



**Annual Network Report**  
**Fast Food & QSR**

**1st January - 31st December 2024**

[www.gapmaps.com](http://www.gapmaps.com)

## Fast Food & QSR

# Australia Annual Network Report

In 2024, Australia's population grew by an estimated 500,000 residents. Despite a 3.5%\* decline in real per capita spending, population growth and inflation have continued to support the Food and Beverage sector.

To keep pace with this level of growth, major QSR chains such as Subway, McDonald's, and KFC need to open at least 20 net new stores annually to maintain store provisions at a ratio of one store per 20,000–30,000 residents. These brands have largely achieved this target.

Guzman Y Gomez, following its recent public listing, added a net 27 new stores, including 10 in Greater Sydney. Hungry Jack's and Zambreno also experienced growth, each opening over 20 new locations. Meanwhile, brands like Mad Mex, Betty's Burgers, and El Jannah each added 10 new stores, further growing their networks.

In total, the 36 leading QSR brands tracked, collectively opened a net 178 new outlets in 2024, highlighting the sector's resilience and sustained growth.

GapMaps tracks the locations of over 1,500 brands across Australia, offering valuable insights into brand clustering, expansion patterns, and optimization strategies. Additionally, GapMaps collaborates with CommBank iQ to provide a deeper understanding of real consumer spending habits at a local level, including food delivery trends. This comprehensive analysis of supply and demand as well as tools like GapFinder enable GapMaps users to make data-driven decisions, optimize their store networks, and drive strategic growth.

*\*as measured by the ABS retail sales series on Cafes, restaurants and takeaway food services for the 12 months to December 2024.*

*Note: In July 2024, CJ's QSR Group Pty Ltd, the master franchisee for Carl's Jr. in Australia went into voluntary administration. However, up to 29 locations are understood to still be trading under sub-franchisee or other arrangements. While excluded from the 2024 GapMaps report, Carl's Jr. has indicated that more locations are planned within 2025 and GapMaps will continue to monitor the brand within the GapMaps platform and in future reports. In addition, the entry of Five Guys and Wendy's into the Australian market will continue to be monitored by GapMaps as the brands provide greater choice for Australian consumers.*



Fast Food & QSR

# Australia Annual Network Report

Brands Tracked

36

Locations

7,523

Stores Opened\*

302

Stores Closed\*

124

	Total Stores
<b>Major QSR (5 Brands):</b>	<b>3,892</b>
Subway	1,246
McDonald's	1,050
KFC	804
Hungry Jack's	471
Red Rooster	321
<b>Pizza (3 Brands):</b>	<b>1,137</b>
Dominos	728
Pizza Hut	274
Crust	135
<b>Other QSR (23 Brands)</b>	<b>2,036</b>
Zambrero	253
Guzman Y Gomez	210
Oporto	208
Grill'd	174
Soul Origin	160
Nando's	140
Noodle Box	99
Roll'd	98
Schnitz	81
Mad Mex	78
Betty's Burgers	69
Chicken Treat	60
FishBowl	46
Wok in a Box	45
NeNe Chicken	44
Taco Bell	39
Burrito Bar	37
Gami Chicken	37
El Jannah	35
Zeus Greek Street Food	35
Rashays	33
Burger Urge	29
Patty Smiths	26
<b>Sushi (5 Brands)</b>	<b>458</b>
Sushi Hub	177
Sushi Sushi	162
Sushi Train	47
Hero Sushi	44
Sushi Jiro	28
<b>Total (36 Brands)</b>	<b>7,523</b>

Last 12 Months\*

Openings	Closures	Net Change
<b>103</b>	<b>29</b>	<b>+74</b>
30	13	+17
22	3	+19
24	1	+23
22	6	+16
5	6	-1
<b>20</b>	<b>29</b>	<b>-9</b>
9	20	-11
6	7	-1
5	2	+3
<b>143</b>	<b>60</b>	<b>+83</b>
28	8	+20
28	1	+27
18	2	+16
6	1	+5
		n.a.
4	5	-1
6	4	+2
3	10	-7
8	1	+7
14	4	+10
10	-	+10
4	4	-
3	-	+3
		n.a.
		n.a.
-	-	-
1	8	-7
		n.a.
10	-	+10
		n.a.
-	6	-6
		n.a.
-	6	-6
<b>36</b>	<b>6</b>	<b>+30</b>
15	1	+14
12	1	+11
4	3	+1
-	1	-1
5	-	+5
<b>302</b>	<b>124</b>	<b>+178</b>

