

# *Nation's Restaurant News*

THE TOP

200

The ultimate sourcebook for  
chain restaurant rankings



NRN TOP 200

# Meeting them where they are

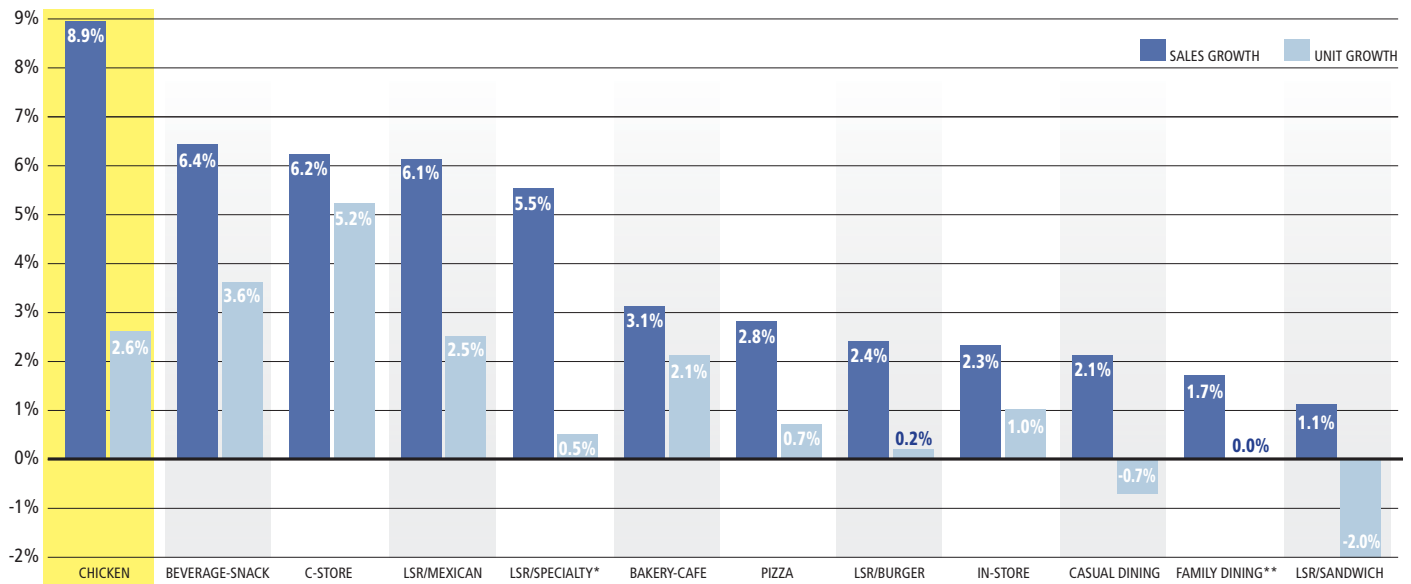
Accessibility, consistency key to chicken category growth **BY BRET THORN**

The 13 chicken chains tracked in the Top 200 once again enjoyed strong growth in the Latest Year, with total segment sales up by 8.9% to nearly \$26.5 billion.

It was the fastest-growing segment in the Top 200, and the average sales growth rate for the 13 chains in the segment was 5.7%, outpacing the 3.2% growth rate for Top 200 chains overall.

Those that performed the best updated their technology, delivered excellent and consistent product, or both.

### Sales and unit growth by segment



\*LSR/SPECIALTY INCLUDES BARBECUE, CAFETERIA, CHINESE, HOT DOG, ITALIAN, JAPANESE, MEDITERRANEAN, NOODLE, SEAFOOD. \*\*FAMILY DINING: FAMILY DINING, BUFFET, GRILL-BUFFET.

