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2022 Mid-Year Network Report

Café

1st July 2021 – 30th June 2022
Australia



Introduction

We are pleased to share our 2022 Mid-Year Network Report for Australia's Cafe 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 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

30 June 2022

20 Brands Tracked

3,093 Locations

178 Stores Opened*

83 Stores Closed*

	Total Stores	Last 12 Months			Last 3 Months		
		Openings	Closures	Net Change	Openings	Closures	Net Change
McCafe	890	31	1	+30	4	-	+4
Boost Juice	321	22	-	+22	-	-	-
The Coffee Club	253	12	13	-1	1	3	-2
Donut King	229	7	12	-5	1	4	-3
Gloria Jean's	188	-	-	-	-	-	-
Muffin Break	180	21	8	+13	7	3	+4
Chatime	150	26	6	+20	1	2	-1
Gong Cha	130	27	2	+25	3	1	+2
Jamaica Blue	103	3	8	-5	-	-	-
Sharetea	84	10	-	+10	-	-	-
Zarrafa's Coffee	75	1	1	-	-	-	-
Top Juice	65	5	7	-2	-	4	-4
Hudsons Coffee	62	-	5	-5	-	-	-
Starbucks	61	3	-	+3	-	-	-
Dome Coffee	59	1	2	-1	-	-	-
Degani	52	2	6	-4	-	1	-1
San Churro	51	1	2	-1	-	-	-
Oliver Brown	48	6	3	+3	-	-	-
Caffe Cherry Beans	48	-	7	-7	-	-	-
Banjo's Bakery Café	44	-	-	-	-	-	-
Total (20 Brands)	3,093	178	83	+95	17	18	-1

*12 months to 30 June 2022

STORE COUNT BY CITY

30 June 2022

	No. Cities	Population (Mil.)	McCafe	Boost Juice	The Coffee Club	Donut King	Gloria Jean's	Muffin Break	ChaiTime	Gong Cha	Jamaica Blue	Sharetea	Zaffra's Coffee	Top Juice	Hudsons Coffee	Starbucks	Dome Coffee	Degani	San Churro	Oliver Brown	Caffe Cherry Beans	Banjo's Bakery Cafe
Australia	126	25.7	854	321	253	229	188	180	150	130	103	84	75	65	62	61	59	52	51	48	48	44
Tier 1 > 1 Million	5	16.2	507	233	163	127	138	125	130	114	69	73	38	57	43	54	42	46	40	43	34	5
Greater Sydney	1	5.2	153	71	28	61	70	24	52	61	19	38	1	47	9	24	-	4	10	39	24	-
Greater Melbourne	1	4.9	161	65	32	32	38	43	42	23	9	30	-	8	16	16	-	36	11	3	4	1
Greater Brisbane	1	2.5	87	34	59	25	16	14	15	17	5	5	33	2	7	14	-	5	5	1	6	3
Greater Perth	1	2.1	66	38	38	6	12	36	10	5	33	-	4	-	5	-	42	1	13	-	-	-
Greater Adelaide	1	1.4	40	25	6	3	7	8	11	8	3	-	-	-	6	-	-	-	1	-	-	1
Tier 2 200,000-1 Mil.	6	2.2	78	36	33	28	16	11	14	12	10	11	18	8	6	6	1	1	7	4	13	20
Gold Coast	1	0.6	24	12	11	5	5	2	5	5	1	2	14	-	2	6	-	1	2	-	3	-
Australian Capital Territory	1	0.5	15	8	8	8	-	1	5	3	-	7	-	4	1	-	-	-	1	2	9	-
Newcastle	1	0.3	13	3	1	6	5	1	3	-	5	-	1	1	2	-	-	-	1	1	-	1
Wollongong	1	0.3	8	4	2	1	3	2	1	2	1	2	-	2	-	-	-	-	1	-	-	-
Sunshine Coast	1	0.3	9	7	9	4	3	3	-	1	3	-	3	1	-	-	-	-	1	1	1	4
Greater Hobart	1	0.2	9	2	2	4	-	2	-	1	-	-	-	-	1	-	1	-	1	-	-	15
Tier 3* 100-200,000	7	0.9	45	17	23	20	5	12	4	3	8	-	8	-	6	1	1	4	-	-	-	1
Townsville	1	0.2	9	2	6	6	-	3	1	-	1	-	4	-	1	-	-	1	-	-	-	-
Geelong	1	0.2	8	3	1	1	2	1	1	-	-	-	-	-	-	-	-	2	-	-	-	-
Cairns	1	0.2	6	3	4	4	-	2	-	1	2	-	2	-	2	-	-	-	-	-	-	1
Greater Darwin	1	0.1	6	2	6	2	2	2	2	2	-	-	-	-	1	-	1	-	-	-	-	-
Ballarat	1	0.1	5	4	-	1	1	1	-	-	1	-	-	-	1	1	-	1	-	-	-	-
Toowoomba	1	0.1	6	2	4	3	-	1	-	-	3	-	2	-	-	-	-	-	-	-	-	-
Tier 4 50-100,000	11	0.7	34	13	15	14	10	17	1	1	9	-	6	-	3	-	3	-	2	1	-	5
Tier 5 20-50,000	38	1.1	62	16	6	23	13	10	1	-	3	-	2	-	3	-	4	1	-	-	1	4
Tier 6 10-20,000	59	0.8	56	4	8	16	5	4	-	-	2	-	2	-	-	-	2	-	-	-	-	1
Other	n.a.	-	72	2	5	1	1	1	-	-	2	-	1	-	1	-	6	-	2	-	-	8

