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2022 Mid-Year Network Report

Auto Tyre & Servicing

1st July 2021 – 30th June 2022
Australia

GapMaps

Introduction

We are pleased to share our 2022 Mid-Year Network Report for Australia's Auto-Tyres and Servicing 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.

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NETWORK SUMMARY
30 June 2022

14 Brands Tracked

2,200 Locations

52 Stores Opened*

24 Stores Closed*

	Total Stores	Last 12 Months			Last 3 Months		
		Openings	Closures	Net Change	Openings	Closures	Net Change
Bridgestone Australia	341	6	5	+1	3	2	+1
Tyrepower	291	9	3	+6	-	-	-
mycar	273	9	3	+6	4	2	+2
Ultra Tune	261	2	3	-1	-	-	-
Beaurepaires	188	-	3	-3	-	-	-
Goodyear Autocare	171	18	1	+17	-	-	-
Dunlop Super Dealers	154	-	2	-2	-	2	-2
Autobarn	135	-	-	-	-	-	-
Bob Jane T-Marts	131	-	1	-1	-	-	-
JAX Quickfit	83	1	1	-	-	-	-
Tyres & More	60	3	1	+2	1	-	+1
Tyreplus	49	4	1	+3	-	-	-
Continental Tyres	39	-	-	-	-	-	-
City Discount Tyres	24	-	-	-	-	-	-
Total (14 Brands)	**2,200**	**52**	**24**	**+28**	**8**	**6**	**+2**

*12 months to 30 June 2022

STORE COUNT BY CITY
30 June 2022

		No. Cities	Population (Mil.)	Bridgestone Australia	Tyrepower	mycar	Ultra Tune	Beaurepaires	Goodyear Autocare	Dunlop Super Dealers	Autobarn	Bob Jane T-Marts	JAX Quickfit	Tyres & More	Tyreplus	Continental Tyres	City Discount Tyres
Australia		**126**	**25.7**	**341**	**291**	**273**	**261**	**188**	**171**	**154**	**135**	**131**	**83**	**60**	**49**	**39**	**24**
Tier 1	> 1 Million	5	16.6	156	122	191	188	83	65	35	73	87	40	33	25	24	21
	Greater Sydney	1	5.4	29	30	48	43	19	13	8	12	18	21	6	7	10	-
	Greater Melbourne	1	5.1	38	24	64	58	37	25	16	29	23	6	9	12	9	-
	Greater Brisbane	1	2.6	42	16	36	42	16	20	7	15	16	10	13	2	2	-
	Greater Perth	1	2.1	22	33	26	25	9	3	4	10	15	1	3	3	3	15
	Greater Adelaide	1	1.4	25	19	17	20	2	4	-	7	15	2	2	1	-	6
Tier 2	200,000-1 Mil.	6	2.2	31	19	34	25	15	17	8	11	14	16	5	3	6	-
	Gold Coast	1	0.6	11	5	9	6	2	5	3	3	3	3	2	1	4	-
	Australian Capital Territory	1	0.4	6	2	11	4	2	4	-	2	2	4	2	1	1	-
	Newcastle	1	0.3	2	4	4	5	1	4	3	1	2	3	-	-	-	-
	Wollongong	1	0.3	4	4	4	3	2	2	-	1	2	3	1	-	-	-
	Sunshine Coast	1	0.3	5	2	3	7	3	2	-	3	3	3	-	1	1	-
	Greater Hobart	1	0.2	3	2	3	-	5	-	2	1	2	-	-	-	-	-
Tier 3*	100-200,000	7	1.0	15	8	16	13	12	7	4	10	7	6	1	5	4	-
	Townsville	1	0.2	4	1	2	2	2	-	1	1	1	1	1	1	-	-
	Geelong	1	0.2	1	1	3	2	2	2	1	2	1	1	-	-	1	-
	Cairns	1	0.2	3	1	3	3	2	1	-	2	1	1	-	1	1	-
	Greater Darwin	1	0.1	1	1	3	2	2	1	1	2	1	-	-	1	1	-
	Ballarat	1	0.1	1	1	2	1	2	1	1	1	1	1	-	-	-	-
	Toowoomba	1	0.1	3	1	1	2	1	1	-	1	1	1	-	1	-	-
Tier 4	50-100,000	11	0.7	18	12	12	12	11	7	6	10	10	8	3	-	1	-
Tier 5	20-50,000	38	1.1	32	29	15	13	23	17	12	20	12	8	7	4	1	-
Tier 6	10-20,000	59	0.8	30	30	5	9	22	23	11	8	1	3	4	5	2	-
Other		n.a.	3.3	59	71	-	1	22	35	78	3	-	2	7	7	1	3

