

Restaurant Trends - Growing And Emerging Concepts - Data reflects change and activity from May 29, 2008 to September 29, 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).

Eugene, OR-based BENE GOURMET PIZZA (founded 2000) has increased by 1 unit, from 2 to 3 (50% growth), with the addition of a new concept called Bene Food & Friends. These are family/casual pizza restaurants, open for lunch and dinner. Beer and wine are served. Units have seating for about 50. Catering is available. All locations are in OR.

Hollywood, FL-based TAVERNA OPA (founded 1998) has increased by 1 unit for the Taverna Opa concept, from 4 to 5 (25% concept growth). Other concepts are Giorgio's Bistro (1), Giorgio's Grill (1), and Taverna Kyma (1). Overall company increase was from 7 to 8 (14% growth). These are upscale Greek restaurants, with a \$15-\$30+ per person check average. Most are open for dinner only (2 serve lunch, 1 breakfast). The restaurants have a full bar and average seating for about 250. Catering and private party services are available. All locations are in FL.

Orlando, FL-based TALK OF THE TOWN RESTAURANT GROUP (founded 1974) has increased by 1 unit, from 10 to 11 (10% growth), opening a new concept called Johnnie's Hideaway. Other concepts are Charley's Steakhouse (4), Fishbones (2), Moonfish (1), Texas Cattle Company (2), and Vito's Chop House (1). These are upscale steak and seafood restaurants, open for lunch and dinner, with a \$15-50+ per person check average. The restaurants have a full bar and seating for about 200. Catering and banquet facilities are available. All the restaurants are in FL.

PHILLY'S BEST headquartered in Irvine, CA (founded 1992) has increased by 3 units, from 24 to 27 (13% growth). These are quick serve sandwich restaurants with seating for about 80. Beer is served. The per person check average is around \$4-\$10. Locations are more than 80% franchised and are in CA.

BARGER BURGER INC based in Kingsport, TN (founded 1956) has increased by 1 unit for their Pal's Sudden Svc concept, from 20 to 21 (5% concept growth). There is a 2nd company concept, Sharon's BBQ and Burger (1 unit). Overall company growth is from 21 to 22 (5% growth). Units are take out with drive through and outdoor seating. The check average is around \$3-\$8 per person. Locations are in TN and VA.

CEFIORE headquartered in City of Industry, CA has increased by 8 units, from 24 to 32 (33% growth). These are quick serve ice cream shops with limited seating. The average check is around \$3-\$8 per person. Units are more than 70% franchised and are in CA, HI, KY, NV and WA. Cefiore is a subsidiary of Todai Restaurants (25 units).

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

Palm Beach Gardens, FL-based DUFFY'S SPORTS GRILL (founded 1985) has increased by 2 units, from 16 to 18 (13% growth). The restaurants are family/casual, open for lunch and dinner, with an \$8-\$20 per person check average. Locations have a full bar and seating for about 250. Catering and banquet services are offered. All are located in FL. A new location is scheduled to open later this year in Delray Beach, FL.

TILTED KILT PUB & EATERY headquartered in Tempe, AZ (founded 2003) has increased by 3 units, from 8 to 11 (38% growth). These are family/casual restaurants with full bar and seating for about 200. The check average is around \$8-\$20 per person. More than 90% of the units are franchised. They are located in AZ, CA, FL, TX and WI.

VIRGINIA BBQ CO based in Fredericksburg, VA (founded 2000) has increased by 4 units, from 11 to 15 (36% growth) and expanded into MD and MI. These are quick serve restaurants with seating for about 30. Beer is served and catering is offered. The per person check average is around \$6-\$12. Locations are in DE, MD, MI and VA. This concept ranked #1 on our April '08 Top Ten Fastest Growing Concepts list.

Concepts previously written about in the past 18 months.

Charlotte, NC-based BOJANGLES' FAMOUS CHICKEN & BISCUITS (founded 1977) has increased by 18 units, from 392 to 410 (5% growth). We wrote about this concept on 5/15/07 (5% growth) and on 1/22/08 (3% growth). These are quick serve chicken restaurants, open for breakfast, lunch and dinner, with a \$3-\$8 per person check average. Seating is for about 50. Trading areas are AL, FL, GA, MD, NC, NJ, NY, PA, SC, TN, VA, Honduras, and Mexico. About 70% of stores are franchised.

Lake Forest, CA-based JOHNNY ROCKETS (founded 1986) has increased by 19 units, from 227 to 246 (8% growth). We wrote about this concept on 4/10/07 (4% growth) and on 10/2/07 (7% growth). These are family/casual burger restaurants, open for lunch and dinner, with a \$4-\$10 per person check average. Beer and wine are served at some locations. Seating is for about 80-100. Trading areas are AL, AZ, CA, CO, CT, DC, FL, GA, IL, IN, KY, MA, MD, MI, MN, MO, NJ, NM, NV, NY, OH, ON, PA, RI, SC, TN, TX, VA, WA, and 8 other countries.

Woodland Hills, CA-based GRILL CONCEPTS (NASDAQ: GRIL, founded 1984) has increased by 1 unit for the Daily Grill concept, from 24 to 25 (4% concept growth), entering into OK, and by 1 unit for their Grill on the Alley concept, from 5 to 6 (20% concept growth). Overall company increase was from 29 to 31 (7% growth). We also wrote about this concept on 1/15/08 (8% company growth). The restaurants are family/casual, serving American cuisine. Meal periods are breakfast, lunch and dinner, with a per person check average of \$10-\$30. All the restaurants have a full bar and seating for about 200. Catering and banquets are offered. Online ordering is available for the Daily Grill restaurants. Trading areas are CA, DC, IL, MA, MD, OK, OR, TN, TX, VA, and WA, with an Aventura, FL location to open in November.

Lawrenceville, GA-based DINNER A'FARE has increased by 9 units, from 30 to 39 (30% growth) and entered into 5 states (AZ, CO, NJ, UT, VA). Other trading areas are CA, DE, FL, GA, IN, NC, PA, and TN, with a Largo, MD location to open later this year.

We wrote about this concept on 9/18/07 (9% growth) and on 7/15/08 (20% growth). This is a meal assembly concept, with \$4-\$10 per meal check averages. Private party facilities are available at most locations.

RED MANGO based in Sherman Oaks, CA (founded 2002) has increased by 14 units, from 25 to 39 (56% growth) and expanded into HI and NJ. These are quick serve ice cream stores with seating for about 20. The per person check average is around \$3-\$8. Locations are more than 90% franchised and are in CA, HI, IL, NJ, NV, NY, OR, UT and WA. We reported on this concept twice before 1/22/08 (550% growth) and 6/17/08 (92% growth).

PACIUGO ITALIAN GELATO based in Dallas, TX (founded 2000) has increased by 13 units, from 26 to 39 (50% growth) and expanded into CA, KS, IL and MO.. These are quick serve ice cream stores with limited seating. The per person check average is around \$3-\$8. Locations are in AZ, CA, CO, FL, KS, IL, MO, MT, TX, WI, and Mexico. There are plans to expand into GA, MI and NC. We last reported on this concept in our 5/27/08 newsletter (8% growth).

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