

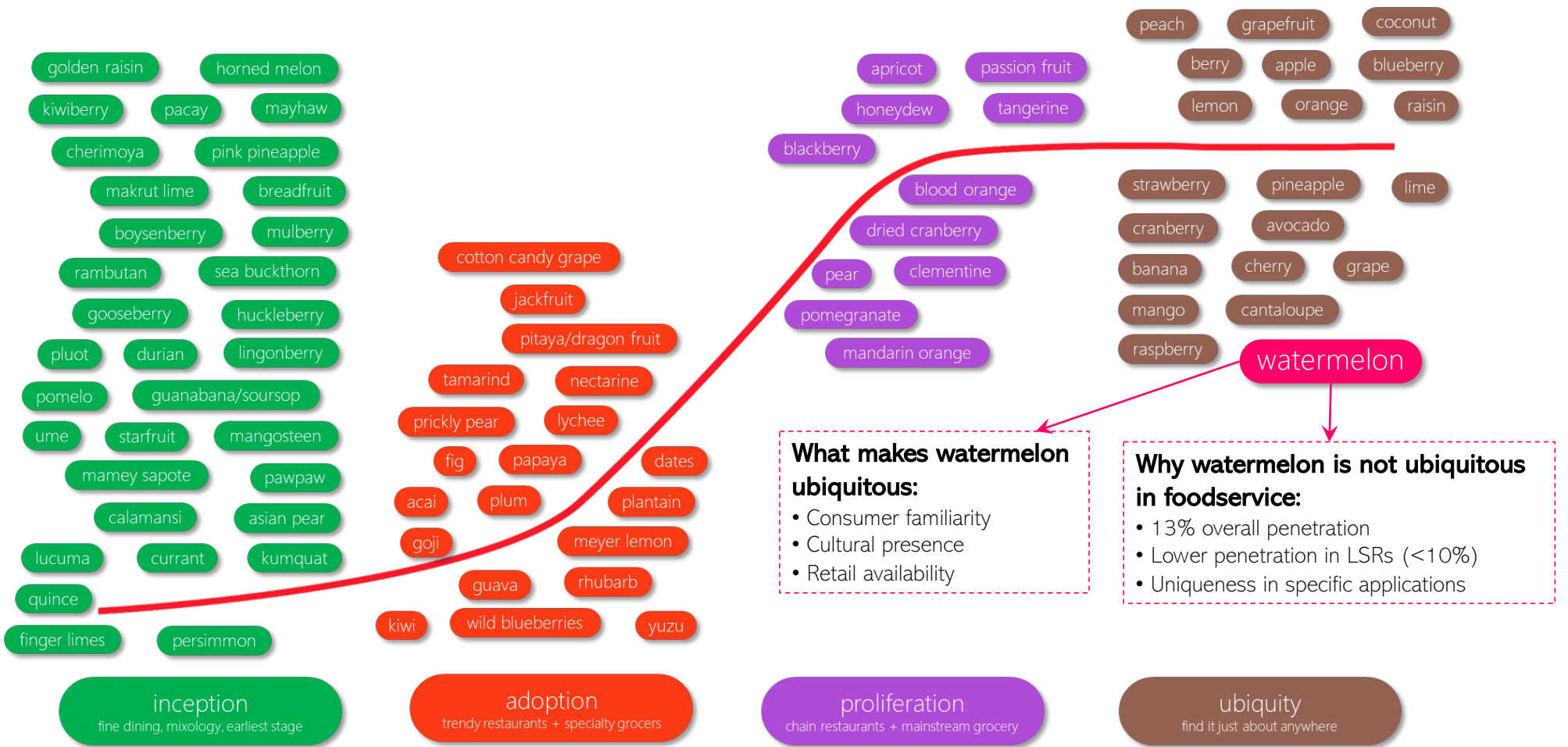
# State of Watermelon in Foodservice

Foodservice Findings from  
National Watermelon Promotion Board  
2022 Research Project





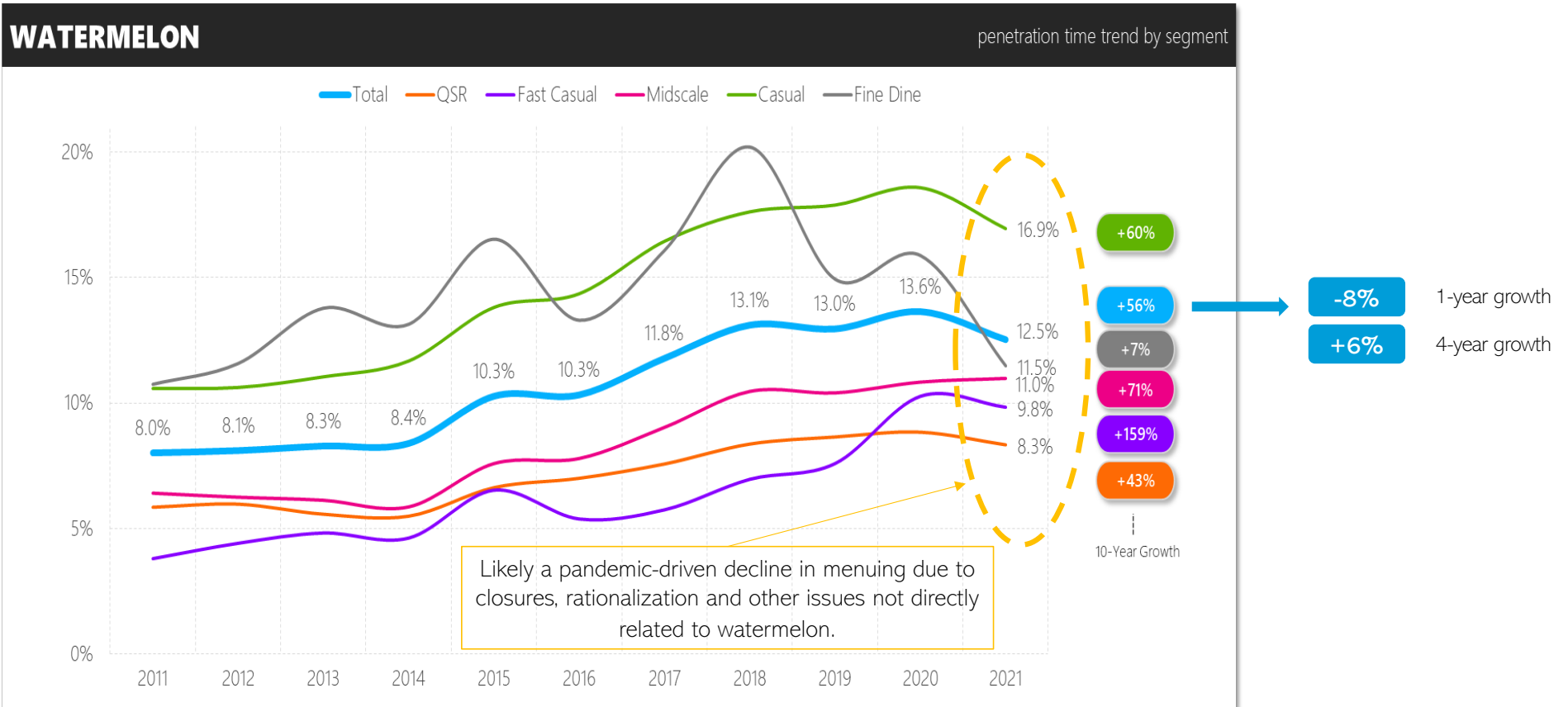
- Objectives
- Process
- Sampling
- Timing