Accessibility

Share of total Australian residents living within 3km of a store:
<b>82%</b>
76%
75%
69%
53%
39%
<b>75%</b>
71%
42%
28%
<b>68%</b>
31%
31%
29%
28%
26%
26%
16%
18%
15%
15%
14%
6%
9%
7%
11%
8%
5%
9%
10%
10%
6%
4%
5%
<b>44%</b>
27%
21%
9%
10%
5%
<b>84%</b>

\* Opening dates as per listing on company website, actual store opening dates may vary. Where possible store relocations (e.g. within the same Shopping Centre) are not included as an opening/closure.

Fast Food & QSR

# City Comparison

	Total Stores
<b>Major QSR (5 Brands):</b>	<b>3,892</b>
Subway	1,246
McDonald's	1,050
KFC	804
Hungry Jack's	471
Red Rooster	321
<b>Pizza (3 Brands):</b>	<b>1,137</b>
Dominos	728
Pizza Hut	274
Crust	135
<b>Other QSR (23 Brands)</b>	<b>2,036</b>
Zambrero	253
Guzman Y Gomez	210
Oporto	208
Grill'd	174
Soul Origin	160
Nando's	140
Noodle Box	99
Roll'd	98
Schnitz	81
Mad Mex	78
Betty's Burgers	69
Chicken Treat	60
FishBowl	46
Wok in a Box	45
NeNe Chicken	44
Taco Bell	39
Burrito Bar	37
Gami Chicken	37
El Jannah	35
Zeus Greek Street Food	35
Rashays	33
Burger Urge	29
Patty Smiths	26
<b>Sushi (5 Brands)</b>	<b>458</b>
Sushi Hub	177
Sushi Sushi	162
Sushi Train	47
Hero Sushi	44
Sushi Jiro	28
<b>Total (36 Brands)</b>	<b>7,523</b>

	Store Count: By Major City					
	Sydney	Melbourne	Brisbane	Perth	Adelaide	Other
<b>Major QSR (5 Brands):</b>	<b>638</b>	<b>710</b>	<b>463</b>	<b>387</b>	<b>229</b>	<b>1,465</b>
Subway	185	223	151	127	87	473
McDonald's	203	199	114	83	54	397
KFC	155	151	88	56	43	311
Hungry Jack's	61	84	51	64	42	169
Red Rooster	34	53	59	57	3	115
<b>Pizza (3 Brands):</b>	<b>258</b>	<b>159</b>	<b>166</b>	<b>98</b>	<b>45</b>	<b>411</b>
Dominos	138	93	108	62	36	291
Pizza Hut	72	37	47	22	7	89
Crust	48	29	11	14	2	31
<b>Other QSR (23 Brands)</b>	<b>471</b>	<b>431</b>	<b>255</b>	<b>257</b>	<b>100</b>	<b>522</b>
Zambrero	13	22	23	56	26	113
Guzman Y Gomez	52	31	39	12	9	67
Oporto	102	21	15	7	12	51
Grill'd	29	50	25	28	5	37
Soul Origin	58	31	12	22	9	28
Nando's	14	52	22	30	5	17
Noodle Box	2	14	32	11	12	28
Roll'd	26	33	7	10	2	20
Schnitz	6	47	3	1	-	24
Mad Mex	43	17	2	6	-	10
Betty's Burgers	19	17	10	4	5	14
Chicken Treat	-	-	-	41	-	19
FishBowl	26	10	6	-	-	4
Wok in a Box	-	2	8	12	14	9
NeNe Chicken	7	24	1	7	-	5
Taco Bell	6	9	11	4	-	9
Burrito Bar	-	1	19	-	-	17
Gami Chicken	9	24	-	1	1	2
El Jannah	21	12	-	-	-	2
Zeus Greek Street Food	20	5	3	1	-	6
Rashays	17	4	5	-	-	7
Burger Urge	-	-	6	-	-	23
Patty Smiths	1	5	6	4	-	10
<b>Sushi (5 Brands)</b>	<b>108</b>	<b>162</b>	<b>41</b>	<b>43</b>	<b>24</b>	<b>80</b>
Sushi Hub	69	34	17	20	13	24
Sushi Sushi	2	101	8	22	5	24
Sushi Train	14	-	11	-	6	16
Hero Sushi	23	3	3	-	-	15
Sushi Jiro	-	24	2	1	-	1
<b>Total (36 Brands)</b>	<b>1,475</b>	<b>1,462</b>	<b>925</b>	<b>785</b>	<b>398</b>	<b>2,478</b>

