Retail Network Report

Fast Food & QSR

2023 | Saudi Arabia 🇸🇦

Welcome to the first edition of GapMaps' Retail Network Report for Saudi Arabia's Fast Food & Quick Service Retail Sector. GapMaps brings unique insights and key trends into the changing competitive landscape of the Fast Food & Quick Service Retail Sector released bi-annually.

Further in-depth analysis can be undertaken within the GapMaps Live platform which is updated monthly to provide the latest view of QSR and Fast Food store locations across all tracked brands.

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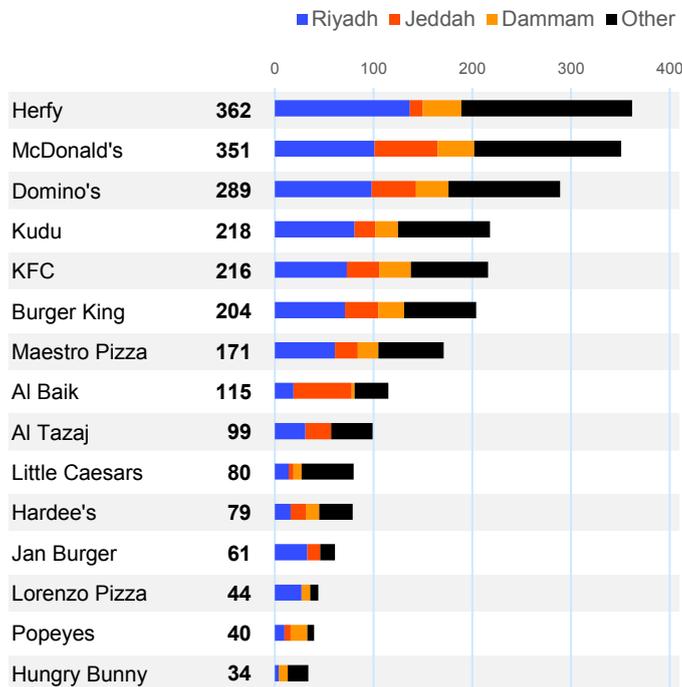| Brands Tracked	Locations	Stores in Largest Three Cities	Cities* with a Herfy Store
15	**2,363**	**1,404**	**36%**

*Urban agglomerations with at least 10,000 residents as at June 2022

Store Count:

■ Riyadh ■ Jeddah ■ Dammam ■ Other

Store Penetration:
Percentage of cities where the brands has at least one store

Brand	Count	7 Tier 1 Cities* with over 1 million residents	3 Tier 2 Cities** with over 500,000 residents	9 Tier 3 Cities with over 200,000 residents	14 Tier 4 Cities with over 100,000 residents	34 Tier 5 Cities with over 50,000 residents	99 Tier 6 Cities with over 10,000 residents	166 Cities with over 10,000 residents
Herfy	362	100%	100%	100%	86%	41%	14%	**36%**
McDonald's	351	100%	100%	100%	86%	38%	7%	**31%**
Domino's	289	100%	100%	100%	93%	26%	5%	**28%**
Kudu	218	100%	100%	100%	71%	41%	5%	**29%**
KFC	216	100%	100%	89%	36%	18%	2%	**19%**
Burger King	204	100%	100%	78%	21%	18%	2%	**17%**
Maestro Pizza	171	100%	100%	100%	71%	12%	0%	**20%**
Al Baik	115	86%	33%	44%	14%	6%	0%	**9%**
Al Tazaj	99	71%	67%	33%	14%	3%	1%	**8%**
Little Caesars	80	86%	67%	78%	50%	21%	5%	**20%**
Hardee's	79	100%	100%	89%	36%	3%	0%	**14%**
Jan Burger	61	71%	33%	33%	0%	3%	1%	**7%**
Lorenzo Pizza	44	57%	0%	33%	0%	0%	0%	**4%**
Popeyes	40	86%	0%	22%	0%	0%	0%	**5%**
Hungry Bunny	34	43%	0%	44%	14%	12%	3%	**10%**

*Riyadh, Jeddah, Dammam, Mecca, Medina, Taif, Al Hofuf
**Buraydah, Khamis Mushait, Tabuk
Source: Store counts are as published by brands on company websites and have not been confirmed directly with the brand.