Source: Datassential NWPB (Watermelon Overview) 0921 Report

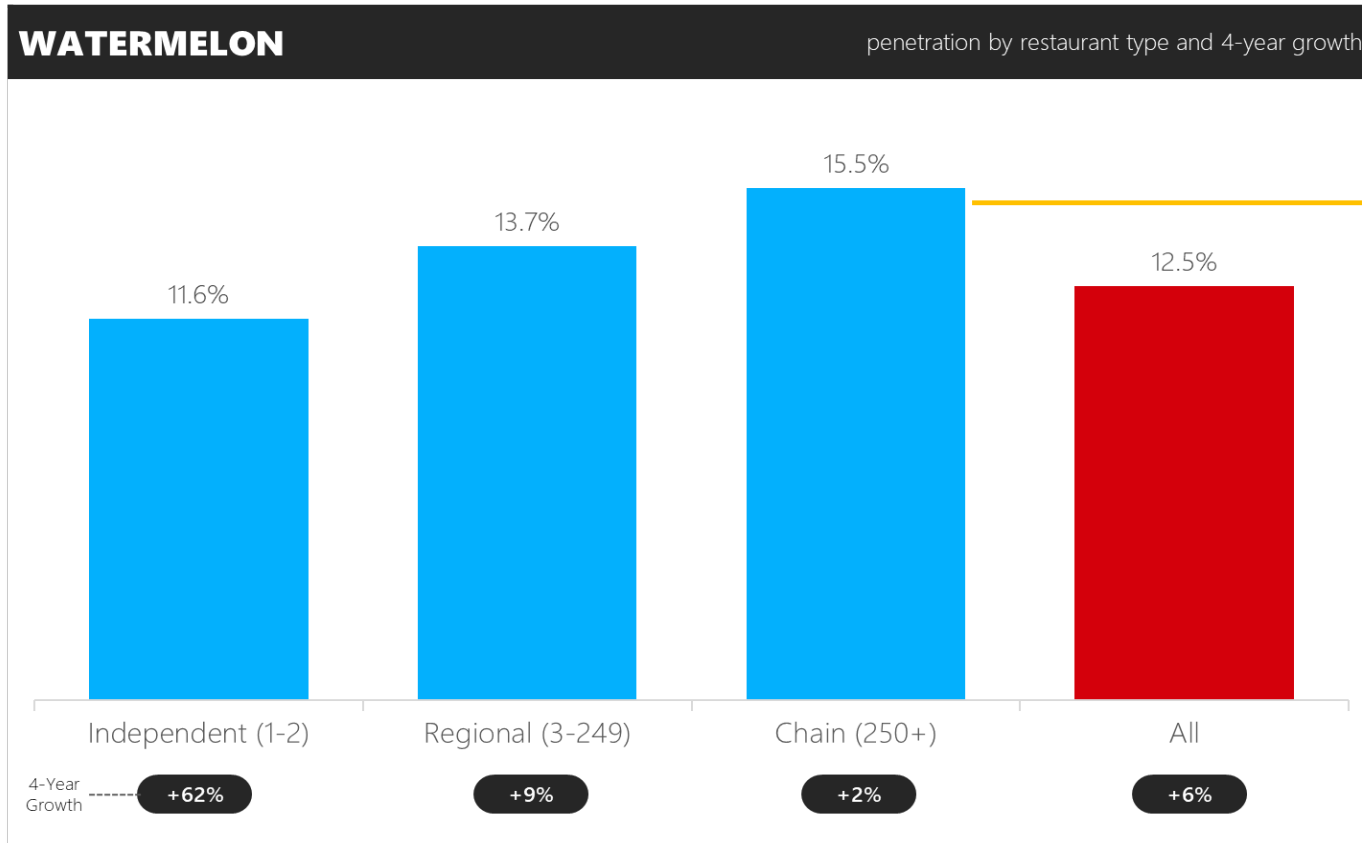


# The pandemic temporarily impacted years of consistent penetration gains.



Source: Datassential NWPB (Watermelon Overview) 0921 Report

# Watermelon is behaving more like an adoption-stage trend, poised to move into proliferation.



National chains have become far more influential in foodservice post-pandemic given the outsized impact on independents and smaller, regional chains.

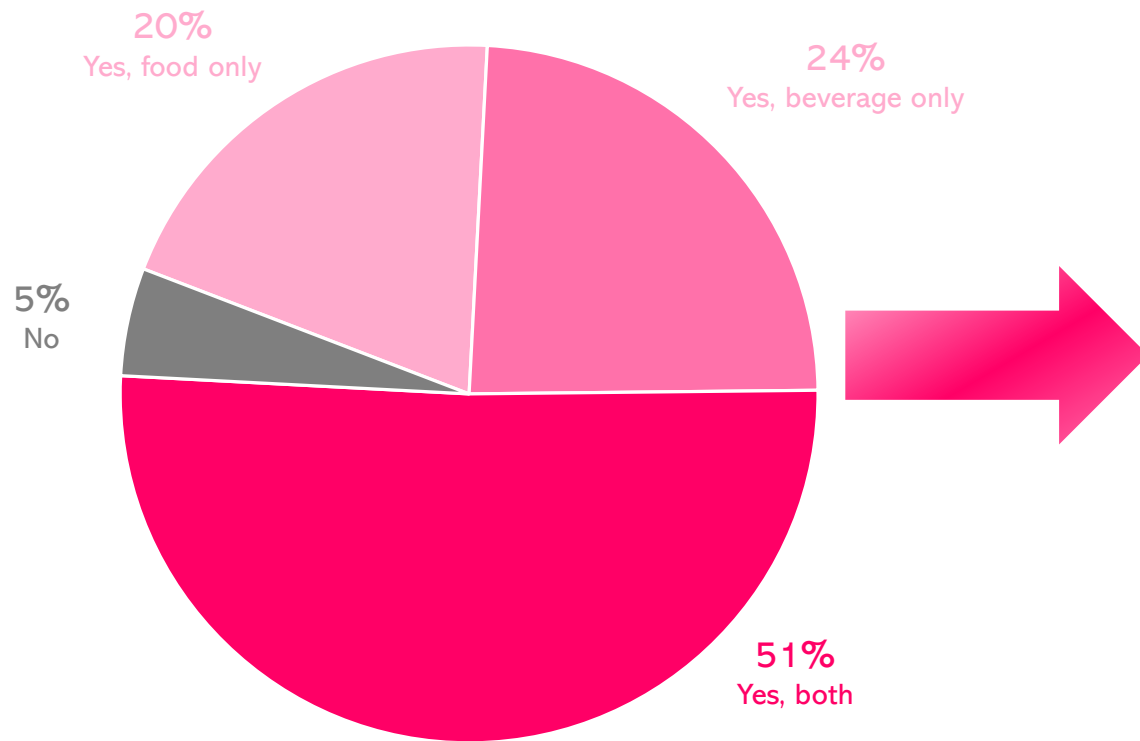
This influence is likely to continue in the short-term.

A photograph of a large pile of green watermelons. One watermelon in the foreground is sliced, showing its bright red, juicy flesh and several black seeds. The rest of the watermelons are whole, with their characteristic dark green, striped rinds. The text "Consumption & Use of Watermelon in Foodservice" is overlaid in white, centered on the image.

# Consumption & Use of Watermelon in Foodservice

# Current use of fresh watermelon has increased significantly since last study.

Current Foodservice Menuing of Fresh Watermelon



|                              | Main Menu, year round | Seasonal/ LTO only |
|------------------------------|-----------------------|--------------------|
| Yes, food only               | 59%                   | 41%                |
| Yes, beverage only           | 50%                   | 50%                |
| Yes, both                    | 37%                   | 63%                |
| <b>Share menuing overall</b> | <b>43%</b>            | <b>57%</b>         |

Currently menu in the September 2020 study was 38%

## Most of foodservice has increased watermelon use

**71%**

of all foodservice  
increased use

**71%**

of limited service  
restaurants  
increased use

**75%**

of full service  
restaurants  
increased use

Less than 10% of foodservice noted a decrease in watermelon use



## Most of foodservice will continue using watermelon in their operations\*

78%

of total foodservice  
planning to  
increase use

81%

of limited service  
restaurants  
planning to  
increase use

78%

of full service  
restaurants  
planning to  
increase use

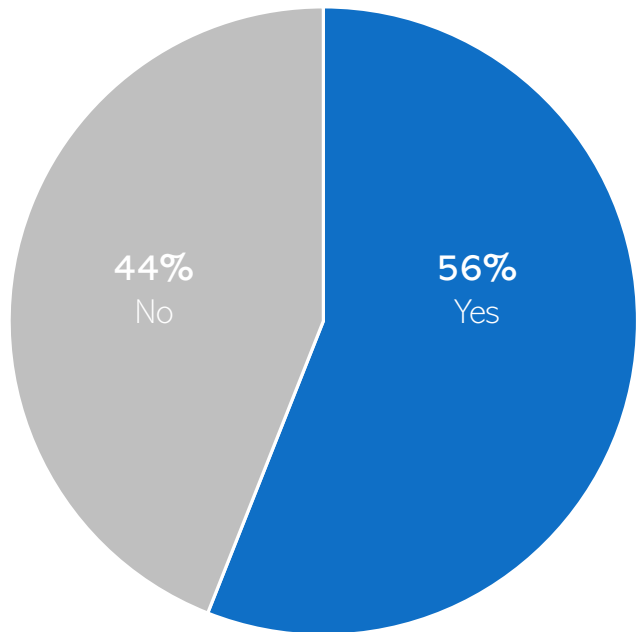
None indicated they are unlikely to continue using watermelon

*\*Percentages are extremely likely + very likely to continue using*

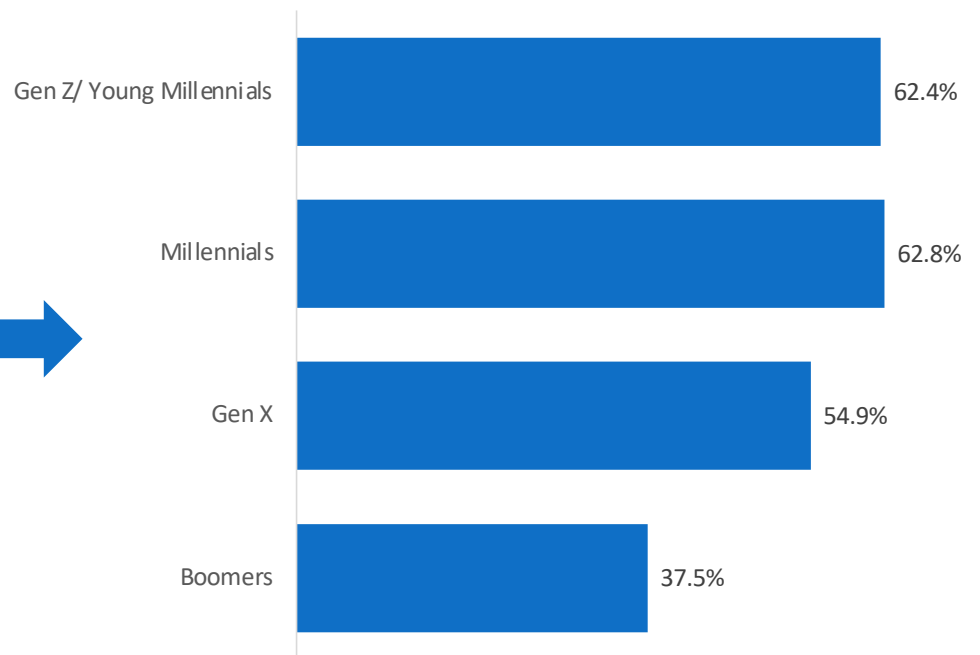
*Source: Menu Matters NWPB Operator Omnibus 2022*

