

Restaurant Trends - Growing And Emerging Concepts - Data reflects change and activity from
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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).

Las Vegas, NV-based CAPRIOTTI'S SANDWICH SHOP (founded 1976) has increased by 3 units, from 44 to 47 (7% growth). These are fast casual sandwich shops, open for lunch and dinner, with a \$6-\$12 per person check average. Seating is for about 30. Catering is available. Trading areas are AZ, DE, FL, MD, NJ, NV, PA, and UT. About 90% of units are franchised.

Scarborough, ON-based WIMPY'S DINER (founded 1961) has increased by 3 units, from 36 to 39 (8% growth). The restaurants are family/casual, open for breakfast, lunch and dinner. Per person check average is \$6-\$12. Units have seating for about 70. All locations are franchised and are located in ON.

Springfield, VA-based HARD TIMES CAFÉ (founded 1980) has increased by 1 unit, from 15 to 16 (7% growth) and entered into DC. The restaurants are family/casual, serving American cuisine, with a \$6-\$12 per person check average. Meal periods are lunch and dinner. Seating is for about 200. All locations have a full bar. Catering and banquet facilities are available. Locations are in DC, MD, NC, and VA. Between 80% and 90% of units are franchised.

STONEWOOD HOLDINGS of Ormond Beach, FL has increased by 1 unit for their Stonewood Tavern and Grill concept, from 17 to 18 (6% concept growth). These are family/casual restaurants with full bar and seating for about 200. The per person check average is around \$10-\$30. Banquets are offered. There is a second 2-unit concept called Peach Valley Café. Overall company growth is from 19 to 20 (5% overall growth). Locations are in FL and NC.

MARCO'S PIZZA of Toledo, OH (founded 1978) has increased by 5 units, from 155 to 160 (3% growth) and expanded into, AL, OK, TN and VA. Units are mostly take-out with limited seating. Locations are more than 90% franchised and are in AL, AZ, FL, IN, MI, NC, NV, OH, OK, TN and VA.

CRABBY BILL'S SEAFOOD RESTAURANT based in Indian Rocks Beach, FL (founded 1980) has increased by 1 unit for the Crabby Bill concept, from 5 to 6 (20% concept growth). There is a second concept called Central Ave Oyster Bar (1). Overall company increase is from 6 to 7 (17% company growth). These are family/casual seafood restaurants with full bar. Seating is for about 150 and catering is offered. The check average is around \$8-\$20 per person. Locations are in FL. Less than half the units are franchised.

SNUFFER'S RESTAURANT & BAR headquartered in Addison, TX (founded 1978) has increased by 1 unit, from 7 to 8 (14% growth). These are family/casual restaurants with full bar and seating for about 300. The check average is around \$6-\$15+ per person. Banquets are offered. All locations are in TX.

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

Phoenix, AZ-based MY BIG FAT GREEK RESTAURANT has increased by 2 units, from 8 to 10 (25% growth). These family/casual Greek restaurants are open for lunch and dinner, with an \$8-\$20 per person check average. Locations have a full bar and seating for about 100. Catering and banquet facilities are available. All units are in AZ. Locations are planned in NV and TX later this year.

PAT KULETO RESTAURANTS headquartered in San Francisco, CA (founded 1985) has increased by 2 units, from 5 to 7 (40% growth). The company opened 2 new concepts, Epic Roasthouse (1) and Water Bar (1). Other concepts are Boulevard (1), Farallon (1), Jardiniere (1), Martini House (1) and Nick's Cove & Cottages (1). Units tend to be upscale with full bar and seating for about 150. Catering and banquets are offered. The per person check average is \$20-\$50+. All are located in CA.

BLUE MOON MEXICAN CAFÉ based in Wykoff, NJ (founded 1987) has increased by 2 units, from 5 to 7 (40% growth). Units are family/casual with full bar and seating for around 100. The per person check average is \$10-\$30+. Catering and banquets are offered. Locations are in NJ and NY.

Concepts previously written about in the past 18 months.

Dallas, TX-based WHICH WICH (founded 2003) has increased by 19 units, from 33 to 52 (58% growth) and entered into MO. We wrote about this concept twice before, on 4/17/07 (75% growth) and on 10/23/07 (57% growth). The company also ranked as #1 on our July '07 Top Ten Fastest Growing Concepts list and again as #3 in January '08. These quick serve sandwich restaurants are open for breakfast, lunch and dinner, with a \$3-\$8 per person check average. Seating is for about 50. Catering is available. More than 90% of units are franchised. Trading areas are AZ, CO, FL, GA, IA, MO, OK, SC, TN, and TX, with a MS location planned to open soon.

Dallas, TX-based DICKEY'S BBQ PIT (founded 1941) has increased by 8 units, from 77 to 85 (10% growth) and entered 3 states (DE, NE, VA). We previously wrote about this chain in our 6/19/07 newsletter (5% growth). These are fast casual BBQ restaurants, open for lunch and dinner, with a \$6-\$12 per person check average. Beer and wine are served and catering is

available. Seating is for about 150. Trading areas are CO, DE, FL, IA, ID, MO, MS, NC, NE, NM, OH, TN, TX, and VA. More than 90% of units are franchised.

Laguna Hills, CA-based INDIGO JOE'S SPORTS PUB & RESTAURANT (founded 2002) has increased by 3 units, from 19 to 22 (16% growth) and entered into KY. We wrote about this concept on 9/4/07 (14% growth) and again on 12/18/07 (19% growth). The restaurants are family/casual, open for lunch and dinner, with an \$8-\$20 per person check average. Units have a full bar and seating for about 225. Trading areas are AL, AZ, CA, CO, GA, KY, MO, NC, NE, OK, SC, and TX. All locations are franchised.

Newport Beach, CA-based ZPIZZA (founded 1986) has increased by 6 units, from 67 to 73 (9% growth) and entered into MN and PA. We wrote about this concept 3 times previously (4/10/07-14% growth, 7/2/07-3% growth, and 12/26/07-12% growth). These are quick serve pizzerias, open for lunch and dinner. Units have seating for about 30. Some locations serve beer and wine. Catering, delivery and online ordering are available. Trading areas are AZ, CA, GA, MD, MN, NC, NV, PA, and VA. About 80% of units are franchised.

FIVE GUYS BURGERS & FRIES based in Lorton, VA (founded 1986) has increased by 25 units, from 240 to 265 (10% growth). These are fast casual burger restaurants with seating for about 50. The per person check average is around \$3-\$8. Locations are in AL, CT, DC, FL, GA, IN, MD, MO, NC, NJ, NY, OH, PA, SC, TN, VA, WI and WV. We reported on this concept in our 2/13/07 newsletter (24% growth) and our 8/14/07 newsletter (41% growth).

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