

# Watermelon Menuing and Innovation in the U.S.

- Penetration by segment
- Menuing by daypart, menu part
- Innovation across categories



Menu  
Matters



+



# Methodology

Restaurant menu review using Menu Data's new database, comparing findings to the 2021 Datassential report

- Some differences in comparison, but overall findings trendable

Innovation review of unique dishes and beverages menued by restaurants domestically and internationally

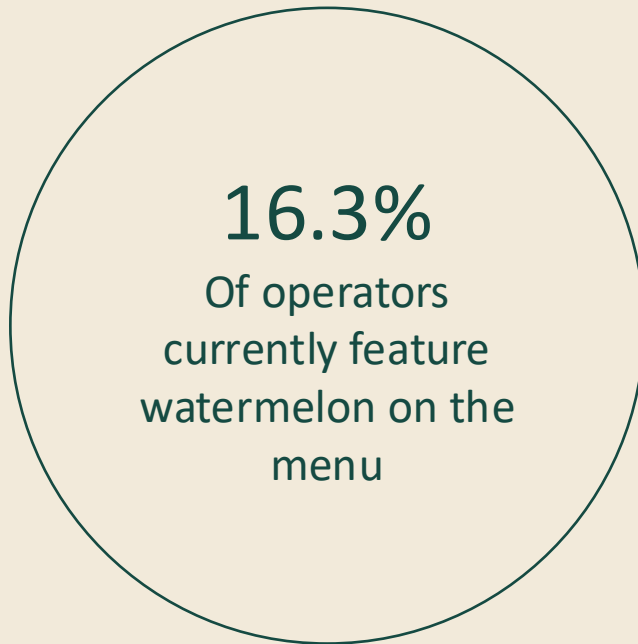
Consumer survey fielded online to a nationally representative sample

- Survey cooperatively designed with National Watermelon Promotion Board
- Maintained key questions for accurate trending
- Consumers qualified by watermelon consumption
- Trended against 2024 fielding



# HOW HAS WATERMELON MENUING CHANGED?

# Watermelon has enjoyed strong growth in past four years



**+30%**  
Current estimated  
penetration is up  
from the 12.5%  
reported in the 2021  
report

# Younger consumers have a strong, and growing, affinity for watermelon

## Watermelon Affinity by Generation

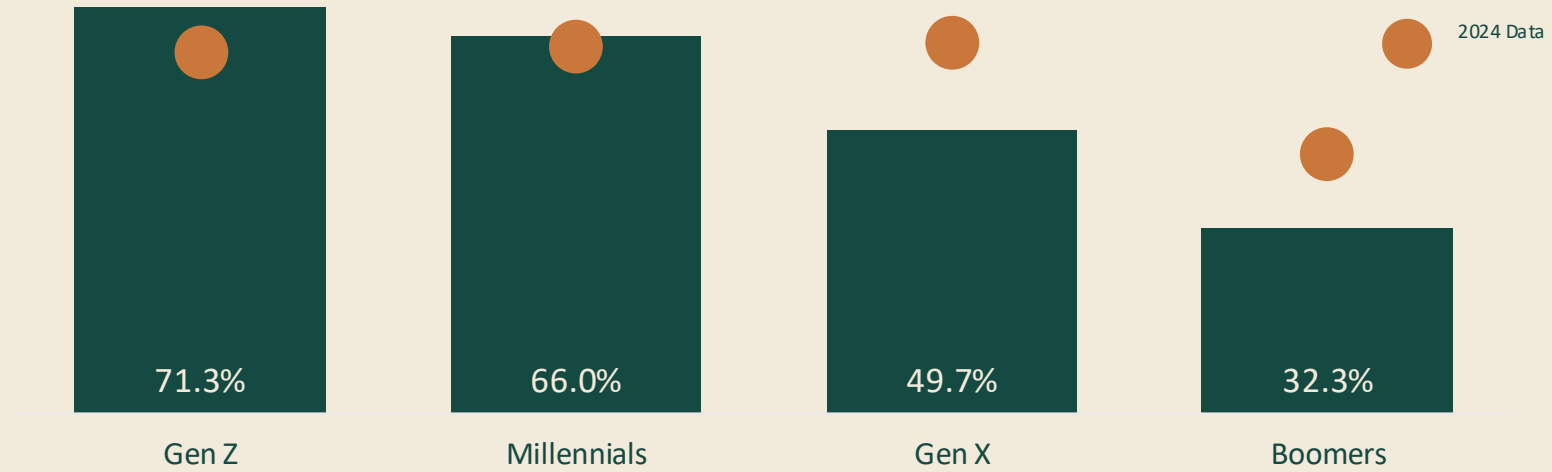
How do you feel about fresh watermelon? (n=1003)



