



Annual Network Report
Fast Food & QSR

1st January - 31st December 2025

www.gapmaps.com

Fast Food & QSR

Australia Annual Network Report

For more than a decade, GapMaps' Fast Food & Quick Service Restaurant (QSR) Annual Report has tracked every opening and closure across Australia's leading brands.

The 2025 edition, covering the 12 months to 31 December 2025, records 7,779 locations across the top 36 QSR brands nationwide.

During 2025 there were 359 openings and 109 closures, resulting in a net increase of 250 stores nationally. It was the strongest year of net growth we have recorded, driven by the second highest number of openings on record, behind only 2023's 407, and the lowest annual closure count in the past decade. The sector continues to expand despite cost pressures and intense competition.

The big three, Subway, McDonald's and KFC, each opened 25 or more stores, expanding in step with population growth and further lifting their accessibility, measured as the share of residents living within 3km of a store.

Mexican QSR continues to rank among the fastest growing segments nationally. Zambrero and Guzman Y Gomez each recorded 30 or more

openings in 2025, both accelerating toward the 300-store milestone and reinforcing the category's expansion momentum.

Mid sized chicken brands also posted solid growth. Oporto, El Jannah and Nando's delivered 22, 15 and 11 new locations respectively, underscoring continued expansion and a growing brand presence.

Sushi Hub added 22 stores, with at least one opening in every state, reaching a milestone of 200 locations nationally.

In the long running Melbourne versus Sydney rivalry, Melbourne has edged ahead in 2025. Melbourne closed the year with 1,522 QSR locations, a net increase of 60, compared with Sydney's 1,507 locations, up 32 net. The gap remains narrow, but for now, despite having a slightly smaller population, Melbourne can claim the lead in total store numbers.

GapMaps tracks more than 1,500 brands across Australia, providing insights into expansion patterns and network optimisation. In partnership with CommBank iQ, we layer in local consumer spending and food delivery data, giving users a clear view of supply and demand to support data-driven decisions, optimize their store networks, and drive strategic growth.





Fast Food & QSR

Australia Annual Network Report

Brands Tracked

36

Locations

7,779

Stores Opened*

359

Stores Closed*

109

	Total Stores
Major QSR (5 Brands):	3,966
Subway	1,262
McDonald's	1,074
KFC	833
Hungry Jack's	482
Red Rooster	315
Pizza (3 Brands):	1,144
Domino's	720
Pizza Hut	284
Crust	140
Other QSR (23 Brands)	2,184
Zambrero	290
Guzman Y Gomez	237
Oporto	225
Grill'd	177
Soul Origin	170
Nando's	149
Noodle Box	107
Roll'd	103
Schnitz	80
Mad Mex	79
Betty's Burgers	75
Chicken Treat	62
FishBowl	53
El Jannah	50
Wok in a Box	44
NeNe Chicken	44
Zeus Street Greek Food	43
Taco Bell	37
Burrito Bar	37
Gami Chicken	35
Burger Urge	31
Rashays	30
Patty Smiths	26
Sushi (5 Brands)	485
Sushi Hub	200
Sushi Sushi	159
Sushi Train	50
Hero Sushi	47
Sushi Jiro	29
Total (36 Brands)	7,779

Last 12 Months*

Openings	Closures	Net Change
101	25	+76
28	10	+18
25	-	+25
31	2	+29
11	1	+10
6	12	-6
29	26	+3
10	20	-10
9	3	+6
10	3	+7
187	47	+140
36	5	+31
30	3	+27
22	5	+17
5	2	+3
15	5	+10
11	1	+10
8	-	+8
6	2	+4
2	3	-1
5	5	-
7	1	+6
3	2	+1
6	-	+6
15	-	+15
-	1	-1
1	1	-
8	-	+8
0	2	-2
4	4	-
0	2	-2
2	-	+2
0	2	-2
1	1	-
42	11	+31
22	-	+22
10	8	+2
4	1	+3
5	2	+3
1	-	+1
359	109	+250

Accessibility

Share of total Australian residents living within 3km of a store:
82%
77%
76%
70%
54%
39%
75%
71%
43%
28%
69%
35%
35%
30%
29%
27%
28%
17%
19%
14%
16%
15%
6%
9%
13%
7%
11%
12%
8%
5%
9%
4%
6%
5%
45%
29%
20%
9%
10%
6%
84%

