

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).

PHILLY'S BEST based in Irvine, CA (founded 1992) has increased by 2 units, from 22 to 24 (9% growth). These are quick serve sandwich shops with seating for about 80. Beer is served and catering is offered. The per person check average is around \$4-\$10. Units are 75% franchised. All stores are located in CA.

ARIZONA STEAKHOUSE based in Simpsonville, SC has increased by 1 unit for their Arizona's at Stonecrest concept, from 1 to 2 (100% concept growth). The overall company increase is from 5 to 6 (20% company growth). Other concepts are Arizona Steakhouse (2) and Travinia Italian Kitchen (2). These are upscale restaurants with full bar and seating for about 175. Cuisines include Italian and Steak as the main themes. Locations are currently in GA and SC.

AMATO'S SANDWICH SHOP headquartered in Portland, ME (founded 1972) has increased by 3 units, from 27 to 30 (11% growth). Stores are fast casual serving pizza, pasta and sandwiches. The per person check average is around \$3-\$8. Seating is for about 40 and catering is offered. Locations are 43% franchised and are in ME, NH and VT.

DOUBLEDAVE'S PIZZAWORKS of Austin, TX (founded 1984) has increased by 7 units, from 49 to 56 (14% growth). These are quick serve units with seating for about 40. Beer is served. Catering is offered. More than 90% of locations are franchised and all are in TX.

Alpharetta, GA-based PROVINO'S ITALIAN RESTAURANT (founded 1977) has opened a new unit for the Provino's concept, from 9 to 10 (11% concept growth). The company also operates the 2-unit Scalini's Italian Restaurant. Overall company increase was from 11 to 12 (9% company growth). These are family/casual Italian restaurants with a \$13-\$20 per person check average. Most locations are open for dinner only, however 2 locations serve lunch also. All have a full bar. Seating is for about 225. Banquet facilities are available. Trading areas are GA and TN.

Ferndale, MI-based BD'S MONGOLIAN BBQ (founded 1992) has opened 3 units, from 30 to 33 (10% growth). This fast casual Asian concept is open for lunch and dinner, with an \$8-\$20 per person check average. Seating is for about 225, with a full bar. Locations are in the states of CO, FL, IL, IN, KS, KY, MD, MI, MO, OH, and WV, with 1 unit in Mongolia. More than half the units are franchised.

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

VERA'S BURGER SHACK based in Kitsilano, BC (founded 1977) has increased by 2 units, from 7 to 9 (29% growth). Locations are quick serve with seating for about 40. Per person check average is around \$3-\$8. Catering is offered. Units are more than 30% franchised and all are located in BC.

Farmers Branch, TX-based CANTINA LAREDO has opened 4 units, from 17 to 21 (24% growth). This is an upscale Mexican concept, open for lunch and dinner, with a per person check average of about \$15-\$30. Seating is for about 200, with a full bar service. Catering is available. Trading areas are AZ, FL, LA, MO, OK, and TX. Cantina Laredo is a subsidiary of Consolidated Restaurant Operations.

Woodbridge, VA-based BUFFALO PHILLY'S has opened 2 locations, from 5 to 7 (40% growth). These are fast casual chicken restaurants, with a \$4-\$10 per person check average. Beer is served. Units have seating for about 40. All locations are in VA.

Culver City, CA-based RED MANGO (founded 2002) has opened 11 units, from 2 to 13 (550% growth) and entered into 4 states (NY, OR, UT, WA). These are quick serve frozen yogurt shops, with a \$3-\$8 per person check average and seating for about 20. Units are open for lunch and dinner hours. More than 90% of locations are franchised. Trading areas are CA, NC, NY, OR, UT, and WA, with 2 locations to soon open in IL.

Los Angeles, CA-based PINKBERRY (founded 2005) has opened 12 units, from 28 to 40 (43% growth). The restaurants are quick serve yogurt shops, with a \$3-\$8 per person check average. Seating is for about 50. Meal periods are lunch and dinner hours. Locations are in CA and NY. All are company owned and operated.

