



GapMaps

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2022 Mid-Year Network Report

Petrol Retail

1st July 2021 – 30th June 2022
Australia



Introduction

We are pleased to share our 2022 Mid-Year Network Report for Australia's Petrol Retail Sector. This report provides you with unique insights and key trends into the changing competitor landscape we've observed in this sector over the 12 months ending 30 June, 2022.

Our data represents the most up-to-date view of physical network locations in Australia. Our aim is to empower you with the insights you need to make better location 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

30 June 2022

12 Brands Tracked

6,699 Locations

196 Locations Opened*

64 Locations Closed*

| | Total Stores | Last 12 Months | | | Last 3 Months | | |
|--------------------------|--------------|----------------|-----------|-------------|---------------|----------|------------|
| | | Openings | Closures | Net Change | Openings | Closures | Net Change |
| BP Australia | 1,518 | 54 | - | +54 | 8 | - | +8 |
| Ampol | | | | | | | |
| Ampol Australia (Caltex) | 1,338 | 20 | 34 | -14 | 3 | 2 | +1 |
| Woolworths Petrol Plus | 532 | 7 | 7 | - | 1 | - | +1 |
| Shell/Coles | | | | | | | |
| Coles Express | 716 | 7 | 9 | -2 | 4 | - | +4 |
| Shell | 377 | 28 | 2 | +26 | 3 | 1 | +2 |
| 7 Eleven Fuel | 595 | 24 | 2 | +22 | 5 | 1 | +4 |
| United Petroleum | 435 | 4 | - | +4 | - | - | - |
| Puma Energy Australia | 295 | 1 | - | +1 | - | - | - |
| Metro Petroleum | 287 | 37 | 6 | +31 | 4 | - | +4 |
| Liberty Oil | 234 | - | - | - | - | - | - |
| Mobil Oil Australia | 202 | 7 | 3 | +4 | 3 | - | +3 |
| On The Run | 170 | 7 | 1 | +6 | 2 | 1 | +1 |
| Total (12 Brands) | 6,699 | 196 | 64 | +132 | 33 | 5 | +28 |