* 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
Major QSR (5 Brands):	3,966
Subway	1,262
McDonald's	1,074
KFC	833
Hungry Jack's	482
Red Rooster	315
Pizza (3 Brands):	1,144
Domino's	720
Pizza Hut	284
Crust	140
Other QSR (23 Brands)	2,184
Zambrero	290
Guzman Y Gomez	237
Oporto	225
Grill'd	177
Soul Origin	170
Nando's	149
Noodle Box	107
Roll'd	103
Schnitz	80
Mad Mex	79
Betty's Burgers	75
Chicken Treat	62
FishBowl	53
El Jannah	50
Wok in a Box	44
NeNe Chicken	44
Zeus Street Greek Food	43
Taco Bell	37
Burrito Bar	37
Gami Chicken	35
Burger Urge	31
Rashays	30
Patty Smiths	26
Sushi (5 Brands)	485
Sushi Hub	200
Sushi Sushi	159
Sushi Train	50
Hero Sushi	47
Sushi Jiro	29
Total (36 Brands)	7,779

	Store Count: By Major City					
	Sydney	Melbourne	Brisbane	Perth	Adelaide	Other
Major QSR (5 Brands):	652	727	475	393	237	1,482
Subway	188	228	156	129	89	472
McDonald's	206	203	118	85	56	406
KFC	162	160	90	57	45	319
Hungry Jack's	63	85	51	66	42	175
Red Rooster	33	51	60	56	5	110
Pizza (3 Brands):	254	159	163	103	44	421
Domino's	134	92	103	65	36	290
Pizza Hut	72	38	48	23	6	97
Crust	48	29	12	15	2	34
Other QSR (23 Brands)	488	474	274	278	108	562
Zambrero	15	38	25	58	29	125
Guzman Y Gomez	56	38	47	14	10	72
Oporto	102	23	17	10	12	61
Grill'd	30	52	25	28	5	37
Soul Origin	58	33	12	27	10	30
Nando's	16	55	22	30	7	19
Noodle Box	3	17	35	12	12	28
Roll'd	28	31	8	11	4	21
Schnitz	4	48	3	1	-	24
Mad Mex	40	20	2	7	-	10
Betty's Burgers	18	18	10	6	5	18
Chicken Treat	-	-	-	43	-	19
FishBowl	28	13	7	-	-	5
El Jannah	27	16	-	-	-	7
Wok in a Box	-	2	8	12	13	9
NeNe Chicken	8	24	1	7	-	4
Zeus Street Greek Food	22	7	6	2	-	6
Taco Bell	6	9	11	4	-	7
Burrito Bar	1	1	18	-	-	17
Gami Chicken	9	22	-	1	1	2
Burger Urge	-	-	6	-	-	25
Rashays	16	2	5	-	-	7
Patty Smiths	1	5	6	5	-	9
Sushi (5 Brands)	113	162	41	48	25	96
Sushi Hub	73	40	17	25	14	31
Sushi Sushi	2	94	8	22	5	28
Sushi Train	15	-	11	-	6	18
Hero Sushi	23	3	3	-	-	18
Sushi Jiro	-	25	2	1	-	1
Total (36 Brands)	1,507	1,522	953	822	414	2,561

