

Restaurant Trends - Growing And Emerging Concepts - Data reflects change and activity from April 11, 2008 to August 11, 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).

Miami Lakes, FL-based SHULA'S STEAKHOUSE (founded 1989) has increased by 2 units for the Shula's Steakhouse concept, from 15 to 17 (13% concept growth) and 2 units for Shula's 347, from 4 to 6 (50% concept growth), entering into the state of TX. Shula's also operates the concepts Shula's 2 (4), and Shula's on the Beach (1). Overall company increase was from 24 to 28 (17% company growth). The Shula's Steakhouse concepts are upscale, open for dinner, with a \$15-\$50 per person check average. Shula's 2 units are more family/casual, averaging \$8-\$20 per person. Catering and banquet services are available. Trading areas are AL, CA, FL, IL, IN, LA, MD, MI, NY, OH, OR, PA, RI, TX, and VA.

Blountville, TN-based PIZZA PLUS (founded 1982) has increased by 4 units, from 60 to 64 (7% growth). These quick serve pizzerias are open for lunch and dinner. Most units have seating for about 40. Delivery is available. Locations are in KY, NC, TN, and VA. Between 10% and 20% of units are franchised.

PLAZA MEXICO MEXICAN RESTAURANT based in Mason City, IA has increased by 1 unit, from 5 to 6 (20% growth). These are family/casual Mexican restaurants with full bar and seating for about 100. The per person check average is around \$6-\$12 and catering is offered. All locations are in IA.

GRAND TRAVERSE PIE CO headquartered in Traverse City, MI (founded 1996) has increased by 1 unit, from 13 to 14 (8% growth). These are fast casual bakery/cafés with seating for about 30. The check average is around \$3-\$8 per person. Units are 93% franchised and are located in IN and MI.

CULVER'S FROZEN CUSTARD & BUTTERBURGERS based in Prairie Du Sac, WI (founded 1984) has increased by 17 units from 376 to 393 (5% growth) and expanded into AZ. These are fast casual burger restaurants with seating for about 90. The check average is around \$3-\$8 per person. Locations are more than 90% franchised and are in AZ, CO, IA, IL, IN, KS, KY, MI, MN, MO, ND, NE, OH, SD, TX, WI and WY.

VAPIANO based in Mclean, VA (founded 2002) has increased by 4 units, from 34 to 38 (12% growth). These are fast casual Italian restaurants with full bar and seating for about 150. The check average is around \$10-\$30. The locations are in DC and VA.

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

Dallas, TX-based FOGO DE CHAO CHURRASCARIA (founded 1979) has increased by 3 units, from 15 to 18 (20% growth) and entered into IN. These are upscale South American steakhouses, open for lunch and dinner, with a \$15-\$50+ per person check average. The restaurants have a full bar and seating for about 350. Trading areas are CA, DC, GA, IL, IN, MD, MN, PA, and TX, with locations to open in Scottsdale, AZ, Miami, FL, and Kansas City, MO later this year.

THE ONE RESTAURANTS based in New York, NY has increased by 1 unit from 1 to 2 (100% concept growth) for the STK concept and added 2 new concepts, Kiss & Fly and Coco de Ville. Overall company increase is from 4 to 7 (75% company growth). These are upscale steak and seafood restaurants with full bar and seating for about 200. The check average is around \$15-\$50+ per person. Other concepts are One (2) and Tenjune (1). Locations are currently in NY and CA with plans to expand into FL and NV.

TAVERN RESTAURANT GROUP of Cincinnati, OH (founded 1973) has increased by 1 unit for the Pub concept, from 6 to 7 (17% concept growth) and added a new concept called Horse and Barrel. Overall company increase is from 11 to 13 (18% growth). Other concepts are Desha's (3), Nicholson's (1) and The Polo Grille (1). These are casual bar and grills with full bar and seating for about 250. Per person check average is around \$6-\$15+ and banquets are offered. Locations are in KY and OH.

Concepts previously written about in the past 18 months.

Rosemead, CA-based PANDA RESTAURANT GROUP (founded 1983) has increased by 47 units for the Panda Express concept, from 1080 to 1127 (4% concept growth). Other concepts are Hibachi-San (26) and Panda Inn (7). Overall company increase was from 1113 to 1160 (4% company growth). We wrote about this concept on 5/1/07 (8% company growth) and on 3/18/08 (6% company growth). Panda Express units are fast casual Chinese restaurants, open for lunch and dinner, with a \$3-\$8 per person check average. Panda Inns are upscale, with a full bar. Hibachi-San is fast casual Japanese cuisine. Catering is available and banquet services are at Panda Inn locations. Trading areas are AZ, CA, CO, CT, FL, GA, HI, IA, ID, IL, IN, KS, LA, MA, MD, ME, MI, MN, MO, NC, NE, NJ, NM, NV, NY, OH, OK, OR, PA, RI, TN, TX, UT, VA, WA, and WI.

Oakville, ON-based MADE IN JAPAN TERIYAKI EXPERIENCE (founded 1986) has increased by 6 units, from 117 to 123 (5% growth) and entered into IA. We wrote about this concept 3 times previously (5/1/07-19% growth, 10/30/07-7% growth, and 3/18/08-4% growth). These are fast casual Japanese restaurants, open for lunch and dinner, with a \$4-\$10 per person check average. Most locations are in mall food courts. Trading areas are AB, BC, CA, GA, IA, MB, NB, NS, ON, PQ,

Europe, South Africa, and the Middle East. New units to open in AZ, FL, and NY later this year. All stores are franchised.

Orlando, FL-based NATURE'S TABLE CAFÉ (founded 1977) has increased by 7 units, from 65 to 72 (11% growth). We wrote about this concept on 12/4/07 (5% growth). These are fast casual American restaurants, open for breakfast, lunch and dinner, with a \$3-\$8 per person check average. Seating is for about 40. Catering is available. Trading areas are CA, CO, FL, GA, KS, MD, OK, PA, TX, and WA. Around 90% of units are franchised.

Milford, OH-based BUFFALO WINGS & RINGS (founded 1988) has increased by 11 units, from 25 to 36 (44% growth) and entered into AZ, MI, and SD. This concept was featured in our 7/10/07 newsletter (29% growth) and again on 10/16/07 (25% growth). These are family/casual American restaurants, specializing in chicken wings. Meal periods are lunch and dinner, with a \$6-\$15+ per person check average. The restaurants have a full bar and seating for about 200. Catering is available. Trading areas are AZ, CA, FL, IL, IN, KY, MI, NC, NY, OH, SD, and TX. All locations are franchised.

WHICH WICH headquartered in Dallas, TX (founded 2003) has increased by 2 units, from 52 to 54 (4% growth). These are quick serve sandwich shops with seating for about 50. Locations are open for breakfast, lunch and dinner and the check average is around \$3-\$8 per person. Units are 98% franchised and are located in AZ, CO, FL, GA, IA, MO, OK, SC, TN and TX. There are plans to expand into CA, NM, MS and WA. We reported on this concept in the following newsletters: 4/17/07 (75% growth), 10/23/07 (57% growth) and 4/22/08 (58% growth). They ranked #1 in our July '07 Top Ten list and #3 in the January '08 Top Ten list.

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