# Growth in menuing is likely driven, and supported, by consumer interest.

Consumer Past Six Month Ordering of Watermelon AFH

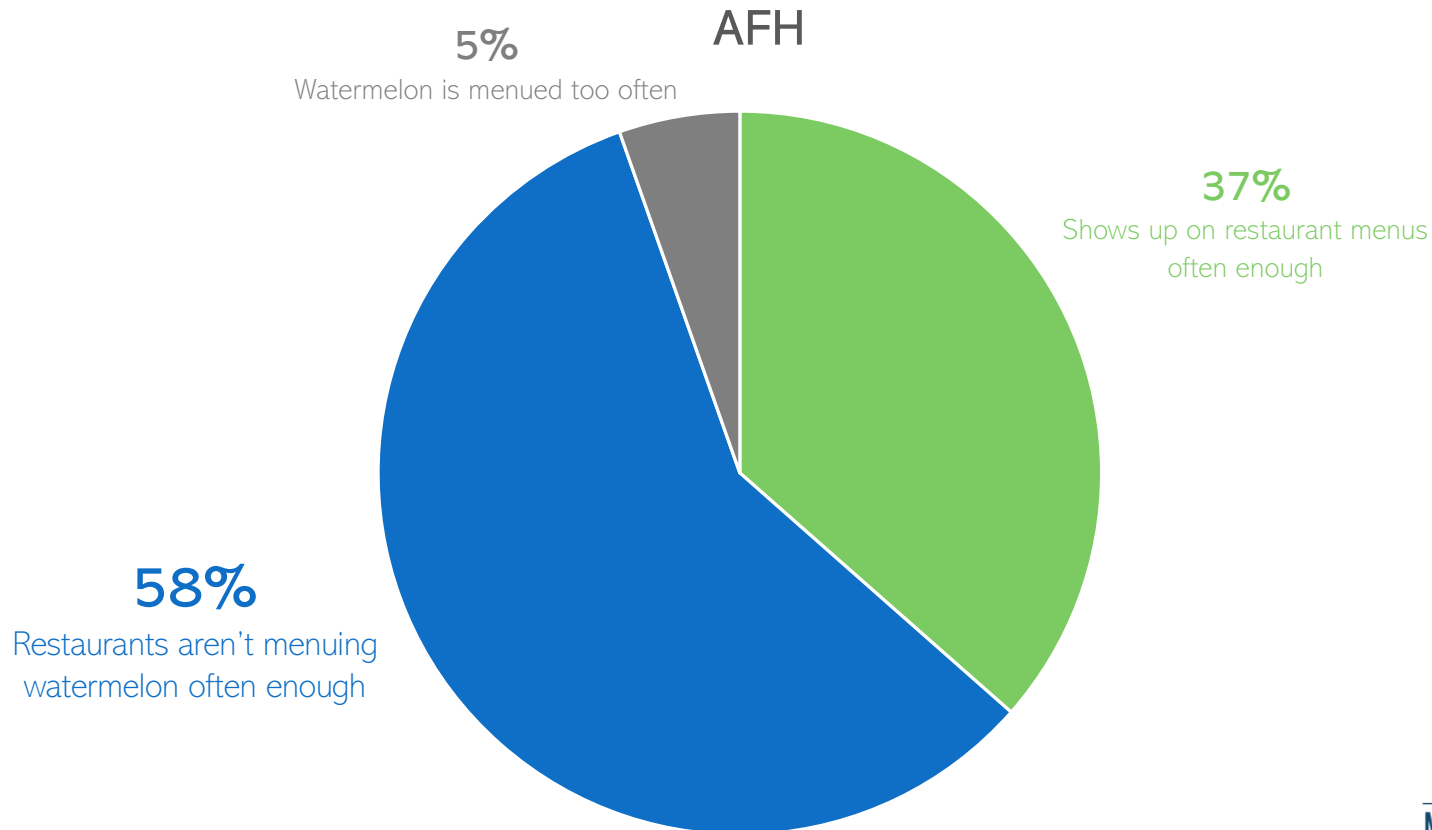


Past Six Month Ordering by Generation



# Consumers still don't think watermelon is leveraged to its full potential on menus.

Consumer Perception of Watermelon Innovation



Source: Menu Matters NWPB Consumer Survey 2022

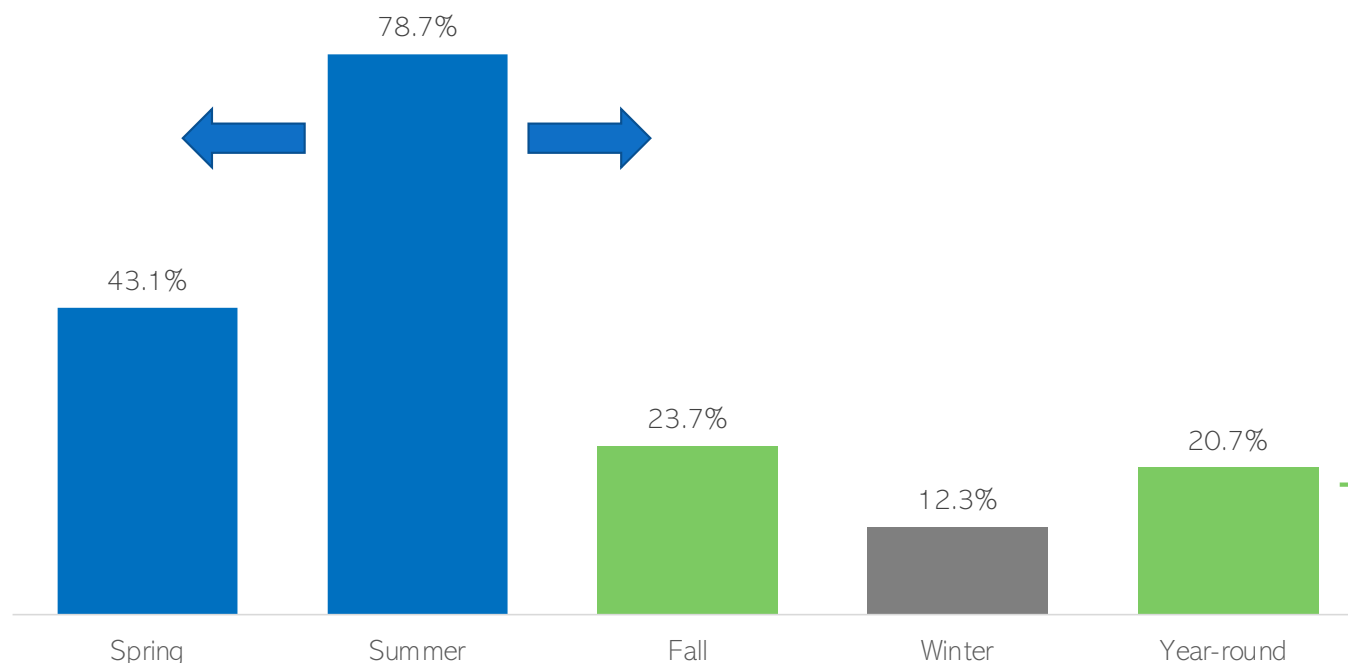
# Seasonality vs Year-round Menuing





# Summer is peak watermelon season, but opportunities exist to extend the season.

Consumer Seasonal Demand for Watermelon AFH



27% of consumers in the 2019 study liked watermelon year-round

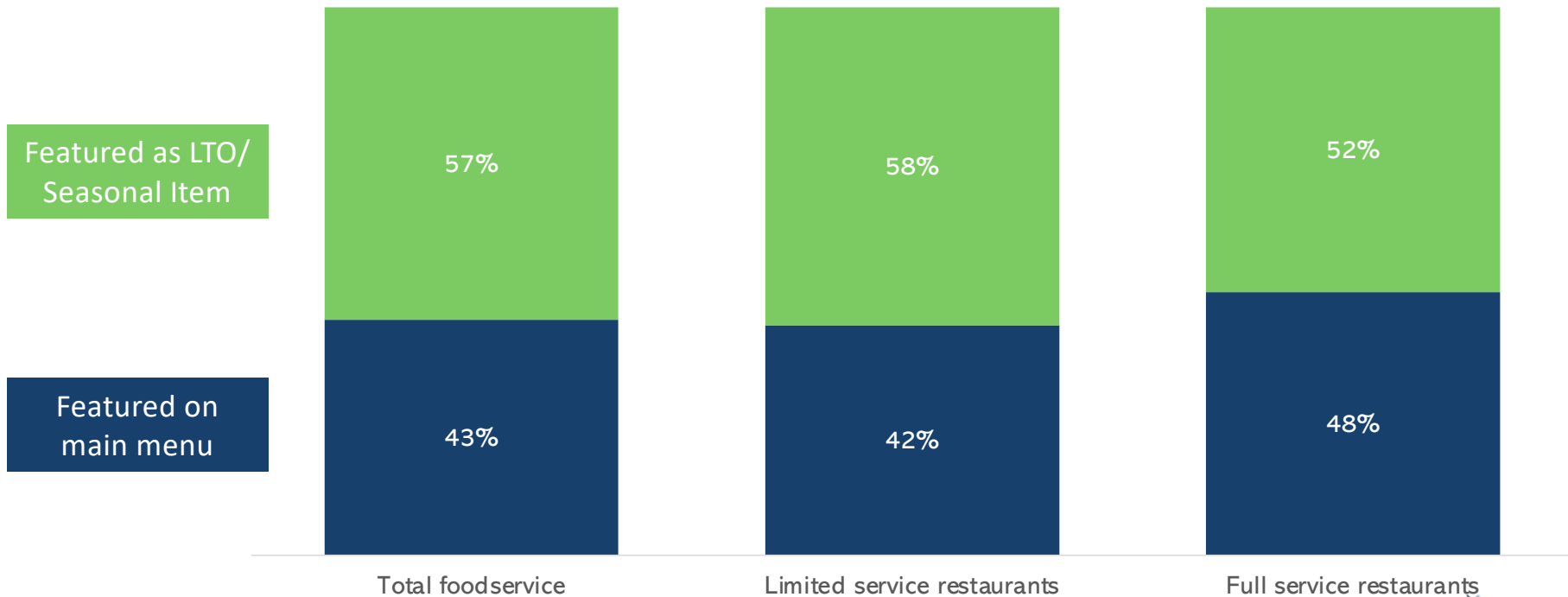
## Share Indicating from 2019 Consumer Study

57%      97%      37%      28%

Source: Datassential Consumer Omnibus Summer 2019; Menu Matters NWPB Consumer Survey 2022

While main menu features are up, foodservice is still leveraging watermelon as a seasonal LTO ingredient.

