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2022 Mid-Year Network Report

Fast Food & QSR

1st July 2021 – 30th June 2022
New Zealand



Introduction

We are pleased to share our 2022 Mid-Year Network Report for New Zealand's Quick Service Restaurant and Fast Food 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 New Zealand. 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

18 Brands Tracked

1,443 Locations

53 Stores Opened*

38 Stores Closed*

	Total Stores	Last 12 Months			Last 3 Months		
		Openings	Closures	Net Change	Openings	Closures	Net Change
Subway	254	5	3	+2	3	2	+1
* McDonalds	169	3	3	-	-	-	-
Domino's	141	5	1	+4	2	-	+2
KFC	111	4	-	+4	-	-	-
Pizza Hut	108	3	-	+3	1	-	+1
Tank Juice	102	10	1	+9	-	-	-
Pita Pit	83	1	10	-9	1	1	-
Burger King	80	5	8	-3	-	-	-
Hell Pizza	77	4	-	+4	-	-	-
St Pierre's Sushi	62	4	-	+4	-	-	-
BurgerFuel	61	3	-	+3	2	-	+2
Noodle Canteen	60	-	-	-	-	-	-
Sal's Pizza	37	2	1	+1	-	-	-
Burger Wisconsin	27	1	-	+1	-	-	-
Lone St	25	1	2	-1	-	-	-
Nando's	24	1	7	-6	1	1	-
Wendy's	22	1	2	-1	1	1	-
Carl's Junior	15	-	3	-3	-	-	-
Total (18 Brands)	1,443	53	38	+15	11	5	+6

* Opening dates as per listing on company website, actual store opening dates may vary

*12 months to 30 June 2022

STORE COUNT BY CITY

30 June 2022

	No. Clusters	Population (Mil.)	Subway	McDonalds	Dominos	KFC	Pizza Hut	Tank Juice	Pita Pit	Burger King	Hell Pizza	St Pierre's Sushi	BurgerFuel	Noodle Canteen	Sal's Pizza	Burger Wisconsin	Lone Star	Nando's	Wendy's
New Zealand	165	4.8	251	167	142	111	108	102	83	79	77	62	61	60	37	27	25	24	22
Tier 1 > 1 Million	1	1.6	84	58	49	39	42	48	33	27	28	33	25	23	21	11	6	14	12
Greater Auckland		1.6	84	58	49	39	42	48	33	27	28	33	25	23	21	11	6	14	12
Tier 2 200,000-1 Mil.	3	1.3	68	48	43	28	24	26	24	23	30	19	20	13	10	13	7	7	5
Greater Christchurch		0.5	23	18	16	11	9	11	6	11	10	8	6	2	5	4	4	2	2
Greater Wellington		0.5	30	18	16	9	9	10	9	6	15	8	8	8	4	9	1	3	1
Hamilton Region		0.3	15	12	11	8	6	5	9	6	5	3	6	3	1	-	2	2	2
Tier 3 100-200,000	4	0.6	27	18	19	15	16	13	10	9	8	4	8	5	2	2	4	2	3
Tauranga		0.2	10	6	6	7	6	8	4	3	2	1	5	1	1	-	1	1	1
Hastings		0.1	4	4	4	2	5	2	2	2	2	3	2	2	-	2	1	-	-
Palmerston North Region		0.1	6	5	4	3	3	1	2	2	2	-	1	2	-	-	1	-	1
Greater Dunedin		0.1	7	3	5	3	2	2	2	2	2	-	-	-	1	-	1	1	1
Tier 4 50-100,000	5	0.4	19	16	9	9	11	6	6	8	5	2	5	7	2	-	4	1	2
Greater Nelson		0.1	4	5	2	2	2	2	1	2	1	-	-	2	1	-	1	-	-
Greater Whangarei		0.1	5	3	2	2	1	1	1	2	1	-	1	2	1	-	1	-	-
New Plymouth		0.1	4	3	2	1	3	1	1	1	1	1	1	1	-	-	-	-	-
Rotorua		0.1	3	3	2	2	4	1	2	2	1	1	2	1	-	-	1	1	2
Invercargill		0.1	3	2	1	2	1	1	1	1	1	-	1	1	-	-	1	-	-
Tier 5 20-50,000	9	0.3	14	11	10	9	8	5	6	11	6	2	3	8	-	1	4	-	-
Tier 6 10-20,000	14	0.2	9	7	5	5	6	-	3	1	-	-	-	2	-	-	-	-	-
Other	129	0.2	30	9	7	6	1	4	1	-	-	2	-	2	2	-	-	-	-

