

Restaurant Trends - Growing And Emerging Concepts - Data reflects change and activity from January 26, 2008 to May 26, 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).

Albuquerque, NM-based FLYING STAR CAFÉ (founded 1987) has increased by 1 unit for the Flying Star concept, from 7 to 8 (14% concept growth). The company also operates a 5 unit concept called Satellite Coffee. Overall company increase was from 12 to 13 (8% growth). The restaurants are family/casual, open for breakfast, lunch and dinner, with a \$4-\$10 per person check average. Cuisine is American. Beer and wine are served. Catering and private party facilities are available. All units are in NM.

Little Rock, AR-based COLTON'S STEAK HOUSE & GRILL (founded 1996) has increased by 1 unit for the Colton's Steak House concept, from 18 to 19 (6% concept growth). The company also operates Colton's Woodfired Grill (1 unit). Overall company increase was from 19 to 20 (5% growth). These are family/casual steakhouse restaurants, open for lunch and dinner, with a \$10-\$30 per person check average. There is a full bar and seating is for about 200. Trading areas are AR, MO, MS, NE, and TN. All locations are franchised.

Houston, TX-based MEXICAN RESTAURANTS INC (NASDAQ: CASA) has increased by 1 unit for the Monterey's Tex Mex concept, from 15 to 16 (7% concept growth), 1 unit for Mission Burritos, from 2 to 3 (50% concept growth), and 1 unit for La Seniorita, from 5 to 6 (20% concept growth). Other concepts are Casa Ole (46), Crazy Jose's (3), and Tortuga Mexican Kitchen (4). Overall company increase was from 75 to 78 (4% growth). These are family/casual Mexican restaurants, open for lunch and dinner, with an \$8-\$20 per person check average. Locations have a full bar and average seating for about 200. Catering and private party facilities are available. There are 18 franchised Casa Ole locations, all other units are company owned and operated. Trading areas are LA, MI, OK, and TX.

POFOLKS of Panama City, FL has increased by 1 unit, from 9 to 10 (11% concept growth). These are family/casual restaurants with seating for about 90. The per person check average is around \$4-\$10. Catering is offered. There is a second 1-unit concept called Triple J Steakhouse. Overall company increase is from 10 to 11 (10% company growth). Units are 18% franchised and are in AL, CA and FL.

BRANDON'S DINER of Upland, CA has increased by 1 unit, from 3 to 4 (33% growth). These are family/casual American restaurants with seating for about 80. Beer and wine are served. Catering is offered. The check average is around \$4-12+ per person with breakfast, lunch and dinner served. All are located in CA.

ALEHOUSE RESTAURANTS based in Jupiter, FL (founded 1988) has increased by 4 units, from 40 to 44 (10% growth) and expanded into IL and NY. These are family/casual restaurants with full bar and seating for about 300. The check average is around \$8-\$20 per person. Catering is available. Locations are currently in FL, GA, IL and NY.

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

Irvine, CA-based MUSTARD CAFÉ has increased by 2 units, from 4 to 6 (50% growth). These are fast casual American restaurants, open for breakfast, lunch and dinner, with a \$4-\$10 per person check average. Beer and wine are served. Seating is for about 50. All units are in CA. About half are franchised.

Concepts previously written about in the past 18 months.

Campbell, CA-based BLENDZ (founded 2003) has increased by 2 units, from 7 to 9 (29% growth). We wrote about this concept on 9/4/07 (40% growth). These are fast casual sandwich and salad cafes, open for breakfast, lunch and dinner, with a \$3-\$8 per person check average. Units have seating for about 30. Catering is available. About 80% of locations are franchised. Trading areas are AZ and CA.

Boston, MA-based THE UPPER CRUST (founded 2001) has increased by 3 units, from 9 to 12 (33% growth). We wrote about this concept on 1/29/08 (29% growth). These are fast casual pizzerias, open for lunch and dinner. Beer and wine are served. Seating is for about 50. Catering and delivery are available. Units are in FL and MA.

Atlanta, GA-based TED'S MONTANA GRILL (founded 2002) has increased by 2 units, from 55 to 57 (4% growth). We've featured this concept 3 times previously (2/6/07-13% growth, 5/15/07-9% growth, and 10/9/07-4% growth). They also ranked #10 on our July '07 Top Ten Fastest Growing Concepts list. These are family/casual steakhouses, open for lunch and dinner, with a \$10-\$30 per person check average. The restaurants have a full bar and seating for about 200. Trading areas are AL, CO, CT, FL, GA, IL, IN, KS, KY, MA, MO, NC, NE, NY, OH, PA, RI, TN, and VA, with a Bozeman, MT location scheduled to open in June.

BOBBY CHEZ SEAFOOD SPECIALTIES based in Cherry Hill, NJ (founded 1997) has increased by 1 unit, from 8 to 9 (13% growth). These are take-out seafood restaurants with a check average of about \$6-\$12 per person. Catering is offered. Locations are in PA and NJ. We last reported on this concept in our 2/20/08 newsletter (33% growth).

SADDLE RANCH CHOP HOUSE of Universal City, CA (founded 1999) increased by 1 unit, from 4 to 5 (25% growth). These are family/casual restaurants with full bar and seating for about 300. The check average is around \$8-\$20 per person. Locations are open for breakfast, lunch and dinner. Banquets are offered. Locations are in AZ, CA and KS. We wrote about this company in our 2/19/08 newsletter (33% growth).

VERA'S BURGER SHACK based in Kitsilano, BC (founded 1977) has increased by 1 unit, from 9 to 10 (11% growth). These are quick serve burger restaurants with seating for about 40. The per person check average is around \$3-\$8. Locations are more than 30% franchised and are in BC. We reported on this concept in our 1/22/08 newsletter (29% growth).

Richmond, BC-based KEG STEAKHOUSE & BAR (TSX: KEG.UN, founded 1971) has increased by 6 units, from 95 to 101 (6% growth) and entered into NB. We wrote about this concept on 1/2/07 (2% growth). These family/casual steakhouses are open for lunch and dinner, with a \$10-\$30 per person check average. Units have a full bar and seating for about 250. Trading areas are AB, AZ, BC, CO, NM, NB, NL, NS, ON, PQ, SK, TX, and WA. About 50% of units are franchised.

Contact

Keith Gellman

Restaurantchains.net

1 Bridge St, Unit 94

Irvington, NY 10533

914-591-4297

<http://www.restaurantchains.net>

keith@restaurantchains.net

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