Fresh Watermelon Use in Foodservice –  
Main Menu vs Seasonal



Source: Menu Matters NWPB Operator Omnibus 2022



**DAVE &  
BUSTER'S**



**BONEFISH  
GRILL**

FRESH WATERMELON  
*Martini*

**FIRST  
WATCH**



**WATERMELON  
WAKE-UP**



**california  
PIZZA KITCHEN**

**Cheddar's**  
SCRATCH EST. 1978 KITCHEN



Prices may vary by location

**Two takes on summer**

Pick between our Absolut® Watermelon Vodkarita or Watermelon Texas Frozen Swirl... Or try one of each!

**Absolut Watermelon Vodkarita**

Absolut Vodka, watermelon puree and sweet & sour mix, hand-shaken, poured over ice and topped with a fresh-cut watermelon.

**Watermelon Texas Frozen Swirl**

It's back - our signature Frozen Texas Margarita, swirled with watermelon puree and topped with fresh-cut watermelon.

**Get 'em while they last**

Just like the warm weather, these drinks will be gone before you know it. So stop by soon to get your relaxing sip of summer.



california  
PIZZA KITCHEN



Newk's  
EATERY



Glory Days  
GRILL



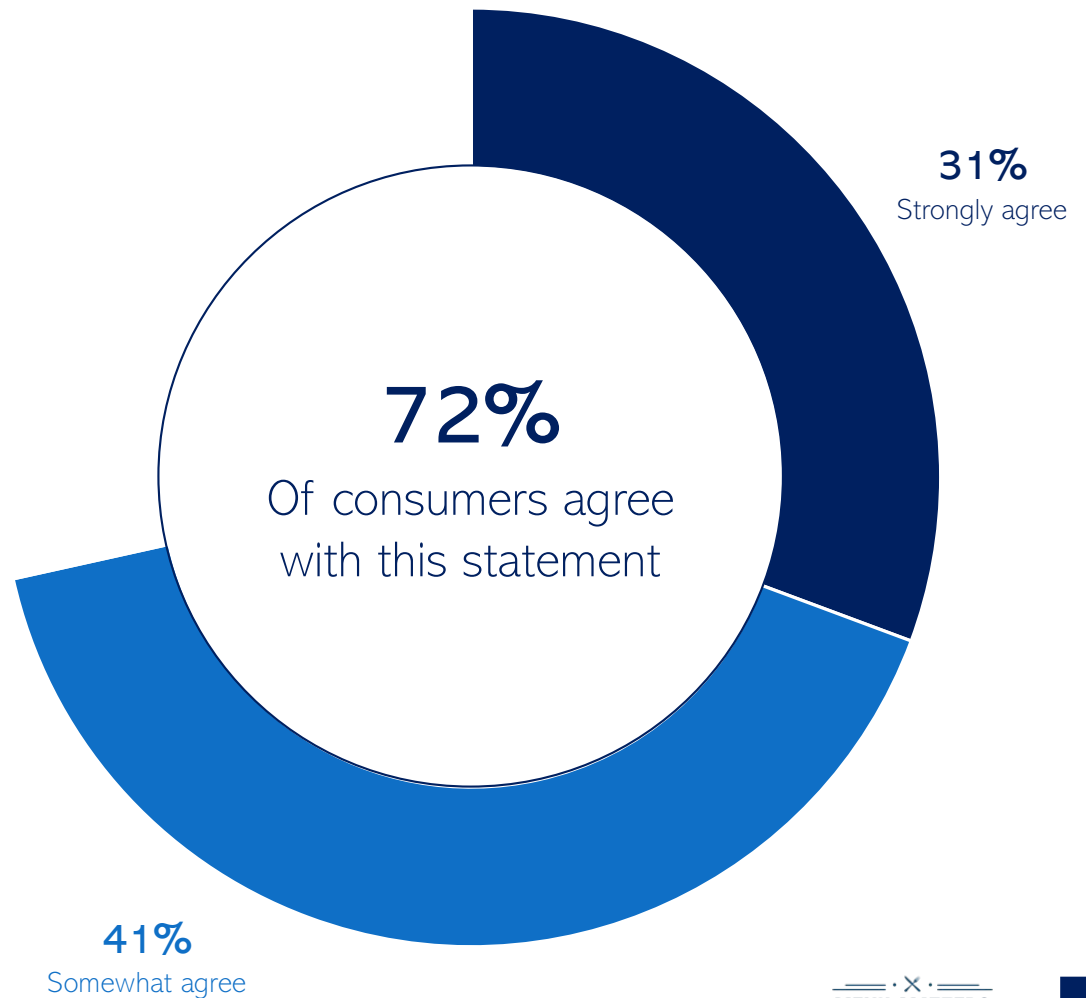




Versatility & Innovation

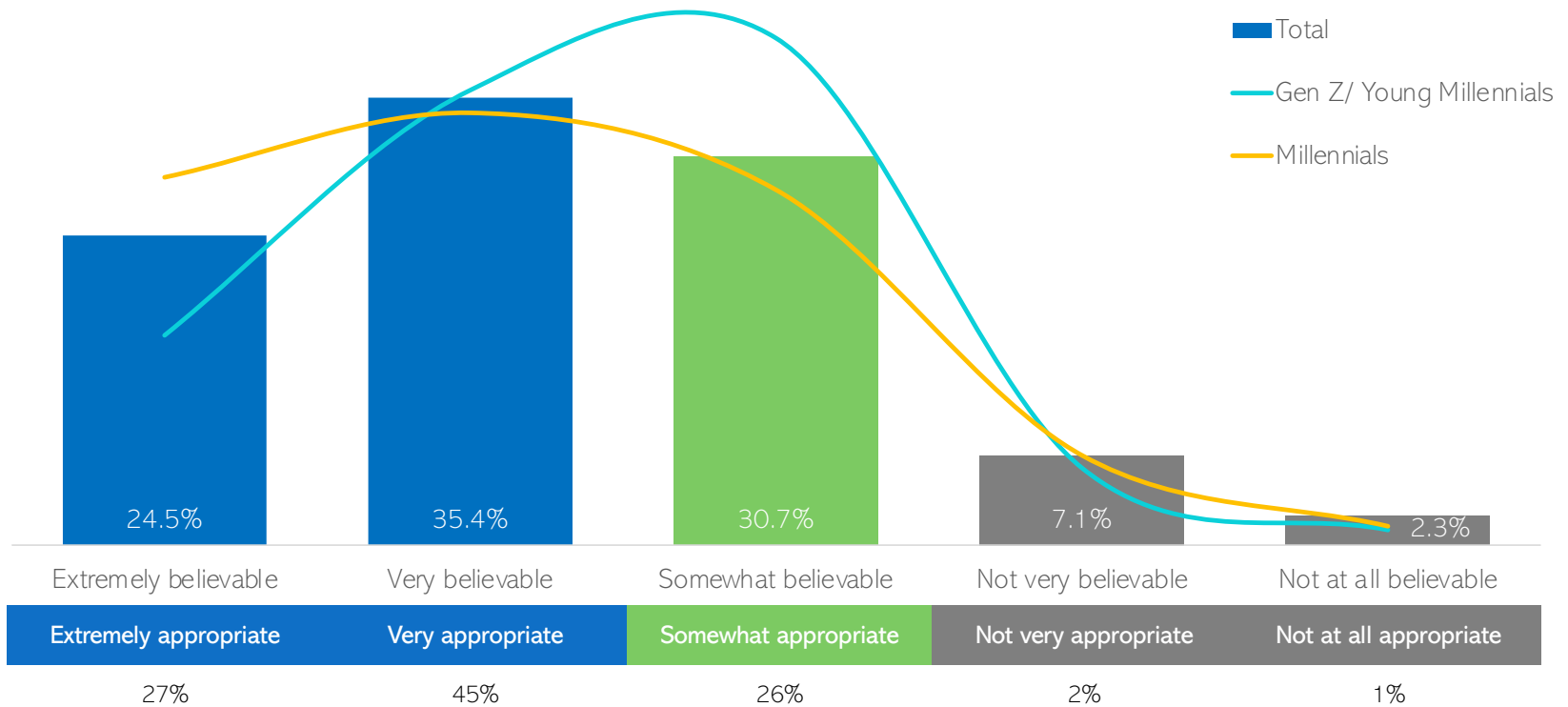
Statement Tested:

