

Restaurant Trends - Growing And Emerging Concepts - Data reflects change and activity from May 22, 2008 to September 22, 2008  
2008-10-01

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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).**

White Plains, NY-based LIVANOS RESTAURANT GROUP (founded 1992) has increased by 1 unit, from 5 to 6 (20% growth), opening a new concept called Burger Deluxe. This is the first of the company's restaurants to open in NJ. The other restaurants are in CT and NY. Other concepts are Abboccato (1), City Limits Diner (3), Molyvos (1), and Oceana (1). Abboccato, Molyvos, and Oceana are upscale, with a \$15-50+ per person check average, while City Limits Diner and Burger Deluxe are more family/casual (\$10-\$30 per person). Restaurants have a full bar and average seating for about 200.

Columbus, OH-based CHARLEY'S GRILLED SUBS (founded 1986) has increased by 12 units, from 335 to 347 (4% growth). The restaurants are quick serve, open for lunch and dinner, with a \$3-\$8 per person check average. Catering is available. Many locations are in malls, while some have seating for about 30. More than 90% of units are franchised. Trading areas are AK, AL, AZ, CA, CO, CT, DC, FL, GA, HI, IA, IL, IN, KS, KY, LA, MA, MD, MI, MN, MO, MS, NC, NE, NJ, NM, NV, NY, OH, OK, ON, OR, PA, RI, SC, TN, TX, UT, VA, WA, WI, and WV.

Plymouth, MA-based BRITISH BEER COMPANY has increased by 1 unit, from 7 to 8 (14% growth). The restaurants are family/casual, open for lunch and dinner, with an \$8-\$20 per person check average. The restaurants have a full bar and seating for about 125. Banquet services are available. All units are in MA.

Englewood, CO-based JACKSON'S ALL AMERICAN SPORTS GRILL (founded 1977) has increased by 1 unit, from 4 to 5 (25% growth) and entered into TX. Other units are in CO and WY. These family/casual restaurants are open for lunch and dinner, with an \$8-\$20 per person check average. Seating is for about 250. All locations have a full bar and offer catering and private party services. Between 10% and 20% of units are franchised. Two more locations are scheduled to open later this year in Tucson, AZ and Parker, CO.

SAM & LOUIE'S NY PIZZA based in Omaha, NE (founded 1994) has increased by 1 unit, from 13 to 14 (8% growth). These are family/casual restaurants with seating for about 125. Beer and wine are served and catering is offered. The check average is around \$6-\$15+ per person. Locations are more than 90% franchised and are in NE.

TUMBLEWEED SOUTHWEST GRILL based in Louisville, KY (founded 1975) has increased by 1 unit, from 48 to 49 (2% growth). These are family/casual restaurants with full bar and seating for about 300. The check average is around \$8-\$20 per person. Catering is offered. About half the locations are franchised and they are located in IL, IN, KY, OH and WI.

THE PICKLE BARREL of Markham, ON has increased by 1 unit, from 9 to 10 (11% growth). These are family/casual restaurants with full bar and seating for about 150. The check average is around \$6-\$12 per person. Banquets and catering are offered. All locations are in ON.

SUSHI BOY headquartered in Gardena, CA has increased by 1 unit, from 11 to 12 (9% growth). These are family/casual sushi restaurants serving beer and wine. Seating is for about 40. The check average is around \$6-\$12. Catering is offered. All locations are in CA.

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

New York, NY-based ROSA MEXICANO (founded 1984) has increased by 2 units for the Rosa Mexicano concept, from 7 to 9 (29% concept growth) and entered into MD and NJ. The company also operates the 1-unit City Grill. Overall company increase was from 8 to 10 (25% company growth). Rosa's restaurants are upscale, open for lunch and dinner, with a \$15-\$50+ per person check average. All locations have a full bar, with an average seating of about 200. Catering and banquets are available. Trading areas are DC, FL, GA, MD, NJ, and NY.

