

Restaurant Trends - Growing And Emerging Concepts - Data reflects change and activity from February 9, 2008 to June 9, 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).

Burlington, ON-based SIR CORP (ticker: SRV.UN) has increased by 2 units for their Jack Astor's concept, from 26 to 28 (8% concept growth) and by 1 unit for the Canyon Creek Chophouse, from 7 to 8 (14% concept growth). Other concepts are Alice Fazooli's (5), Far Niente (1), Four (1), Loose Moose (1), and Reds (1). Overall company increase was from 42 to 45 units (7% growth). Most of the restaurants are family/casual, open for lunch and dinner, with a \$10-\$30 per person check average. Canyon Creek Chophouse is upscale. Restaurants have seating for about 200. Catering and banquet facilities are available. All restaurants have a full bar. Company trading areas are AB, NC, NS, NY, ON, and PQ.

Homewood, IL-based AURELIO'S PIZZA (founded 1959) has increased by 2 units, from 41 to 43 (5% growth). These are family/casual Italian and pizza restaurants, open for lunch and dinner. Per person check average ranges from \$4-\$20+. Some locations have seating for about 100, others are take-out/delivery only. Catering is available. Units are in the states of CO, FL, IL, IN, MN, and NV. More than 90% of stores are franchised.

Bradley, IL-based MONICAL'S PIZZA (founded 1959) has increased by 3 units, from 58 to 61 (5% growth). These quick serve pizzerias are open for lunch and dinner. Beer and wine are served. Most locations have seating for about 100. Catering and delivery are available. Stores are located in IL, IN, and WI. About 50% of units are franchised.

EAST BAY DELI of Charleston, SC has increased by 1 unit, from 3 to 4 (33% growth). These are family/casual units that serve beer. Seating is for about 50. The per person check average is around \$3-\$8. Locations are in SC.

A K O'CONNORS of Des Moines, IA has increased by 1 unit, from 2 to 3 (50% concept growth). There are 2 other single concepts called Peoples Bar & Grill and Thumbs. Overall company growth is from 4 to 5 (24% company growth). Locations are fast casual, with American food and full bar. Seating is for around 60. The check average is around \$4-\$10 per person. All are located in IA.

INNOVATIVE DINING GROUP based in Los Angeles, CA (founded 1992) has increased by 1 unit, from 9 to 10 (11% growth), adding a new concept called Lucky Fish. These are upscale seafood restaurants. Seating is for about 150 and full bar is available. The check average is around \$15-\$30+ per person. Locations are in CA and NV.

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

Dallas, TX-based WINGS PIZZA N THINGS (founded 2000) has increased by 5 units, from 19 to 24 (26% growth) and entered into CO and WA. These fast casual chicken restaurants are open for lunch and dinner, with an \$8-\$20 per person check average. The restaurants have a full bar and seating for about 100. Catering and delivery are available. Trading areas are AZ, CA, CO, FL, TX, VA, WA, WY, Mexico, and Puerto Rico.

ROOSTERS of Columbus, OH (founded 1988) has increased by 2 units, from 16 to 18 (13% growth). These are family/casual American restaurants with full bar and seating for about 150. The per person check average is around \$6-\$12. All locations are in OH.

GARCIA'S PIZZA IN A PAN based in Champaign, IL has increased by 2 units, from 3 to 5 (67% growth). These are quick serve pizza restaurants serving beer. Seating is for around 50. Catering is available. All locations are in IL.

DONALD'S DONUTS of Channelview, TX has increased by 3 units, from 13 to 16 (23% growth). These are quick serve units, open for breakfast and lunch. Seating is for around 30. The check average is around \$2-\$6 per person. All are located in TX.

Concepts previously written about in the past 18 months.

Tampa, FL-based BEEF O'BRADY'S (founded 1985) has increased by 5 units, from 245 to 250 (2% growth) and entered into IA. We wrote about this concept 3 times previously (6/5/07-2% growth, 9/11/07-5% growth, and 2/12/08-7% growth). These are family/casual bar and grill restaurants, open for lunch and dinner, with a \$6-\$15+ per person check average. Beer and wine are served and seating is for about 150. Catering is available. Trading areas are AL, AR, FL, GA, IA, IL, IN, KY, LA, MD, MI, MN, MS, NC, OH, SC, TN, TX, VA, and WI. More than 90% of units are franchised.

Sherman Oaks, CA-based RED MANGO (founded 2002) has increased by 12 units, from 13 to 25 (92% growth) and entered into IL. We wrote about this concept before on 1/22/08 (550% growth) and it was also ranked #1 on our April 2008 Top Ten Fastest Growing Concepts list. These are quick serve frozen yogurt stores, with a \$3-\$8 per person check average. Locations are open during lunch and dinner hours. Seating is for about 20. Trading areas are CA, IL, NV, NY, OR, UT, and WA, with a NJ location to open soon. All locations are franchised.

Columbus, OH-based BRAVO DEVELOPMENT INC (founded 1981) has increased by 4 units for the Brio Tuscan Grille concept, from 24 to 28 (17% concept growth) and entered into AZ and NV. The company also operates Bravo Cucina Italiana (39) and Bon Vie (1). Overall company growth was from 64 to 68 (6% growth). We wrote about this company on 10/23/07 (8% company growth) and on 2/12/08 (5% company growth). These are upscale Italian restaurants, open for lunch and dinner, with a \$15-\$30+ per person check average. Units have a full bar and seating for about 200. Bon Vie is an upscale French-American restaurant. The restaurants have catering and banquet facilities. Trading areas are AL, AZ, FL, GA, IA, IL, IN, KS, KY, LA, MI, MO, NC, NJ, NM, NV, NY, OH, OK, PA, TN, TX, VA, and WI, with a Brio Tuscan Grille to open in Lone Tree, CO later this year.

Taylors, SC-based FATZ CAFÉ (founded 1988) has increased by 3 units, from 41 to 44 (7% growth) and entered into VA. We wrote about this concept on 3/27/07 (3% growth), 10/23/07 (9% growth), and on 3/12/08 (8% 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 250. Catering is available. Trading areas area GA, NC, SC, TN, and VA.

NATIVE NEW YORKER based in Gilbert, AZ (founded 1979) has increased by 4 units, from 23 to 27 (17% growth). These are family/casual American restaurants with a full bar. Seating is for around 200. The check average is around \$6-\$15+ per person. Catering and banquets are offered. Locations are in AZ. There are plans to open units in CA and TX during 2008. We wrote about this concept in our 9/25/07 newsletter (20% growth) and our 2/26/08 newsletter (28% growth).

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