**“Fresh watermelon is under appreciated, and restaurants should be doing more to use fresh watermelon in new and interesting ways.”**



# Most consumers believe watermelon can be an on-trend ingredient, and foodservice agrees.

Believability of Watermelon as On-trend Ingredient Among Consumers

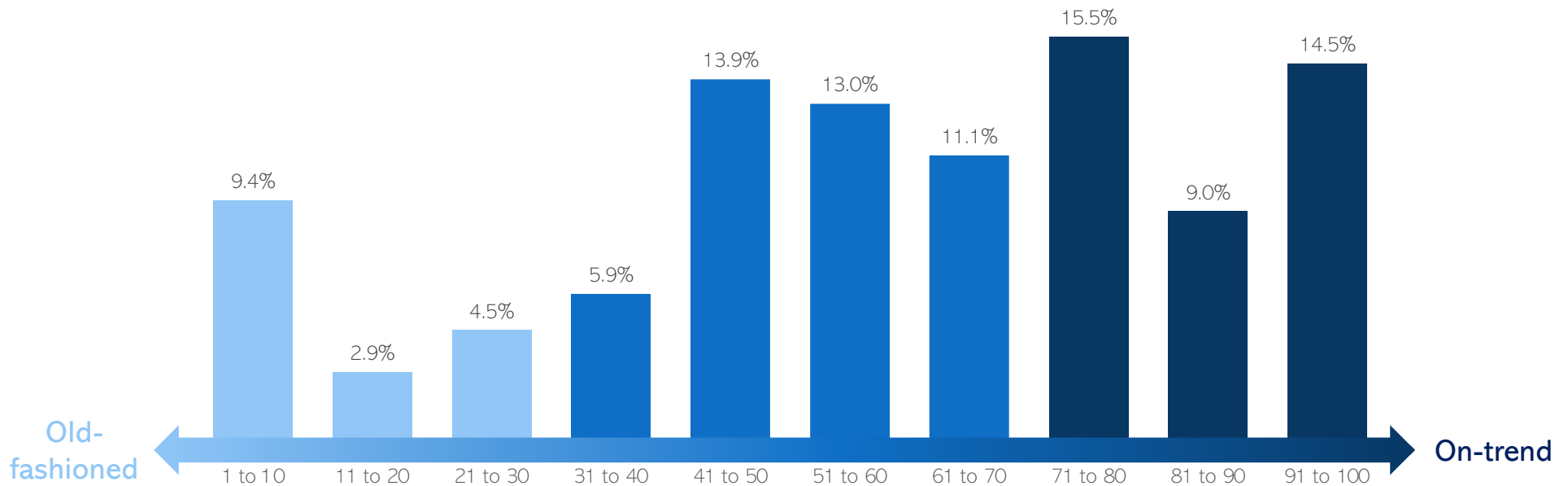


Foodservice perceptions of fresh watermelon an on-trend applications

Source: Menu Matters NWPB Consumer Survey 2022; Menu Matters NWPB Operator Omnibus 2022

# Foodservice, and retail, innovation around watermelon is shifting perceptions away from strictly nostalgia/ old-fashioned.

Old-fashioned vs On-trend Perceptions of Dishes Featuring Watermelon Among Consumers



Source: Menu Matters NWPB Consumer Survey 2022



# Consumer interest in beverage & food applications with watermelon

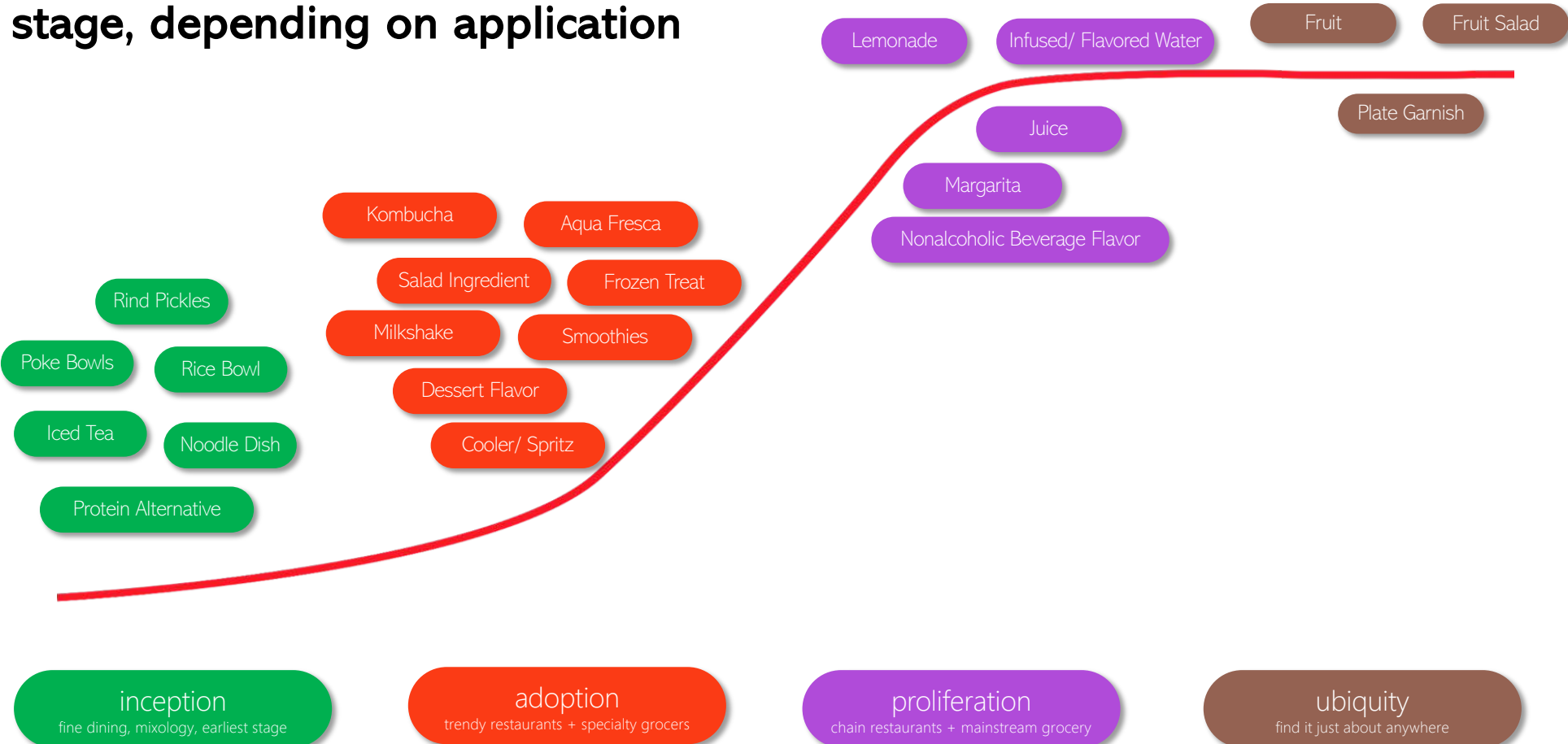
|  | Nonalcoholic Beverages  | Alcoholic Beverages | Food                  |
|--|-------------------------|---------------------|-----------------------|
| <b>Broad appeal applications</b>         | Lemonade/ limeade       |                     | Stand-alone option    |
|  | Smoothies               | Margarita           | Frozen desserts       |
|  | Juice/ juice blends     | Frozen cocktails    | Nonfrozen desserts    |
|  | Infused/ flavored water | Coolers             | Snacks                |
| <b>Niche applications with potential</b> | Coolers/ refreshers     |                     |                       |
|  | Kombucha                | Hard kombucha       | Tomato replacement    |
|  | Nondairy shakes         | Mojito              | Noodle dishes         |
|  | Soda floats             | Hard seltzer        | Breakfast baked goods |
|  | Aqua frescas            | Mixed drinks        | Poke/ poke bowls      |
| Functional beverages                     | Hard lemonade/ limeade  | Meat alternatives   |                       |

# Foodservice behavior and interest of applications with watermelon

| Top Menued                                   | Broad Interest                              | Niche/ Innovative Applications |
|--|---|--------------------------------|
| Nonalcoholic beverage ingredient (smoothies) | Condiment ingredient for savory application | Noodle dishes                  |
| Appetizer/ side ingredient                   | Condiment ingredient for sweet application  | Rice-based bowls               |
| Salad topping                                | Meat alternative/ replacement               | Dipping sauces for tots/ fries |
| Dessert ingredient                           | Plant-based entrée ingredient               | Classic cocktails              |
| Rind pickles                                 | Snack ingredient                            | Savory jams                    |
| Beverage garnish                             | Primary ingredient in salads                | Spritz                         |
|  |   | Kombucha                       |

Source: Menu Matters NWPB Consumer Survey 2022; Menu Matters NWPB Operator Omnibus 2022