STORES PER MILLION RESIDENTS BY CITY
30 June 2022

	No. Cities	Population (Mil.)	Bridgestone Australia	Tyrepower	mycar	Ultra Tune	Beaurepaires	Goodyear Autocare	Dunlop Super Dealers	Autobarn	Bob Jane T-Marts	JAX Quickfit	Tyres & More	Tyreplus	Continental Tyres	City Discount Tyres
Australia	**126**	**25.7**	**13.2**	**11.3**	**10.6**	**10.1**	**7.3**	**6.6**	**6.0**	**5.2**	**5.1**	**3.2**	**2.3**	**1.9**	**1.5**	**0.9**
Tier 1 > 1 Million	5	16.6	9.4	7.4	11.5	11.4	5.0	3.9	2.1	4.4	5.3	2.4	2.0	1.5	1.4	1.3
Greater Sydney	1	5.4	5.4	5.6	9.0	8.0	3.5	2.4	1.5	2.2	3.4	3.9	1.1	1.3	1.9	-
Greater Melbourne	1	5.1	7.5	4.7	12.6	11.4	7.3	4.9	3.1	5.7	4.5	1.2	1.8	2.4	1.8	-
Greater Brisbane	1	2.6	16.3	6.2	13.9	16.3	6.2	7.7	2.7	5.8	6.2	3.9	5.0	0.8	0.8	-
Greater Perth	1	2.1	10.3	15.4	12.1	11.7	4.2	1.4	1.9	4.7	7.0	0.5	1.4	1.4	1.4	7.0
Greater Adelaide	1	1.4	18.1	13.8	12.3	14.5	1.5	2.9	-	5.1	10.9	1.5	1.5	0.7	-	4.4
Tier 2 200,000-1 Mil.	6	2.2	14.2	8.7	15.6	11.5	6.9	7.8	3.7	5.0	6.4	7.3	2.3	1.4	2.8	-
Gold Coast	1	0.6	17.8	8.1	14.6	9.7	3.2	8.1	4.9	4.9	4.9	4.9	3.2	1.6	6.5	-
Australian Capital Territory	1	0.4	13.9	4.6	25.5	9.3	4.6	9.3	-	4.6	4.6	9.3	4.6	2.3	2.3	-
Newcastle	1	0.3	5.8	11.7	11.7	14.6	2.9	11.7	8.8	2.9	5.8	8.8	-	-	-	-
Wollongong	1	0.3	14.2	14.2	14.2	10.6	7.1	7.1	-	3.5	7.1	10.6	3.5	-	-	-
Sunshine Coast	1	0.3	18.6	7.5	11.2	26.1	11.2	7.5	-	11.2	11.2	11.2	-	3.7	3.7	-
Greater Hobart	1	0.2	12.6	8.4	12.6	-	21.0	-	8.4	4.2	8.4	-	-	-	-	-
Tier 3* 100-200,000	7	1.0	15.6	8.3	16.6	13.5	12.5	7.3	4.2	10.4	7.3	6.2	1.0	5.2	4.2	-
Townsville	1	0.2	22.6	5.6	11.3	11.3	11.3	-	5.6	5.6	5.6	5.6	5.6	5.6	-	-
Geelong	1	0.2	6.0	12.1	18.1	12.1	12.1	12.1	6.0	12.1	6.0	6.0	-	-	6.0	-
Cairns	1	0.2	19.3	6.4	19.3	19.3	12.9	6.4	-	12.9	6.4	6.4	-	6.4	6.4	-
Greater Darwin	1	0.1	6.8	6.8	20.4	13.6	13.6	6.8	6.8	13.6	6.8	-	-	6.8	6.8	-
Ballarat	1	0.1	9.2	9.2	18.5	9.2	18.5	9.2	9.2	9.2	9.2	9.2	-	-	-	-
Toowoomba	1	0.1	28.4	9.5	9.5	18.9	9.5	9.5	-	9.5	9.5	9.5	-	9.5	-	-
Tier 4 50-100,000	11	0.7	25.0	16.7	16.7	16.7	15.3	9.7	8.3	13.9	13.9	11.1	4.2	-	1.4	-
Tier 5 20-50,000	38	1.1	28.3	25.7	13.3	11.5	20.4	15.1	10.6	17.7	10.6	7.1	6.2	3.5	0.9	-
Tier 6 10-20,000	59	0.8	35.8	35.8	6.0	10.7	26.2	27.4	13.1	9.5	1.2	3.6	4.8	6.0	2.4	-