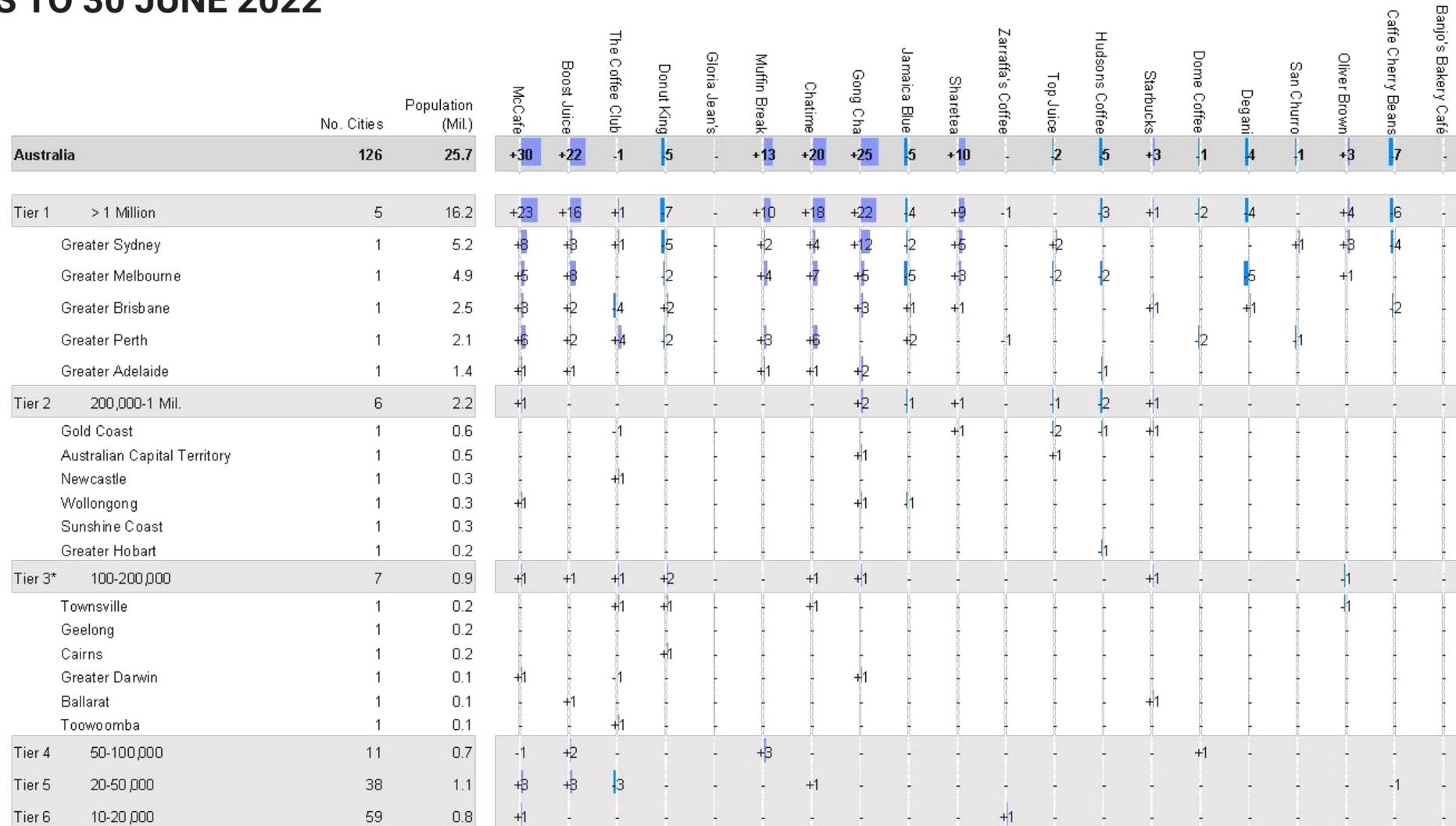
STORES PER MILLION RESIDENTS BY CITY

30 June 2022

	No. Cities	Population (Mil.)	McCafe	Boost Juice	The Coffee Club	Donut King	Gloria Jean's	Muffin Break	ChaiTime	Gong Cha	Jamaica Blue	Sharetea	Zaffra's Coffee	Top Juice	Hudsons Coffee	Starbucks	Dome Coffee	Degani	San Churro	Oliver Brown	Caffe Cherry Beans	Banjo's Bakery Café
Australia	126	25.7	33.2	12.5	9.8	8.9	7.3	7.0	5.8	5.1	4.0	3.3	2.9	2.5	2.4	2.4	2.3	2.0	2.0	1.9	1.9	1.7
Tier 1 > 1 Million	5	16.2	31.3	14.4	10.1	7.8	8.5	7.7	8.0	7.0	4.3	4.5	2.3	3.5	2.7	3.3	2.6	2.8	2.5	2.7	2.1	0.3
Greater Sydney	1	5.2	29.2	13.6	5.4	11.7	13.4	4.6	9.9	11.7	3.6	7.3	0.2	9.0	1.7	4.6	-	0.8	1.9	7.5	4.6	-
Greater Melbourne	1	4.9	32.7	13.2	6.5	6.5	6.7	8.7	8.5	4.7	1.8	6.1	-	1.6	3.3	3.3	-	7.3	2.2	0.6	0.8	0.2
Greater Brisbane	1	2.5	34.4	13.5	23.4	9.9	6.3	5.5	5.9	6.7	2.0	2.0	13.1	0.8	2.8	5.5	-	2.0	2.0	0.4	2.4	1.2
Greater Perth	1	2.1	31.2	18.0	18.0	2.8	5.7	17.0	4.7	2.4	15.6	-	1.9	-	2.4	-	19.6	0.5	6.1	-	-	-
Greater Adelaide	1	1.4	28.8	18.0	4.3	2.2	5.0	5.8	7.9	5.8	2.2	-	-	-	4.3	-	-	-	0.7	-	-	0.7
Tier 2 200,000-1 Mil.	6	2.2	35.7	16.5	15.1	12.8	7.3	5.0	6.4	5.5	4.6	5.0	8.2	3.7	2.7	2.7	0.5	0.5	3.2	1.8	6.0	9.2
Gold Coast	1	0.6	40.0	20.0	18.4	8.3	8.3	3.3	8.3	8.3	1.7	3.3	23.4	-	3.3	10.0	-	1.7	3.3	-	5.0	-