*12 months to 30 June 2022

STORE COUNT BY CITY

30 June 2022

| | | No. Cities | Population (Mil.) | BP Australia | Ampol Australia (Caltex) | Woolworths Petrol Plus / EG Fuels | Shell/Coles | Shell | 7 Eleven Fuel | United Petroleum | Puma Energy Australia | Metro Petroleum | Liberty Oil | Mobil Oil Australia | On The Run |
|------------------|------------------------------|------------|-------------------|--------------|--------------------------|-----------------------------------|-------------|------------|---------------|------------------|-----------------------|-----------------|-------------|---------------------|------------|
| Australia | | 126 | 25.7 | 1,518 | 1,338 | 532 | 716 | 377 | 595 | 435 | 295 | 287 | 234 | 202 | 170 |
| Tier 1 | > 1 Million | 5 | 16.6 | 667 | 465 | 275 | 432 | 73 | 481 | 170 | 110 | 138 | 74 | 55 | 131 |
| | Greater Sydney | 1 | 5.4 | 166 | 141 | 77 | 116 | 20 | 156 | 23 | 2 | 110 | 4 | 4 | - |
| | Greater Melbourne | 1 | 5.1 | 173 | 106 | 102 | 160 | 28 | 161 | 90 | 7 | 18 | 29 | 3 | 2 |
| | Greater Brisbane | 1 | 2.6 | 106 | 97 | 50 | 67 | 9 | 118 | 22 | 43 | 10 | 8 | 5 | - |
| | Greater Perth | 1 | 2.1 | 98 | 73 | 25 | 59 | 14 | 46 | 24 | 58 | - | 6 | 1 | 6 |
| | Greater Adelaide | 1 | 1.4 | 124 | 48 | 21 | 30 | 2 | - | 11 | - | - | 27 | 42 | 123 |
| Tier 2 | 200,000-1 Mil. | 6 | 2.2 | 76 | 105 | 44 | 72 | 13 | 72 | 30 | 14 | 28 | 5 | 1 | - |
| | Gold Coast | 1 | 0.6 | 18 | 26 | 7 | 21 | 1 | 30 | 10 | 7 | 3 | 2 | - | - |
| | Australian Capital Territory | 1 | 0.4 | 8 | 12 | 10 | 15 | - | 8 | 2 | - | 3 | - | - | - |
| | Newcastle | 1 | 0.3 | 19 | 12 | 7 | 12 | 3 | 16 | 3 | - | 11 | 1 | - | - |
| | Wollongong | 1 | 0.3 | 8 | 13 | 8 | 9 | 2 | 10 | - | - | 11 | - | 1 | - |
| | Sunshine Coast | 1 | 0.3 | 11 | 9 | 6 | 6 | 2 | 8 | 2 | 7 | - | 2 | - | - |
| | Greater Hobart | 1 | 0.2 | 12 | 33 | 6 | 9 | 5 | - | 13 | - | - | - | - | - |
| Tier 3* | 100-200,000 | 7 | 1.0 | 51 | 38 | 32 | 37 | 9 | 15 | 26 | 34 | 5 | 8 | 13 | - |
| | Townsville | 1 | 0.2 | 9 | 8 | 6 | 8 | 1 | 1 | 4 | 7 | - | 2 | 3 | - |
| | Geelong | 1 | 0.2 | 7 | 6 | 5 | 9 | 1 | 5 | 3 | - | 1 | 1 | - | - |
| | Cairns | 1 | 0.2 | 6 | 6 | 2 | 6 | 1 | - | 2 | 4 | - | 1 | 8 | - |
| | Greater Darwin | 1 | 0.1 | 7 | 4 | 7 | 6 | - | - | 10 | 19 | - | - | - | - |
| | Ballarat | 1 | 0.1 | 7 | 4 | 3 | 3 | 3 | 4 | 4 | 1 | 2 | 3 | - | - |
| | Toowoomba | 1 | 0.1 | 8 | 5 | 4 | 3 | 2 | 5 | 1 | 2 | 2 | - | - | - |
| Tier 4 | 50-100,000 | 11 | 0.7 | 46 | 52 | 23 | 22 | 10 | 5 | 18 | 18 | 5 | 6 | 10 | - |
| Tier 5 | 20-50,000 | 38 | 1.1 | 90 | 104 | 52 | 46 | 24 | 13 | 31 | 17 | 28 | 17 | 21 | 8 |
| Tier 6 | 10-20,000 | 59 | 0.8 | 77 | 79 | 45 | 47 | 28 | 6 | 37 | 15 | 18 | 23 | 16 | 12 |
| Other | | n.a. | 3.3 | 511 | 495 | 61 | 60 | 220 | 3 | 123 | 87 | 65 | 101 | 86 | 19 |