# Watermelon can occupy every trend stage, depending on application



**inception**  
fine dining, mixology, earliest stage

**adoption**  
trendy restaurants + specialty grocers

**proliferation**  
chain restaurants + mainstream grocery

**ubiquity**  
find it just about anywhere

# Grilled watermelon is an untapped prep opportunity...as well as a potential prepared product innovation area.

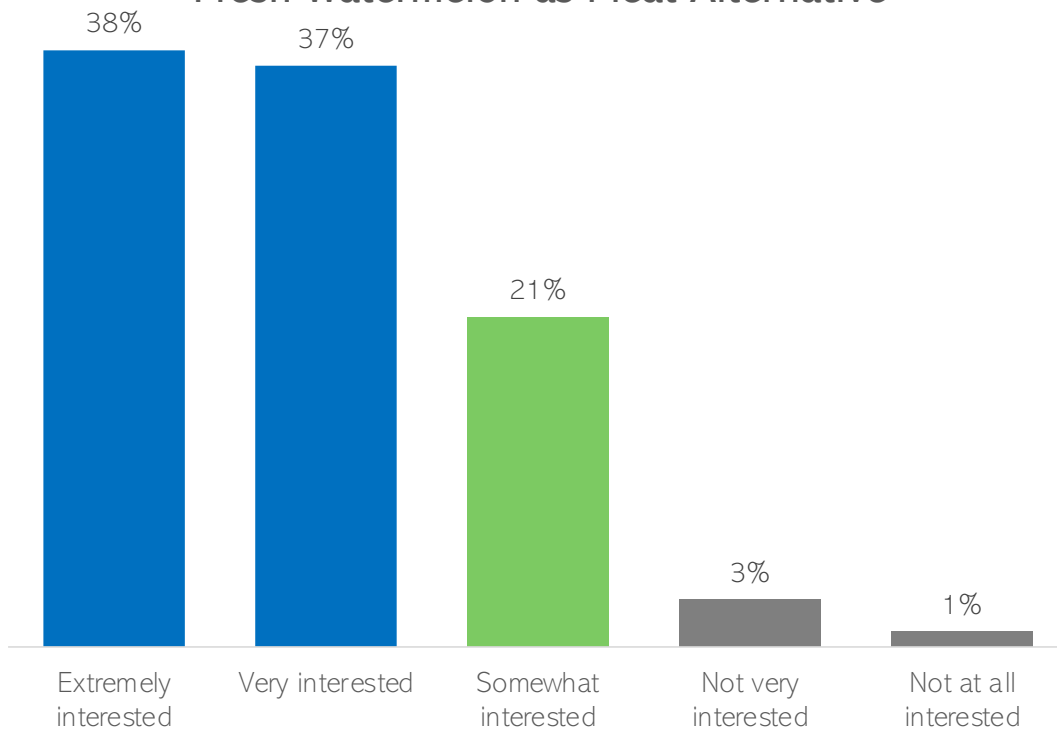
|                  | Consumer Interest | Foodservice Interest |
|------------------|-------------------|----------------------|
| Grilled          | 41%               | 45%                  |
| Seasoned/ spiced | 40%               | 38%                  |
| Dehydrated       | 25%               | 50%                  |
| Pickled          | 24%               | 40%                  |
| Compressed       | 24%               | 44%                  |



Grilled watermelon is featured on only 38% of foodservice menus

# Whole ingredient meat alternative options, including fresh watermelon, are on-trend.

Foodservice Interest in Learning How to Use Fresh Watermelon as Meat Alternative



Source: Menu Matters NWPB Operator Omnibus 2022





Health &  
Wellness

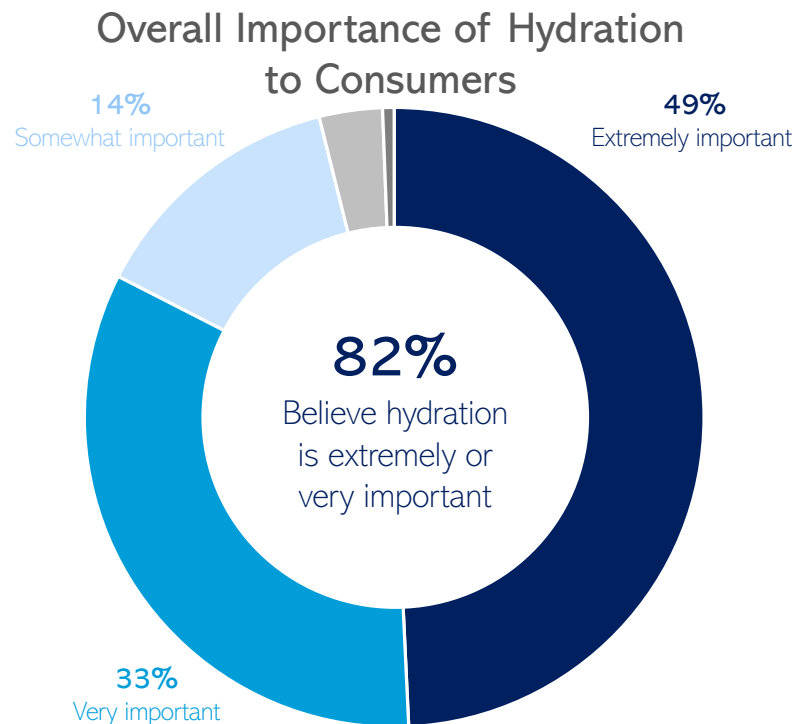
A top-down photograph of watermelon slices and fresh mint leaves arranged on a white, textured surface. The watermelon is cut into triangular and wedge-shaped pieces, showing the red flesh and black seeds. Several sprigs of green mint leaves are scattered around the watermelon. The background has a subtle, embossed pattern.

**60%**

of consumers believe watermelon  
is a healthy fruit option

*Source: Menu Matters NWPB Consumer Survey 2022*

Hydration is very important to consumers, with room to grow watermelon's functional association with this health benefit.