Australian Capital Territory	1	0.5	33.1	17.6	17.6	17.6	-	2.2	11.0	6.6	-	15.4	-	8.8	2.2	-	-	-	2.2	4.4	19.8	-
Newcastle	1	0.3	37.9	8.7	2.9	17.6	14.6	2.9	8.7	-	14.6	-	2.9	2.9	5.8	-	-	-	2.9	2.9	-	2.9
Wollongong	1	0.3	29.2	14.6	7.3	3.7	11.0	7.3	3.7	7.3	3.7	7.3	-	7.3	-	-	-	-	3.7	-	-	-
Sunshine Coast	1	0.3	33.9	26.4	33.9	15.1	11.3	11.3	-	3.8	11.3	-	11.3	3.8	-	-	-	-	3.8	3.8	3.8	15.1
Greater Hobart	1	0.2	36.4	8.1	8.1	16.2	-	8.1	-	4.0	-	-	-	-	4.0	-	4.0	-	4.0	-	-	60.7
Tier 3* 100-200,000	7	0.9	47.6	18.0	24.3	21.1	5.3	12.7	4.2	3.2	8.5	-	8.5	-	6.3	1.1	1.1	4.2	-	-	-	1.1
Townsville	1	0.2	52.5	11.7	35.0	35.0	-	17.5	5.8	-	5.8	-	23.3	-	5.8	-	-	5.8	-	-	-	-
Geelong	1	0.2	48.9	18.3	6.1	6.1	12.2	6.1	6.1	-	-	-	-	-	-	-	-	12.2	-	-	-	-
Cairns	1	0.2	39.1	19.5	26.1	26.1	-	13.0	-	6.5	13.0	-	13.0	-	13.0	-	-	-	-	-	-	6.5
Greater Darwin	1	0.1	42.9	14.3	42.9	14.3	14.3	14.3	14.3	14.3	-	-	-	-	7.1	-	7.1	-	-	-	-	-
Ballarat	1	0.1	46.3	37.1	-	9.3	9.3	9.3	-	-	9.3	-	-	-	9.3	9.3	-	9.3	-	-	-	-
Toowoomba	1	0.1	55.4	18.5	36.9	27.7	-	9.2	-	-	27.7	-	18.5	-	-	-	-	-	-	-	-	-
Tier 4 50-100,000	11	0.7	46.9	17.9	20.7	19.3	13.8	23.5	1.4	1.4	12.4	-	8.3	-	4.1	-	4.1	-	2.8	1.4	-	6.9
Tier 5 20-50,000	38	1.1	54.6	14.1	5.3	20.2	11.4	8.8	0.9	-	2.6	-	1.8	-	2.6	-	3.5	0.9	-	-	0.9	3.5
Tier 6 10-20,000	59	0.8	66.6	4.8	9.5	19.0	5.9	4.8	-	-	2.4	-	2.4	-	-	-	2.4	-	-	-	-	1.2

