

Restaurant Trends - Growing And Emerging Concepts - Data reflects change and activity from January 19, 2008 to May 19, 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).

Marietta, GA-based LA PARRILLA MEXICAN RESTAURANTS (founded 1994) has increased by 1 unit, from 12 to 13 (8% growth) and entered into AL. All other units are in GA. The restaurants are family/casual, with a full bar and seating for about 200. Meal periods are lunch and dinner, with an \$8-\$20 per person check average. Catering is available.

Denver, CO-based MAD GREENS INSPIRED SALADS (founded 2004) has increased by 1 unit, from 7 to 8 (14% growth). These fast casual salad restaurants are open for lunch and dinner, with a \$6-\$12 per person check average. One location serves beer and wine, others sell no alcohol. Catering and delivery are available. All locations are in CO.

Dallas, TX-based PACIUGO ITALIAN GELATO (founded 2000) has increased by 2 units, from 24 to 26 (8% growth) and entered into AZ. The stores are quick serve, open for lunch and dinner, with a \$3-\$8 per person check average. There is seating for about 30. Catering is available. About 20% of units are franchised. Trading areas are AZ, CO, FL, MT, TX, and WI.

CONCEPT ENTERTAINMENT GROUP based in Portland, OR has increased by 1 unit, from 7 to 8 (14% growth) opening a new concept called Grand Central. Other concepts are Barracuda (1), Dixie Tavern (1), Duke's (1), The Gypsy (1), The Lotus (1), The Thirsty Lion (1) and The Zone (1). Concepts tend to be family/casual with full bar and seating for around 200. The check average is about \$10-\$30 per person. Catering and banquets are offered. All locations are in OR.

BOBBY COX COMPANIES INC of Fort Worth, TX (founded 1961) has increased by 5 units for their Rosa's Café concept, from 26 to 31 (19% concept growth) and by 1 unit for their Taco Villa concept, from 16 to 17 (6% concept growth). Overall company growth is from 47 to 53 (13% company growth). The restaurants tend to be fast/casual with seating for about 100. Beer and wine are served. Catering and drive-thru are offered. Locations are in CA, NM, OK and TX.

BLUE RIBBON RESTAURANTS of New York, NY (founded 1992) has increased by 1 unit, from 7 to 8 (14% growth) opening a new concept called Blue Ribbon Sushi Bar & Grill. Other concepts are Blue Ribbon (1), Blue Ribbon Bakery (1), Blue Ribbon Brooklyn (1), Blue Ribbon Market (1), Blue Ribbon Sushi (2) and Downing St Wine Bar (1). Units tend to be upscale with full bar and seating for about 100. The check average is around \$15-\$50+ per person. Banquets are offered. All are located in NY.

STRAITS CAFÉ of San Francisco, CA (founded 1987) has increased by 1 unit, from 3 to 4 (33% growth) and expanded into GA. This is an upscale Asian concept with full bar and seating for about 150. Banquets and catering are offered. The check average is around \$10-\$30 per person. Locations are in CA and GA.

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

Fort Wayne, IN-based EDDIE MERLOT'S has increased by 2 units, from 2 to 4 (100% growth) and entered into OH. This is an upscale steakhouse concept, open for dinner only, with a \$30-\$50 per person check average. Units have a full bar and seating for about 150. Catering and banquet services are available. Locations are in IN and OH.

Key West, FL-based JIMMY BUFFETT'S MARGARITAVILLE (founded 1987) has increased by 2 units, from 13 to 15 (15% growth). The restaurants are family/casual, open for lunch and dinner, with an \$8-\$20 per person check average. Locations have a full bar and seating for about 250. Catering and banquet facilities are available. Trading areas are AZ, FL, LA, NV, SC, Mexico, and the Cayman Islands. A new location is set to open at the Mohegan Sun Casino, in Uncasville, CT, Fall 2008.

DAGWOOD'S SANDWICH SHOPPES of Alexandria, LA (founded 2006) has increased by 4 units, from 13 to 17 (31% growth) and expanded into IN and SC. These are quick serve units with seating for about 50. The check average is around \$3-\$8 per person. Units are franchised and are located in AL, FL, GA, IN, KY, LA, MO, SC and TX. This concept ranked number 1 on our January '08 Top Ten List.

Concepts previously written about in the past 18 months.

Kearney, NE-based WHISKEY CREEK WOOD FIRE GRILL (founded 1995) has increased by 3 units, from 14 to 17 (21% growth) and entered into AR and SD. We wrote about this concept on 7/17/07 (17% growth). The restaurants are family/casual steakhouses, with a \$10-\$30 per person check average. Meal periods are lunch and dinner. Seating is for about 200, with a full bar. Catering and banquet facilities are available. Between 40% and 50% of units are franchised. Trading areas are AR, FL, KS, MN, MO, NE, and SD.

Vancouver, BC-based FDC BRANDS (founded 1997) has increased by 2 units for the Mr Mike's Steakhouse concept, from 10 to 12 (20% concept growth). The company is also a franchisee of 27 Pizza Huts and 7 A&W Restaurants. Overall company increase was from 44 to 46 (4% company growth). The restaurants are family/casual steakhouses, with a full bar

and seating for about 200. Trading areas are AB and BC. We wrote about this company twice previously (3/6/07-29% growth and 7/31/07-11% growth).

Los Angeles, CA-based POLLO CAMPERO (founded 1971) has increased by 12 units, from 234 to 246 (5% growth) and entered NJ. We wrote about this concept on 1/15/08 (10% growth). These are fast casual chicken restaurants, open for breakfast, lunch and dinner, with a \$3-\$8 per person check average. Seating is for about 80. Catering and delivery are available. Trading areas are CA, DC, FL, IL, MD, NJ, NY, TX, VA, Guatemala, El Salvador, Honduras, Nicaragua, Mexico, Costa Rica, Ecuador, Spain, Indonesia, and China.

BJ'S RESTAURANTS headquartered in Huntington Beach, CA (founded 1978, NASDAQ = BJRI) has increased by 4 units, from 68 to 72 (6% growth). These are family/casual American restaurants with full bar and seating for about 300. The check average is around \$10-\$30 per person. Banquets and catering are offered. We reported on this concept in our 9/4/07 newsletter (15% growth) and our 2/5/08 newsletter (8% growth). Locations are in AZ, CA, CO, FL, HI, NV, OH, OK, OR and TX.

BOB'S BURGERS & BREW based in Burlington, WA has increased by 1 unit, from 8 to 9 (13% growth). These are family/casual restaurants with full bar and seating for about 150. Banquets and catering are offered. The per person check average is around \$8-\$20. All are located in WA. We last reported on this concept in our 3/27/08 newsletter when they had 33% growth.

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