	Net Change*: Last 12 Months: By Major City						
	Sydney	Melbourne	Brisbane	Perth	Adelaide	Other	Total
<b>Major QSR (5 Brands):</b>	<b>+9</b>	<b>+23</b>	<b>+10</b>	<b>+4</b>	<b>+2</b>	<b>+26</b>	<b>+74</b>
Subway	+3	+6	+3	+2	-1	+4	+17
McDonald's	+1	+6	+2	-	+3	+7	+19
KFC	+5	+6	+2	+1	+1	+8	+23
Hungry Jack's	+4	+4	+1	+1	-1	+7	+16
Red Rooster	-4	+1	+2	-	-	-	-1
<b>Pizza (3 Brands):</b>	<b>-6</b>	<b>+3</b>	<b>+2</b>	<b>-3</b>	<b>-1</b>	<b>-4</b>	<b>-9</b>
Dominos	-5	-	+1	-1	-	-6	-11
Pizza Hut	-1	+1	-	-1	-1	+1	-1
Crust	-	+2	+1	-1	-	+1	+3
<b>Other QSR (23 Brands)</b>	<b>+24</b>	<b>+22</b>	<b>+5</b>	<b>+8</b>	<b>+2</b>	<b>+22</b>	<b>+83</b>
Zambrero	-2	+6	-	+7	+2	+7	+20
Guzman Y Gomez	+10	+5	+2	-	-	+10	+27
Oporto	+5	+3	+2	+1	-	+5	+16
Grill'd	+1	+1	-	+1	-	+2	+5
Soul Origin	-	-	-	-	-	-	n.a.
Nando's	-	-2	+1	+1	-	-1	-1
Noodle Box	+2	+2	+2	-	-	-4	+2
Roll'd	-2	-3	+1	-2	-1	-	-7
Schnitz	-	+3	-	-	-	+4	+7
Mad Mex	+5	+4	-	-1	-	+2	+10
Betty's Burgers	+3	+2	+2	-	+1	+2	+10
Chicken Treat	-2	-	-	+1	-	+1	-
FishBowl	+1	+1	+1	-	-	-	+3
Wok in a Box	-	-	-	-	-	-	n.a.
NeNe Chicken	-	-	-	-	-	-	n.a.
Taco Bell	-	-	-	-	-	-	-
Burrito Bar	-	-1	-5	-	-	-1	-7
Gami Chicken	-	-	-	-	-	-	n.a.
El Jannah	+5	+4	-	-	-	+1	+10
Zeus Greek Street Food	-	-	-	-	-	-	n.a.
Rashays	-2	-	-	-	-	-4	-6
Burger Urge	-	-	-	-	-	-	n.a.
Patty Smiths	-	-3	-1	-	-	-2	-6
<b>Sushi (5 Brands)</b>	<b>+4</b>	<b>+7</b>	<b>+4</b>	<b>+10</b>	<b>+1</b>	<b>+4</b>	<b>+30</b>
Sushi Hub	+4	+1	+1	+5	+2	+1	+14
Sushi Sushi	-	+4	+1	+4	-	+2	+11
Sushi Train	+1	-	+1	-	-1	-	+1
Hero Sushi	-1	-	-	-	-	-	-1
Sushi Jiro	-	+2	+1	+1	-	+1	+5
<b>Total (36 Brands)</b>	<b>+31</b>	<b>+55</b>	<b>+21</b>	<b>+19</b>	<b>+4</b>	<b>+48</b>	<b>+178</b>

\* Opening dates as per listing on company website, actual store opening dates may vary. Where possible store relocations (e.g. within the same Shopping Centre) are not included as an opening/closure.



