

Restaurant Trends - Growing And Emerging Concepts - Data reflects change and activity from July 27, 2007 to November 27, 2007
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Update from Restaurantchains.net on growing and emerging restaurant concepts

Growing Concepts that have grown by at least 5% during their period.

Lake Forest, CA-based JOHN'S INCREDIBLE PIZZA CO (founded 1995) has opened a new unit, from 7 to 8 (14% growth). These are 11,000 sq ft pizza buffets, open for lunch and dinner, with a \$6-\$12 per person check average. Beer and wine is served. Private party rooms are available. All locations are in CA.

Bloomington, IL-based BIAGGI'S RISTORANTE ITALIANO (founded 1999) has opened a new unit during the period, from 20 to 21 (5% growth), entering into the state of MS. These are family/casual Italian restaurants, open for lunch and dinner, with a \$10-\$30 per person check average. Units have a full bar and seating for about 250. Banquet rooms are available. Trading areas are CO, IA, IL, IN, MN, MS, NC, NE, NY, OH, UT, and WI.

Orlando, FL-based NATURE'S TABLE CAFÉ (founded 1977) has opened 3 units, from 60 to 63 (5% growth) and entered into the state of GA. These are fast casual restaurants, open for breakfast, lunch and dinner, with a \$3-\$8 per person check average. Units seat about 40. Trading areas are CA, CO, FL, GA, KS, MD, OK, PA, TX, and WA. Between 80 & 90% of locations are franchised.

CITY BARBEQUE based in Dublin, OH (founded 1999) has increased by 1 unit, from 11 to 12 (9% growth). Locations are family/casual BBQ restaurants serving beer and wine. Seating is for about 100. The per person check average is around \$6-\$15. Catering and banquets are offered. Units are 17% franchised and are located in OH.

FLAT TOP GRILL of Oak Park, IL (founded 1995) has increased by 1 unit, from 10 to 11 (10% growth). These are buffet restaurants with full bar and seating for about 125. The per person check average is around \$6-\$12. Catering and banquets are offered. Locations are in IL, IN, VA and WI.

Multiple new location openings:

BUFFALO WILD WINGS of Minneapolis, MN has 6 new locations opening. They are located in Virginia Beach-VA, Auburn-NY, Kingston-NY, South Elgin-IL, Round Rock-TX, and Gibsonia-PA. There are currently 461 total units in AL, AR, AZ, CA, CO, CT, DE, FL, GA, IA, IL, IN, KS, KY, LA, MD, MI, MO, MN, MS, MT, NC, ND, NE, NV, NY, OH, OK, OR, PA, SC, SD, TN, TX, VA, WI and WV.

CHILI'S GRILL & BAR headquartered in Dallas, TX has 10 new locations opening. They are located in Arlington-TX, Batesville-MS, Pace-FL, Morgan Hill-CA, Phoenix-AZ, Lauderhill-FL, Albany-GA, Palmdale-CA, Alice-TX and Frisco-TX. Current locations total 1318 and are in AB, AK, AL, AR, AZ, CA, CO, CT, DE, FL, GA, HI, IA, ID, IL, IN, KS, KY, LA, MA, MD, ME, MI, MN, MO, MS, NC, ND, NE, NH, NJ, NM, NV, NY, OH, OK, OR, PA, RI, SC, SD, TN, TX, UT, VA, VT, WA, WI, WV and WY.

Tampa, FL-based BEEF O'BRADY'S (founded 1985) has 4 new locations opening. They are in Gulfport-MS this November, with 3 more units to open in the next 2 months in Homestead-FL, Peru-IN, and Ocala-FL. Company total now is 230 units with locations in the states AL, AR, FL, GA, IL, IN, KY, LA, MD, MI, MN, MS, NC, OH, SC, TN, TX, VA, and WI.

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

Traverse City, MI-based GRAND TRAVERSE PIE CO (founded 1996) has opened 3 units, from 10 to 13 (30% growth) and entered into the state of IN. All other units are in MI. These fast casual bakery/cafes are open for breakfast, lunch and dinner, with a \$3-\$8 per person check average. Units have seating for about 30. Online ordering is available. About 90% of units are franchised.

DONNELLY HOSPITALITY MANAGEMENT of Vancouver, BC has opened two new concepts called The Modern and Lamplighter. The overall company growth is from 6 to 8 (33% growth). Units tend to be family/casual with full bar and seating for about 225. The per person check average is around \$10-\$30. Other concepts are Bar None (1), Bimini's Tap House (1), Granville Room (1), Library Square Public House (1), Republic (1) and The Calling Public House (1). All are located in BC.

FOGO DE CHAO CHURRASCARIA based in Dallas, TX (founded 1979) has increased by 2 units, from 13 to 15 (15% growth) and expanded into MD. These are upscale Brazilian restaurants with full bar and seating for around 350. The check average is around \$50 per person. Locations are in CA, DC, GA, IL, MD, MN, PA and TX.

Concepts previously written about in the past 18 months.

Carlsbad, CA-based RUBIO'S FRESH MEXICAN GRILL (founded 1983, NASDAQ: RUBO) has increased by 7 units, from 164 to 171 (4% growth). We last featured this company in our 2/13/07 newsletter (6% growth). The restaurants are family/casual, with a \$6-\$15+ per person check average. Locations serve beer and wine and have seating for about 150. Meal

periods are lunch and dinner. Catering platters are available. Trading areas are AZ, CA, CO, NV, and UT. About 10% of units are franchised.

Memphis, TN-based LENNY'S SUB SHOP (founded 1998) has opened 6 units, from 136 to 142 (4% growth) and expanded into the states of IN and NM. This concept was profiled in our 11/15/06 and 4/24/07 newsletters (48% growth over the past year). The restaurants 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 services are available. More than 90% of units are franchised. Locations are in the states of AL, AR, CA, FL, GA, IN, KS, MI, MO, MS, NC, NM, NV, OK, TN, and TX, with locations to open in soon in OH and VA.

Mississauga, ON, Canada-based EXTREME PITA (founded 1997) has opened 7 units, from 153 to 160 (5% growth) and entered into the state of RI. This concept was featured in our 5/8/07 newsletter (7% growth). These are fast casual sandwich shops, open for lunch and dinner, with a \$4-\$10 per person check average. Catering and online ordering are available from the company's website. Trading areas are AB, AZ, BC, CA, MB, NB, ND, NL, NS, NV, ON, PQ, RI, SK, and TX, with a St Cloud, MN location opening soon.

COFFEE BEAN & TEA LEAF of Los Angeles, CA (founded 1963) has increased by 132 units, from 459 to 591 (29% growth). These are quick serve coffee units open for breakfast, lunch and dinner. Seating is for about 30. Stores are 53% franchised and are located in AZ, CA, HI, NV, Asia, Australia and the Middle East. We last reported on this company in our 6/12/07 newsletter when they had 9% growth.

DAPHNE'S GREEK CAFÉ headquartered in San Diego, CA (founded 1991) has increased by 3 units, from 74 to 77 (4% growth). These are family/casual Greek restaurants serving beer and wine. Seating is for about 80. Units are open for lunch and dinner and catering is offered. The check average is around \$6-\$12 per person. Locations are in AZ, CA and CO. We last reported on this company in our 6/5/07 newsletter when they had 4% growth.

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