

Restaurant Trends - Growing And Emerging Concepts - Data reflects change and activity from
December 7, 2007 to April 7, 2008

2008-04-16

Update from Restaurantchains.net on growing and emerging restaurant concepts

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

Covington, LA-based SMOOTHIE KING (founded 1973) has increased by 21 units, from 509 to 530 (4% growth). This is a quick serve, juice/smoothie concept, with a \$2-\$6 per person check average and seating for about 10. Meal periods are breakfast, lunch and dinner hours. Trading areas are AL, AR, AZ, CA, CO, DC, FL, GA, IA, IL, IN, KS, KY, LA, MD, MI, MO, MS, NC, NJ, NM, NV, NY, OH, OK, PA, SC, TN, TX, UT, VA, WI and South Korea, with a MN location scheduled to open later this year. More than 90% of units are franchised.

KEVIN TAYLOR RESTAURANT GROUP of Denver, CO has increased by 1 unit, from 4 to 5 (25% growth). The company opened a new concept called Limelight Supper Club and Lounge. Concepts tend to be upscale with full bar and seating for about 150. The check average is around \$15-\$50+ per person. All are located in CO.

HAPPY'S PIZZA based in Southfield, MI (founded 1994) has increased by 5 units, from 30 to 35 (17% growth). These are pizza restaurants open for lunch and dinner. Catering is available. Units have limited seating. About half the units are franchised and all are located in MI.

POMPEI based in Lyons, IL has increased by 1 unit, from 6 to 7 (17% concept growth). There is a second 2-unit concept called Davino's Little Pompei. Overall company growth is from 8 to 9 (13% company growth). POMPEI locations are family/casual Italian and pizza restaurants serving beer and wine. Seating is for about 200. Catering and banquets are offered. The per person check average is around \$6-\$15+. All are located in IL.

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

Austin, TX-based AUSTIN'S PIZZA (founded 1999) has increased by 2 units, from 10 to 12 (20% growth). These take-out/delivery pizzerias are open for lunch and dinner. Catering and online ordering are available. All locations are in TX.

San Francisco, CA-based JAVA DETOUR (Ticker: JVDT, founded 1995) has increased by 3 units, from 19 to 22 (16% growth) and entered into NC. These quick serve coffee shops are open for breakfast, lunch and dinner, with a \$2-\$6 per person check average. Some units have seating for about 30, others are drive-thru only. Trading areas are CA, MN, NC, NV, and WI. Between 41% and 50% of units are franchised.

NEWK'S EXPRESS CAFÉ based in Oxford, MS has increased by 5 units, from 9 to 14 (56% growth). These are fast casual sandwich restaurants. Seating is for about 60 and beer and wine are served. The per person check average is around \$6-\$12 and catering is offered. Locations are more than 70% franchised and are in AL, MS, TN and TX.

MR EMPANADA based in Tampa, FL (founded 2003) has increased by 2 units, from 4 to 6 (50% growth). These are quick serve South American restaurants with seating for about 30. The check average is around \$3-\$8 per person and catering is offered. Locations are 83% franchised and are in FL.

Concepts previously written about in the past 18 months.

Beverly Hills, CA-based WOLFGANG PUCK WORLDWIDE (founded 1982) has increased by 1 unit for their Cut concept, from 1 to 2 (100% concept growth), 3 units for Wolfgang Puck Express, from 56 to 59 (5% concept growth), 1 unit for Wolfgang Puck Café, from 3 to 4 (33% concept growth), and 1 unit for Wolfgang Puck Bistro, from 1 to 2 (100% concept growth). Overall company increase was from 78 to 83 (6% growth), with the closing of the Vert concept. The company has entered into the states of KY and NY. Other concepts are 20.21 (1), Chinois (2), Postrio (2), Puck's (1), Red/Seven (1), Spago (4), The Source (1), Trattoria Del Lupo (1), Wolfgang Puck American Grill (1), Wolfgang Puck Bar & Grill (1), and Wolfgang Puck Grill (1). We previously featured this company in our 12/11/07 newsletter (30% company growth). The concepts serve a variety of different cuisine types, mostly upscale, with a \$15-\$30+ per person check average. Wolfgang Puck Express units are fast casual, with an \$8-\$20 per person check average. Catering and banquet facilities are available. Trading areas are AZ, CA, CO, DC, FL, GA, HI, IL, IN, KY, MA, MI, MN, MO, NC, NJ, NV, NY, OH, ON, TN, UT, VA, WA, and WI.

Nashville, TN-based LOGAN'S ROADHOUSE (founded 1991) has increased by 6 units, from 186 to 192 (3% growth). We wrote about this chain on 4/3/07 (13% growth) and on 7/23/07 (3% growth). These are family/casual American restaurants, open for lunch and dinner, with an \$8-\$20 per person check average. Locations have a full bar and seating for about 250. Between 10% and 20% of units are franchised. Trading areas are AL, AR, AZ, CA, FL, GA, IL, IN, KS, KY, LA, MI, MO, MS, NC, OH, OK, PA, SC, TN, TX, VA, and WV.

Dallas, TX-based GENGHIS GRILL (founded 1998) has increased by 3 units, from 17 to 20 (18% growth) and entered into AZ and NV. We wrote about this concept on 5/8/07 (17% growth) and on 11/20/07 (21% growth). These are fast casual Asian restaurants, open for lunch and dinner, with an \$8-\$20 per person check average. Units have a full bar and seating for about 125. More than 70% of locations are franchised. Trading areas are AZ, CO, IA, IL, MN, NV, TN, and TX.

Burlington, VT-based BRUEGGER'S BAGEL BAKERY (founded 1983) has increased by 8 units, from 265 to 273 (3% growth) and entered into DC and KY. We featured this concept in our 12/18/07 newsletter (3% growth). These quick serve bakery/cafes are open for breakfast and lunch, with a \$2-\$6 per person check average. Most units have seating for about 30. Catering is available. Trading areas are AK, AL, AZ, CA, CO, CT, DC, FL, IA, KY, MA, MI, MN, NC, NE, NY, OH, PA, SC, TN, VA, VT, and WI. About 40% of units are franchised.

MINA GROUP headquartered in San Francisco, CA (founded 2002) has increased by 2 units for their Bourbon Steak concept, from 1 to 3 (200% concept growth). Units are upscale steakhouses with full bar and seating for about 250. The check average is around \$15-\$50+ per person. Banquets are offered. Other concepts are Arcadia (1), Michael Mina (2), Nobhill (1), Saltwater (1), Seablue (2), Stonehill Tavern (1) and Stripsteak (1). Overall company growth is from 10 to 12 (20% growth). We last reported on this company in our 11/27/07 newsletter (25% growth). Locations are in CA, MI, NJ and NV.

TUSCANY STEAK & PASTA HOUSE of Decatur, IL has increased by 1 unit, from 5 to 6 (20% growth). These are family/casual Italian restaurants with full bar and seating for around 300. Catering and banquets are offered. The per person check average is around \$10-\$30. All are located in IL. We last reported on this concept in our 12/26/07 newsletter when they had 25% growth.

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This article comes from Hotel News Resource

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The URL for this story is:

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