	Net Change*: Last 12 Months: By Major City						
	Sydney	Melbourne	Brisbane	Perth	Adelaide	Other	Total
Major QSR (5 Brands):	+14	+17	+12	+6	+9	+18	+76
Subway	+3	+5	+5	+2	+3	-	+18
McDonald's	+3	+4	+4	+2	+2	+10	+25
KFC	+7	+9	+2	+1	+2	+8	+29
Hungry Jack's	+2	+1	-	+2	-	+5	+10
Red Rooster	-1	-2	+1	-1	+2	-5	-6
Pizza (3 Brands):	-4	-	-2	+3	-1	+7	+3
Domino's	-4	-2	-5	+2	-	-1	-10
Pizza Hut	-	-	+2	-	-1	+5	+6
Crust	-	+2	+1	+1	-	+3	+7
Other QSR (23 Brands)	+17	+39	+19	+20	+7	+38	+140
Zambrero	+2	+13	+2	+2	+3	+9	+31
Guzman Y Gomez	+4	+7	+8	+2	+1	+5	+27
Oporto	-	+2	+2	+3	-	+10	+17
Grill'd	+1	+2	-	-	-	-	+3
Soul Origin	-	+2	-	+5	+1	+2	+10
Nando's	+2	+3	-	-	+2	+3	+10
Noodle Box	+1	+3	+3	+1	-	-	+8
Roll'd	+2	-2	+1	+1	+1	+1	+4
Schnitz	-2	+1	-	-	-	-	-1
Mad Mex	-4	+3	-	+1	-	-	-
Betty's Burgers	-1	+1	-	+2	-	+4	+6
Chicken Treat	-	-	-	+1	-	-	+1
FishBowl	+2	+2	+1	-	-	+1	+6
El Jannah	+6	+4	-	-	-	+5	+15
Wok in a Box	-	-	-	-	-1	-	-1
NeNe Chicken	+1	-	-	-	-	-1	-
Zeus Street Greek Food	+2	+2	+3	+1	-	-	+8
Taco Bell	0	-	-	-	-	-2	-2
Burrito Bar	+1	-	-1	-	-	-	-
Gami Chicken	0	-2	-	-	-	-	-2
Burger Urge	-	-	-	-	-	+2	+2
Rashays	-	-2	-	-	-	-	-2
Patty Smiths	-	-	-	+1	-	-1	-
Sushi (5 Brands)	+5	+4	-	+5	+2	+15	+31
Sushi Hub	+4	+5	-	+5	+1	+7	+22
Sushi Sushi	-	-2	-	-	+1	+3	+2
Sushi Train	+1	-	-	-	-	+2	+3
Hero Sushi	-	-	-	-	-	+3	+3
Sushi Jiro	-	+1	-	-	-	-	+1
Total (36 Brands)	+32	+60	+29	+34	+17	+78	+250

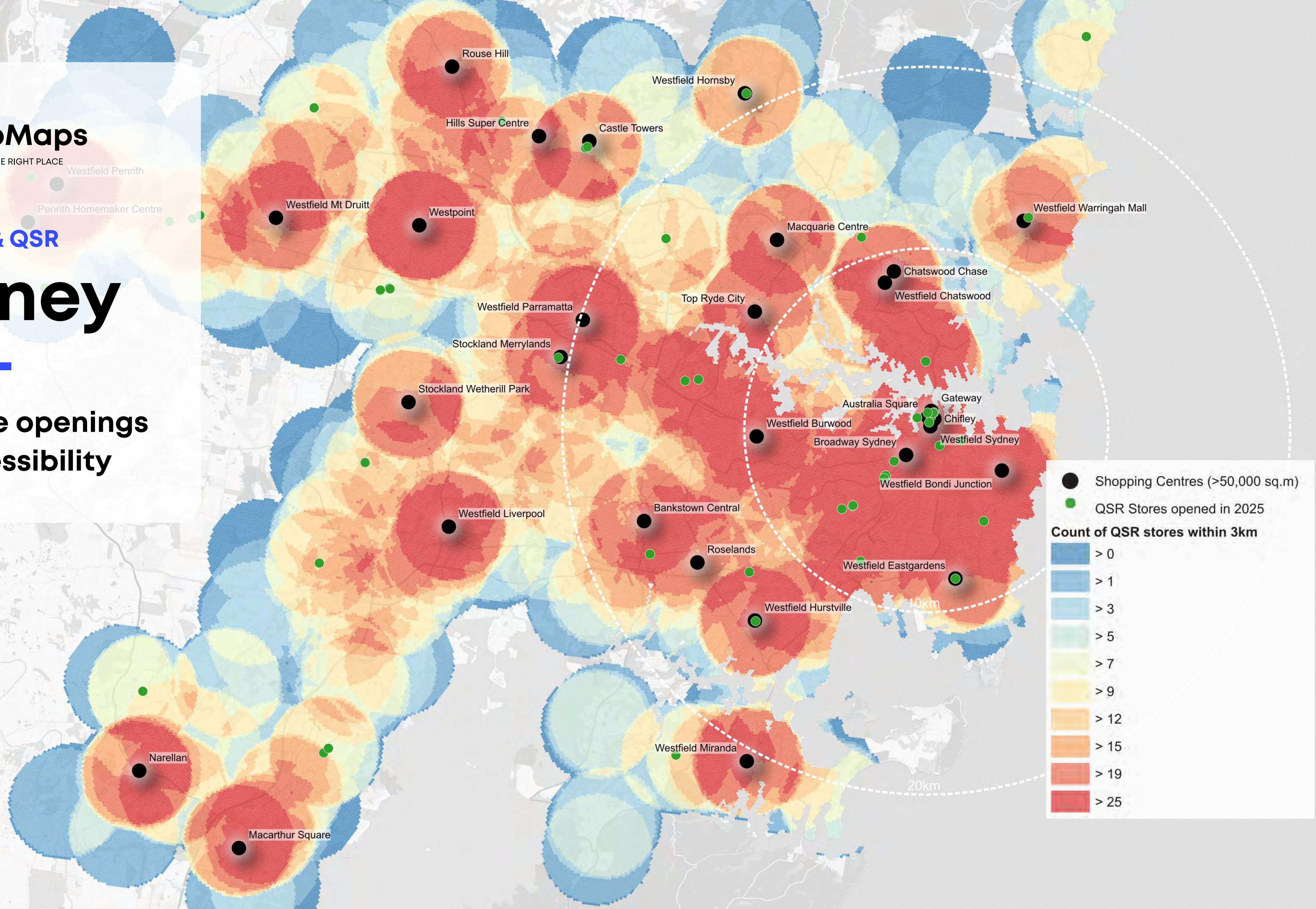
* Opening dates as per listing on company website, actual store opening dates may vary. Where possible store relocations (e.g. within the same Shopping Centre) are not included as an opening/closure.