STORES PER MILLION RESIDENTS BY CITY

30 June 2022

| | | No. Cities | Population (Mil.) | BP Australia | Ampol Australia (Caltex) | Woolworths Petrol Plus / EG Fuels | Ampol Shell/Coles | Shell | 7 Eleven Fuel | United Petroleum | Puma Energy Australia | Metro Petroleum | Liberty Oil | Mobil Oil Australia | On The Run |
|------------------|------------------------------|------------|-------------------|--------------|--------------------------|-----------------------------------|-------------------|-------------|---------------|------------------|-----------------------|-----------------|-------------|---------------------|-------------|
| Australia | | 126 | 25.7 | 59.0 | 52.0 | 20.7 | 27.8 | 14.6 | 23.1 | 16.9 | 11.5 | 11.2 | 9.1 | 7.8 | 6.6 |
| Tier 1 | > 1 Million | 5 | 16.6 | 40.3 | 28.1 | 16.6 | 26.1 | 4.4 | 29.0 | 10.3 | 6.6 | 8.3 | 4.5 | 3.3 | 7.9 |
| | Greater Sydney | 1 | 5.4 | 31.0 | 26.3 | 14.4 | 21.6 | 3.7 | 29.1 | 4.3 | 0.4 | 20.5 | 0.7 | 0.7 | - |
| | Greater Melbourne | 1 | 5.1 | 33.9 | 20.8 | 20.0 | 31.4 | 5.5 | 31.6 | 17.7 | 1.4 | 3.5 | 5.7 | 0.6 | 0.4 |
| | Greater Brisbane | 1 | 2.6 | 41.1 | 37.6 | 19.4 | 25.9 | 3.5 | 45.7 | 8.5 | 16.7 | 3.9 | 3.1 | 1.9 | - |
| | Greater Perth | 1 | 2.1 | 45.8 | 34.1 | 11.7 | 27.5 | 6.5 | 21.5 | 11.2 | 27.1 | - | 2.8 | 0.5 | 2.8 |
| | Greater Adelaide | 1 | 1.4 | 90.0 | 34.8 | 15.2 | 21.8 | 1.5 | - | 8.0 | - | - | 19.6 | 30.5 | 89.2 |
| Tier 2 | 200,000-1 Mil. | 6 | 2.2 | 34.8 | 48.1 | 20.2 | 33.0 | 6.0 | 33.0 | 13.8 | 6.4 | 12.8 | 2.3 | 0.5 | - |
| | Gold Coast | 1 | 0.6 | 29.1 | 42.1 | 11.3 | 34.0 | 1.6 | 48.5 | 16.2 | 11.3 | 4.9 | 3.2 | - | - |
| | Australian Capital Territory | 1 | 0.4 | 18.5 | 27.8 | 23.2 | 34.8 | - | 18.5 | 4.6 | - | 7.0 | - | - | - |
| | Newcastle | 1 | 0.3 | 55.5 | 35.1 | 20.5 | 35.1 | 8.8 | 46.8 | 8.8 | - | 32.2 | 2.9 | - | - |
| | Wollongong | 1 | 0.3 | 28.3 | 46.0 | 28.3 | 31.8 | 7.1 | 35.4 | - | - | 38.9 | - | 3.5 | - |
| | Sunshine Coast | 1 | 0.3 | 41.0 | 33.5 | 22.4 | 22.4 | 7.5 | 29.8 | 7.5 | 26.1 | - | 7.5 | - | - |
| | Greater Hobart | 1 | 0.2 | 50.3 | 138.4 | 25.2 | 37.8 | 21.0 | - | 54.5 | - | - | - | - | - |
| Tier 3* | 100-200,000 | 7 | 1.0 | 53.1 | 39.5 | 33.3 | 38.5 | 9.4 | 15.6 | 27.1 | 35.4 | 5.2 | 8.3 | 13.5 | - |
| | Townsville | 1 | 0.2 | 50.8 | 45.2 | 33.9 | 45.2 | 5.6 | 5.6 | 22.6 | 39.5 | - | 11.3 | 16.9 | - |
| | Geelong | 1 | 0.2 | 42.3 | 36.2 | 30.2 | 54.4 | 6.0 | 30.2 | 18.1 | - | 6.0 | 6.0 | - | - |
| | Cairns | 1 | 0.2 | 38.6 | 38.6 | 12.9 | 38.6 | 6.4 | - | 12.9 | 25.7 | - | 6.4 | 51.4 | - |
| | Greater Darwin | 1 | 0.1 | 47.6 | 27.2 | 47.6 | 40.8 | - | - | 68.0 | 129.3 | - | - | - | - |
| | Ballarat | 1 | 0.1 | 64.7 | 37.0 | 27.7 | 27.7 | 27.7 | 37.0 | 37.0 | 9.2 | 18.5 | 27.7 | - | - |
| | Toowoomba | 1 | 0.1 | 75.6 | 47.3 | 37.8 | 28.4 | 18.9 | 47.3 | 9.5 | 18.9 | 18.9 | - | - | - |
| Tier 4 | 50-100,000 | 11 | 0.7 | 63.9 | 72.2 | 31.9 | 30.6 | 13.9 | 6.9 | 25.0 | 25.0 | 6.9 | 8.3 | 13.9 | - |
| Tier 5 | 20-50,000 | 38 | 1.1 | 79.7 | 92.1 | 46.1 | 40.7 | 21.3 | 11.5 | 27.5 | 15.1 | 24.8 | 15.1 | 18.6 | 7.1 |
| Tier 6 | 10-20,000 | 59 | 0.8 | 91.8 | 94.2 | 53.6 | 56.0 | 33.4 | 7.2 | 44.1 | 17.9 | 21.5 | 27.4 | 19.1 | 14.3 |

