

Restaurant Trends - Growing And Emerging Concepts - Data reflects change and activity from May 15, 2008 to September 15, 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).

West Carrollton, OH-based FRICKER'S (founded 1985) has increased by 1 unit, from 18 to 19 (6% growth). These are family/casual chicken restaurants, open for lunch and dinner, with a \$6-\$15+ per person check average. Locations have a full bar and seating for about 125. Private party facilities are available. Trading areas are IN, MI, and OH. Between 20% and 30% of units are franchised.

Oceanside, CA-based PACIFIC RESTAURANT HOLDINGS (founded 2000) has increased by 2 units for the New York NY Fresh Deli concept, from 20 to 22 (10% concept growth). Other concepts are Steve's Pizza (9) and Playa Grill (1). Overall company increase was from 30 to 32 (7% growth). The delis are quick serve sandwich shops, open for lunch and dinner, with a \$3-\$8 per person check average. Catering is available. Seating is for about 30. Company trading areas are AL, AR, AZ, CA, FL, IA, MO, ND, NM, OR, PA, TX, and UT. All units are franchised.

Lawrenceville, GA-based GANDOLFO'S NEW YORK DELICATESSEN (founded 1989) has increased by 2 units, from 49 to 51 (4% growth) and entered into NH. The restaurants are quick serve sandwich shops, 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 AZ, CA, CO, GA, ID, MD, MT, NC, NE, NH, NV, OK, OR, and UT. More than 90% of units are franchised.

Mukilteo, WA-based DINNERS READY has increased by 4 units, from 32 to 36 (13% growth). This is a meal assembly service, open for lunch and dinner hours, with a \$4-\$10 per person check average. Private party services are offered at all locations. Trading areas are BC, CA, ID, NC, NV, NY, OH, OR, and WA.

OCEANAIRE SEAFOOD ROOM headquartered in Minneapolis, MN (founded 1999) has increased by 1 unit from 15 to 16 (7% growth). These are upscale seafood restaurants with full bar and seating for about 300. The check average is around \$15-\$50+ per person. Banquets are offered. All locations are in OH.

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

Denver, CO-based INK COFFEE CO (founded 1995) has increased by 2 units, from 6 to 8 (33% growth). The stores are quick serve, open for breakfast, lunch and dinner, serving coffee and sandwiches. Units have seating for about 25, with a per person check average of about \$3-\$8. One unit serves beer and wine. Catering and delivery options are available. All stores are in CO.

J. GUMBO'S DOWN-HOME CAJUN COOKIN based in Jeffersonville, IN has increased by 2 units, from 7 to 9 (29% growth) and expanded into IN and OH. These are fast casual Cajun restaurants with seating for about 40. Beer and wine are offered. The check average is around \$4-\$10 per person. Catering is available. Locations are more than 90% franchised and are in IN, KY and OH.

BONTE WAFFLERIE & CAFÉ headquartered in Philadelphia, PA (founded 2003) has increased by 2 units, from 5 to 7 (40% growth). These are fast casual bakery/cafés with seating for about 40. The per person check average is around \$4-\$10. Catering is offered. More than half are franchised and are located in NJ and PA.

ROSE'S RESTAURANT & BAKERY based in Portland, OR (founded 1956) has increased by 2 units, from 4 to 6 (50% growth). These are family/casual restaurants with full bar and seating for about 70. Breakfast, lunch and dinner are served. The check average is around \$6-\$12 per person. Locations are in OR and WA.

SHARKY'S WOODFIRED MEXICAN GRILL of Agoura Hills, CA (founded 1992) has increased by 3 units, from 18 to 21 (17% growth) and expanded into WA. These are family/casual Mexican restaurants with seating for about 100. Beer and wine are served and catering and banquets are offered. The per person check average is around \$6-\$12. Locations are in CA and WA.

Concepts previously written about in the past 18 months.

Richmond, BC-based KEG STEAKHOUSE & BAR (founded 1971) has increased by 2 units, from 101 to 103 (2% growth) and entered into FL. We featured this concept in our 6/3/08 newsletter (6% growth). The restaurants are family/casual steakhouses, open for lunch and dinner, with a \$10-\$30 per person check average. Locations have a full bar and seating for about 250. Trading areas are AB, AZ, BC, CO, FL, MB, NB, NL, NS, ON, PQ, SK, TX, and WA. About 50% of the restaurants are franchised.

Vestavia Hills, AL-based JIM 'N NICK'S BAR-B-Q (founded 1985) has increased by 2 units, from 22 to 24 (9% growth) and entered into NC. We wrote about this concept on 9/4/07 (10% growth). The company also ranked #8 on our April '07 Top Ten Fastest Growing Concepts list. These family/casual BBQ restaurants are open for lunch and dinner, with a \$6-\$12 per person check average. Locations have a full bar and seating for about 100. Catering is available. Trading areas are AL,

CO, FL, GA, NC, SC, and TN.

Los Angeles, CA-based PINKBERRY (founded 2005) has increased by 12 units, from 55 to 67 (22% growth). We wrote about this concept on 1/22/08 (43% growth) and on 6/24/08 (38% growth). These quick serve frozen yogurt shops are open for lunch and dinner hours, with a \$3-\$8 per person check average. Seating ranges from 20-50 at most stores. Locations are in CA and NY.

Margate, FL-based SALAD CREATIONS OF AMERICA (founded 2002) has increased by 10 units, from 41 to 51 (24% growth) and entered into LA, MT, NY, and Kuwait. We featured this company 3 times in the last 18 months (8/20/07-140% growth, 12/26/07-42% growth, and 5/6/08-21% growth). The company also made our Top Ten Fastest Growing Concepts list twice (ranked #1 in October '07 and #6 in January '08). These are fast casual soup and salad restaurants, open for lunch and dinner. Per person check average is \$4-\$10. Seating is for around 50. Catering is available. Units are in AZ, CO, FL, GA, HI, IL, LA, MA, MD, MI, MN, MT, NC, NV, NY, RI, SC, TX, VA, WV, Trinidad, Brazil, and Kuwait. More than 90% of the stores are franchised.

DUDUM SPORTS & ENTERTAINMENT headquartered in Walnut Creek, CA (founded 2004) has increased by 1 unit for their Bing Crosby concept, from 2 to 3 (50% concept growth) and by 3 units for their Maria Maria concept, from 2 to 5 (150% concept growth). Overall company growth is from 9 to 12 (33% company growth after decreasing 1 unit for their Cantina concept). The restaurants tend to be upscale with full bar and seating for about 175. Banquets are offered. Current concepts are Bing Crosby's Restaurant (3), Cantina (1), Joe Dimaggios (2), Maria Maria (5) and McCovey's (1). Units are in AZ, CA and TX. We reported on this company in our 1/2/08 newsletter (40% growth) and our 5/6/08 newsletter (29% growth).

EL POLLO LOCO based in Costa Mesa, CA (founded 1975) has increased by 7 units, from 399 to 406 (2% growth). These are quick serve Mexican restaurants with seating for about 60. Catering is offered. We reported on this concept in our newsletters published on 2/5/08 (4% growth) and 6/10/08 (5% growth). About half the locations are franchised and are in AZ, CA, CO, CT, GA, IL, MA, NV, TX and WA.

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