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Sydney

New store openings and accessibility



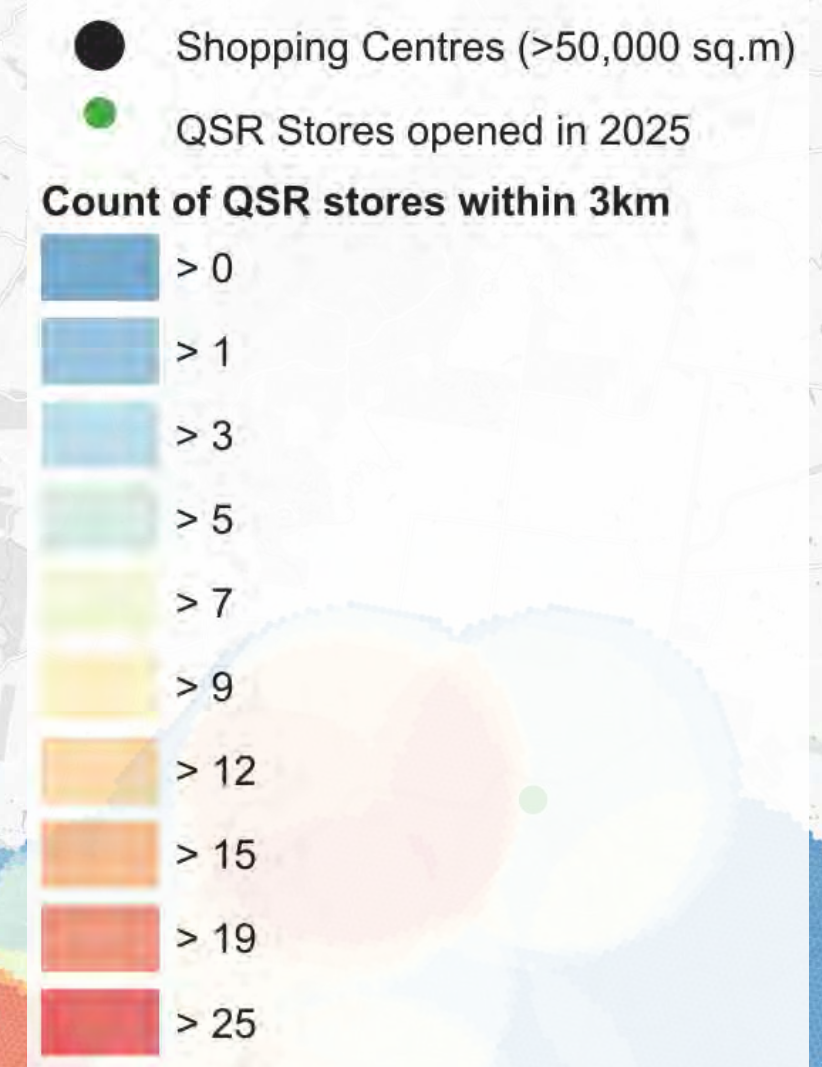