LAST LICKS ICE CREAM of New Rochelle, NY (founded 1997) has increased by 2 units, from 5 to 7 (40% growth). These are quick serve ice cream restaurants with seating for about 20. Banquets are offered. Locations are in NY and MI.

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

Philadelphia, PA-based STARR RESTAURANT GROUP (founded 1995) has increased by 3 units, from 16 to 19 (19% growth), adding 3 new concepts-Parc, Chelsea Prime, and Teplitzky's. We wrote about this concept on 5/29/07 (7% company increase). The restaurants are all upscale concepts, serving a variety of cuisines. Per person check average is about \$15-\$50+. The restaurants are open for lunch and dinner, with a full bar. Locations seat an average of 150. Catering and banquets are offered. Other concepts are Alma De Cuba (1), Barclay Prime (1), Buddakan (3), Butcher & Singer (1), Continental (3), El Vez (1), Jones (1), Morimoto (2), Pod (1), Tangerine (1), and Washington Square (1). Trading areas are NJ, NY and PA.

Chattanooga, TN-based GORDON BIRSCH BREWERY RESTAURANT (founded 1988) has increased by 2 units for the Gordon Biersch concept from 26 to 28 (8% concept growth) and entered into TX and Taiwan. Other concepts are A1A Ale Works (1), Big River Grill (4), Bluewater Grill (1), Ragtime Tavern (1), Rock Bottom Restaurant (2), and Seven Bridges

Grille (1). Overall company increase was from 36 to 38 (6% growth). We featured this concept on 5/20/08 (13% company growth). These are family/casual American brewpub restaurants, open for lunch and dinner, with a per person check average of \$10-\$30. All units have a full bar. Seating is for about 400. Banquet services are available. Restaurants are in AZ, CA, CO, DC, FL, GA, HI, IL, LA, MD, MO, NC, NV, OH, SC, TN, TX, VA, WA, and Taiwan.

Manasquan, NJ-based JERSEY MIKE'S GIANT SUBS (founded 1956) has increased by 11 units, from 344 to 355 (3% growth). We wrote about this concept on 5/13/08 (2% growth). These are quick serve sandwich shops, open for lunch and dinner, with a \$3-\$8 per person check average. Seating is for about 20. Catering is available. Trading areas are AL, AZ, CA, CO, CT, FL, GA, IN, KS, KY, MA, MN, MO, NC, NJ, NV, OH, OK, PA, RI, SC, TN, TX, VA, WA, and WV. More than 90% of stores are franchised.

Huntington Beach, CA-based BJ'S RESTAURANTS (NASDAQ: BJRI, founded 1978) has increased by 6 units, from 72 to 78 (8% growth) and entered into 4 states (IN, KY, LA, WA). We wrote about this concept 3 times (9/4/07-15% growth, 2/5/08-8% growth, and 5/27/08-6% growth). The restaurants are family/casual, serving American cuisine. Per person check average is \$10-\$30. Meal periods are lunch and dinner. There is full bar service and seating for about 300. Catering and private party facilities are available. Online ordering and delivery are available at some locations. Trading areas are AZ, CA, CO, FL, HI, IN, KY, LA, NV, OH, OK, OR, TX, and WA.

AMATO'S SANDWICH SHOP based in Portland, ME (founded 1902) has increased by 3 units, from 31 to 34 (10% growth). These are fast casual sandwich shops with seating for about 40. Beer and wine are served and catering is offered. The check average is around \$3-\$8 per person. About half of the stores are franchised and are located in ME, NH and VT. We last reported on this concept in our 1/22/08 newsletter (11% growth).

ALEHOUSE RESTAURANTS based in Jupiter, FL (founded 1988) has increased by 2 units, from 44 to 46 (5% growth) and expanded into PA. We reported on this concept in our 6/3/08 newsletter (10% growth). These are family/casual restaurants with full bar and seating for about 300. The per person check average is around \$8-\$20. Catering is offered. Locations are in FL, GA, IL, NY and PA.

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This article comes from Hotel News Resource

<http://www.hotelnewsresource.com>

The URL for this story is:

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