

Restaurant Trends - Growing And Emerging Concepts - Data reflects change and activity from April 18, 2008 to August 18, 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).**

Seattle, WA-based RESTAURANTS UNLIMITED (founded 1969) has increased by 1 unit for the Pizzeria Fondi concept, from 2 to 3 (50% concept growth), 2 units for Kincaid's Fish Chop & Steak, from 9 to 11 (22% concept growth), 2 units for Palomino, from 8 to 10 (25% concept growth), 1 unit for Stanford's Restaurant & Bar, from 9 to 10 (11% concept growth), and 1 unit for Newport Seafood Grill, from 3 to 4 (33% concept growth). Overall company growth was from 56 to 63 (13% company growth). The company entered into the state of WI. Other concepts include Billy Heartbeats (1), Clunkerdagger (1), Cutters Bayhouse (1), Henry's Tavern (1), Horatio's (1), Maggie Bluff's (1), Manzana Rotisserie Grill (3), Marina Fish House (1), Newport Bay Restaurant (7), Palisade (1), Portland City Grill (1), Ryan's Grill (1), Portland Steak & Chophouse (1), Scott's Bar & Grill (1), Simon & Seafort's (1), Skates on the Bay (1), and Stanley and Seafort's (1). These are all upscale restaurants, most serving steak & seafood, with a \$15-\$50+ per person check average. Most locations are open for lunch and dinner, with a few serving breakfast as well. Catering and banquet facilities are available. All restaurants have a full bar. Average seating is for about 200. Trading areas are AK, AZ, CA, HI, IN, MN, OH, OR, PA, TX, VA, WA, and WI.

Lincoln, NE-based RUNZA (founded 1949) has increased by 6 units for the Runza concept, from 74 to 80 (8% concept growth). They company also operates the 4-unit Braeda Fresh Express Cafe. Overall company increase was from 78 to 84 (8% company growth). Runzas are quick serve sandwich shops, open for lunch and dinner, with a \$3-\$8 per person check average. Braeda is a fast casual sandwich and salad café, with a \$6-\$12 per person check average. Average units have seating for about 80. Catering is available. Trading areas are CO, IA, KS, and NE. Around half the units are franchised.

MELLOW MUSHROOM headquartered in Atlanta, GA has increased by 4 units, from 82 to 86 (5% growth). These are quick serve restaurants with full bar and seating for about 60. The check average is around \$4-\$10 per person. Catering is offered. Locations are more than 90% franchised and are in AL, FL, GA, IN, KY, LA, MS, NC, SC, TN, TX and VA.

SUPER GYROS of Bloomington, IL has increased by 1 unit, from 2 to 3 (50% growth). These are mostly take-out Greek restaurants with seating for about 20. Catering and delivery are offered. Locations are in IL.

EARL OF SANDWICH based in Orlando, FL (founded 2004) has increased by 1 unit, from 9 to 10 (11% growth). These are quick serve sandwich shops with seating for about 100. The per person check average is around \$4-\$10. More than half are franchised. Locations are in CA, FL, IN, MI, NV and TX.

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

Vancouver, BC-based CACTUS CLUB CAFÉ (founded 1988) has increased by 2 units, from 17 to 19 (12% growth). These are upscale restaurants, featuring a variety of Asian, steak, seafood, pasta and Mexican entrees. Per person check average is \$15-\$30+. Meal periods are lunch and dinner. Restaurants have a full bar and seating for about 200. Locations are in AB and BC.

San Francisco, CA based MINA GROUP (founded 2002) has increased by 2 units, from 12 to 14 (17% growth) adding 2 new concepts, Clark Bar (1) and Nemi (1) and expanded into AZ. Other concepts are Arcadia (1), Bourbon Steak (3), Michael Mina (2), Nobhill (1), Saltwater (1), Seablue (2), Stonehill Tavern (1) and Stripsteak (1). They tend to be upscale Steak and Seafood restaurants with full bar and seating for around 250. The check average is around \$15-\$50+ per person. Banquets are offered. Current locations are in AZ, CA, MI, NJ and NV.

