

Restaurant Trends - Growing And Emerging Concepts - Data reflects change and activity from March 7, 2008 to July 7, 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).

The Maine-based chain RICETTA'S BRICK OVEN PIZZERIA has increased by 1 unit, from 2 to 3 (50% growth). The restaurants are family casual, open for lunch and dinner, with seating for about 50. Beer and wine are served. Catering, delivery, and banquet services are available. All units are in ME.

BROOKLYN'S PIZZERIA of McKinney, TX has increased by 1 unit, from 4 to 5 (25% growth). These are quick serve, Italian/Pizza restaurants serving beer and wine. Seating is for about 60 and the per person check average is around \$4-\$10. Catering is offered. All are located in TX.

LA BELLE VIE based in Minneapolis, MN (founded 1989) has increased by 1 unit, from 2 to 3 (50% growth). They added a new concept called Smiley's Carribean BBQ. Other concepts are La Belle Vie (1) and Solera (1). The restaurants are upscale with full bar and seating for around 150. The check average is around \$15-\$30+. Banquets are offered. All are located in MN.

MOUNTAIN SUN BREW PUB of Boulder, CO (founded 1993) has increased by 1 unit, from 2 to 3 (50% growth). The owners opened a new concept called Vine St. Pub. The locations are family/casual with full bar and seating for around 125. The per person check average is around \$6-\$15+. The third concept is called Southern Sun (1 unit). All are located in CO.

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

Hyattsville, MD-based THREE BROTHERS PIZZA (founded 1976) has increased by 2 units, from 14 to 16 (14% growth). Most of the locations are family/casual, serving either a full bar or beer and wine. Catering is offered. Seating is for about 70. All units are in MD. Between 70% and 80% of locations are franchised.

Austin, TX-based CHUY'S COMIDA DELUXE (founded 1982) has increased by 2 units for the Chuy's concept, from 8 to 10 (25% concept growth). The company also operates Hula Hut (1) and Shady Grove (1). Overall company increase from 10 to 12 (20% company growth). The restaurants are family/casual Mexican, open for lunch and dinner, with a \$6-\$15+ per person check average. Locations have a full bar, and seating for about 200. All restaurants are in TX.

RAY'S PIZZA of Phoenix, AZ (founded 1980) has increased by 2 units, from 11 to 13 (18% growth). These are quick serve Italian/Pizza restaurants with seating for around 70. Beer and wine are served. All are located in AZ.

CEDAR RIVER SEAFOOD based in Orange Park, FL (founded 1986) has increased by 2 units, from 11 to 13 (18% growth). Locations are family/casual with seating for around 175. The check average is around \$10-\$30 per person. Beer and wine are served and banquets are offered. Units are more than 20% franchised and are in FL and GA.

Concepts previously written about in the past 18 months.

Dallas, TX-based TEXAS DE BRAZIL CHURRASCARIA (founded 1998) has increased by 2 units, from 11 to 13 (18% growth). We featured this concept on 1/23/07 (25% growth). The restaurants are upscale, South American steakhouses, open for lunch and dinner, with a \$15-50+ per person check average. Units have a full bar and seating for about 200. Catering is available. Trading areas are CO, FL, IL, TN, TX, VA, and Aruba, with locations scheduled to open in Baton Rouge, LA and Las Vegas, NV later this year.

Lawrenceville, GA-based DINNER A'FARE has increased by 5 units, from 25 to 30 (20% growth) and entered into DE and NV. We wrote about this concept on 9/18/07 (9% growth). These are meal assembly stores, open for lunch and dinner hours, with a \$4-\$10 per person check average. Meeting facilities are available at some locations. Trading areas are CA, DE, FL, GA, IN, MD, NC, NV, PA, and TN.

Manhattan Beach, CA-based ROBEK'S FRUIT SMOOTHIES & HEALTHY EATS (founded 1996) has increased by 15 units, from 141 to 156 (11% growth). We wrote about this concept on 2/20/07 (15% growth), 9/25/07 (11% growth) and on 2/12/08 (16% growth). These quick serve, juice/smoothie cafes are open for lunch and dinner hours, with a \$2-\$6 per person check average. Trading areas are AZ, CA, CT, DC, FL, GA, HI, IL, KS, MA, MD, NC, NM, NY, OH, TX, VA, WA, and Ireland. About 99% of units are franchised.

Broomfield, CO-based NOODLES & CO (founded 1995) has increased by 11 units, from 171 to 182 (6% growth) and entered into NC. We wrote about this concept on 1/16/07 (5% growth), 7/2/07 (14% growth), and on 2/19/08 (10% growth). These are fast casual noodle restaurants, open for lunch and dinner, with a \$6-\$12 per person check average. Meal periods are lunch and dinner. Beer and wine are served. Seating is for about 90. Trading areas are CA, CO, IA, IL, IN, KS, MD, MI, MN, MO, NC, NE, OH, OR, UT, VA, and WI. About 10% of locations are franchised.

NESTLE TOLLHOUSE CAFE BY CHIP based in Richardson, TX (founded 1930) has increased by 8 units, from 102 to 110 (8% growth). These are take-out units located mostly in malls. The per person check average is around \$2-\$6. Catering is offered. Locations are in AZ, CA, CO, FL, GA, IL, IN, KS, LA, MD, MI, MN, MO, NC, NE, NJ, NM NV, NY, OK, PA, SC, TX, UT, VA and Puerto Rico. We reported on this concept in our 5/8/07 newsletter (21% growth) and our 4/8/08 newsletter (10% growth).

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