NET STORE CHANGE BY CITY

12 MONTHS TO 30 June 2022

| | No. Cities | Population (Mil.) | BP Australia | Ampol Australia (Caltex) | Woolworths Petrol Plus / E/G Fuels | Ampol | Shell/Coles | Shell | 7 Eleven Fuel | United Petroleum | Puma Energy Australia | Metro Petroleum | Liberty Oil | Mobil Oil Australia | On The Run |
|------------------------------|------------|-------------------|--------------|--------------------------|------------------------------------|-----------|-------------|------------|---------------|------------------|-----------------------|-----------------|-------------|---------------------|------------|
| Australia | 126 | 25.7 | +54 | -13 | - | -2 | +26 | +22 | +4 | +1 | +31 | - | +4 | +6 | |
| Tier 1 > 1 Million | 5 | 16.6 | +26 | -4 | -1 | -3 | +13 | +16 | +1 | - | +10 | - | +1 | +4 | |
| Greater Sydney | 1 | 5.4 | +1 | -1 | - | -2 | +7 | +2 | - | - | +7 | - | -1 | - | |
| Greater Melbourne | 1 | 5.1 | +8 | +1 | +1 | +1 | +1 | +6 | +1 | - | - | - | +1 | +1 | |
| Greater Brisbane | 1 | 2.6 | +3 | +1 | -1 | -2 | +2 | +4 | - | - | +3 | - | - | - | |
| Greater Perth | 1 | 2.1 | +5 | -1 | - | +1 | +2 | +4 | - | - | - | - | - | -1 | |
| Greater Adelaide | 1 | 1.4 | +9 | -4 | -1 | -1 | +1 | - | - | - | - | - | +1 | +4 | |
| Tier 2 200,000-1 Mil. | 6 | 2.2 | +2 | -3 | - | +1 | +3 | - | - | - | +5 | - | - | - | |
| Gold Coast | 1 | 0.6 | +1 | -1 | - | +1 | - | - | - | - | +2 | - | - | - | |
| Australian Capital Territory | 1 | 0.4 | - | - | - | - | - | - | - | - | +1 | - | - | - | |
| Newcastle | 1 | 0.3 | +1 | -2 | - | - | +1 | - | - | - | +2 | - | - | - | |
| Wollongong | 1 | 0.3 | - | - | - | - | +1 | - | - | - | - | - | - | - | |
| Sunshine Coast | 1 | 0.3 | - | - | - | - | - | - | - | - | - | - | - | - | |
| Greater Hobart | 1 | 0.2 | - | - | - | - | +1 | - | - | - | - | - | - | - | |
| Tier 3* 100-200,000 | 7 | 1.0 | +1 | -2 | +1 | +1 | - | +2 | +1 | +1 | +3 | - | - | - | |
| Townsville | 1 | 0.2 | - | - | - | +1 | - | +1 | - | +1 | - | - | - | - | |
| Geelong | 1 | 0.2 | - | -1 | - | - | - | - | - | - | +1 | - | - | - | |
| Cairns | 1 | 0.2 | - | - | - | - | - | - | - | - | - | - | - | - | |
| Greater Darwin | 1 | 0.1 | +1 | - | - | - | - | - | +1 | - | - | - | - | - | |
| Ballarat | 1 | 0.1 | - | -1 | +1 | - | - | +1 | - | - | +1 | - | - | - | |
| Toowoomba | 1 | 0.1 | - | - | - | - | - | - | - | - | +2 | - | - | - | |
| Tier 4 50-100,000 | 11 | 0.7 | +1 | -1 | - | - | +1 | +1 | - | - | +2 | - | +1 | - | |
| Tier 5 20-50,000 | 38 | 1.1 | +4 | -3 | +2 | -1 | +1 | +2 | - | - | +4 | - | +3 | +1 | |
| Tier 6 10-20,000 | 59 | 0.8 | - | - | -1 | - | -1 | +1 | +1 | - | +3 | - | - | +1 | |