STORES PER MILLION RESIDENTS BY CITY

30 June 2022

	No. Clusters	Population (Mil.)	Subway	McDonalds	Dominos	KFC	Pizza Hut	Tank Juice	Pita Pit	Burger King	Hell Pizza	St Pierre's Sushi	BurgerFuel	Noodle Canteen	Salt's Pizza	Burger Wisconsin	Lone Star	Nando's	Wendy's
New Zealand	165	4.8	53	35	30	23	23	21	17	17	16	13	13	13	8	6	5	5	5
Tier 1 > 1 Million	1	1.6	52	36	30	24	26	30	20	17	17	20	15	14	13	7	4	9	7
Greater Auckland		1.6	52	36	30	24	26	30	20	17	17	20	15	14	13	7	4	9	7
Tier 2 200,000-1 Mil.	3	1.3	51	36	33	21	18	20	18	17	23	14	15	10	8	10	5	5	4
Greater Christchurch		0.5	45	35	31	21	18	21	12	21	20	16	12	4	10	8	8	4	4
Greater Wellington		0.5	59	35	31	18	18	20	18	12	29	16	16	16	8	18	2	6	2
Hamilton Region		0.3	50	40	37	27	20	17	30	20	17	10	20	10	3	-	7	7	7
Tier 3 100-200,000	4	0.6	46	30	32	25	27	22	17	15	13	7	13	8	3	3	7	3	5
Tauranga		0.2	55	33	33	39	33	44	22	17	11	6	28	6	6	-	6	6	6
Hastings		0.1	27	27	27	14	34	14	14	14	14	21	14	14	-	14	7	-	-
Palmerston North Region		0.1	44	36	29	22	22	7	15	15	15	-	7	15	-	-	7	-	7
Greater Dunedin		0.1	55	23	39	23	16	16	16	16	16	-	-	-	8	-	8	8	8
Tier 4 50-100,000	5	0.4	49	41	23	23	28	16	16	21	13	5	13	18	5	-	10	3	5
Greater Nelson		0.1	42	52	21	21	21	21	10	21	10	-	-	21	10	-	10	-	-
Greater Whangarei		0.1	60	36	24	24	12	12	12	24	12	-	12	24	12	-	12	-	-
New Plymouth		0.1	52	39	26	13	39	13	13	13	13	13	13	13	-	-	-	-	-
Rotorua		0.1	42	42	28	28	57	14	28	28	14	14	28	14	-	-	14	14	28
Invercargill		0.1	50	33	17	33	17	17	17	17	17	-	17	17	-	-	17	-	-
Tier 5 20-50,000	9	0.3	50	39	35	32	28	18	21	39	21	7	11	28	-	4	14	-	-
Tier 6 10-20,000	14	0.2	50	39	28	28	34	-	17	6	-	-	-	11	-	-	-	-	-
Other	129	0.2	134	40	31	27	4	18	4	-	-	9	-	9	9	-	-	-	-

NET STORE CHANGE BY CITY

12 MONTHS TO 30 June 2022

		No. Cities	Population (Mil.)	Subway	McDonalds	Dominos's	KFC	Pizza Hut	Tank Juice	Pita Pit	Burger King	Hell Pizza	St Pierre's Sushi	BurgerFuel	Noodle Carteen	Sai's Pizza	Burger Wisconsin	Lone Star	Nando's	Wendy's	Carl's Junior
New Zealand		165	4.8	+2	-	+5	+4	+3	+9	-9	+3	+4	+4	+3	-	+1	+1	-1	+6	-1	+3
Tier 1	> 1 Million	1	1.6	-	-	+2	+3	-	+1	-7	-4	+1	+3	-	-	-	-	-1	-5	-2	-3
	Greater Auckland	-	1.6	-	-	+2	+3	-	+1	-7	-4	+1	+3	-	-	-	-	-1	-5	-2	-3
Tier 2	200,000-1 Mil.	3	1.3	+2	-1	+1	-	-	+3	-1	-2	-	-	+2	-	-	+1	-	-1	-	-
	Greater Christchurch	-	0.5	+1	-	-	-	-	+2	-	-	-	-	-	-	-	+1	-	+1	-	-
	Greater Wellington	-	0.5	+1	-1	+1	-	-	-	+1	+2	-	-	+1	-	-	-	-	-	-	-
	Hamilton Region	-	0.3	-	-	-	-	-	+1	-	-	-	-	+1	-	-	-	-	-	-	-
Tier 3	100-200,000	4	0.6	+1	-	-	-	-	+2	-1	-	+1	+1	+1	-	-	-	-	-	-	-
	Tauranga	-	0.2	+1	-	-	-	-	-	+1	-	+1	-	+1	-	-	-	-	-	-	-
	Hastings	-	0.1	-	-	-	-	-	+1	-	-	-	+1	-	-	-	-	-	-	-	-
	Palmerston North Region	-	0.1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Greater Dunedin	-	0.1	-	-	-	-	-	+1	-	-	-	-	-	-	-	-	-	-	-	-
Tier 4	50-100,000	5	0.4	-1	-	-	+1	+2	+2	-	+1	+2	-	-	-	+1	-	-	-	+1	-
	Greater Nelson	-	0.1	-	-	-	-	-	-	-	-	+1	-	-	-	-	-	-	-	-	-
	Greater Whangarei	-	0.1	-	-	-	+1	-	+1	-	+1	-	-	-	-	+1	-	+1	-	-	-
	New Plymouth	-	0.1	-1	-	-	-	+1	-	-	-	-	-	-	-	-	-	-1	-	-	-
	Rotorua	-	0.1	-	-	-	-	+1	-	-	-	+1	-	-	-	-	-	-	-	+1	-
	Invercargill	-	0.1	-	-	-	-	-	+1	-	-	-	-	-	-	-	-	-	-	-	-
Tier 5	20-50,000	9	0.3	-	-	-	-	+1	+1	-	+2	-	-	-	-	-1	-	-	-	-	-
Tier 6	10-20,000	14	0.2	-	-	+2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

