

Restaurant Trends - Growing And Emerging Concepts - Data reflects change and activity from April 25, 2008 to August 25, 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).

Dallas, TX-based EL CHICO MEXICAN CAFÉ (founded 1940) has increased by 7 units, from 73 to 80 (10% growth) and entered into MS. These are family/casual Mexican restaurants, open for lunch and dinner, with a \$6-\$15+ per person check average. Units seat about 225 and have a full bar. Catering is available. Trading areas are AL, AR, FL, KY, LA, MO, MS, OK, SC, TN, and TX. Between 30% and 40% of locations are franchised.

Austin, TX-based SERRANO'S CAFE & CANTINA (founded 1986) has increased by 1 unit for the Serrano's concept, from 5 to 6 (20% concept growth). The company also operates 8 Houston area Ninfa's restaurants. Overall company growth was from 13 to 14 (8% growth). Serrano's is a family/casual Mexican restaurant concept, open for lunch and dinner, with a \$6-\$15+ per person check average. Locations have a full bar and seating for about 150. Catering and banquet facilities are available. All units are in TX.

Montreal, PQ-based EGGSPECTION (founded 1993) has increased by 1 unit, from 14 to 15 (7% growth). The restaurants are family/casual, serving American cuisine. Meal periods are breakfast, lunch and dinner. The units have a full bar and seating for about 200. Per person check average is \$6-\$15+. Private party services are available. Trading areas are MD, ME, ON, PQ, VA, and India. Less than 10% of units are franchised.

SPRINKLES CUPCAKES based in Beverly Hills, CA has increased by 1 unit, from 3 to 4 (33% growth) and expanded into AZ. Units are fast casual with a limited menu and limited seating. Locations are in AZ, CA and TX. There are plans to open new units in Palo Alto, CA (September '08) and Houston, TX (February '09).

RAZZOO'S CAJUN CAFÉ headquartered in Addison, TX has increased by 1 unit for the Razzoo's concept from 11 to 12 (9% growth). There is a second 3-unit concept called Bone Daddy's. Overall company growth is from 14 to 15 (7% company growth). These are family/casual cajun restaurants with full bar and seating for about 250. The check average is around \$6-\$15+ per person. Catering is offered. Locations are in NC and TX.

GREEN CACTUS GRILL based in Centerport, NY (founded 1993) has increased by 1 unit, from 10 to 11 (10% growth). These are quick serve Mexican restaurants with seating for about 40. Catering is offered. The per person check average is around \$4-\$10. There is a new franchise program in place (currently 9% franchised). All are located in NY.

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

Spokane, WA-based PIZZA PIPELINE (founded 1988) has increased by 3 units, from 14 to 17 (21% growth). These are mostly take-out/delivery pizzerias, open for lunch and dinner. Online ordering is available. Locations are in ID, MT, OR, and WA. Between 60% and 70% of stores are franchised.

THE COUNTER based in Culver City, CA (founded 2003) has increased by 3 units, from 8 to 11 (38% growth) and expanded into CO and GA. These are family/casual burger restaurants with full bar and seating for about 100. The per person check average is around \$6-\$15+. Locations are more than 80% franchised and are in CA, CO, GA, NC and TX.

Concepts previously written about in the past 18 months.

Cincinnati, OH-based PENN STATION EAST COAST SUBS (founded 1985) has increased by 5 units, from 184 to 189 (3% growth). We wrote about this concept on 4/24/07 (6% growth) and again on 12/18/07 (5% growth). This is a fast casual sandwich shop concept, open for lunch and dinner, with a \$4-\$10 per person check average. Seating is for about 50. Trading areas are IL, IN, KY, MI, MO, NC, OH, PA, SC, TN, VA, and WV. More than 90% of units are franchised.

Reno, NV-based PORT OF SUBS (founded 1972) has increased by 7 units, from 146 to 153 (5% growth). We wrote about this concept on 12/18/07 (6% growth). These quick serve sandwich shops are open for breakfast, lunch and dinner, with a \$3-\$8 per person check average. Seating is for about 40. Catering and online ordering are available. Trading areas are AZ, CA, ID, NV, OR, UT, and WA. About 90% of units are franchised.

East Lansing, MI-based BIGGBY COFFEE (founded 1995) has increased by 8 units, from 92 to 100 (9% growth). We featured this concept on 2/6/07 (6% growth), 9/18/07 (17% growth) and on 12/26/07 (13% growth). This quick serve coffee concept is open for breakfast, lunch and dinner hours, with a \$2-\$6 per person check average. Some units have seating for about 50. Catering and online ordering are available. Trading areas are AL, FL, GA, IL, MI, OH, SC, and WI. More than 90% of the stores are franchised.

GOLDEN KRUST CARIBBEAN BAKERY & GRILL based in Bronx, NY (founded 1989) has increased by 7 units, from 123 to 130 (6% growth). These are quick serve Caribbean restaurants with seating for about 60. The per person check average is around \$4-\$10. Locations are more than 90% franchised and are in CT, FL, GA, MA, MD, NC, NJ and NY. We reported on this concept in our 4/24/07 newsletter (3% growth) and our 11/13/07 newsletter (4% growth).

URBAN FLATS FLATBREAD CO of Orlando, FL (founded 2004) has increased by 1 unit, from 7 to 8 (14% growth). We reported on this concept in our 10/23/07 newsletter (75% growth). These are family/casual restaurants with seating for around 150. Beer and wine are served and catering is offered. Locations are in FL and GA and about half are franchised. There are plans to expand into Nashville, TN, Atlanta, GA and Richmond, VA during the Fall of '08.

SANSAI JAPANESE GRILL based in Los Angeles, CA (founded 1978) has increased by 2 units, from 31 to 33 (6% growth). These are fast casual Japanese restaurants with seating for about 80. The check average is about \$6-\$15 per person. Catering and banquets are offered. Locations are in CA and MO. We reported on this concept in our 8/27/08 newsletter when they had 15% growth.

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