Concepts previously written about in the past 18 months.

B.R. GUEST RESTAURANTS of New York, NY (founded 1987) has added a new concept called Primehouse New York. Company increase is from 17 to 18 units (6% growth). Current concepts are Atlantic Grill (1), Blue Fin (1), Blue Water Grill (2), David Burke's Primehouse (1), Dos Caminos (4), Fiamma Trattoria (2), Isabella's (1), Level V (1), Ocean Grill (1), Primehouse New York (1), Ruby Foo's (2) and Vento (1). These are upscale restaurants with full bar and seating for about 250. The per person check average is around \$30-\$50+. Cuisines are Italian, Asian, Mexican, Seafood and Steakhouse. Locations are in IL, NV and NY. We last reported on this company in our 8/14/07 newsletter when they had 33% growth.

BANDANA'S BAR-B-Q based in St Louis, MO (founded 1996) has increased by 3 units, from 21 to 24 (14% growth). These are family casual BBQ restaurants with full bar and seating for about 150. The check average is around \$8-\$20 per person. Units are 21% franchised and are IN, IA, IL and MO. We reported on this concept in our 3/6/07 newsletter when they had 11% growth.

BAKER BROS AMERICAN DELI of Dallas, TX (founded 1999) has increased 4 units, from 12 to 16 (33% growth) and expanded into SC. These are fast casual deli concepts with seating for around 125. Catering is offered and beer and wine is served. The per person check average is around \$6-\$12. Units are 50% franchised and are in AR, NV, SC and TX. We wrote about this concept in our 8/20/07 newsletter when they had 20% growth.

Park Ridge, NJ-based BENSI (founded 1983) has opened 2 units, from 16 to 18 (13% growth). This concept was previously featured in our 8/4/06 newsletter (8% growth) and in our 5/29/07 edition (23% growth). The restaurants are family/casual, with a \$10-\$30 per person check average. Seating is for about 100, with full bar service. Meal periods are lunch and dinner. Catering and banquet services are offered. Locations are in NJ and PA. A new unit is scheduled to open in Wyomissing, PA this winter.

Charlotte, NC-based BOJANGLES' FAMOUS CHICKEN & BISCUITS (founded 1977) has opened 12 units, from 380 to 392 (3% growth) and entered into the state of NJ. We covered this concept in our 5/15/07 newsletter (5% growth). These quick serve chicken restaurants are open for breakfast, lunch and dinner, with a \$2-\$6 per person check average. Seating is for about 50. Between 60 and 70% of locations are franchised. Trading areas are AL, FL, GA, MD, NC, NJ, NY, PA, SC, TN, VA, Honduras, and Mexico.

Whitewater, WI-based TOPPERS PIZZA (founded 1991) has opened 2 locations, from 15 to 17 (13% growth) and entered IL. This concept was featured in our 8/28/07 newsletter (15% growth). This is a quick serve pizzeria concept, open for lunch and dinner. Seating is for about 50. Catering and delivery are available. Between 30 and 40% of units are franchised. Trading areas are IL, MN, NC, and WI.

Atlanta, GA-based TED'S MONTANA GRILL (founded 2002) has opened 4 locations, from 51 to 55 (8% growth) and entered into MA. We've written about this company 3 times before (2/6/07-13% growth), 5/15/07-9% growth and 10/9/07-4% growth). Overall 1-year growth was 38%. The company also ranked #10 on our July '07 Top Ten Fastest Growing Restaurant Concepts list. The restaurants are family/casual steakhouses, with a \$10-\$30 per person check average. Meal periods are lunch and dinner. Locations have a full bar. Seating is for about 200. Trading areas are AL, CO, CT, FL, GA, IL, IN, KS, KY, MA, MO, NC, NE, NY, OH, PA, RI, TN, and VA. A Bozeman, MT location is scheduled to open in June '08.

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