SOURCE: NRN RESEARCH

### CHICKEN (Estimated Sales Per Unit)

RANK 2019	CHAIN	AVERAGE UNIT VOLUME
99	BOJANGLES' FAMOUS CHICKEN 'N BISCUITS	\$1,708.9
119	POPEYES LOUISIANA KITCHEN	\$1,416.4
125	LEE'S FAMOUS RECIPE CHICKEN	\$1,251.1
146	KFC	\$1,083.7
152	GOLDEN CHICK	\$965.7
168	CHURCH'S CHICKEN	\$765.6

## SEGMENT INSIGHTS

### ESTIMATED SALES & AVERAGE VOLUME (Per Unit)

2019	CHAIN	AVG VOLUME
124	CARL'S JR	\$1,279.9
125	LEE'S FAMOUS RECIPE CHICKEN	1,251.1
126	SONIC DRIVE-IN	1,235.3
127	SRKU JAPAN	1,230.5
128	BLAZE FAST-FRIED PIZZA	1,225.5
129	PIZZA RANCH	1,219.5
130	BOSTON MARKET	1,219.2

### GROWTH IN US SYSTEMWIDE SALES

2019	CHAIN
153	BEEF O'BRADY'S FAMILY SPORTS PUB
154	BUBBA GUMP SHRIMP CO.
155	LEE'S FAMOUS RECIPE CHICKEN
156	BIG BOY / FRISH'S BIG BOY
157	SHONEY'S
158	BARNES & NOBLE CAFÉ
159	STEAK 'N SHAKE

### TOTAL NUMBER OF U.S. UNITS

2019	CHAIN
149	SHAKE SHACK
150	RUTH'S CHRIS STEAK HOUSE
151	LEE'S FAMOUS RECIPE CHICKEN
152	SHONEY'S
153	BAR LOUIE
154	CAFÉ RIO MEXICAN GRILL

### GROWTH IN TOTAL U.S. UNITS

2019	CHAIN
139	AUNTIE ANN'S
140	LEE'S FAMOUS RECIPE CHICKEN
141	TIM HORTON'S
142	BOSTON MARKET
143	SMOKEY BONES BAR & FIRE GRILL
144	MORTON'S THE STEAKHOUSE
145	LITTLE CEASAR'S PIZZA

### GROWTH IN U.S. FRANCHISE UNITS

2019	CHAIN
105	TEXAS ROADHOUSE
106	LEE'S FAMOUS RECIPE CHICKEN
107	TIM HORTON'S
108	NOODLES & COMPANY
109	DENNY'S
110	COLD STONE CREAMERY
111	THE MELTING POT

## SIZING UP THE 2019 TOP 200

+ **3.2%**

Average systemwide sales growth of Top 200 chains compared with 3.8% growth a year earlier

### FASTEST-GROWING SEGMENTS

Year-over-year % change, U.S. systemwide sales

**8.9%**

CHICKEN

**6.4%**

BEVERAGE-SNACK

**6.2%**

C-STORE

**6.1%**

LSR/MEXICAN

**5.5%**

LSR/SPECIALTY\*

SOURCE: NRN RESEARCH

### Unit expansion

**225,972**

UNITS UP FROM  
**223,706**  
A YEAR EARLIER

↑ **1%**

INCREASE IN TOTAL TOP 200 UNIT COUNT

↑ **1.9%**

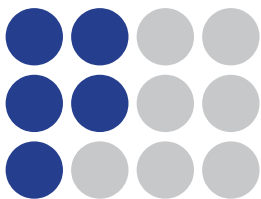
AVERAGE RATE OF UNIT GROWTH FOR CHAINS

### Sizing up the segments

Number of chains

Casual Dining	<b>61</b>
LSR/Burger	<b>26</b>
Family Dining**	<b>17</b>
Pizza	<b>16</b>
LSR/Sandwich	<b>14</b>
Beverage-Snack	<b>13</b>
<b>Chicken</b>	<b>13</b>
LSR/Specialty*	<b>12</b>
LSR/Mexican	<b>10</b>
Bakery-Cafe	<b>8</b>
C-Store	<b>6</b>
In-Store	<b>4</b>
<b>TOTAL</b>	<b>200</b>

## BY THE NUMBERS



**5** out of 12 segments gained Top 200 market share in the Latest Year

### Segments that **GAINED** share

BEVERAGE-SNACK

C-STORE

**CHICKEN**

LSR/MEXICAN

LSR/SPECIALTY

### Segments that **LOST** share

BAKERY-CAFE

CASUAL DINING

FAMILY DINING

IN-STORE

LSR/BURGER

LSR/SANDWICH

PIZZA