More full-service chains have started or continued their reopening processes, such as: Red Lobster (361 locations with open dining rooms), P. F. Chang’s (63 locations open for dine-in), Golden Corral, Perkins, First Watch, Huddle House, Hooters, Buffalo Wild Wings, and Texas Roadhouse. Bloomin’ Brands (Outback, Carrabba’s, Bonefish Grill) has also reopened a significant portion of its dining rooms.

At its lowest, Dunkin’s same-store-sales was down by 30%, but they’re back up to a decline of 20-25%. Since the start of the pandemic, roughly 1000 Dunkin’ and Baskin-Robbins locations have been closed. A few dining rooms may open for several weeks in June in states with fewer restrictions, and closely-monitored results will inform the rest of Dunkin’s reopening journey.

Starbucks has recently regained between 60-65% of its prior-year domestic sales levels, and 80% of its Chinese market sales. The chain plans to lean heavily on “on-the-go” and pickup-only formats. Store hours may reduce going forward, as will hours for employees, though the chain will extend its unpaid leave policy and emergency healthcare benefits until September.

As of May 17, 49% of Darden Restaurants’ dining rooms were reopened, and the chain expects this figure to rise to 65% by end of May. Between the end of Q4 and May 17, average SSS across all brands declined by -47.9%, though it has gradually improved over the last 5 weeks, with Olive Garden looking the most promising. The company’s weekly cash burn rate improved to less than $10m, and it has already repaid its $750m credit facility at the start of May.

In its most recent 8-K filing, Restaurant Brands International revealed improvements in comparable sales for all 3 of its flagship brands (Tim Horton’s, Burger King, Popeyes); Popeyes’ sales especially were trending in positive low-forties, up from flat in mid-March. All RBI restaurants in home markets remain open in limited service models, and the company expects to continue its reopening process in a measured, careful fashion.

Judging by their recent financial results, established LSR Pizza chains have thrived in the age of off-premise dining: Domino’s U.S. sales results “accelerated materially” (+20.9%) in the second half of Q2, and Papa John’s recently saw its best sales period in the company’s history for the second straight month (+33.5% for system-wide U.S. restaurants). Their international divisions, however, have not seen the same success: 320 Papa John’s and 900 Domino’s international units remain closed, at least for the near term.

Le Pain Quotidien filed for bankruptcy this week, and all 98 temporarily-closed domestic units have been sold to Aurify Brands LLC. If the deal is approved, Aurify plans to reopen at least 35 locations. No buyer has been found for the chain’s European operations.
### LSR ASIAN
- Panda Express
- Sarku Japan
- Genji
- Flame Broiler
- Waba Grill
- Pei Wei
- Yoshinoya
- Bonchon Chicken

### LSR BAKERY-CAFE
- Panera Bread
- Einstein Brothers
- Schlotzsky's
- Bruegger's
- Great Harvest Bread Co.
- Corner Bakery
- Au Bon Pain
- Newk's Eatery
- Le Pain Quotidien
- Pret A Manger

### LSR BURGER
- McDonald's
- Burger King
- Wendy's
- Sonic Drive-In
- Jack In The Box
- Hardee's
- Five Guys
- Carl's Jr.
- Checkers And Rally's
- Whataburger
- Culver's
- A&W
- Steak N Shake
- White Castle

### LSR CHICKEN
- KFC
- Chick-Fil-A
- Popeye's
- Wingstop
- Church's Chicken
- Bojangles'
- Raising Canes
- Boston Market
- Chicken Express
- Golden Chick
- Pollo Tropical
- Lee's Famous Recipe Chicken
- Louisiana Famous Fried Chicken

### LSR COFFEE
- Starbucks
- Dunkin'
- Tim Horton's
- Caribou Coffee
- Daylight Donuts
- Dutch Bros Coffee

### LSR DESSERT-SNACK
- Krispy Kreme
- Shipley Do-Nuts
- Coffee Bean And Tea Leaf
- Peet's Coffee & Tea
- Scooter's Coffeehouse
- Biggby Coffee
- Kung Fu Tea
- Honey Dew Donuts
- PJ's Coffee
- Donut Connection
- Human Bean

### LSR MEXICAN
- Taco Bell
- Chipotle
- Qdoba
- Moe's Southwest Grill
- Del Taco
- El Pollo Loco
- Taco John's
- Rubio's Coastal Grill
- Taco Cabana
- Fuzzy's Taco Shop
- Taco Bueno
- Baja Fresh
- Cafe Rio
- Tijuana Flats Burrito Co
- Taco Time
- Costa Vida

### LSR PIZZA
- Pizza Hut
- Domino's Pizza
- Little Caesars
- Papa John's
- Papa Murphy's
- Marco's Pizza
- Hungry Howie's
- Chuck E. Cheese
- Godfather's Pizza
- Mod Pizza
- Round Table
- Cicci's Pizza
- Jet's Pizza

### LSR SALAD-HEALTHFUL
- Smoothie King
- Tropical Smoothie Cafe
- Jamba Juice
- Sweetgreen
- Planet Smoothie
- Nekter Juice Bar
- Freshii

### LSR SANDWICH-DELI
- Subway
- Arby's
- Jimmy John's
- Jersey Mike's
- Firehouse Subs
- Charley's Philly Steaks

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**TOP 250 CHAIN UPDATES (05.28.20)** // orange text indicates chains with announced unit closures.

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- Flame Broiler
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- Yoshinoya
- Bonchon Chicken

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- Freshii

**LSR SANDWICH-DELI**
- Subway
- Arby's
- Jimmy John's
- Jersey Mike's
- Firehouse Subs
- Charley's Philly Steaks

### LSR OTHER
- Long John Silver's
- Captain D's
- Dickey's Barbecue Pit
- Noodles & Co.
- Zoës Kitchen
- Fazoli's
- L & L Hawaiian Barbecue
- Pita Pit
- Skyline Chili
- Golden Krust
- Ono Hawaiian BBQ
- Taziki's
- Cava Grill

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### FSR AMERICAN
- Applebee's
- Chili's
- Red Robin
- Ruby Tuesday
- TGI Fridays
- BJ's
- Cheesecake Factory
- O'Charley's
- Cheddar's Scratch Kitchen
- Johnny Rockets
- Hwy 55 Burgers, Shakes & Fries
- Fuddruckers
- Ninety Nine Restaurant And Pub
- Bar Louie

### FSR FAMILY DINING
- Waffle House
- IHOP
- Denny's
- Cracker Barrel
- Bob Evans
- First Watch
- Huddle House
- Perkins
- Braum's
- Big Boy/Frisch's
- Friendly's
- Village Inn
- Original Pancake House
- Black Bear Diner
- Shoney's
- Shari's

### FSR ITALIAN
- Olive Garden
- Carrabba's

### FSR PIZZA
- Mellow Mushroom
- California Pizza Kitchen
- Old Chicago Pizza

### FSR SEAFOOD-STEAK
- Outback
- Red Lobster
- Texas Roadhouse
- Longhorn Steakhouse
- Logan's Roadhouse
- Bonefish Grill
- Ruth's Chris Steak House

### FSR SPORTS BAR
- Buffalo Wild Wings
- Hooters
- Beef 'O' Brady's
- Dave & Busters
- Miller's Ale House

### FSR REGIONAL-ETHNIC
- P.F. Chang's
- On The Border
- Famous Dave's
- Chuy's Restaurant
- Melting Pot Restaurant
- Sonny's BBQ

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