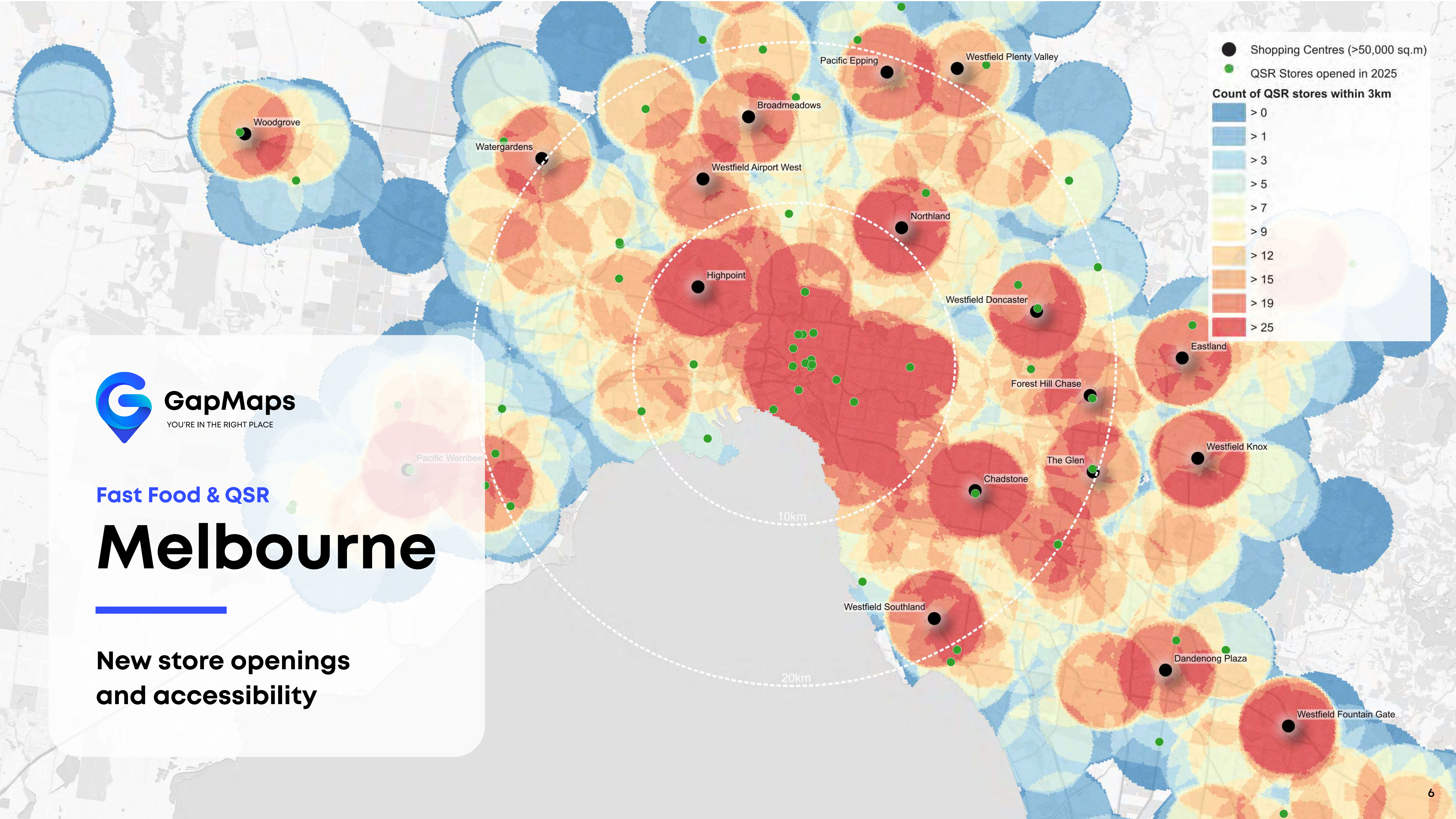
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Sydney

