

Restaurant Trends - Growing And Emerging Concepts - Data reflects change and activity from
December 21, 2007 to April 21, 2008
2008-04-30

Update from Restaurantchains.net on growing and emerging restaurant concepts

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

Philadelphia, PA-based BONTE WAFFLERIE & CAFÉ (founded 2003) has increased by 1 unit, from 4 to 5 (25% growth) and entered into NJ. All other units are in PA. These fast casual bakery/cafes are open for breakfast and lunch, with a \$4-\$10 per person check average. Seating is for about 40. Catering is available. About half the units are franchised.

St Louis, MO-based RACANELLI'S NEW YORK STYLE PIZZA (founded 1994) has increased by 1 unit, from 5 to 6 (20% growth). These quick serve pizzerias are open for lunch and dinner, with seating for about 30. Beer is served. Catering and delivery are available. All units are in MO.

Mt Shasta, CA-based BLACK BEAR DINER (founded 1995) has increased by 2 units, from 36 to 38 (6% growth). The restaurants are family/casual, open for breakfast, lunch and dinner, with a \$6-\$12 per person check average. Locations serve beer and wine and have seating for about 150. Trading areas are AZ, CA, CO, NV, OR, and WA.

ITALIAN OCCASIONS RESTAURANTS based out of Severna Park, MD has increased by 1 unit, from 9 to 10 (11% growth). They opened a new concept called Pomo Grill. Units are family/casual restaurants serving beer and wine. Seating is for about 150. The per person check average is around \$6-\$15+. Catering and banquets are offered. Other concepts are 4 Seasons Grille (1), Café Mezzonate (1) and Squisito's Pasta Blitz (7). All are located in MD.

LARK CREEK RESTAURANT GROUP headquartered in San Francisco, CA (founded 1989) has increased by 1 unit for their Yankee Pier concept, from 3 to 4 (33% growth). Other concepts are Arterra (1), Bradley Ogden (1), Lark Creek Inn (1), Lark Creek Restaurant (1), Lark Creek Steak (1), One Market (1) and Parcel 104 (1). Overall company growth is from 10 to 11 (10% growth). Units are upscale with full bar and seating for about 250. The check average is around \$15-\$50+ per person. Catering and banquets are offered. Locations are in CA and NV.

CASSANO'S PIZZA & SUBS based in Kettering, OH (founded 1953) has increased by 3 units, from 36 to 39 (8% growth). These are quick serve pizza restaurants serving beer and wine. Seating is for about 70. Units are 15% franchised and are located in OH.

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

New York, NY-based NEW YORK CITY RESTAURANT GROUP (founded 1995) has increased by 3 units, from 13 to 16 (23% growth), with the opening of 3 new concepts (Bocca di Bacco, Gallo Nero, and Lime Jungle). The company also operates Arte Café (2), Bar Baresco (1), Cara Mia (1), Film Center Café (1), Il Bastardo (1), Intermezzo (1), Maria Pia (1), Nero (1), Puttanesca (1), Roberto Passon (1), Scarlatto (1), Zucchero E Pomodori (1). The restaurants are upscale Italian, with a \$15-\$50+ per person check average. Lime Jungle serves Mexican food. Units are open for lunch and dinner, with a full bar and average seating for about 125. Catering, banquet, and delivery services are available. All locations are in NY.

TAQUERIA EL ZARAPE of McAllen, TX (founded 1996) has increased by 2 units, from 6 to 8 (33% growth). These are quick serve Mexican restaurants serving beer and wine. Seating is for about 70. The check average is around \$3-\$8 per person. All are located in TX.

WINGS ETC based in Fort Wayne, IN (founded 1994) has increased by 2 units, from 13 to 15 (15% growth). This is a family/casual concept with seating for about 150. The per person check average is around \$6-\$15+. Locations are 73% franchised and are in IL, IN and MI.

Concepts previously written about in the past 18 months.

Dallas, TX-based GOLDEN CHICK (founded 1978) has increased by 1 unit for the Golden Chick concept, from 80 to 81 (1% concept growth) and by 3 units for Jalapeno Tree, from 13 to 16 (23% concept growth). Overall company increase is from 93 to 97 (4% growth). We wrote about this company on 9/18/07 (7% company growth). The Golden Chick restaurants are a quick serve chicken concept, with a \$3-\$8 per person check average. Jalapeno Tree is a family/casual Mexican restaurant concept with a full bar. Catering and delivery are available. Between 70% and 80% of the restaurants are franchised. Trading areas are OK and TX.

St Louis Park, MN-based GRANITE CITY FOOD AND BREWERY (NASDAQ: GCFB, founded 1999) has increased by 4 units, from 21 to 25 (19% growth) and entered into IN and OH. We wrote about this concept on 1/30/07 (29% growth) and on 12/18/07 (17% growth). The restaurants are family/casual, open for lunch and dinner, with an \$8-\$20 per person check average. Locations have a full bar and seating for about 250. Trading areas are AR, IA, IL, IN, KS, MN, MO, ND, NE, OH, SD, and WI.

San Marcos, CA-based SUBMARINA CALIFORNIA SUBS (founded 1977) has increased by 9 units, from 52 to 61 (17% growth) and entered 4 states (AZ, FL, MI, and TN). We wrote about this company on 2/20/07 (6% growth). These fast casual sandwich shops are open for lunch and dinner, with a \$3-\$8 per person check average. Units have seating for about 30. Catering is available. Trading areas are AZ, CA, FL, MI, and TN, with a Houston, TX location planned later this year. All locations are franchised.

NEIGHBORHOOD VENTURES INC based in Addison, TX (founded 1995) has increased by 3 units for their Fish City Grill concept, from 18 to 21 (17% concept growth). These are family/casual seafood restaurants with full bar and seating for about 80. The per person check average is around \$10-\$30. Catering is offered. There are two other concepts, Half Shells Oyster Bar (1) and Half Shells Seafood Grill (1). Overall company growth is from 20 to 23 (15% overall growth). Locations are more than 70% franchised and are located in AR, CO, FL, OK and TX. We wrote about this company in our 1/2/07 newsletter (57% growth) and our 1/8/08 newsletter (43% growth). The Fish City Grill concept has been featured twice on our Top Ten list of fastest growing concepts. They ranked #4 in Jan '07 and #6 in April '08.

NYPD PIZZA headquartered in Orlando, FL (founded 1996) has increased by 3 units, from 14 to 17 (21% growth). These are quick serve pizza restaurants serving beer and wine. Seating is for about 60 and catering is offered. Locations are more than 90% franchised and are in AR, CA, CO, FL, NM, SC, TN and UT. We reported on this concept in our 5/15/07 newsletter (20% growth) and our 1/15/08 newsletter (17% 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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