Only **66%** of consumers know that watermelon is 92% water

**73%** of foodservice states understanding nutritional benefits are extremely/ very important when evaluating products



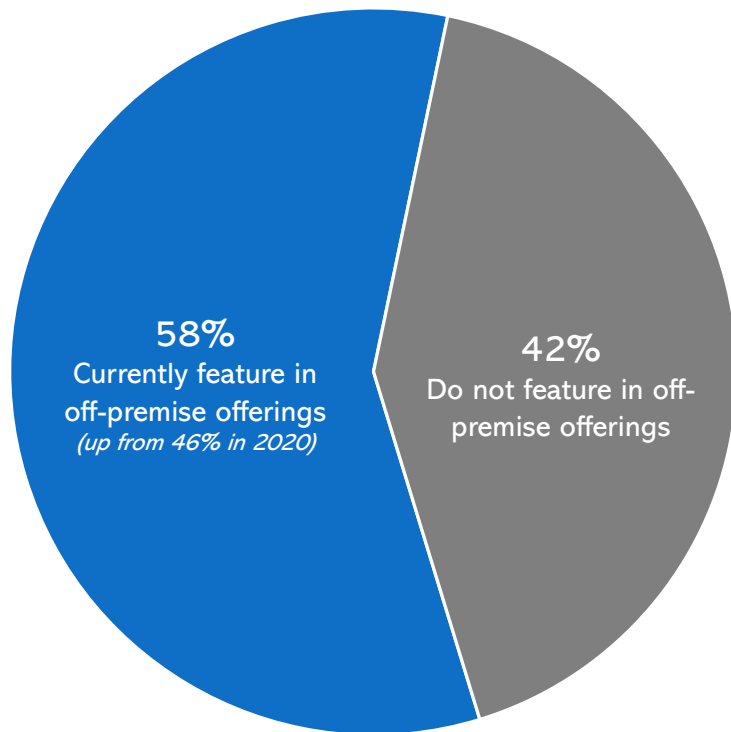
# Off-premise Potential





# Watermelon is common on off-premise menus, and likely to become more common in the near future.

Fresh Watermelon on Off-premise Menus



**63%** of foodservice is extremely or very likely to offer fresh watermelon on off-premise menu

**Nearly 25%** of consumers who never order watermelon don't because it's not available for off-premise orders

## Top issues with watermelon on off-premise menus:

Item becomes too soggy

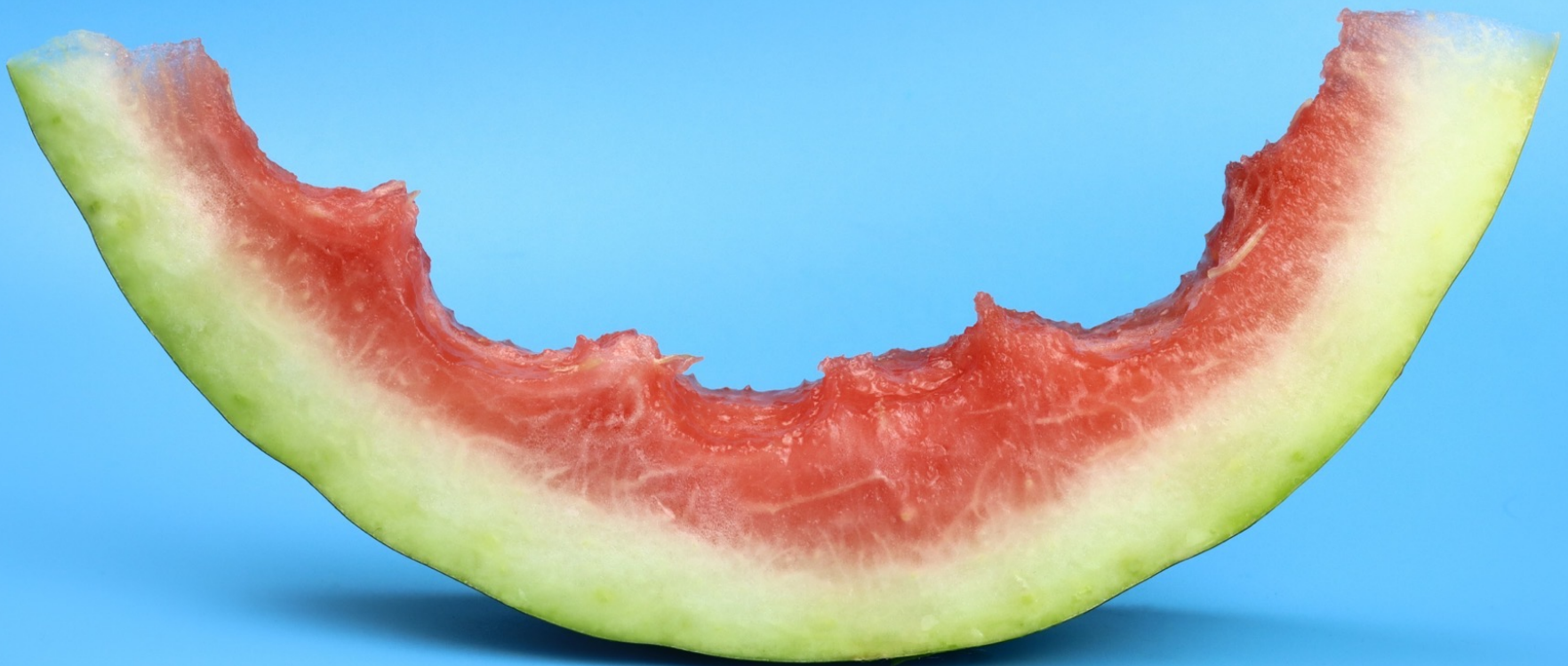
Watermelon becomes too warm/ tepid

Watermelon bruises easily

Watermelon becomes discolored

Watermelon looks/ feels "slimy"

# Leveraging the Rind



In foodservice, watermelon rind has potential, but consumer acceptance will likely be pushed by foodservice use.

81%

Of foodservice is extremely/ very interested in learning how to use fresh rind

74%

Of foodservice is extremely/ very interested in watermelon rind products

53%

Of consumers understand the rind is edible

63%

Of consumers are interested to some degree in seeing rind on the menu, particularly:

Rind candy/ candied rind

Rind pickles

Rind slaw

Stir fry featuring rind

Condiments featuring rind



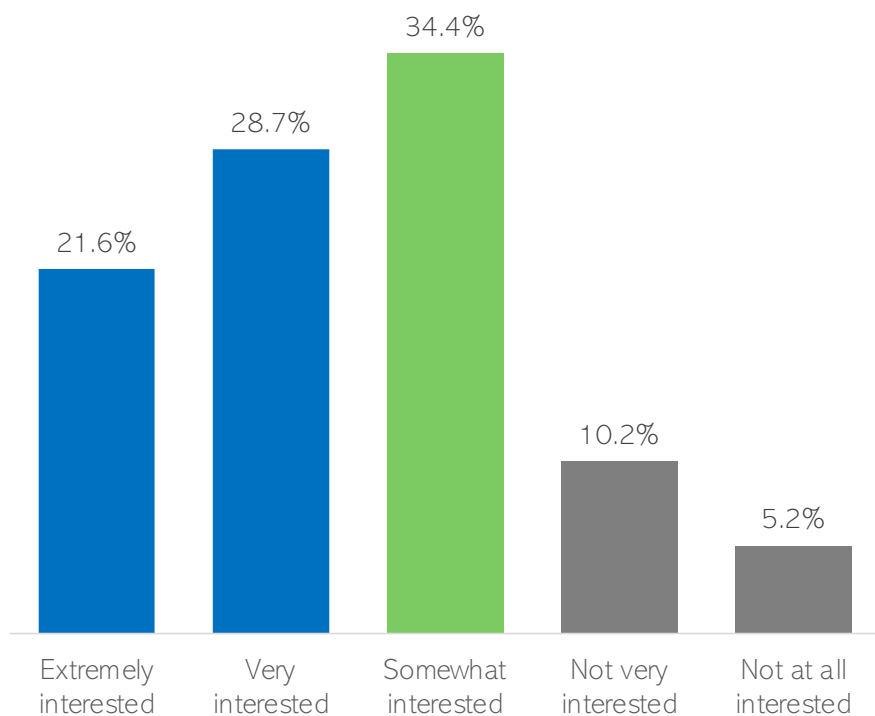
# Impact Beyond Foodservice





# Consumers are interested in prepared options with watermelon at retail, particularly – as with restaurants – desserts and salads.

Consumer Interest in Prepared Options at Retail



**68%**

Of consumers expect retail prepared food options to keep up with restaurant innovations

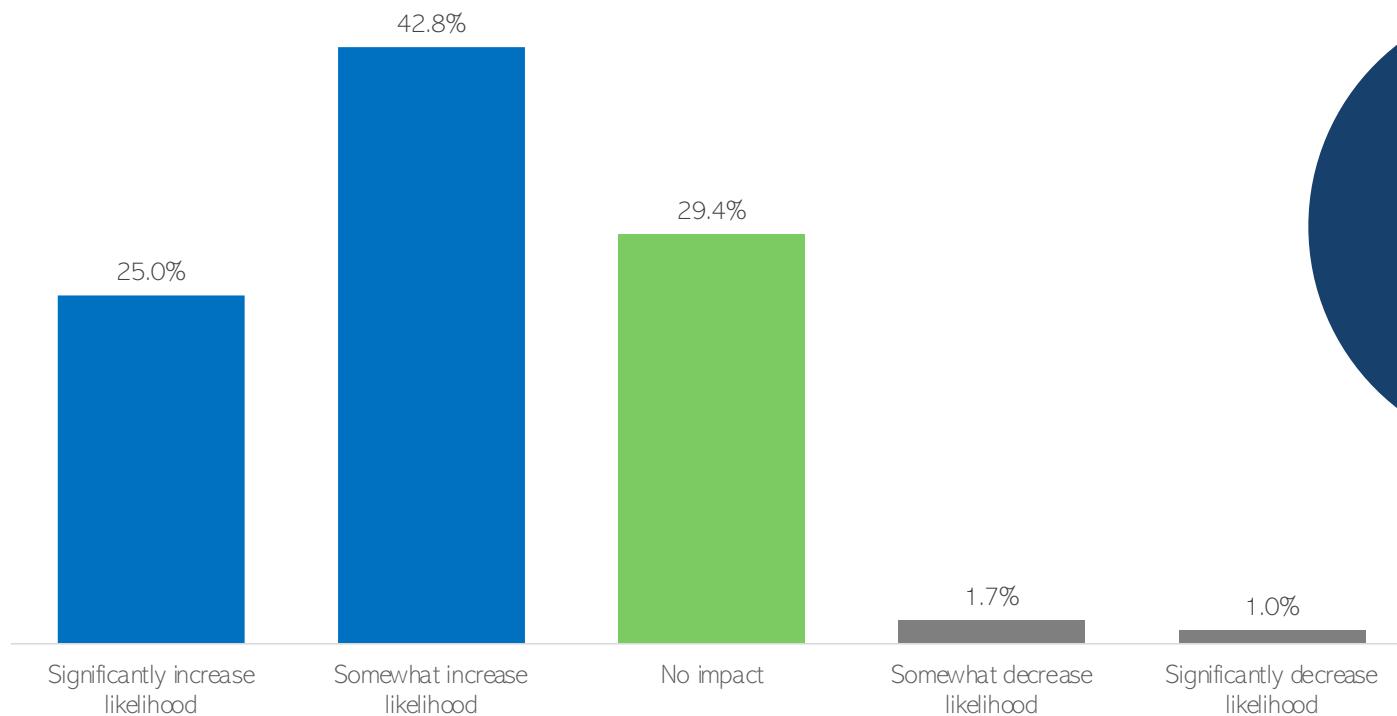
**57%**

Of consumers want retail prepared options featuring watermelon to be seasonal, with 25% looking for year-round options