80 STORE OPENINGS 6 MONTHS TO 30 June 2022

| Brand | Suburb | State |
|--------------------------|---------------------|-------|
| 7 ELEVEN FUEL | INGLEBURN | NSW |
| 7 ELEVEN FUEL | MUSWELLBROOK | NSW |
| 7 ELEVEN FUEL | BURDELL | QLD |
| 7 ELEVEN FUEL | CHANDLER (QLD) | QLD |
| 7 ELEVEN FUEL | EIGHT MILE PLAINS | QLD |
| 7 ELEVEN FUEL | DANDENONG SOUTH | VIC |
| 7 ELEVEN FUEL | DOREEN | VIC |
| 7 ELEVEN FUEL | HOPPERS CROSSING | VIC |
| 7 ELEVEN FUEL | SHEPPARTON | VIC |
| 7 ELEVEN FUEL | AUSTRALIND | WA |
| 7 ELEVEN FUEL | BENTLEY (WA) | WA |
| 7 ELEVEN FUEL | CANNING VALE | WA |
| AMPOL AUSTRALIA (CALTEX) | OBERON | NSW |
| AMPOL AUSTRALIA (CALTEX) | BELGRAVE SOUTH | VIC |
| AMPOL AUSTRALIA (CALTEX) | BRIGHT (VIC.) | VIC |
| AMPOL AUSTRALIA (CALTEX) | BROADFORD | VIC |
| AMPOL AUSTRALIA (CALTEX) | CASTERTON | VIC |
| BP AUSTRALIA | LAVINGTON | NSW |
| BP AUSTRALIA | TUMBARUMBA | NSW |
| BP AUSTRALIA | WARUMUNGU | NT |
| BP AUSTRALIA | MOOROOKA | QLD |
| BP AUSTRALIA | POMONA (QLD) | QLD |
| BP AUSTRALIA | TOLGA | QLD |
| BP AUSTRALIA | ST KILDA (VIC.) | VIC |
| BP AUSTRALIA | WARRNAMBOOL | VIC |
| BP AUSTRALIA | WILLIAMSTOWN (VIC.) | VIC |
| BP AUSTRALIA | CAPRICORN | WA |
| BP AUSTRALIA | WONTHELLA | WA |
| COLES EXPRESS | DEERAGUN | QLD |
| COLES EXPRESS | LAVERTON NORTH | VIC |
| COLES EXPRESS | RINGWOOD (VIC.) | VIC |
| COLES EXPRESS | WOLLERT | VIC |
| COLES EXPRESS | VITTORIA (WA) | WA |

