

Restaurant Trends - Growing And Emerging Concepts - Data reflects change and activity from
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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).

Layton, UT-based IGGY'S SPORTS GRILL has opened a new unit, from 6 to 7 (17% growth). The restaurants are family/casual sports bar and grills, open for lunch and dinner, with a \$6-\$15+ per person check average. Stores have full bars, with seating for about 200. All locations are in UT. A new franchise program is currently in planning.

Los Angeles, CA-based POLLO CAMPERO (founded 1971) has opened 22 units, from 212 to 234 (10% growth) and opened their first locations in the state of FL and the country of China. Stores are fast casual chicken restaurants. They are open for breakfast, lunch and dinner, with a \$3-\$8 per person check average. Seating is available for about 80 and catering is offered. Trading areas are CA, DC, FL, IL, MD, NY, TX, VA, and the countries of Guatemala, Honduras, Ecuador, El Salvador, China, Costa Rica, Nicaragua, Mexico, Spain, and Indonesia. More than 90% of units are franchised.

CONCENTRIC RESTAURANTS of Atlanta, GA (founded 2002) has added a new concept called Stats Food Play. The overall company growth is from 8 to 9 units (13% growth). Units are typically upscale with a full bar and seating for around 200, whereas the Stats Food Play concept is more of a sports bar. Current concepts are Lobby At Twelve (1), Luma On Park (1), Murphy's (1), One Midtown Kitchen (1), Piebar (1), Stats Food Play (1), Tap (1), Trois (1) and Two Urban Licks (1). All locations are in GA.

GRILL CONCEPTS headquartered in Los Angeles, CA (founded 1984) has increased by 2 units for their Daily Grill concept, from 21 to 23 (10% concept growth). Overall company increase is from 26 to 28 (8% growth). Restaurants are family/casual with full bars. Seating is for about 200. The per person check average is around \$10-\$30. The company's other concept is called Grill On The Alley (5 units). Locations are in CA, DC, IL, MD, OR, TN, TX, VA and WA.

CARROLS CORP headquartered in Syracuse, NY (NASDAQ: TAST- founded 1960) has increased by 3 units for their Pollo Tropical concept, from 80 to 83 (4% concept growth) and by 6 units for their Taco Cabana concept, from 141 to 147 (4% concept growth). During the same period, the company decreased 1 unit for their Burger King concept, from 326 to 325. The overall company growth is from 547 to 555 (1% company growth). Locations are currently in CT, FL, GA, IN, KY, MA, ME, MI, NC, NM, NY, OH, OK, PA, SC, TX, VT, Puerto Rico and Ecuador.

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

Winston Salem, NC-based EAST COAST WINGS (founded 1995) has opened 2 units, from 9 to 11 (22% growth). The restaurants are family/casual specializing in buffalo wings. Units average between 80 and 100 seats. Meal periods are lunch and dinner and beer is served. About 90% of units are franchised. All locations are in NC.

Haymarket, VA-based FOSTER'S GRILLE (founded 1999) has increased by 5 units, from 14 to 19 (36% growth) and entered into the state of FL. These family/casual, American restaurants are open for lunch and dinner, with a \$6-\$15+ per person check average. Seating is for about 100. Beer and wine is served and there are private party facilities available. Locations are in the states of FL, GA, MD, MO, NC, and VA. Between 60 and 70% of units are franchised.

HARRY CARAY'S RESTAURANT GROUP based in Chicago, IL (founded 1987) has increased by 1 unit for their Harry Caray Italian Steakhouse concept, from 2 to 3 (50% concept growth). The company also added a new concept called Holy Mackerel. The overall company increase is from 5 to 7 (40% growth). These are mostly upscale steakhouses with full bar and seating for around 225. The check average is around \$15-\$30+ per person. Catering and banquets are available. Current concepts are 10 Pin Bowling Lounge (1), Harry Caray's Italian Steakhouse (3), Harry Caray's Seventh Inning Stretch (1), Hi-tops Bar (1) and Holy Mackerel (1). All locations are in IL.

GREENBERRY'S COFFEE & TEA based in Charlottesville, VA (founded 1992) has increased by 5 units, from 9 to 14 (56% growth) and expanded into MD and NJ. These are quick serve coffee shops with seating for about 30. The per person check average is around \$2-\$6. Locations are more than 90% franchised and are located in MD, NC, NJ, TX and VA.

SMITHFIELD CHICKEN & BBQ headquartered in Cary, NC (founded 1964) has increased by 2 units, from 32 to 34 (6% growth). These are fast casual BBQ restaurants with seating for about 40. Catering is offered and the per person check average is around \$4-\$10. About 50% of units are franchised. All are located in NC.

Concepts previously written about in the past 18 months.

Northglenn, CO-based WINGMAN (founded 1981) has opened 2 units, from 5 to 7 (40% growth) and entered into GA. This concept was featured in our 1/16/07 newsletter (25% growth). Growth over the last year was 75%. These quick serve chicken restaurants are open for lunch and dinner, with a \$3-\$8 per person check average. Units serve beer, and have seating for about 50. Catering and delivery are available. Between 70 and 80% of locations are franchised. Trading areas are CO, GA, and NJ.

Orlando, FL-based NYPD PIZZA (founded 1996) has increased by 2 units, from 12 to 14 (17% growth) and entered into CO and UT. We wrote about this concept in our 5/15/07 newsletter (20% growth, entered 2 states). These quick serve pizzerias are open for lunch and dinner, serving beer and wine. Seating is for about 60. Locations are in the states of AR, CA, CO, FL, NM, SC, TN, and UT. More than 90% of units are franchised.

New York, NY-based CHINA GRILL MANAGEMENT INC (founded 1987) has opened 1 unit of their China Grill concept, from 5 to 6 and 1 unit for Kobe Club, from 1 to 2. Overall company increase was from 25 to 26 units (4% growth), due to closure of the Wild Salmon concept. We featured this company in our 3/13/07 newsletter (4% company growth). Other concepts are Asia De Cuba (5), Blue Door (1), Borough Food & Drink (1), Hudson Cafeteria (1), Mix (1), Ono (1), Red Square (2), Red White And Blue (1), Rumjungle (1), Social (2), Suka (1), and Tuscan Steak (1). These are upscale restaurants, with varying cuisine types, most with a per person check average of \$50 and up. Banquet facilities are available. Restaurants are located in AZ, CA, FL, IL, NJ, NV, NY, London, and Mexico City.

Scottsdale, AZ-based KONA GRILL (NASDAQ: KONA, founded 1998) has opened 2 units, from 16 to 18 (13% growth) and entered 2 states (CT and LA). We had written about this concept twice previously (12/12/06-40% growth and 8/28/07-14% growth). These family/casual American restaurants are open for lunch and dinner, with a full bar and seating for about 275. Per person check average is \$10-\$30. Trading areas are AZ, CO, CT, FL, IL, IN, LA, MI, MO, NE, NV, and TX, with new locations scheduled to open soon in Richmond, VA and Eden Prairie, MN.

EAST COAST SALOONS based in New York, NY (founded 1977) has increased by 1 unit for their McFadden's concept from 10 to 11 (10% concept growth) and expanded into NV. The overall company increase is from 16 to 17 (6% company growth). These are family casual locations with full bar and seating for about 300. Concepts are Burke's Bar (1), Calico Jack's (2), Makers Lounge (1), McFadden's (11) and Sully's Saloon (2). Locations are in DC, IL, KY, MA, NV, NY, OH, PA and TN. We last reported on this company in our 8/14/07 newsletter (23% growth).

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