NET STORE CHANGE BY CITY

12 MONTHS TO 30 JUNE 2022



79 STORE OPENINGS 6 MONTHS TO 30 JUNE 2022

Brand	Suburb	State
BOOST JUICE	GRIFFITH (NSW)	NSW
BOOST JUICE	SOUTH MACKAY	QLD
BOOST JUICE	EDWARDSTOWN	SA
BOOST JUICE	ALFREDTON	VIC
BOOST JUICE	LILYDALE (VIC.)	VIC
BOOST JUICE	MOONEE PONDS	VIC
BOOST JUICE	MORNINGTON (VIC.)	VIC
BOOST JUICE	WYNDHAM VALE	VIC
BOOST JUICE	CRAWLEY	WA
CHATIME	HAYMARKET	NSW
CHATIME	MOUNT DRUITT	NSW
CHATIME	NOWRA	NSW
CHATIME	TUGGERAH	NSW
CHATIME	WEST END (TOWNSVILLE - QLD)	QLD
CHATIME	BRUNSWICK (VIC.)	VIC
CHATIME	DOCKLANDS	VIC
CHATIME	ARMADALE (WA)	WA
CHATIME	JOONDALUP	WA
CHATIME	LEEDERVILLE	WA
DOME COFFEE	BUNBURY (WA)	WA
DONUT KING	UPPER MOUNT GRAVATT	QLD
DONUT KING	ENDEAVOUR HILLS	VIC
GONG CHA	BELCONNEN	ACT
GONG CHA	BARRACK HEIGHTS	NSW
GONG CHA	FAIRFIELD (NSW)	NSW
GONG CHA	HURSTVILLE	NSW
GONG CHA	KOGARAH	NSW
GONG CHA	LANSVALE	NSW
GONG CHA	MOUNT ANNAN	NSW
GONG CHA	NEWTOWN	NSW
GONG CHA	REVESBY	NSW
GONG CHA	RIVERWOOD	NSW
GONG CHA	WESTMEAD	NSW
GONG CHA	ALTONA NORTH	VIC
GONG CHA	BROADMEADOWS (VIC.)	VIC
GONG CHA	RICHMOND (VIC.)	VIC