| Brand | Suburb | State |
|-----------------------------------|---------------------|-------|
| METRO PETROLEUM | BELMONT (NSW) | NSW |
| METRO PETROLEUM | BROKEN HILL | NSW |
| METRO PETROLEUM | KURRI KURRI | NSW |
| METRO PETROLEUM | TELARAH | NSW |
| METRO PETROLEUM | BLACKWATER | QLD |
| METRO PETROLEUM | CAPALABA | QLD |
| METRO PETROLEUM | KURABY | QLD |
| METRO PETROLEUM | MARSDEN | QLD |
| METRO PETROLEUM | SOUTH TOOWOOMBA | QLD |
| METRO PETROLEUM | CORIO | VIC |
| MOBIL OIL AUSTRALIA | COFFS HARBOUR | NSW |
| MOBIL OIL AUSTRALIA | DUBBO | NSW |
| MOBIL OIL AUSTRALIA | NURIOOTPA | SA |
| MOBIL OIL AUSTRALIA | SALISBURY (SA) | SA |
| MOBIL OIL AUSTRALIA | DANDENONG SOUTH | VIC |
| ON THE RUN | CLOVELLY PARK | SA |
| ON THE RUN | KENSINGTON PARK | SA |
| ON THE RUN | OLD NOARLUNGA | SA |
| ON THE RUN | ALPHINGTON | VIC |
| ON THE RUN | HAMILTON (VIC.) | VIC |
| ON THE RUN | WEST WODONGA | VIC |
| SHELL | BOOLAROO | NSW |
| SHELL | CHIPPING NORTON | NSW |
| SHELL | COLYTON | NSW |
| SHELL | KENTHURST | NSW |
| SHELL | LONG JETTY | NSW |
| SHELL | MOONBI | NSW |
| SHELL | TOMAGO | NSW |
| SHELL | UNANDERRA | NSW |
| SHELL | WYONG | NSW |
| SHELL | CABOOLTURE | QLD |
| SHELL | HAWTHORNE | QLD |
| SHELL | INJUNE | QLD |
| SHELL | PAGET | QLD |
| SHELL | BLANCHETOWN | SA |
| SHELL | HAHNDORF | SA |
| SHELL | KEITH | SA |
| SHELL | BURNIE | TAS |
| SHELL | CAMBRIDGE (TAS.) | TAS |
| SHELL | LONGFORD (TAS.) | TAS |
| SHELL | VIOLET TOWN | VIC |
| SHELL | WALPEUP | VIC |
| SHELL | ASCOT (WA) | WA |
| SHELL | MOUNT LAWLEY | WA |
| SHELL | SOUTHERN CROSS (WA) | WA |
| WOOLWORTHS PETROL PLUS / EG FUELS | SALISBURY (SA) | SA |
| WOOLWORTHS PETROL PLUS / EG FUELS | BACCHUS MARSH | VIC |

23 STORE CLOSURES 6 MONTHS TO 30 June 2022

| Brand | Suburb | State |
|-----------------------------------|---------------------|-------|
| 7 ELEVEN FUEL | LANE COVE | NSW |
| 7 ELEVEN FUEL | FAIRFIELD (QLD) | QLD |
| AMPOL AUSTRALIA (CALTEX) | SANDGATE (NSW) | NSW |
| AMPOL AUSTRALIA (CALTEX) | DOUGLAS-DALY | NT |
| AMPOL AUSTRALIA (CALTEX) | PETERMANN | NT |
| AMPOL AUSTRALIA (CALTEX) | AYR | QLD |
| AMPOL AUSTRALIA (CALTEX) | BUNDABERG EAST | QLD |
| AMPOL AUSTRALIA (CALTEX) | MARYBOROUGH (QLD) | QLD |
| AMPOL AUSTRALIA (CALTEX) | WOOMBYE | QLD |
| AMPOL AUSTRALIA (CALTEX) | YEPPON | QLD |
| AMPOL AUSTRALIA (CALTEX) | COLLINSWOOD | SA |
| AMPOL AUSTRALIA (CALTEX) | NURIOOTPA | SA |
| AMPOL AUSTRALIA (CALTEX) | CORIO | VIC |
| AMPOL AUSTRALIA (CALTEX) | MALLACOOTA | VIC |
| AMPOL AUSTRALIA (CALTEX) | MANJIMUP | WA |
| AMPOL AUSTRALIA (CALTEX) | SOUTHERN CROSS (WA) | WA |
| COLES EXPRESS | LAWNTON | QLD |
| COLES EXPRESS | PIALBA | QLD |
| ON THE RUN | MANNING | WA |
| SHELL | EDEN | NSW |
| SHELL | MEDOWIE | NSW |
| WOOLWORTHS PETROL PLUS / EG FUELS | SALISBURY (SA) | SA |
| WOOLWORTHS PETROL PLUS / EG FUELS | WEST LAKES | SA |



GapMaps

YOU'RE IN THE RIGHT PLACE

For further information

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