

Restaurant Trends - Growing And Emerging Concepts - Data reflects change and activity from October 27, 2007 to February 27, 2008
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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).

Chicago, IL-based FOUR CORNERS TAVERN GROUP (founded 1994) has increased by 1 unit, from 5 to 6 (20% growth), with the opening of a new concept called Westend. Other concepts are Brownstone Tavern, Gaslight Bar & Grille, Kirkwood Bar & Grille, Schoolyard Tavern, and Sidebar Restaurant. These are family/casual bar and grill restaurants, open for lunch and dinner, with an \$8-\$20 per person check average. Average seating is about 125. Banquet facilities are available. All units are in IL.

Maryland-based GREYSTONE GRILL has increased by 1 unit, from 3 to 4 (33% growth). The restaurants are family/casual, serving American cuisine. Per person check average is \$10-\$30. Seating is for about 125, with a full bar. Meal periods are lunch and dinner. Private party facilities are available. All units are in MD. Plans are to open 2 more locations (Frederick, MD and Leesburg, VA) later this year.

Edmonton, AB-based BOOSTER JUICE (founded 1999) has increased by 22 units, from 166 to 188 (13% growth) and entered into NJ and TX. These juice/smoothie cafes are open for lunch and dinner hours, with a \$2-\$6 per person check average. Seating is for about 10. Catering is available. Trading areas are AB, AZ, BC, CA, FL, ID, MB, NB, NJ, NL, NS, NY, ON, OR, PQ, SK, TX, UT, WA, Saudi Arabia, and the UAE. More than 90% of units are franchised.

BARGO'S GRILL & TAP of Dayton, OH has increased by 1 unit, from 2 to 3 (50% growth). These are family/casual bar and grill units with full bar and seating for about 150. Locations are company owned and are in OH.

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

La Jolla, CA-based LADEKI RESTAURANT GROUP (founded 1989) has increased by 2 units for their Sammy's Woodfire Pizza concept, from 12 to 14 (17% concept growth). The company also operates a Japanese restaurant concept called Roppongi (1 unit). Overall company growth from 13 to 15 (15%). Sammy's is a family/casual pizza restaurant, open for lunch and dinner, with seating for about 150. Locations offer a full bar, with banquet and catering services. Trading areas are CA and NV. A new Sammy's is scheduled to open in La Mesa, CA later this year.

NANDO'S CHICKEN CANADA based in Richmond, BC (founded 1994) has increased by 4 units, from 20 to 24 (20% growth). These are fast casual chicken restaurants with seating for about 60. The check average is around \$8-\$20 per person. Catering is offered. Locations are more than 90% franchised and are in AB, BC and ON.

JIM'S RAZORBACK PIZZA of Springdale, AR has increased by 3 units, from 17 to 20 (18% growth) and expanded into MO. These are quick serve restaurants with seating for around 50. Catering is offered. Locations are 45% franchised and are in AR and MO.

THAI SPICE of Houston, TX has increased by 2 units, from 5 to 7 (40% growth). These are buffet restaurants with seating for about 150. Beer and wine and catering are offered at some locations. The per person check average is around \$6-\$12. All are located in TX.

WINGS XTREME of Columbus, OH has increased by 2 units, from 2 to 4 (100% growth) and expanded into IN. Locations are take-out/delivery and open for lunch and dinner. The check average is around \$3-\$8 per person. Catering and franchising are offered. Locations are in OH and IN.

Concepts previously written about in the past 18 months.

Irvine, CA-based YARD HOUSE RESTAURANT (founded 1996) has increased by 2 units, from 17 to 19 (12% growth). We wrote about this company once before in our 2/6/07 newsletter (14% growth). These are family/casual, American restaurants, open for lunch and dinner, with a \$10-\$30 per person check average. Locations have a full bar and seating for about 300. Catering and private party facilities are available. Trading areas are AZ, CA, CO, FL, HI, IL, and KS.

