

Restaurant Trends - Growing And Emerging Concepts - Data reflects change and activity from January 5, 2008 to May 5, 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).

Carp, ON-based MEXICALI ROSA'S (founded 1979) has increased by 2 units for the Mexicali Rosa's concept, from 25 to 27 (8% concept growth). They also operate a 2-unit concept called Hernando's Hideaway. Overall company increase was from 27 to 29 (7% growth). These are family/casual Mexican restaurants, open for lunch and dinner, with a \$6-\$15+ per person check average. Seating is for about 80. All locations have a full bar. Banquet services are available. More than 90% of units are franchised. Trading areas are NB, NL, NS, ON, and PQ.

Washington, DC-based ROCKLAND'S BBQ & GRILLING CO (founded 1990) has increased by 1 unit, from 3 to 4 (33% growth). These are family casual BBQ restaurants, open for lunch and dinner, with a \$4-\$10 per person check average. Locations have a full bar and seating for about 50. Catering and delivery are available. Units are in DC, MD, and VA.

Golden, CO-based TUCANOS BRAZILIAN GRILL has increased by 1 unit, from 2 to 3 (50% growth). These are upscale, South American steakhouses, with a \$15-\$30+ per person check average. Locations have seating for about 300 and a full bar. Catering is available. Locations are in NM and UT.

DOOLITTLES RESTAURANTS headquartered in Bloomington, MN (founded 1989) has increased by 1 unit, from 3 to 4 (33% growth). The restaurants are family/casual with full bar. Seating is for about 200. The check average is around \$8-\$20 per person. Banquets are offered. Locations are in MN and ND.

MASTRO COMPANIES based in Scottsdale, AZ (founded 1991) has increased by 1 unit for their Maloney's Tavern concept, from 6 to 7 (17% concept growth). There is a second 1-unit concept called Cocomo Joes. Overall company growth is from 7 to 8 (14% growth). Locations tend to be family/casual with full bar and seating for about 300. The check average is around \$10-\$30+. Banquets and catering are offered. Locations are in AZ, CA, CO and NM.

FAMOUS FAMIGLIA headquartered in White Plains, NY (founded 1986) has increased by 27 units, from 61 to 88 (44% growth) and expanded into OH and AK. These quick serve pizza restaurants are mostly located in airports and stadiums. Locations are in AK, AZ, DC, FL, GA, HI, IL, MA, MI, MN, MO, NJ, NV, NY, OH, PA, TN, TX, VA, Hong Kong, Russia and Mexico. There are plans to open units in CA, KY, MD and RI.

COWBOY CIAO of Scottsdale, AZ has added a new concept called Digestif. Overall company increase is from 3 to 4 (33% growth). Other concepts are Cowboy Ciao (1), Kazimierz (1) and See Saw (1). Units tend to be upscale with full bar and serving multiple cuisines. Seating is for about 70 with catering and banquets offered. The per person check average is around \$15-\$30+. All locations are in AZ. There are plans to open another new concept called Mexican Standoff in Scottsdale, AZ, in Spring '08.

QUAKER STEAK & LUBE based in Sharon, PA (founded 1974) has increased by 3 units, from 25 to 28 (12% growth). These are family/casual restaurants with full bar and seating for around 350. The check average is around \$6-\$15+ per person. Catering and banquets are offered. Units are more than 90% franchised. Locations are in FL, NC, OH, PA, TN, WI and WV.

In last week's newsletter, we incorrectly reported that Lombardi Family Concepts had opened a new concept called La Taverna. The correct name for the concept is La Cubanita. Restaurantchains.net regrets the error.

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

San Francisco, CA-based CAFFE TRIESTE (founded 1956) has increased by 2 units, from 5 to 7 (40% growth). These fast casual bakery/cafes are open for breakfast, lunch and dinner, with a \$4-\$10 per person check average. Seating is for about 50 and beer and wine are served. All locations are in CA.

Scottsdale, AZ-based FOX RESTAURANT CONCEPTS has increased by 1 unit for the North concept, from 4 to 5 (25% concept growth), 8 to 9 units for Sauce (13% concept growth) and added a new concept called Zinburger (1 unit). Overall company increase was from 20 to 23 (15% growth). The company has entered into the state of TX. Other trading areas are AZ and CO. Other concepts are Blanco Tacos & Tequila (1), Bloom (2), Chloe's Corner (1), Montana Avenue (1), Olive & Ivy (1), The Greene House (1), and Wildflower (1). The concepts are mostly family/casual, with a \$10-\$30 per person check average. Meal periods are lunch and dinner, serving a multitude of cuisine types. Most units seat an average of 250, with a full bar. Private party facilities are available.

Concepts previously written about in the past 18 months.

Manasquan, NJ-based JERSEY MIKE'S GIANT SUBS (founded 1956) has increased by 8 units, from 336 to 344 (2% growth) and entered into AZ. We previously wrote about this concept in our 2/13/07 newsletter (3% growth). These are quick serve sandwich shops, open for lunch and dinner, with a \$3-\$8 per person check average. Units have seating for about 20.

Catering is available. Trading areas are AL, AZ, CA, CO, CT, FL, GA, IN, KS, KY, MA, MN, MO, NC, NJ, NV, OH, OK, PA, RI, SC, TN, TX, VA, WA, and WV. More than 90% of locations are franchised.

Tulsa, OK-based CAMILLE'S SIDEWALK CAFÉ (founded 1996) has increased by 3 units for the Camille's concept, from 81 to 84 (4% concept growth) and has also added a new quick serve frozen yogurt concept called Freshberry (1 unit). Camille's also operates a 1-unit concept called Coney Beach. Overall company increase was from 82 to 86 (5% growth). The company has entered into the states of LA, NM, and SC. We wrote about this concept on 7/10/07 (6% company growth). The restaurants are fast casual soup and sandwich shops, with a \$4-\$10 per person check average. Meal periods are breakfast, lunch and dinner. Seating is for about 70, serving beer and wine. Catering and online ordering are available. Trading areas are AR, CA, CO, DC, FL, GA, IA, IL, IN, KS, LA, MI, MN, MO, NC, NE, NJ, NM, NY, OH, OK, PA, SC, SD, TX, and VA. All units are franchised.

Danbury, CT-based FAMOUS UNCLE AL'S HOT DOGS & GRILL (OTCBB: FDOG, founded 1985) has increased by 2 units, from 14 to 16 (14% growth). We featured this concept in our 12/26/07 newsletter (40% growth). These family/casual hot dog shops are open for lunch and dinner, with a \$3-\$8 per person check average. Beer is served and seating is for about 50. Online ordering is available. Trading areas are AZ, CT, FL, NV, and VA. All locations are franchised.

HOMEMADE PIZZA CO based in Chicago, IL has increased by 2 units, from 20 to 22 (10% growth). These are take-out pizza restaurants. Catering is offered. Locations are in IL and MN. We wrote about this company three times previously in our 1/2/07 newsletter (43% growth), also our 6/12/07 newsletter (40% growth) and our 1/2/08 newsletter (43% growth). This concept ranked # 3 on our July '07 Top Ten fastest growing concepts list.

THE COUNTER based in Culver City, CA (founded 2003) has increased by 1 unit from 7 to 8 (14% growth). These are family casual burger restaurants with full bar and seating for about 100. The check average is around \$6-\$15+ per person. Locations are more than 80% franchised and are in CA, FL, NC and TN. We wrote about this concept in our 1/8/08 newsletter when they had 133% growth.

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