

Restaurant Trends - Growing And Emerging Concepts - Data reflects change and activity from August 10, 2007 to December 10, 2007

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Update from Restaurantchains.net on growing and emerging restaurant concepts

Growing Concepts that have grown by at least 5% (if less than 50 units).

BLUE BURRITO GRILLE based in Phoenix, AZ (founded 1987) has increased by 1 unit, from 3 to 4 (33% growth). Units are fast casual serving beer and wine. Seating is for about 100. The per person check average is around \$4-\$10. Locations are currently in AZ and UT. There are plans to open a new location in Gilbert, AZ.

IN-N-OUT BURGERS headquartered in Irvine, CA (founded 1948) has increased by 3 units, from 207 to 210 (1% growth). These are quick serve burger restaurants open for lunch and dinner. Seating is for about 70 and the per person check average is around \$3-\$8. Locations are in AZ, CA and NV.

ANTHONY'S PIZZA & PASTA headquartered in Denver, CO (founded 1984) has increased by 3 units, from 21 to 24 (14% growth). These are quick serve restaurants with seating for about 90. Locations serve beer and wine. All locations are franchised and located in CO.

Reno, NV-based PORT OF SUBS (founded 1972) has opened 8 units, from 142 to 150 (6% growth) and entered into the state of OR. The restaurants are quick service sandwich shops, open for breakfast, lunch and dinner, with a \$3-\$8 per person check average. Units have seating for about 40. Catering and online ordering are available. Trading areas are AZ, CA, ID, NV, OR, UT, and WA. Between 80-90% of locations are franchised.

Burlington, VT-based BRUEGGER'S BAGEL BAKERY (founded 1983) has opened 8 units, from 257 to 265 (3% growth). Units are quick serve bakery/cafes, with seating for about 30. Locations are open for breakfast and lunch, with a \$2-\$6 per person check average. Trading areas are AK, AL, AZ, CA, CO, CT, FL, IA, MA, MI, MN, NC, NE, NY, OH, PA, SC, TN, VA, VT, and WI. Between 30-40% of units are franchised.

Chicago, IL-based PEPE'S MEXICAN RESTAURANTS (founded 1967) has opened 2 units, from 49 to 51 (4% growth). These are family/casual restaurants, open for lunch and dinner, with a \$6-\$15+ per person check average. Units have seating for about 70 and serve beer and wine. Catering and private party facilities are available. More than 90% of locations are franchised. The restaurants are located in the states of IL and IN. A new location is opening this winter in Cedar Lake, IN.

Concepts with 20 units or less who grew by at least 2 units.

FAMILY TABLE RESTAURANT of Storm Lake, IA has increased by 2 units, from 13 to 15 (15% growth). These are family/casual locations with seating for about 70. Units are open for breakfast, lunch and dinner. The check average is around \$6-\$12 per person and banquet services are offered. All units are located in IA.

ROMEO'S PIZZA based in Medina, OH (founded 2000) has increased by 2 units, from 8 to 10 (25% growth). 9 of the restaurants are take-out/delivery pizza units while 1 of the new units offers full service. Catering is available. Stores are 60% franchised. All locations are in OH.

Chicago, IL-based LEVY RESTAURANTS (founded 1978) has added 2 new concepts (Hershey's Chicago-1 unit and Desert Orchid-1 unit), for an overall company increase from 15 to 17 (13% company growth). Other concepts are Bistro 110 (1), Bistro Toujours (1), Café Spiaggia (1), Cielo (1), Curly's Pub (1), Fox Sports Skybox (1), Fulton's Crabhouse (1), Fulton's on the River (1), Galero Grill (1), Jake Melnick's (1), Portobello Yacht Club (1), Spiaggia (1), Spratt's Kitchen (1), Wellshire Inn (1), and Wolfgang Puck Café (1). Concepts are upscale, with a \$15-\$50+ per person check average. The restaurants average about 250 seats, with full bar service. Catering and banquet facilities are available. Trading areas are CA, CO, FL, IL, NC, UT, and WI.