Scottsdale, AZ-based PARADISE BAKERY & CAFÉ (founded 1976) has increased by 12 units, from 53 to 65 (23% growth). We wrote about this concept twice before (3/20/07-13% growth and 10/30/07-18% growth). The restaurants are fast casual, with a \$3-\$8 per person check average. Meal periods are breakfast lunch and dinner. Seating is for about 60. Catering and delivery services are available. Trading areas are AZ, CA, CO, IN, MA, NE, OR, TX, UT, and WA. More than 50% of units are franchised.

Heathrow, FL-based RUTH'S CHRIS STEAKHOUSE (NASDAQ: RUTH, founded 1965) has increased by 8 units, from 110 to 118 (9% growth) and entered into AR. We wrote about this chain on 10/23/07 (4% growth). The restaurants are upscale, open for dinner only, with a \$30-\$50+ per person check average. Locations have a full bar and seating for about 250. Private dining facilities are available. Trading areas are AB, AL, AR, AZ, CA, CO, CT, DC, FL, GA, HI, IL, IN, KY, LA, MA, MD, MI, MN, MO, MS, NC, NJ, NV, NY, OH, ON, OR, PA, RI, SC, TN, TX, UT, VA, WA, WI, Aruba, China, Japan, Mexico,

and Puerto Rico. More than half of units are franchised.

Athens, GA-based ZAXBY'S (founded 1990) has increased by 24 units, from 392 to 416 (6% growth). We've written about this concept 3 times before (10/2/06-4% growth, 2/20/07-13% growth, and 9/25/07-7% growth). These family/casual chicken restaurants are open for lunch and dinner, with a \$4-\$10 per person check average. Seating is for about 90. More than 90% of units are franchised. Trading areas are AL, AR, FL, GA, KY, MS, NC, SC, TN, and VA, with a Mansfield, TX location to open this year.

EMERIL'S HOMEBASE INC of New Orleans, LA (founded 1990) has added a new concept called Table 10, increasing from 10 to 11 units (10% growth). This is an upscale American restaurant located at the new Palazzo Hotel in Las Vegas, NV. The per person check average is around \$30-\$50+. Most Emeril's concepts tend to seat around 225. Current concepts are Delmonico Steakhouse (1), Emeril's Delmonico (1), Emeril's Gulf Coast Fish House (1), Emeril's New Orleans Fish House (1), Emeril's Restaurant (4), Emeril's Tchoup Choup (1), Nola Restaurant (1) and Table 10 (1). Locations are in FL, GA, LA, MS and NV. We last reported on this company in our 11/6/07 newsletter when they had 11% growth.

DUTCH BROS COFFEE headquartered in Grants Pass, OR (founded 1992) has increased by 9 units, from 114 to 123 (8% growth). These are take-out coffee stands open for breakfast, lunch and dinner. Locations are more than 80% franchised and are in AZ, CA, ID, NV, OR and WA. We reported on this concept in our 4/3/07 newsletter (12% growth) and our 11/6/07 newsletter (21% growth).

WING ZONE based in Atlanta, GA (founded 1991) has increased by 15 units, from 85 to 100 (18% growth). We last wrote about this concept in our 3/20/07 newsletter when they had 6% growth. These are mostly take-out/delivery units with limited seating. Locations are open for lunch and dinner and catering is offered. The per person check average is around \$4-\$10. Locations are more than 90% franchised and are in AL, CO, FL, GA, IA, IL, KY, LA, MD, MI, MO, MS, NC, ND, NE, NJ, NY, OH, PA, SC, TN, TX, VA, WA and WI.

SALVATORE'S OLD FASHIONED PIZZERIA of Rochester, NY (founded 1978) has increased by 2 units, from 14 to 16 (14% growth). These are quick serve Italian and pizza restaurants with seating for about 30. Online ordering and catering are offered. We reported on this concept in our 6/27/07 newsletter when they had 27% growth. Locations are currently in NY. There are plans to expand into NC during 2008.

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