Brand	Suburb	State
McCAFE	EASTERN CREEK	NSW
McCAFE	INGLEBURN	NSW
McCAFE	NORTH TAMWORTH	NSW
McCAFE	ORAN PARK	NSW
McCAFE	SCHOFIELDS	NSW
McCAFE	CASUARINA (NT)	NT
McCAFE	BIRKDALE	QLD
McCAFE	MORAYFIELD	QLD
McCAFE	BOLIVAR	SA
McCAFE	NURIOOTPA	SA
McCAFE	ARMSTRONG CREEK (VIC.)	VIC
McCAFE	WALLAN	VIC
McCAFE	WOLLERT	VIC
McCAFE	ALBANY	WA
McCAFE	BRABHAM	WA
McCAFE	CANNINGTON	WA
McCAFE	PERTH (WA)	WA
McCAFE	WESTMINSTER	WA
MUFFIN BREAK	CAMPBELLTOWN (NSW)	NSW
MUFFIN BREAK	URRAWEEEN	QLD
MUFFIN BREAK	DANDENONG SOUTH	VIC
MUFFIN BREAK	HOPPERS CROSSING	VIC
MUFFIN BREAK	RINGWOOD (VIC.)	VIC
MUFFIN BREAK	SOMERTON (VIC.)	VIC
MUFFIN BREAK	BUNBURY (WA)	WA
MUFFIN BREAK	JANDAKOT	WA
OLIVER BROWN	ERINA	NSW
SAN CHURRO	MOUNT DRUITT	NSW
SHARETEA	KELLYVILLE	NSW
SHARETEA	MIRANDA	NSW
SHARETEA	RYDE	NSW
SHARETEA	SCHOFIELDS	NSW
SHARETEA	SYDNEY	NSW
SHARETEA	CARINDALE	QLD
SHARETEA	HELENSVALE	QLD
SHARETEA	FRANKSTON	VIC
STARBUCKS	COOMERA	QLD
STARBUCKS	SMYTHES CREEK	VIC
THE COFFEE CLUB	BANKSTOWN	NSW
THE COFFEE CLUB	GLENVALE	QLD
THE COFFEE CLUB	WEST LAKES	SA
THE COFFEE CLUB	BROADMEADOWS (VIC.)	VIC
THE COFFEE CLUB	WARNBRO	WA

43 STORE CLOSURES 6 MONTHS TO 30 JUNE 2022

Brand	Suburb	State
CHATIME	HAYMARKET	NSW
CHATIME	HAYMARKET	NSW
CHATIME	MASCOT	NSW
DEGANI	EPPING (VIC.)	VIC
DEGANI	MOUNT ELIZA	VIC
DEGANI	WHEELERS HILL	VIC
DOME COFFEE	COCKBURN CENTRAL	WA
DONUT KING	FAIRFIELD (NSW)	NSW
DONUT KING	GLENMORE PARK	NSW
DONUT KING	FRANKSTON	VIC
DONUT KING	ROSEBUD	VIC
DONUT KING	MORLEY	WA
GONG CHA	KINGSFORD	NSW
GONG CHA	MELBOURNE	VIC
HUDSONS COFFEE	ADELAIDE	SA
JAMAICA BLUE	EASTGARDENS	NSW
JAMAICA BLUE	WOLLONGONG	NSW
JAMAICA BLUE	CRAIGIEBURN	VIC
JAMAICA BLUE	DONCASTER	VIC
MUFFIN BREAK	LIDCOMBE	NSW
MUFFIN BREAK	MORAYFIELD	QLD
MUFFIN BREAK	BROADMEADOWS (VIC.)	VIC
MUFFIN BREAK	EPPING (VIC.)	VIC
MUFFIN BREAK	KEYSBOROUGH	VIC
MUFFIN BREAK	MELBOURNE	VIC
MUFFIN BREAK	TAYLORS LAKES	VIC
OLIVER BROWN	MOUNT DRUITT	NSW
THE COFFEE CLUB	CESSNOCK	NSW
THE COFFEE CLUB	ERINA	NSW
THE COFFEE CLUB	TIWI	NT
THE COFFEE CLUB	CALAMVALE	QLD
THE COFFEE CLUB	MERMAID WATERS	QLD
THE COFFEE CLUB	NUNDAH	QLD
THE COFFEE CLUB	UPPER MOUNT GRAVATT	QLD
THE COFFEE CLUB	MODBURY	SA
THE COFFEE CLUB	FOREST HILL (VIC.)	VIC
THE COFFEE CLUB	FRANKSTON	VIC
THE COFFEE CLUB	TORQUAY (VIC.)	VIC
THE COFFEE CLUB	KALGOORLIE	WA
TOP JUICE	HORNSBY	NSW
TOP JUICE	SYDNEY	NSW
TOP JUICE	BRISBANE CITY	QLD
TOP JUICE	BROADBEACH WATERS	QLD



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For further information

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