

Restaurant Trends - Growing And Emerging Concepts - Data reflects change and activity from April 4, 2008 to August 4, 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).**

Fraser, MI-based THE ORIGINAL BUSCEMIS (founded 1976) has increased by 3 units, from 42 to 45 (7% growth). These quick serve pizzerias are open for lunch and dinner. Beer and wine are served and catering is available. Most locations have seating for about 50. All are located in MI. More than 90% of units are franchised.

American Fork, UT-based BAJIO GRILL has increased by 5 units, from 38 to 43 (13% growth) and entered into KY, MT, and WY. These are family/casual Mexican restaurants, open for lunch and dinner, with a \$6-\$12 per person check average. Seating is for about 80. Catering is available. Between 60% and 70% of locations are franchised. Trading areas are AZ, ID, IN, KY, MT, NV, OR, TX, UT, and WY. The company is also the franchisee of 200 Subway restaurants in UT.

CARBONE'S PIZZERIA based in Saint Paul, MN (founded 1954) has increased by 3 units, from 29 to 32 (10% growth). These are quick serve pizza restaurants serving beer. Seating is for about 50. Locations are more than 90% franchised and are in MN and WI.

SAKURA JAPANESE STEAKHOUSE of Ellicott City, MD (founded 1988) has increased by 1 unit, from 18 to 19 (6% growth). These are family/casual Japanese restaurants with full bar and seating for about 150. The per person check average is around \$10-\$30+. Locations are in MD, NJ and VA.

JO TO GO COFFEE based in Green Bay, WI (founded 1998) has increased by 1 unit, from 14 to 15 (7% growth) and expanded into KS. These are mostly take-out coffee shops with seating for about 20. Locations are in GA, KS, MI, MO and WI.

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

New Orleans, LA-based ZEA ROTISSERIE & GRILL (founded 1990) has increased by 2 units for the Zea Rotisserie concept, from 9 to 11 (22% concept growth) and entered into TX. The company also operates Semolina Restaurant (3) and Semolina's Bistro Italia (2). Overall company increase was from 14 to 16 (14% company growth). Zea Restaurants are upscale, serving a variety of American, seafood, pasta, and chicken entrees. Per person check average is \$15-\$30+. Meal periods are lunch and dinner. Semolinas are upscale Italian restaurants. Catering and banquet facilities are available. Trading areas are AL, FL, LA, NM, and TX. About 25% of the restaurants are franchised.

ICEBERG DRIVE-INN based in Salt Lake City, UT (founded 1960) has increased by 2 units, from 12 to 14 (17% growth). These are quick serve restaurants with seating for about 70. The check average is around \$3-\$8 per person. Locations are 86% franchised and are located in UT.

HAMBURGER MARY'S BAR & GRILLE of West Hollywood, CA (founded 1972) has increased by 2 units, from 5 to 7 (40% growth) and expanded into IA and FL. These are family/casual restaurants with full bar and seating for about 250. The per person check average is around \$8-\$20. Locations are more than 70% franchised and are in CA, CO, FL, IA and IL.

**Concepts previously written about in the past 18 months.**

Los Angeles, CA-based INTERNATIONAL COFFEE & TEA CO (founded 1963) has increased by 75 units, from 577 to 652 (13% growth) and entered into Mexico. We wrote about this concept on 5/1/07 (9% growth). These are quick serve coffee shops, open for breakfast, lunch and dinner, with a \$2-\$6 per person check average. Most locations have seating for about 20. Online ordering is available. Trading areas are AL, CA, HI, NV, Australia, Mexico, Asia and the Middle East. Between 50% and 60% of locations are franchised.

Atlanta, GA-based SHANE'S RIB SHACK has increased by 4 units, from 79 to 83 (5% growth) and entered into LA and NY. We featured this concept on 4/10/07 (30% growth) and again on 3/18/08 (13% growth). These are quick serve BBQ restaurants, open for lunch and dinner. Per person check average is \$4-\$10. Beer is served. Seating is for about 70. Catering is available. Trading areas are AZ, FL, GA, IA, KY, LA, MD, NC, NV, NY, OH, SC, TN, and VA. All units are franchised.

Columbus, MS-based restaurant group EAT WITH US (founded 1982) has increased by 2 units for the Sweet Peppers Deli concept, from 10 to 12 (20% concept growth). Other concepts are Bulldog Deli (1), Grill (3), Harvey's (3), and Park Heights (1). Overall company growth was from 18 to 20 (11% company growth). We wrote about this concept on 5/15/07 (13% company growth). These are fast casual American restaurants, open for lunch and dinner, with a \$6-\$15+ per person check average. Locations have a full bar, with seating for about 80. Catering and banquet facilities are offered. Trading areas are AL, MS, and TN, with a Sweet Peppers to open in Slidell, LA later this year. Between 20% and 30% of locations are franchised.

Fort Walton Beach, FL-based CUPPY'S COFFEE SMOOTHIES & MORE (founded 2006) has increased by 14 units, from 74 to 88 (19% growth) and entered into AR, IA, NY, and OR. We featured this concept on 4/8/08 (25% growth). These are quick serve coffee shops, open for breakfast and lunch hours, with a \$2-\$6 per person check average. Many locations are drive-thru only, some have limited seating. Trading areas are AL, AR, AZ, BC, CA, CO, FL, GA, IA, IL, IN, KY, LA, MA, MI, MS, NC, NV, NY, OH, OK, OR, PA, SC, TN, TX, VA, and WV. More than 90% of units are franchised.

PIOLA based in Miami Beach, FL (founded 1986) has increased by 4 units, from 21 to 25 (19% growth). These are family/casual restaurants serving Italian and Pizza. Seating is for around 100. Full bar and banquets are offered. Locations are in DC, FL, NY, Italy, Argentina, Chile, Brazil and Mexico. We reported on this concept in our 12/26/07 newsletter (11% growth).

DICK'S WINGS headquartered in Jacksonville, FL has increased by 2 units, from 21 to 23 (10% growth). These are family/casual restaurants serving beer and wine. Seating is for about 125. The check average is around \$6-\$12 per person. Locations are more than 90% franchised and are in FL and GA. We previously wrote about this concept in our 1/9/07 newsletter when they had 33% growth.

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