Atlanta, GA-based RAVING BRANDS (founded 2000) has opened 6 units for their Monkey Joe's concept, from 13 to 19 (46% growth). Monkey's Joe is a children's play and party venue, serving pizza and ice cream. Facilities can accommodate up to 175 guests. Trading areas for Monkey Joe's are FL, GA, MO, NC, SC, and WI. Other concepts operated by Raving Brands include Bonehead's (7 units), Doc Green's (16), Flying Biscuit (5), Mama Fu's (20), PJ's Coffee & Tea (52), Planet Smoothie (134) and Shane's Rib Shack (70). All units for all concepts are franchised.

Arlington, TX-based SPRING CREEK BARBEQUE (founded 1980) has opened 3 units for the Spring Creek Barbeque concept, from 19 to 22 (16% concept growth). The restaurants are family/casual, open for lunch and dinner, with a \$6-\$12 per person check average. Units seat about 250, serving beer and wine. Catering and banquet facilities are available. Other concepts by this company are Mexican Inn (10 units) and Shady Oak Barbeque (4). All restaurants are located in TX.

Concepts previously written about in the past 18 months.

BOSTON'S THE GOURMET PIZZA of Dallas, TX (founded 1964) has increased by 22 units for their Boston Pizza concept (based in Canada), from 267 to 289 (8% concept growth). "Boston's The Gourmet Pizza" is their other brand concept with 50 units. The overall company growth is from 318 to 339. We last reported on this company in our 12/19/06 newsletter (12%

growth) and our 5/29/07 newsletter (3% growth). Overall one-year company growth is from 279 to 339 (22% growth). Locations are more than 90% franchised and are in AB, AK, AZ, BC, CA, CO, FL, GA, IA, IL, IN, MB, MI, MN, NB, ND, NE, NJ, NL, NM, NS, NT, NV, ON, PA, PE, PQ, SD, SK, TX, UT, WA, WI and YT.

GRANITE CITY FOOD AND BREWERY headquartered in St Louis Park, MN (founded 1999 - NASDAQ: GCFB) has increased by 3 units, from 18 to 21 (17% growth) and expanded into AR and IL. These are family casual restaurants with full bar and seating for about 250. The per person check average is around \$8-\$20. We last reported on this company's growth in our 1/30/07 newsletter when they had 29% growth. The company also ranked #6 on our April '07 Top Ten Fastest Growing Concepts list. Locations are currently in AR, IA, IL, KS, MN, MO, ND, NE, SD and WI.

HABIT BURGER GRILL based in Santa Barbara, CA (founded 1969) has increased by 2 units, from 19 to 21 (11% growth). Locations are quick serve with seating for around 40. The per person check average is between \$3-\$8. All units are located in CA. We last reported on this concept in our 4/24/07 newsletter when they had grown by 12%.

Cincinnati, OH-based PENN STATION EAST COAST SUBS (founded 1985) has opened 9 units, from 171 to 180 (5% growth). We featured this company in our 4/24/07 newsletter, when they had 6% growth. These fast casual sandwich shops are open for lunch and dinner, with a \$4-\$10 per person check average. Most units have seating for about 50. Trading areas are IL, IN, KY, MI, MO, NC, OH, PA, SC, TN, VA, WV. More than 90% of locations are franchised.

Laguna Hills, CA-based INDIGO JOE'S SPORTS PUB & RESTAURANT (founded 2002) has opened 3 units, from 16 to 19 (19% growth) and entered into the state of OK. We reported on this company in our 9/4/07 newsletter (14% growth while entering 2 new states). This is a family/casual sports bar and grill, with an \$8-\$20 per person check average. Meal periods are lunch and dinner. Trading areas are AL, AZ, CA, CO, GA, MO, NC, NE, OK, SC, and TX, with new units opening in KY, NV, VA, and WV over the next few months. All locations are franchised.

Richardson, TX-based WINGSTOP (founded 1994) has opened 19 units, from 307 to 326 (6% growth) and entered the state of PA. Wingstop has been featured in 3 of our previous newsletters: 7/19/06 (8% growth), 4/24/07 (3% growth) and 8/20/07 (8% growth). They have grown 33% in unit growth during the last 18 months. These quick serve chicken restaurants are open for dinner only, with a \$6-\$12 per person check average. Beer and wine is served. Units have seating for about 60. Catering, delivery, and online ordering are available. Trading areas are AL, AR, AZ, CA, CO, FL, GA, ID, IL, KY, LA, MD, MO, MS, NC, NE, NM, NV, OH, OK, OR, PA, SC, TN, TX, VA, WI. More than 90% of stores are franchised.

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