NET STORE CHANGE BY CITY
12 MONTHS TO 30 June 2022

		No. Cities	Population (Mil.)	Bridgestone Australia	Tyrepower	mycar	Ultra Tune	Beaurepaires	Goodyear Autocare	Dunlop Super Dealers	Autobarn	Bob Jane T-Marts	JAX Quickfit	Tyres & More	Tyreplus	Continental Tyres	City Discount Tyres
Australia		**126**	**25.7**	+1	+6	+6	-1	-3	+17	-2	-	-1	-	+2	+3	-	-
Tier 1	> 1 Million	5	16.6	-2	+3	+7	-1	-	+3	-	-	-1	-	-	+2	-	-
	Greater Sydney	1	5.4	-	+2	+1	-	-	-	-	-	-1	-	-	+1	-	-
	Greater Melbourne	1	5.1	+1	+1	+5	-1	-	+3	-	-	-	-1	-	-	-	-
	Greater Brisbane	1	2.6	-2	-1	-	-	-	-	-	-	-	-	+1	-	-	-
	Greater Perth	1	2.1	-1	-	+1	-	-	-	-	-	-	-	-	+1	-	-
	Greater Adelaide	1	1.4	-	+1	-	-	-	-	-	-	-	+1	-1	-	-	-
Tier 2	200,000-1 Mil.	6	2.2	+1	-	-	-	-	+1	-	-	-	-	+1	-	-	-
	Gold Coast	1	0.6	-	-	-	-	-	-	-	-	-	-	+1	-	-	-
	Australian Capital Territory	1	0.4	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Newcastle	1	0.3	+1	-	-	-	-	-	-	-	-	-	-	-	-	-
	Wollongong	1	0.3	-	-	-	-	-	+1	-	-	-	-	-	-	-	-
	Sunshine Coast	1	0.3	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Greater Hobart	1	0.2	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Tier 3*	100-200,000	7	1.0	-	-	-	-	-1	+2	-	-	-	-	-	-	-	-
	Townsville	1	0.2	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Geelong	1	0.2	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Cairns	1	0.2	-	-	-	-	-	+1	-	-	-	-	-	-	-	-
	Greater Darwin	1	0.1	-	-	-	-	-	-	-	-	-	-	-	-1	-	-
	Ballarat	1	0.1	-	-	-	-	-	+1	-	-	-	-	-	-	-	-
	Toowoomba	1	0.1	-	-	-	-	-1	-	-	-	-	-	-	+1	-	-
Tier 4	50-100,000	11	0.7	-1	-	-	+1	-	-	-1	-	-	-	-	-	-	-
Tier 5	20-50,000	38	1.1	+1	+1	-1	-1	-	+3	-	-	-	-	-	-	-	-
Tier 6	10-20,000	59	0.8	+1	+1	-	-	-1	+4	-	-	-	-	+1	-	-	-

22 STORES OPENED
6 MONTHS TO 30 June 2022

Brand	Suburb	State
BRIDGESTONE AUSTRAL	BALLINA	NSW
BRIDGESTONE AUSTRAL	RICHMOND (RICHMOND - QLD)	QLD
BRIDGESTONE AUSTRAL	CANNING VALE	WA
GOODYEAR AUTOCARE	LIVERPOOL	NSW
GOODYEAR AUTOCARE	CAIRNS CITY	QLD
GOODYEAR AUTOCARE	GLADSTONE CENTRAL	QLD
GOODYEAR AUTOCARE	BURNIE	TAS
JAX QUICKFIT	EDWARDSTOWN	SA
MYCAR	HALLAM	VIC
MYCAR	HASTINGS (VIC.)	VIC
MYCAR	MULGRAVE (VIC.)	VIC
MYCAR	PRESTON (VIC.)	VIC
MYCAR	BANKSIA GROVE	WA
MYCAR	HARRISDALE	WA
TYREPLUS	MOSS VALE	NSW
TYREPLUS	NORTH CURL CURL	NSW
TYREPLUS	TOOWOOMBA CITY	QLD
TYREPOWER	ROCKDALE	NSW
TYREPOWER	ROXBY DOWNS	SA
TYREPOWER	BENALLA	VIC
TYREPOWER	NARROGIN	WA
TYRES & MORE	BELLS CREEK	QLD

14 STORES CLOSED
6 MONTHS TO 30 June 2022

Brand	Suburb	State
BRIDGESTONE AUSTR.	MILTON (QLD)	QLD
BRIDGESTONE AUSTR.	GEEBUNG	QLD
BRIDGESTONE AUSTR.	KENSINGTON (QLD)	QLD
BRIDGESTONE AUSTR.	OSBORNE PARK	WA
BRIDGESTONE AUSTR.	OSBORNE PARK	WA
DUNLOP SUPER DEALE	TWEED HEADS SOUTH	NSW
DUNLOP SUPER DEALE	ST GEORGE (QLD)	QLD
MYCAR	NUNDAH	QLD
MYCAR	MOUNT GAMBIER	SA
MYCAR	PORT KENNEDY	WA
TYRES & MORE	GLYNDE	SA
ULTRA TUNE	NOWRA	NSW
ULTRA TUNE	BULLEEN	VIC
ULTRA TUNE	FITZROY (VIC.)	VIC

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For further information

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