**GapMaps**

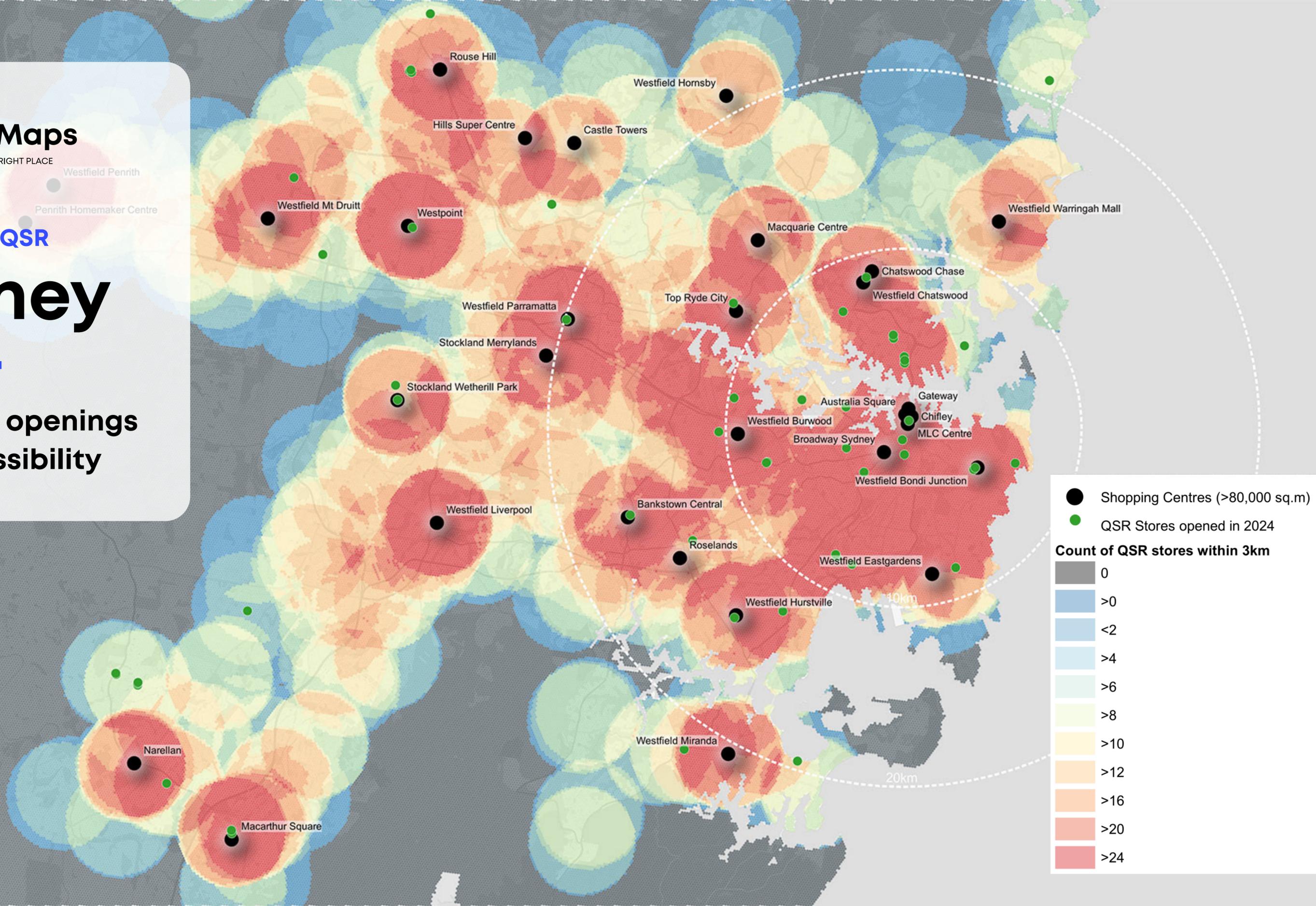
YOU'RE IN THE RIGHT PLACE

Westfield Penrith  
Penrith Homemaker Centre

**Fast Food & QSR**

# Sydney

**New store openings  
and accessibility**



Fast Food & QSR

# Sydney

## New store openings and accessibility

	Total Stores
<b>Major QSR (5 Brands):</b>	<b>638</b>
Subway	185
McDonald's	203
KFC	155
Hungry Jack's	61
Red Rooster	34
<b>Pizza (3 Brands):</b>	<b>258</b>
Dominos	138
Pizza Hut	72
Crust	48
<b>Other QSR (23 Brands)</b>	<b>471</b>
Zambrero	13
Guzman Y Gomez	52
Oporto	102
Grill'd	29
Soul Origin	58
Nando's	14
Noodle Box	2
Roll'd	26
Schnitz	6
Mad Mex	43
Betty's Burgers	19
Chicken Treat	-
FishBowl	26
Wok in a Box	-
NeNe Chicken	7
Taco Bell	6
Burrito Bar	-
Gami Chicken	9
El Jannah	21
Zeus Greek Street Food	20
Rashays	17
Burger Urge	-
Patty Smiths	1
<b>Sushi (5 Brands)</b>	<b>108</b>
Sushi Hub	69
Sushi Sushi	2
Sushi Train	14
Hero Sushi	23
Sushi Jiro	-
<b>Total (36 Brands)</b>	<b>1,475</b>