Source: Menu Matters NWPB Consumer Survey 2022

# Away from home innovation and access will impact retail purchase behavior.

Impact of Foodservice Experience on Consumer Retail Purchase



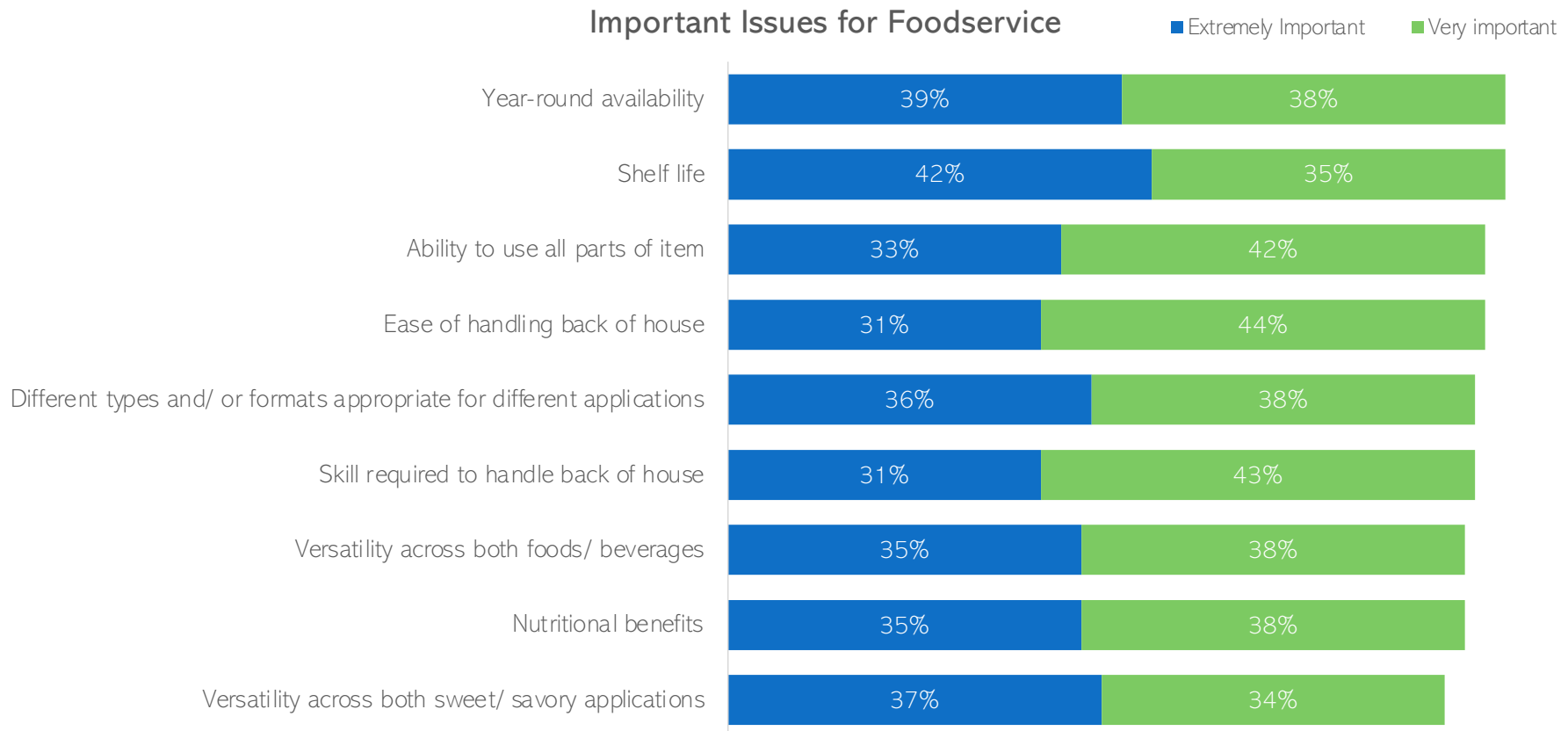
**57%**  
Of consumers are likely to experiment with watermelon at home after seeing it on restaurant menus

Source: Menu Matters NWPB Consumer Survey 2022

A photograph of a large, ripe watermelon with dark green stripes and lighter green patches, resting on the ground in a field. The background is a soft-focus green field. The text "Role of National Watermelon Promotion Board" is overlaid in white, bold, sans-serif font in the center of the image.

# Role of National Watermelon Promotion Board

# There are solutions for watermelon that exist to address the most important issues to foodservice.

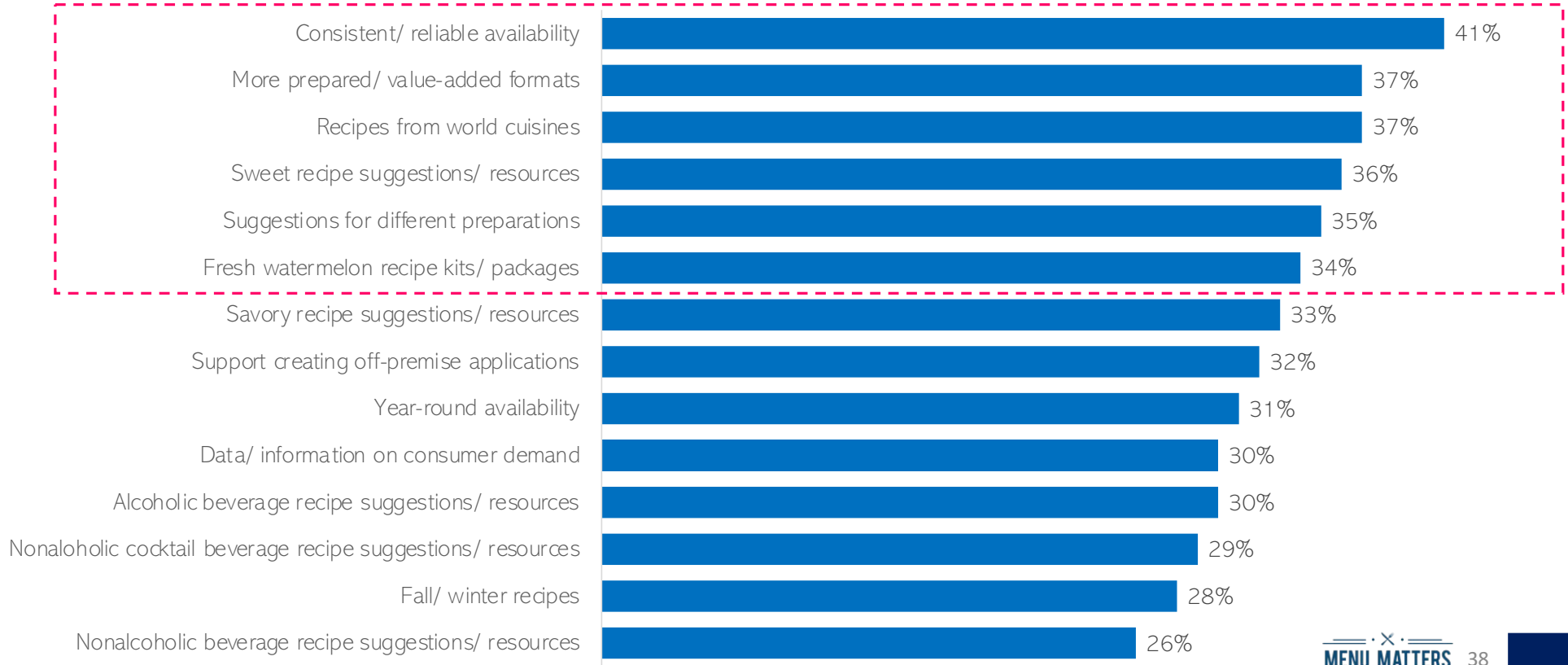


Source: Menu Matters NWPB Operator Omnibus 2022



# NWPB can help raise awareness on options available that address several of these key issues for foodservice.

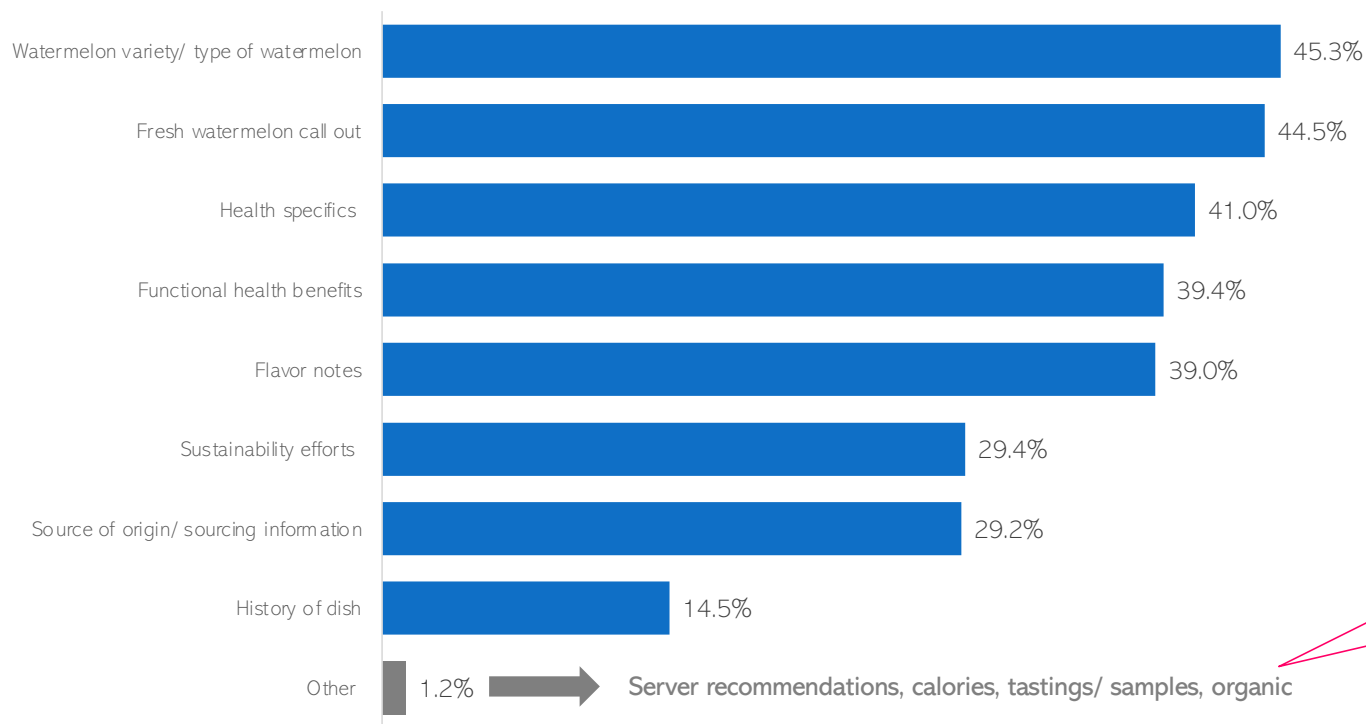
## Foodservice Interest in Resources to Encourage Increased Fresh Watermelon Use



Source: Menu Matters NWPB Operator Omnibus 2022

# NMPB can educate foodservice on how best to leverage fresh watermelon on the menu in the most impactful ways.

Consumer Preferred Watermelon Descriptors/ Menu Call Outs



"Just any way. U let me know u have watermelon fresh and I would love some."



# THANK YOU

Maeve Webster

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