

Restaurant Trends - Growing And Emerging Concepts - Data reflects change and activity from
November 30, 2007 to March 30, 2008

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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).

Scottsdale, AZ-based RANCH 1 (founded 1990) has increased by 5 units, from 27 to 32 (19% growth) and entered into NE. These are quick serve chicken restaurants, open for lunch and dinner, with a \$3-\$8 per person check average. Some units have seating for about 50, many are located in mall food courts. Trading areas are AZ, CT, DC, IL, NC, NE, NJ, NY, TN, TX, and WA. Ranch 1 is a subsidiary of Scottsdale, AZ-based Kahala Corp. All locations are franchised.

Northbrook, IL-based LOU MALNATI'S PIZZA (founded 1971) has increased by 2 units, from 26 to 28 (8% growth). These Italian pizzeria restaurants are open for lunch and dinner. Most locations are take-out/delivery only, while some have seating for about 200, with a full bar. Catering and private party facilities are available. All locations are in IL.

Fort Walton Beach, FL-based CUPPY'S COFFEE SMOOTHIES & MORE (founded 2006) has increased by 15 units, from 59 to 74 (25% growth) and entered into AZ and CO. These are quick serve coffee cafes, open for breakfast and lunch, with a \$2-\$6 per person check average. Most locations have seating for about 10. Trading areas are AL, AZ, BC, CA, CO, FL, GA, IL, IN, KY, LA, MA, MI, MS, NC, NV, OH, OK, PA, SC, TN, TX, VA, and WV. All units are franchised.

KITSCH'N based in Chicago, IL has increased by 1 unit, from 3 to 4 (33% growth) adding a new concept called Paramount Room. Other concepts are Kitsch'n (2) and Volo Restaurant & Wine Bar (1). Locations tend to be family/casual with full bar and seating for about 125. The per person check average is around \$6-\$15+. All are located in IL.

CARLUCCI'S ITALIAN GRILL has increased by 1 unit, from 4 to 5 (25% growth). There is a second concept called Villa Rosa (1 unit). Overall company growth is from 5 to 6 (20% growth). Locations are family/casual Italian restaurants with full bar and seating for about 200. The per person check average is around \$10-\$30. Banquets and catering are offered. Units are located in NJ and PA.

FIRKIN GROUP OF PUBS based in Markham, ON (founded 1987) has increased by 7 units, from 41 to 48 (17% growth) and expanded into CA, FL, NV and WA. These are family/casual units with full bar and seating for around 125. The per person check average is around \$10-\$30+. Locations are more than 90% franchised and are in AZ, BC, CA, FL, IA, MI, NV, NY, ON, TX, VA, WA and WV.

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

Knoxville, TN-based BUDDY'S BAR-B-Q (founded 1972) has increased by 2 units, from 16 to 18 (13% growth). The restaurants are fast casual, with seating for about 80. Beer is served. Meal periods are lunch and dinner, with a \$4-\$10 per person check average. Breakfast is served at select locations. Catering and banquet facilities are available. Between 20% and 30% of locations are franchised. All units are in TN.

TN-based STROUD'S BARBEQUE has increased by 2 units, from 7 to 9 (29% growth). The restaurants are family/casual, with a \$4-\$10 per person check average. Units have seating for about 70 and a full bar. Catering is available. All locations are in TN.

GATOR'S DOCKSIDE based in Heathrow, FL (founded 1991) has increased by 3 units, from 17 to 20 (18% growth). These are family/casual restaurants with full bar and seating for about 350. The per person check average is around \$8-\$20. Less than half the units are franchised. All are located in FL.

KABUKI JAPANESE RESTAURANT headquartered in Burbank, CA (founded 1980) has increased by 2 units, from 9 to 11 (22% growth) and expanded into AZ. These are upscale Japanese restaurants with full bar and seating for about 125. The per person check average is around \$10 to \$30+. Locations are in AZ and CA. There are plans to open locations in Las Vegas, NV, June '08 and Valencia, CA, July '08.

Concepts previously written about in the past 18 months.

Richardson, TX-based NESTLE TOLLHOUSE CAFE BY CHIP (founded 1930) has increased by 9 units, from 93 to 102 (10% growth) and entered into NM. We wrote about this concept in our 5/8/07 newsletter (21% growth). The cafes are take-out cookie shops, open for lunch and dinner hours. Per person check average is \$2-\$6. Catering is available. Trading areas are AR, AZ, CA, CO, FL, GA, IL, IN, KS, LA, MD, MI, MN, MO, NC, NE, NJ, NM, NV, NY, OK, OR, PA, SC, TX, UT, VA, and Puerto Rico. Locations are set to open in HI and MS later this year. All units are franchised.

TX-based PALIO'S PIZZA CAFE has increased by 3 units, from 12 to 15 (25% growth). We wrote about this concept on 11/20/07 (20% growth). The restaurants are quick serve, open for lunch and dinner, with seating for about 50. Beer is served. Catering and delivery are available. All locations are in TX.

Memphis, TN-based LENNY'S SUB SHOP (founded 1998) has increased by 20 units, from 142 to 162 (14% growth) and entered into OH and VA. We wrote about this concept 3 times previously (11/15/06-6% growth, 4/24/07-33% growth, and 12/4/07-4% growth). These are quick serve sandwich shops, open for lunch and dinner, with a \$3-\$8 per person check average. Units have seating for about 60. Catering and delivery are available. Locations are in the states of AL, AR, CA, FL, GA, IN, KS, MI, MO, MS, NC, NM, NV, OH, OK, TN, TX, and VA, with a SC location to open soon. More than 90% of units are franchised.

HUHOT MONGOLIAN GRILL based in Missoula, MT (founded 1999) has increased by 4 units, from 25 to 29 (16% growth). These are fast casual Asian restaurants serving beer and wine. Seating is for about 150 and the check average is around \$6-\$12 per person. Locations are more than 70% franchised and are in CO, FL, IA, KS, MI, MO, MN, MT, ND, NE, SD, TX, WA and WI. We reported on this concept in our 5/1/07 newsletter (15% growth) and the 12/11/07 newsletter (9% growth).

PAT'S FAMILY RESTAURANTS of National Park, NJ (founded 1974) has increased by 5 units, from 46 to 51 (11% growth). We last reported on this concept in our 12/11/07 newsletter when they had 7% growth. These are quick serve Italian and pizza restaurants with seating for about 60. Beer and wine is served and catering is offered. Locations are in DE, MD, NJ and PA.

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