New store openings and accessibility

		Total Stores		Last 12 Months*			Accessibility
				Openings	Closures	Net Change	Share of city residents living within 3km of a store:
Major QSR (5 Brands):			652	17	3	+14	93%
Subway			188	4	1	+3	87%
McDonald's			206	3	-	+3	89%
KFC			162	7	-	+7	86%
Hungry Jack's			63	3	1	+2	53%
Red Rooster			33	-	1	-1	33%
Pizza (3 Brands):			254	3	7	-4	92%
Domino's			134	-	4	-4	88%
Pizza Hut			72	1	1	-	72%
Crust			48	2	2	-	55%
Other QSR (23 Brands)			488	33	16	+17	86%
Zambrero			15	4	2	+2	20%
Guzman Y Gomez			56	5	1	+4	52%
Oporto			102	4	4	-	73%
Grill'd			30	1	-	+1	33%
Soul Origin			58	2	2	-	50%
Nando's			16	2	-	+2	23%
Noodle Box			3	1	-	+1	3%
Roll'd			28	2	-	+2	33%
Schnitz			4	-	2	-2	7%
Mad Mex			40	-	4	-4	43%
Betty's Burgers			18	-	1	-1	21%
Chicken Treat			-	-	-	-	0%
FishBowl			28	2	-	+2	22%
El Jannah			27	6	-	+6	40%
Wok in a Box			-	-	-	-	0%
NeNe Chicken			8	1	-	+1	14%
Zeus Street Greek Food			22	2	-	+2	32%
Taco Bell			6	-	-	-	11%
Burrito Bar			1	1	-	+1	4%
Gami Chicken			9	-	-	-	12%
Burger Urge			-	-	-	-	0%
Rashays			16	-	-	-	18%
Patty Smiths			1	-	-	-	3%
Sushi (5 Brands)			113	7	2	+5	67%
Sushi Hub			73	4	-	+4	57%
Sushi Sushi			2	-	-	-	4%
Sushi Train			15	1	-	+1	19%
Hero Sushi			23	2	2	-	30%
Sushi Jiro			-	-	-	-	0%
Total (36 Brands)			1,507	60	28	+32	96%

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Melbourne

**New store openings
and accessibility**

Fast Food & QSR

Melbourne

New store openings and accessibility

	Total Stores
Major QSR (5 Brands):	727
Subway	228
McDonald's	203
KFC	160
Hungry Jack's	85
Red Rooster	51
Pizza (3 Brands):	159
Domino's	92
Pizza Hut	38
Crust	29
Other QSR (23 Brands)	474
Zambrero	38
Guzman Y Gomez	38
Oporto	23
Grill'd	52
Soul Origin	33
Nando's	55
Noodle Box	17
Roll'd	31
Schnitz	48
Mad Mex	20
Betty's Burgers	18
Chicken Treat	-
FishBowl	13
El Jannah	16
Wok in a Box	2
NeNe Chicken	24
Zeus Street Greek Food	7
Taco Bell	9
Burrito Bar	1
Gami Chicken	22
Burger Urge	-
Rashays	2
Patty Smiths	5
Sushi (5 Brands)	162
Sushi Hub	40
Sushi Sushi	94
Sushi Train	-
Hero Sushi	3
Sushi Jiro	25
Total (36 Brands)	1,522

Last 12 Months*

Openings	Closures	Net Change
19	2	+17
5	-	+5
4	-	+4
9	-	+9
1	-	+1
-	2	-2
4	4	-
1	3	-2
-	-	-
3	1	+2
48	9	+39
13	-	+13
7	-	+7
2	-	+2
3	1	+2
3	1	+2
3	-	+3
-	2	-2
1	-	+1
4	1	+3
1	-	+1
-	-	-
2	-	+2
4	-	+4
-	-	-
-	-	-
2	-	+2
-	-	-
-	-	-
-	2	-2
-	-	-
-	2	-2
-	-	-
10	6	+4
5	-	+5
4	6	-2
-	-	-
-	-	-
1	-	+1
81	21	+60

Accessibility

Share of city residents living within 3km of a store:
94%
90%
89%
84%
65%
51%
83%
76%
43%
36%
83%
40%
39%
21%
46%
33%
53%
18%
30%
47%
22%
23%
0%
13%
22%
3%
28%
13%
11%
1%
28%
0%
2%
5%
67%
37%
63%
0%
4%
26%
95%

* 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



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