

Restaurant Trends - Growing And Emerging Concepts - Data reflects change and activity from March 28, 2008 to July 28, 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).

Lincolnshire, IL-based EGG HARBOR CAFÉ (founded 1985) has increased by 1 unit, from 13 to 14 (8% growth). These are family/casual breakfast and lunch restaurants, with a \$3-\$8 per person check average. Seating is for about 100. Locations are in IL and WI.

New York, NY-based HALE & HEARTY SOUPS (founded 1995) has increased by 2 units, from 21 to 23 (10% growth) and entered into NJ. These fast casual soup and sandwich shops are open for breakfast, lunch and dinner, with a \$4-\$10 per person check average. Units have seating for about 30. Catering, delivery and online ordering are available. Trading areas are NY and NJ.

CRUMBS BAKESHOP based in New York, NY (founded 2003) has increased by 1 unit, from 7 to 8 (14% growth). These are quick serve bakery cafés with seating for about 20. Catering is offered. Per person check average is around \$3-\$8. Locations are in CA and NY.

MANDARIN RESTAURANT FRANCHISE CORP based in Brampton, ON (founded 1979) has increased by 1 unit, from 18 to 19 (6% growth). These are Chinese buffet restaurants with full bar and seating for about 300. The per person check average is around \$8-\$20. Units are more than 90% franchised and are in ON.

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

Ashland, NH-based GREAT AMERICAN DINING (founded 1971) has increased by 1 unit for the Common Man concept, from 5 to 6 (20% concept growth) and added a new concept called Rise and Shine Café (1 unit). Overall company increase was from 13 to 15 (15% company growth). These are family casual restaurants, serving both American and Italian cuisines. Meal periods are breakfast, lunch and dinner at most locations. Average seating is about 150. Restaurants have a full bar and offer catering and banquet services. Other concepts are called Airport Diner (1), Camp (1), Foster's Boiler Room (1), Italian Farmhouse (1), Lago (1), Lakehouse (1), Tilt N Diner (1), and Town Docks (1). All restaurants are in NH. A new unit of Common Man is scheduled to open in Claremont, NH, Summer 2009.

SEASONS PIZZA & RESTAURANT based in Newark, DE has increased by 2 units, from 16 to 18 (13% growth). These are family/casual Italian and Pizza restaurants with seating for around 60. Beer and wine are served. Catering and banquets are offered. Locations are more than 20% franchised and are in DE, MD and NJ.

DEWEY'S PIZZA based in Cincinnati, OH (founded 1998) has increased by 3 units, from 12 to 15 (25% growth). These are family/casual restaurants with seating for about 90. Beer and wine are served. Banquets are offered. Locations are in KY, MO and OH.

Concepts previously written about in the past 18 months.

Lone Tree, CO-based THE EGG & I (founded 1987) has increased by 3 units, from 25 to 28 (12% growth). We wrote about this concept on 11/6/07 (26% growth). The restaurants are family/casual, open for breakfast and lunch, with a \$3-\$8 per person check average. Seating is for about 125. Between 70% and 80% of units are franchised. Trading areas are CO, TX, UT, and WY, with a Birmingham, AL location to open later this year.

Atlanta, GA-based HUDDLE HOUSE (founded 1964) has increased by 9 units, from 427 to 436 (2% growth). We wrote about this concept on 3/13/07 (1% growth) and again on 10/9/07 (3% growth). The restaurants are family/casual, open for breakfast, lunch and dinner, with a \$4-\$10 per person check average. Seating is for about 60. Trading areas are AL, AR, FL, GA, IL, IN, KY, LA, MO, MS, NC, OH, OK, SC, TN, TX, VA, and WV. More than 90% of units are franchised.

Tustin, CA-based MIMI'S CAFÉ (founded 1978) has increased by 6 units, from 126 to 132 (5% growth) and entered into the states of MD and VA. We wrote about this concept twice before, on 3/13/07 (3% growth) and on 10/2/07 (6% growth). The restaurants are family/casual, open for breakfast, lunch and dinner, with an \$8-\$20 per person check average. Locations have a full bar and seating for about 200. The restaurants are in the states of AR, AZ, CA, CO, FL, GA, IL, KS, KY, MD, MO, NC, NE, NM, NV, OH, OK, SC, TN, TX, UT, and VA. Mimi's Café is a subsidiary of Bob Evans Farms Restaurants.

Portland, OR-based MCCORMICK & SCHMICK'S SEAFOOD (NASDAQ: MSSR, founded 1979) has increased by 4 units for the McCormick & Schmick's concept, from 77 to 81 (5% concept growth) and entered into WI. The company also operates the 6-unit Boathouse Restaurants concept. Overall company increase was from 83 to 87 (5% company growth). We wrote about this concept on 10/16/07 (7% company growth). These upscale seafood restaurants are open for lunch and dinner, with a \$15-\$30+ per person check average. Seating is for about 300. All locations have a full bar. Banquet facilities are available. Trading areas are AL, AZ, BC, CA, CO, DC, FL, GA, IL, IN, MA, MD, MI, MN, MO, NC, NJ, NV, NY, OH, OR, PA, RI, TX, VA, WA, and WI.

PAT'S FAMILY RESTAURANTS headquartered in National Park, NJ (founded 1974) has increased by 3 units, from 51 to 54 (6% growth). These are quick serve Italian and Pizza restaurants. Seating is for about 60 and catering is offered. Locations are in DE, MD, NJ and PA. We reported on this concept in our 12/11/07 newsletter (7% growth) and our 4/8/08 newsletter (11% growth).

RED BRICK PIZZA based in Palmdale, CA (founded 1998) has increased by 5 units, from 73 to 78 (7% growth). Locations are fast casual serving beer and wine. Seating is for around 60. Stores are more than 90% franchised and are in AZ, CA, CO, FL, NM, NV, OR and TX. We reported on this concept in our 7/31/07 newsletter (10% growth).

BEAR CLAW COFFEE based in Chelsea, MI has increased by 3 units, from 23 to 26 (13% growth). These are quick serve units with seating for about 20. Locations are open for breakfast, lunch and dinner. Catering and banquets are offered. They are 88% franchised and are located in MI and KY. We last reported on this concept in our 5/1/07 newsletter (19% growth).

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