THE FREAKY BEAN COFFEE CO based in Westbrook, ME (founded 2006) has increased by 2 units for their Freaky Bean concept, from 2 to 4 (100% concept growth). Overall company growth is from 4 to 6 (50% company growth). These are quick serve coffee shops with seating for about 20. There is a second concept called Maine Roasters (2 units). All are located in ME.

**Concepts previously written about in the past 18 months.**

Wheat Ridge, CO-based QDOBA MEXICAN GRILL (founded 1995) has increased by 23 units, from 414 to 437 (6% growth). We wrote about this concept on 3/25/08 (12% growth). These are fast casual Mexican restaurants, open for lunch and dinner, with a \$4-\$10 per person check average. Beer and wine are served. Seating is for about 80. Catering is available. Trading areas are AK, AL, AR, AZ, CA, CO, DC, FL, GA, IA, ID, IL, IN, KY, LA, MA, MD, MI, MN, MO, MS, MT, NC, ND, NE, NJ, NV, NY, OH, OK, OR, PA, SC, SD, TN, TX, VA, WA, WI, WV, and WY, with locations to open soon in DE and KS. Between 70% and 80% of units are franchised. Qdoba is a subsidiary of San Diego, CA-based Jack in the Box restaurants.

Newport Beach, CA-based ZPIZZA (founded 1986) has increased by 4 units, from 73 to 77 (5% growth) and entered into MT. We wrote about this concept 4 times previously (4/10/07-14% growth, 7/2/07-3% growth, 12/26/07-12% growth, and 4/22/08 (9% growth). These quick serve pizzerias are open for lunch and dinner. Beer and wine are served at some locations. Most have seating for about 30. Catering, delivery and online ordering are available. Trading areas are AZ, CA, GA, MD,

MN, MT, NC, NV, PA, and VA. About 80% of units are franchised.

Sewell, NJ-based VENUTO'S OLD WORLD PIZZA (founded 2007) has increased by 5 units, from 8 to 13 (63% growth). We featured this concept in our 3/25/08 newsletter (75% growth). It also ranked #2 on our April 2008 Top Ten Fastest Growing Concepts list. These are quick serve pizzerias, open for lunch and dinner. Most units have seating for about 60. Online ordering and delivery are available. Trading areas are NJ and PA. All locations are franchised.

Memphis, TN-based LENNY'S SUB SHOP (founded 1998) has increased by 7 units, from 162 to 169 (4% growth) and entered into SC. We have featured this concept 3 times previously (4/24/07-33% growth, 12/4/07-4% growth, and 4/8/08-14% growth). These are quick serve sandwich shops, open for lunch and dinner, with a \$3-\$8 per person check average. Seating is for about 60. Catering and delivery are available. Trading areas are AL, AR, CA, FL, GA, IN, KS, MI, MO, MS, NC, NM, NV, OH, OK, SC, TN, TX, and VA, with locations to open in CO and LA later this year. More than 90% of stores are franchised.

MELT GELATO & CREPE CAFÉ based in Temecula, CA (founded 2003) has increased by 2 units, from 25 to 27 (8% growth) and expanded into VA. These are quick serve ice cream units with seating for about 30. The per person check average is around \$3-\$8. Locations are in AZ, CA, CT, IL, MA, OH and VA. We last reported on this concept in our 4/1/08 newsletter when they had 14% growth.

FAMOUS FAMIGLIA based in White Plains, NY (founded 1986) has increased by 5 units, from 88 to 93 (6% growth) and entered into KY. These are quick serve pizza restaurants with seating for about 50. Locations are in AK, AZ, DC, FL, GA, HI, IL, KY, MA, MI, MO, NJ, NY, NV, OH, PA, TN, TX and VA. There are plans to expand into CA, DE, MD, RI and WI. We reported on this concept in our 5/13/08 newsletter (44% growth).

## 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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