Last 12 Months\*

Openings	Closures	Net Change
<b>17</b>	<b>8</b>	<b>+9</b>
4	1	+3
4	3	+1
5	-	+5
4	-	+4
-	4	-4
-	<b>6</b>	<b>-6</b>
-	5	-5
-	1	-1
-	-	-
<b>36</b>	<b>12</b>	<b>+24</b>
-	2	-2
10	-	+10
7	2	+5
2	1	+1
-	-	n.a.
-	-	-
2	-	+2
1	3	-2
-	-	-
5	-	+5
3	-	+3
-	2	-2
1	-	+1
-	-	n.a.
-	-	n.a.
-	-	-
-	-	n.a.
5	-	+5
-	2	-2
-	-	n.a.
-	-	-
<b>5</b>	<b>1</b>	<b>+4</b>
4	-	+4
-	-	-
1	-	+1
-	1	-1
-	-	-
<b>58</b>	<b>27</b>	<b>+31</b>

Accessibility

Share of city residents living within 3km of a store:
<b>93%</b>
87%
89%
86%
52%
34%
<b>92%</b>
89%
73%
58%
<b>84%</b>
19%
47%
72%
33%
51%
20%
1%
31%
11%
44%
22%
0%
22%
0%
13%
10%
0%
11%
33%
28%
18%
0%
3%
<b>65%</b>
55%
4%
18%
31%
0%
<b>96%</b>

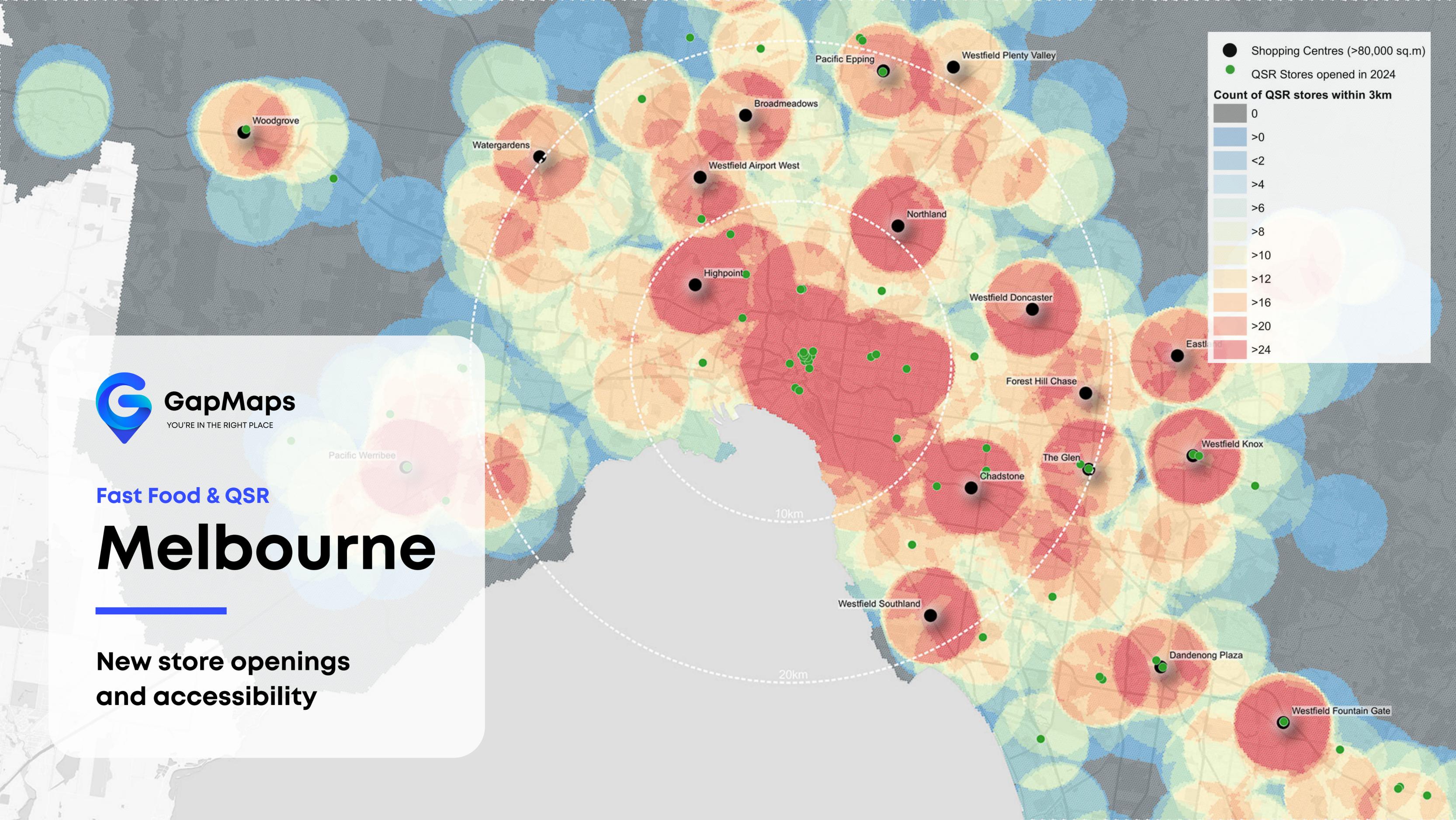
\* Opening dates as per listing on company website, actual store opening dates may vary. Where possible store relocations (e.g. within the same Shopping Centre) are not included as an opening/closure.