36 STORE OPENINGS 6 MONTHS TO 30 June 2022

Brand	Suburb	Region
BURGER WISCONSIN	LINCOLN WEST	CANTERBURY
BURGERFUEL	TAURANGA SOUTH	BAY OF PLENTY
BURGERFUEL	CAMBRIDGE CENTRAL	WAIKATO
BURGERFUEL	UPPER HUTT CENTRAL	WELLINGTON
DOMINO'S	GOLFLANDS	AUCKLAND
DOMINO'S	TAKANINI WEST	AUCKLAND
DOMINO'S	GORE CENTRAL	SOUTHLAND
DOMINO'S	THAMES CENTRAL	WAIKATO
HELL PIZZA	AUCKLAND	AUCKLAND
HELL PIZZA	ROTORUA CENTRAL	BAY OF PLENTY
HELL PIZZA	TAURANGA HOSPITAL	BAY OF PLENTY
HELL PIZZA	RICHMOND WEST (TASMAN DIST)	TASMAN
KFC	AVONDALE SOUTH (AUCKLAND)	AUCKLAND
KFC	SYLVIA PARK	AUCKLAND
KFC	PORT-LIMEBURNERS	NORTHLAND
LONE STAR	KENSINGTON (WHANGAREI DIST)	NORTHLAND
NANDO'S	VICTORIA PARK	AUCKLAND
PITA PIT	ROLLESTON SOUTH WEST	CANTERBURY
PIZZA HUT	BELL BLOCK WEST	TARANAKI
ST PIERRE'S SUSHI	BOMBAY HILLS	AUCKLAND
ST PIERRE'S SUSHI	ONEHUNGA-TE PAPAPA INDUST	AUCKLAND
ST PIERRE'S SUSHI	ONEKAWA WEST	HAWKE'S BAY
SUBWAY	VICTORIA PARK	AUCKLAND
SUBWAY	TAURANGA CENTRAL	BAY OF PLENTY
SUBWAY	TE ANAU	SOUTHLAND
SUBWAY	RONGOTAI	WELLINGTON
TANK JUICE	MOUNT WELLINGTON NORTH WE	AUCKLAND
TANK JUICE	QUAY STREET-CUSTOMS STREE	AUCKLAND
TANK JUICE	BUSH INN	CANTERBURY
TANK JUICE	CHRISTCHURCH CENTRAL-SOUT	CANTERBURY
TANK JUICE	HASTINGS CENTRAL	HAWKE'S BAY
TANK JUICE	WHANGANUI CENTRAL	MANAWATU-WANGANUI
TANK JUICE	KENSINGTON (WHANGAREI DIST)	NORTHLAND
TANK JUICE	INVERCARGILL CENTRAL	SOUTHLAND
TANK JUICE	TE RAPA NORTH	WAIKATO
WENDY'S	NGAPUNA	BAY OF PLENTY

24 STORE CLOSURES 6 MONTHS TO 30 June 2022

Brand	Suburb	Region
LONE STAR	PUKEKOHE CENTRAL	AUCKLAND
LONE STAR	NEW PLYMOUTH CENTRAL	TARANAKI
MCDONALDS	HUTT CENTRAL NORTH	WELLINGTON
NANDO'S	EDEN VALLEY	AUCKLAND
NANDO'S	HENDERSON CENTRAL	AUCKLAND
NANDO'S	MILLWATER SOUTH	AUCKLAND
NANDO'S	NEWMARKET	AUCKLAND
NANDO'S	ONEHUNGA CENTRAL	AUCKLAND
NANDO'S	OTAHUHU CENTRAL	AUCKLAND
NANDO'S	CHRISTCHURCH CENTRAL	CANTERBURY
PITA PIT	ALBANY CENTRAL	AUCKLAND
PITA PIT	HENDERSON CENTRAL	AUCKLAND
PITA PIT	MANUKAU CENTRAL	AUCKLAND
PITA PIT	ONEHUNGA CENTRAL	AUCKLAND
PITA PIT	PAKURANGA HEIGHTS EAST	AUCKLAND
PITA PIT	REMUERA WAIATA	AUCKLAND
PITA PIT	WYNYARD-VIADUCT	AUCKLAND
PITA PIT	MOUNT MAUNGANUI NORTH	BAY OF PLENTY
PITA PIT	RANGIORA CENTRAL	CANTERBURY
PITA PIT	JOHNSONVILLE CENTRAL	WELLINGTON
SAL'S PIZZA	QUEENSTOWN CENTRAL	OTAGO
SUBWAY	NEW PLYMOUTH CENTRAL	TARANAKI
SUBWAY	WESTPORT NORTH	WEST COAST
WENDY'S	QUEEN STREET	AUCKLAND



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