

Restaurant Trends - Growing And Emerging Concepts - Data reflects change and activity from February 2, 2008 to June 2, 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)

Arizona-based BURRITO EXPRESS (founded 1995) has increased by 1 unit, from 2 to 3 (50% growth). The restaurants are mostly take-out, open for breakfast, lunch and dinner. Catering and delivery are available. All units are in AZ.

Boca Raton, FL-based ROTELLI PIZZA & PASTA (founded 1999) has increased by 3 units, from 30 to 33 (10% growth). These family/casual Italian & pizza restaurants are open for lunch and dinner, with a \$6-\$15+ per person check average. Beer and wine are served. Seating is for about 100. Catering and delivery are available. Trading areas are CO, FL, NC, OH, PA, and SC. All units are franchised.

Ann Arbor, MI-based COTTAGE INN PIZZA (founded 1948) has increased by 3 units for the Cottage Inn Pizza concept, from 77 to 80 (4% concept growth). The company also operates a 1-unit, upscale concept called Quarter Bistro. Overall company increase was from 78 to 81 (4% company growth). These quick serve pizzerias are open for lunch and dinner. Delivery is available. Trading areas are IN, MI, and OH. More than 90% of locations are franchised.

BAGEL BAGEL CAFÉ of Tallahassee, FL (founded 1991) has increased by 1 unit, from 7 to 8 (14% growth). These are fast casual units with seating for about 50. The check average is around \$3-\$8 per person. Catering is offered. Locations are more than 10% franchised and are in FL. There are plans for another location to open in Orlando, FL.

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

HIGH TECH BURRITO of Rohnert Park, CA (founded 1986) has increased by 2 units, from 13 to 15 (15% growth). These are fast casual Mexican restaurants serving beer and wine. Seating is for around 50. The per person check average is around \$3-\$8. All are located in CA.

RIB CITY GRILL based in Fort Myers, FL (founded 1989) has increased by 5 units, from 18 to 23 (28% concept growth) and expanded into MI. There is a second concept called The Veranda Restaurant (1 unit). Overall company growth is from 19 to 24 (26% growth). These are family/casual BBQ restaurants with full bar and seating for around 100. The per person check average is about \$8-\$20. Locations are in CO, FL, MI, OH, UT and WI.

BIG CITY BURRITO of Fort Collins, CO (founded 1994) has increased by 2 units, from 12 to 14 (17% growth). These are fast casual Mexican restaurants serving beer and wine. Seating is for around 50. The check average is about \$3-\$8 per person. Catering is offered. Locations are more than 90% franchised and are in CO, HI, NE, SD and WY.

LA FOGATA of Mauldin, SC has increased by 3 units, from 11 to 14 (27% growth). These are family/casual Mexican restaurants with full bar and seating for around 100. The per person check average is around \$4-\$10+. Locations are in NC and SC.

Concepts previously written about in the past 18 months

Haymarket, VA-based FOSTER'S GRILLE (founded 1999) has increased by 3 units, from 19 to 22 (16% growth). We wrote about this concept once before on 1/15/08 (36% growth). These are family/casual American restaurants, open for lunch and dinner, with a \$6-\$15+ per person check average. Beer and wine are served. Seating is for about 100. About 70% of units are franchised. Locations are in FL, GA, MD, MO, NC, and VA.

Costa Mesa, CA-based EL POLLO LOCO (founded 1975) has increased by 19 units, from 380 to 399 (5% growth) and entered into WA. We featured this concept on 2/20/07 (4% growth) and on 2/5/08 (4% growth). These quick serve Mexican restaurants are open for lunch and dinner, with a \$2-\$6 per person check average. Catering is available. Between 50% and 60% of units are franchised. Trading areas are AZ, CA, CO, CT, GA, IL, MA, NV, TX, and WA.

Toronto, ON-based PIZZA NOVA (founded 1963) has increased by 9 units, from 110 to 119 (8% growth). We previously featured this concept on 1/8/08 (11% growth). These quick serve pizzerias are open for lunch and dinner. Delivery is available. Trading areas are NJ, ON, and PQ. More than 90% of locations are franchised.

Coppell, TX-based CICI'S PIZZA (founded 1985) has increased by 10 units, from 621 to 631 (2% growth) and entered into MN. We wrote about this concept on 6/19/07 (2% growth). These are pizza buffet restaurants, open for lunch and dinner. Seating is for about 200. Catering is available. Trading areas are AL, AR, AZ, CO, FL, GA, IA, IL, IN, KS, KY, LA, MD, MI, MN, MO, MS, NC, NE, NM, NV, OH, OK, PA, SC, SD, TN, TX, VA, and WV. More than 90% of locations are franchised.

CHEZ CORA based in Ste-therese, Québec (founded 1987) has increased by 2 units, from 90 to 92 (2% growth). These are family/casual restaurants open for breakfast and lunch. Seating is for about 125 and beer and wine are served. Locations are in AB, MB, NB, NL, NS, ON, PE and PQ. We wrote about this concept in our 4/3/07 newsletter (6% growth) and our

10/16/07 newsletter (3% growth).

JOHNNY'S NY STYLE PIZZA of Fayetteville, GA (founded 1977) has increased 4 units for the Johnny's NY Style Pizza concept, from 54 to 58 (7% growth) and by 3 units for the Johnny Brusco's concept, from 10 to 13 (30% growth). Overall company increase is from 64 to 71 (11% growth). Units are quick serve with seating for about 90. Beer and wine are served and catering is offered. The per person check average is around \$4-\$10. Locations are in GA, KS, MS, TN, TX and the company has now expanded into AR and NC. We reported on this concept two previous newsletters, 1/9/07 (15% growth) and 10/16/07 (5% growth).

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