Fast Food & QSR

# Melbourne

New store openings  
and accessibility



Fast Food & QSR

# Melbourne

## New store openings and accessibility

	Total Stores
<b>Major QSR (5 Brands):</b>	<b>710</b>
Subway	223
McDonald's	199
KFC	151
Hungry Jack's	84
Red Rooster	53
<b>Pizza (3 Brands):</b>	<b>159</b>
Dominos	93
Pizza Hut	37
Crust	29
<b>Other QSR (23 Brands)</b>	<b>431</b>
Zambrero	22
Guzman Y Gomez	31
Oporto	21
Grill'd	50
Soul Origin	31
Nando's	52
Noodle Box	14
Roll'd	33
Schnitz	47
Mad Mex	17
Betty's Burgers	17
Chicken Treat	-
FishBowl	10
Wok in a Box	2
NeNe Chicken	24
Taco Bell	9
Burrito Bar	1
Gami Chicken	24
El Jannah	12
Zeus Greek Street Food	5
Rashays	4
Burger Urge	-
Patty Smiths	5
<b>Sushi (5 Brands)</b>	<b>162</b>
Sushi Hub	34
Sushi Sushi	101
Sushi Train	-
Hero Sushi	3
Sushi Jiro	24
<b>Total (36 Brands)</b>	<b>1,462</b>

Last 12 Months*			Net Change
Openings	Closures		
<b>24</b>	<b>1</b>		<b>+23</b>
7	1		+6
6	-		+6
6	-		+6
4	-		+4
1	-		+1
<b>7</b>	<b>4</b>		<b>+3</b>
3	3		-
1	-		+1
3	1		+2
<b>36</b>	<b>14</b>		<b>+22</b>
6	-		+6
5	-		+5
3	-		+3
1	-		+1
			n.a.
2	4		-2
2	-		+2
1	4		-3
4	1		+3
5	1		+4
2	-		+2
-	-		-
1	-		+1
			n.a.
			n.a.
-	-		-
-	1		-1
			n.a.
4	-		+4
			n.a.
-	-		-
			n.a.
-	3		-3
<b>9</b>	<b>2</b>		<b>+7</b>
2	1		+1
5	1		+4
-	-		-
-	-		-
2	-		+2
<b>76</b>	<b>21</b>		<b>+55</b>

Accessibility
Share of city residents living within 3km of a store:
<b>94%</b>
89%
89%
83%
65%
54%
<b>82%</b>
77%
43%
36%
<b>80%</b>
27%
34%
20%
44%
31%
51%
16%
30%
47%
18%
22%
0%
12%
3%
28%
11%
1%
31%
14%
11%
3%
0%
5%
<b>69%</b>
32%
65%
0%
4%
24%
<b>95%</b>

\* Opening dates as per listing on company website, actual store opening dates may vary. Where possible store relocations (e.g. within the same Shopping Centre) are not included as an opening/closure.

# Want to learn more?

Contact Us



## GapMaps Head Office

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