

Restaurant Trends - Growing And Emerging Concepts - Data reflects change and activity from January 12, 2008 to May 12, 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).

San Jose, CA-based LEE'S SANDWICHES (founded 2001) has increased by 1 unit, from 32 to 33 (3% growth) and entered OK. The restaurants are quick serve sandwich shops, open for breakfast, lunch and dinner, with a \$2-\$6 per person check average. Trading areas are AZ, CA, OK, and TX. Less than 10% of units are franchised. There are plans to open new locations in Rowland Heights, CA and Dallas, TX later this year.

Lakewood, OH-based ALADDIN'S EATERY (founded 1994) has increased by 3 units, from 22 to 25 (14% growth) and entered into TX and VA. These family/casual Mediterranean restaurants are open for lunch and dinner, with a \$6-\$15+ per person check average. Beer and wine are served. Seating is for about 50. Catering is available. Trading areas are IL, NC, OH, PA, TX, and VA. More than 90% of locations are franchised.

Gainesville, FL-based GUMBY'S PIZZA (founded 1985) has increased by 3 units, from 21 to 24 (14% growth). These are take-out/delivery pizzerias, open for lunch and dinner. Online ordering is available. About half the locations are franchised. Units are in FL, GA, IA, IL, KS, MI, MO, NC, OH, PA, TX, VA, and WI.

BROTHERS BBQ of Denver, CO (founded 1998) has increased by 1 unit, from 7 to 8 (14% growth). Locations are family/casual serving beer and wine. Seating is for about 100 and the per person check average is around \$4-\$10. Catering is offered. All are located in CO.

PRETZEL TWISTER of New Hill, NC (founded 1992) has increased by 7 units, from 39 to 46 (18% growth) and expanded into OH. These are take-out stores with a limited menu. The check average is around \$1-\$4 per person. More than 90% of locations are franchised. They are located in AL, FL, IL, IN, KY, LA, MA, MD, MS, NC, OH, PA, SC, VA and WV.

FINS MARKET & GRILL of Fair Oaks, CA (founded 1991) has increased by 1 unit, from 4 to 5 (25% growth). These are family/casual seafood restaurants serving beer and wine. Seating is for about 80 and the check average is around \$10-\$30+ per person. Catering is available. All locations are in CA.

HEART OF AMERICA RESTAURANTS & INNS based in Moline, IL (founded 1978) has increased by 1 unit for their Thunder Bay concept, from 3 to 4 (33% concept growth). The restaurants tend to be family/casual with full bar and seating for about 250. Locations are open for breakfast, lunch and dinner with a check average of around \$6-\$15+ per person. Catering and banquets are available. Other concepts are Checkered Flag Bar & Grille (1), Gramma's Kitchen (1), Johnny's Italian Steakhouse (5) and Machine Shed Restaurant (6). Overall company growth is from 16 to 17 (6% growth). Locations are in IA, IL, MN, NE and WI.

TEXAS ROADHOUSE headquartered in Louisville, KY (founded 1993, NASDAQ = TXRH) has increased by 9 units, from 284 to 293 (3% growth). These are family/casual steakhouses with full bar and seating for about 125. Locations are open for dinner only and the per person check average is about \$10-\$30. Catering is offered. Locations are 28% franchised and are in AL, AR, AZ, CA, CO, CT, DE, FL, GA, IA, ID, IL, IN, KS, KY, LA, MA, MD, ME, MI, MN, MO, MS, MT, NC, ND, NE, NH, NJ, NM, NY, OH, OK, PA, RI, SC, SD, TN, TX, UT, VA, WI, WV and WY.

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

Hollywood, CA-based THE DOLCE GROUP (founded 2001) has increased by 1 unit for the Dolce Enoteca concept, from 3 to 4 (33% concept growth) and by 1 unit for Ketchup, from 1 to 2 (100% concept growth). Other concepts are Bella Cucina Italiana (1), Geisha House (2), Les Deux (1), and Ten Pin Alley (1). Overall company increase was from 9 to 11 (22% growth). The company has just entered into the state of AL. These are upscale restaurant concepts, with a full bar and seating for about 200. Per person check average is about \$15-\$30+. Meal periods are lunch and dinner, serving multiple cuisine types. Private party facilities are available. Trading areas are AL, CA, GA, and NV. A new location for Dolce Enoteca will be opening soon in DC, as well as 2 new concepts (The Boardroom in Dallas, TX and Rare 120 in Huntsville, AL and Las Vegas, NV).

The owners of RUBY'S OYSTER BAR & BISTRO based in Rye, NY (founded 1993) have opened two new concepts called Morgan's Fish House and The Tap House. Overall company increase is from 4 to 6 (50% growth). These are upscale restaurants with full bar and seating for about 125. The per person check average is around \$10-30. Banquets are offered. Other concepts are Elm Street Oyster House (1), Lexington Square Café (1), Ruby's Oyster Bar (1) and Rye Grill & Bar (1). Locations are in CT and NY.

Concepts previously written about in the past 18 months.

Chattanooga, TN-based GORDON BIRSCH BREWERY RESTAURANT (founded 1988) has increased by 4 units for the Gordon Birsch concept, from 22 to 26 (18% concept growth). Other concepts are A1A Ale Works (1), Big River Grill (4), Bluewater Grill (1), Ragtime Tavern (1), Rock Bottom Restaurant (2), and Seven Bridges Grille (1). Overall company

increase was from 32 to 36 (13% growth). We reported on this concept once before in our 2/6/07 newsletter (18% company growth). The restaurants are family/casual, serving American cuisine. Meal periods are lunch and dinner. Seating is for about 400. Per person check average is about \$10-\$30. Private party facilities are available. Trading areas are AZ, CA, CO, DC, FL, GA, HI, IL, LA, MD, MO, NC, NV, OH, SC, TN, VA, and WA. A New Gordon Biersch location is planned to open this month in Plano, TX.

Birmingham, MI-based LEO'S CONEY ISLAND (founded 1972) has increased by 3 units, from 28 to 31 (11% growth). We reported on this concept in our 8/14/07 newsletter (8% growth). These family/casual sandwich restaurants are open for breakfast, lunch and dinner, with a \$4-\$10 per person check average. Two locations serve beer and wine, others don't sell any alcohol. Catering is available. All units are franchised and are located in MI.

Coralville, IA-based PANCHERO'S MEXICAN GRILL (founded 1992) has increased by 4 units, from 48 to 52 (8% growth) and entered into MO. We wrote about this concept 3 times previously (11/7/06-21% growth, 7/17/07-13% growth, and 2/5/08-7% growth). These are fast casual Mexican restaurants, open for lunch and dinner, with a \$6-\$12 per person check average. Locations have seating for about 80. Beer and wine are served. Between 50% and 60% of units are franchised. Trading areas are CO, CT, FL, IA, IL, MI, MN, MO, NC, ND, NE, PA, SD, TX, and WI. Locations are planned for CA, GA, NJ, and VA later this year.

COSI SANDWICH BAR based in Deerfield, IL (founded 1996, NASDAQ = COSI) has increased by 3 units, from 141 to 144 (2% growth). These are fast casual sandwich restaurants with full bar and seating for about 50. The check average is around \$6-\$12 per person. Locations are currently in CA, CT, DC, DE, FL, IL, KY, MA, MD, MI, MN, NJ, NY, OH, OK, PA, TX, VA, WA and WI. We reported on this concept in our 5/15/07 newsletter (13% growth) and our 2/12/08 newsletter (4% growth).

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