLD
GONG CHA	Yarrowonga (NT)	NT
GONG CHA	Rouse Hill	NSW
JAMAICA BLUE	Harrisdale	WA
JAMAICA BLUE	Nedlands	WA
JAMAICA BLUE	Dianella	WA
JAMAICA BLUE	Eastgardens	NSW
JAMAICA BLUE	Biggera Waters	QLD
JAMAICA BLUE	Noosaville	QLD
JAMAICA BLUE	Midland	WA
JAMAICA BLUE	Shailer Park	QLD
JAMAICA BLUE	Kardinya	WA
ZARRAFFA'S COFFEE	Biggera Waters	QLD
ZARRAFFA'S COFFEE	Helensvale	QLD
ZARRAFFA'S COFFEE	Pialba	QLD
ZARRAFFA'S COFFEE	Ballina	NSW

Brand	Suburb	State
TOP JUICE	Rhodes	NSW
TOP JUICE	Macquarie Park	NSW
TOP JUICE	Heidelberg	VIC
TOP JUICE	Sydney	NSW
TOP JUICE	Sydney	NSW
TOP JUICE	Chatswood	NSW
TOP JUICE	Macquarie Park	NSW
TOP JUICE	Merrylands	NSW
HUDSONS COFFEE	Perth Airport	WA
DOVE COFFEE	Perth (WA)	WA
STARBUCKS	Miranda	NSW
STARBUCKS	Doncaster	VIC
STARBUCKS	Malvern East	VIC
STARBUCKS	Eight Mile Plains	QLD
STARBUCKS	Maidstone	VIC
STARBUCKS	Fortitude Valley	QLD
DEGANI	Edmondson Park	NSW
DEGANI	Atwell	WA
DEGANI	Mango Hill	QLD
MUZZ BUZZ	Middle Swan	WA
MUZZ BUZZ	Springvale (Vic.)	VIC
STELLAROSSA	Fernvale (Qld)	QLD
CHATIME	Melton West	VIC
CHATIME	Haymarket	NSW
CHATIME	Penrith	NSW
CHATIME	Macquarie Park	NSW
CHATIME	Wollongong	NSW
CHATIME	Red Hill (Brisbane - Qld)	QLD
CHATIME	Karawara	WA
CHATIME	Moonee Ponds	VIC
CHATIME	Marrickville	NSW
CHATIME	Eastgardens	NSW
CHATIME	Ringwood (Vic.)	VIC
CHATIME	Caddens	NSW
CHATIME	Karrinyup	WA
CHATIME	Oakleigh	VIC
CHATIME	Lane Cove	NSW
CHATIME	Craigieburn	VIC
CHATIME	Burwood	NSW
CHATIME	Warriewood	NSW
CHATIME	Frankston	VIC
CHATIME	Golden Grove	SA
CHATIME	Elsternwick	VIC
CHATIME	Canley Heights	NSW
CHATIME	Carnes Hill	NSW
CHATIME	Midland	WA
CHATIME	Caroline Springs	VIC
CHATIME	Brighton (SA)	SA

69 STORE CLOSURES

12 MONTHS TO 1 JAN 2022

Brand	Suburb	State
THE COFFEE CLUB	Redcliffe (Qld)	QLD
THE COFFEE CLUB	Brisbane Airport	QLD
THE COFFEE CLUB	Brisbane Airport	QLD
THE COFFEE CLUB	Ascot (Brisbane - Qld)	QLD
THE COFFEE CLUB	Tweed Heads South	NSW
DONUT KING	Baulkham Hills	NSW
DONUT KING	Maribyrnong	VIC
DONUT KING	Mirrabooka (WA)	WA
DONUT KING	Mount Pleasant (Mackay - Qld)	QLD
DONUT KING	Rhodes	NSW
DONUT KING	Runaway Bay	QLD
DONUT KING	Fairfield (NSW)	NSW
DONUT KING	Macquarie Fields	NSW
DONUT KING	Marrickville	NSW
DONUT KING	Fairfield (NSW)	NSW
DONUT KING	Blackburn	VIC
DONUT KING	Tarneit	VIC
MUFFIN BREAK	Hyde Park (Qld)	QLD
MUFFIN BREAK	Box Hill (Vic.)	VIC
MUFFIN BREAK	Mulgrave (Vic.)	VIC
MUFFIN BREAK	Corio	VIC
MUFFIN BREAK	Rosebud	VIC
MUFFIN BREAK	Urraween	QLD
MUFFIN BREAK	Richmond (Vic.)	VIC
MUFFIN BREAK	Grovedale	VIC

Brand	Suburb	State
JAMAICA BLUE	Miranda	NSW
JAMAICA BLUE	Melton West	VIC
JAMAICA BLUE	Richmond (Vic.)	VIC
JAMAICA BLUE	Penrith	NSW
JAMAICA BLUE	Preston (Vic.)	VIC
JAMAICA BLUE	Brisbane City	QLD
ZARRAFFA'S COFFEE	Maroochydore	QLD
ZARRAFFA'S COFFEE	Peppermint Grove	WA
ZARRAFFA'S COFFEE	Biggera Waters	QLD
TOP JUICE	Glebe	NSW
TOP JUICE	Coolangatta (Qld)	QLD
TOP JUICE	Doncaster	VIC
TOP JUICE	Melbourne	VIC
TOP JUICE	Brisbane City	QLD
TOP JUICE	Robina	QLD
TOP JUICE	East Maitland	NSW

Brand	Suburb	State
HUDSONS COFFEE	Melbourne	VIC
HUDSONS COFFEE	Mount Waverley	VIC
HUDSONS COFFEE	Caringbah	NSW
HUDSONS COFFEE	Miranda	NSW
HUDSONS COFFEE	Randwick	NSW
HUDSONS COFFEE	Tugun	QLD
HUDSONS COFFEE	Hobart	TAS
HUDSONS COFFEE	Port Melbourne	VIC
HUDSONS COFFEE	Essendon	VIC
HUDSONS COFFEE	East Maitland	NSW
HUDSONS COFFEE	Melbourne	VIC
DOME COFFEE	Subiaco	WA
DOME COFFEE	Northbridge (WA)	WA
DEGANI	Frankston	VIC
DEGANI	Lilydale (Vic.)	VIC
DEGANI	Perth (WA)	WA
DEGANI	Kealba	VIC
DEGANI	Ringwood (Vic.)	VIC
THE COFFEE EMPORIUM	Cheltenham (Vic.)	VIC
THE COFFEE EMPORIUM	Ryde	NSW
THE COFFEE EMPORIUM	Parramatta	NSW
CIBO	Adelaide	SA
CHATIME	Adelaide	SA
CHATIME	Melbourne	VIC
CHATIME	Chatswood	NSW
CHATIME	Sydney	NSW
CHATIME	Sydney	NSW
CHATIME	Southbank	VIC



GapMaps

YOU'RE IN THE RIGHT PLACE

For further information

Please Contact

Scott Johnson

Senior Analyst

scott@gapmaps.com

GapMaps Head Office
Suite 1, Level 1, 425 Docklands Drive
Docklands, 3008, Australia

+ 61 3 9670 4569 | info@gapmaps.com | www.gapmaps.com