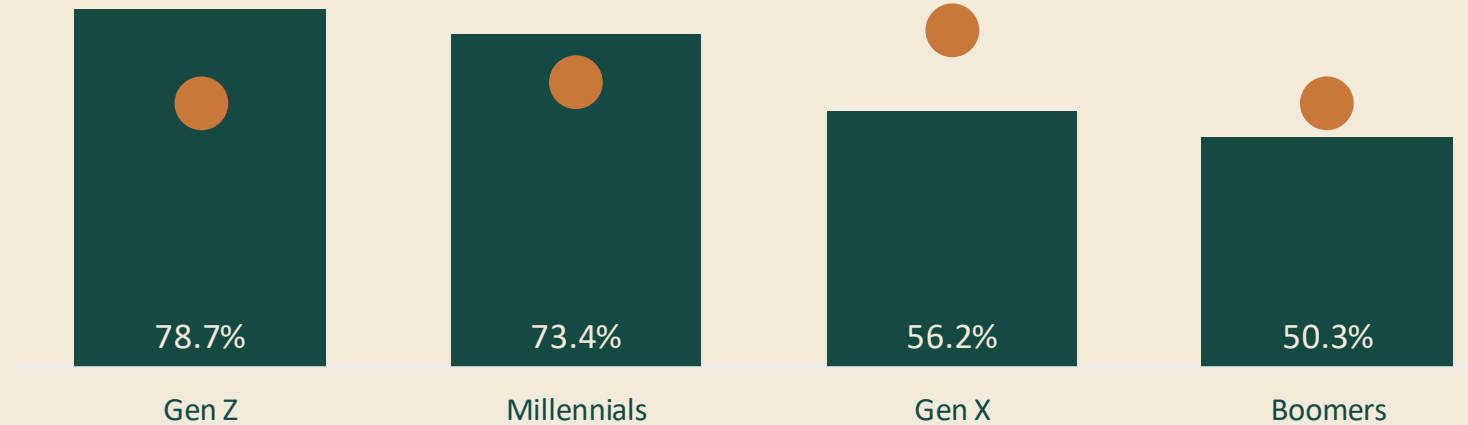
	"Love It"	
	2025	2024
Gen Z	63%	50%
Millennials	51%	52%
Gen X	40%	64%
Boomers	33%	50%

**Younger consumers are increasing ordering and interest**

AFH Ordering of FOOD Items Featuring Watermelon – % Have Ordered

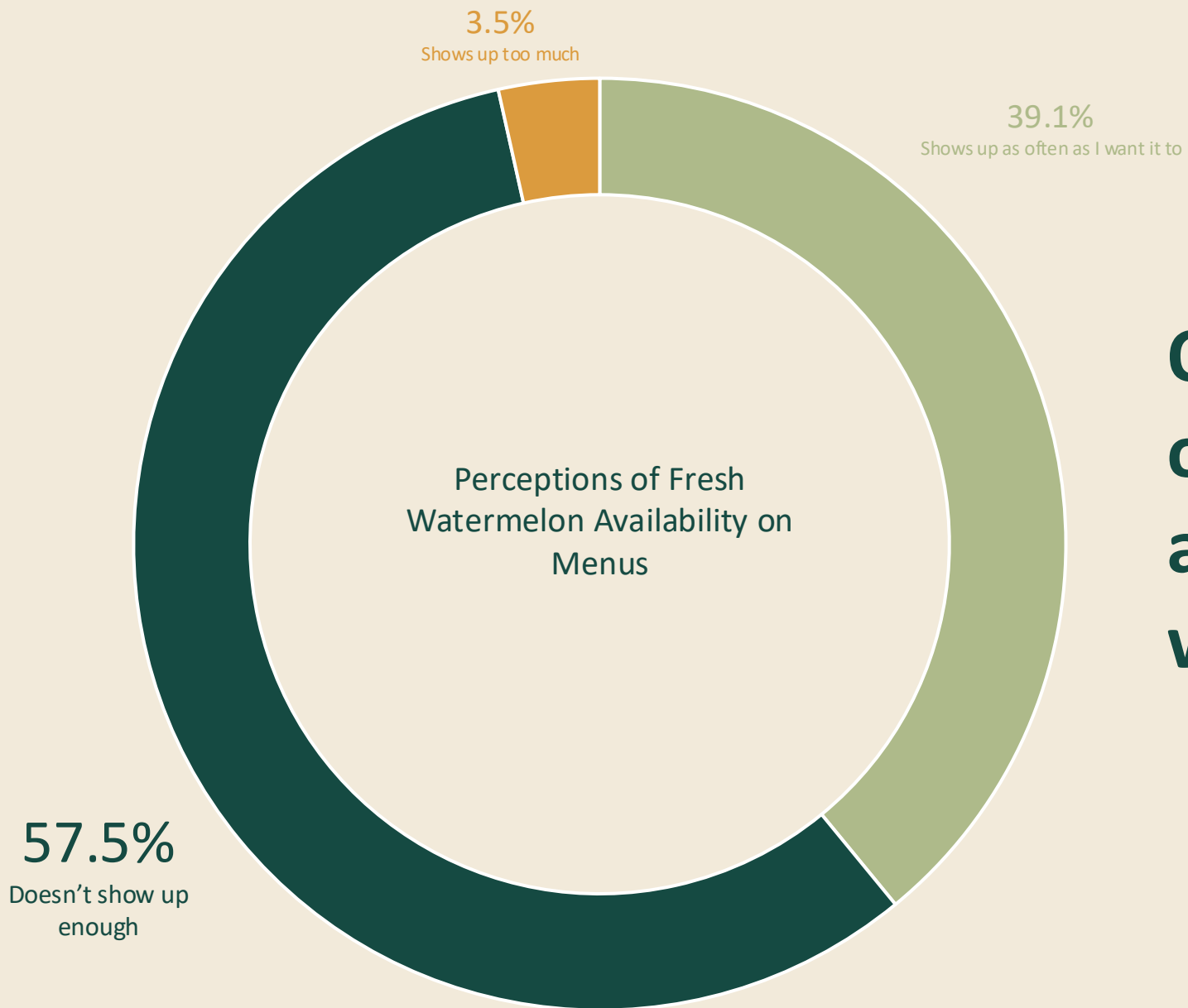


Interesting in Fresh Watermelon AFH – Extremely/ Very Interested



Source: 2025 proprietary NWPB survey fielded by Menu Matters  
Have you ordered a food or beverage item from a restaurant that incorporated fresh watermelon or was watermelon flavored within the past six months? (n=1042)  
How interested are you in seeing your favorite restaurants feature food and/or beverage items that are made with fresh watermelon? This does not include any beverage or food product that may reference "watermelon flavor" but is not made with fresh watermelon. (n=1042)





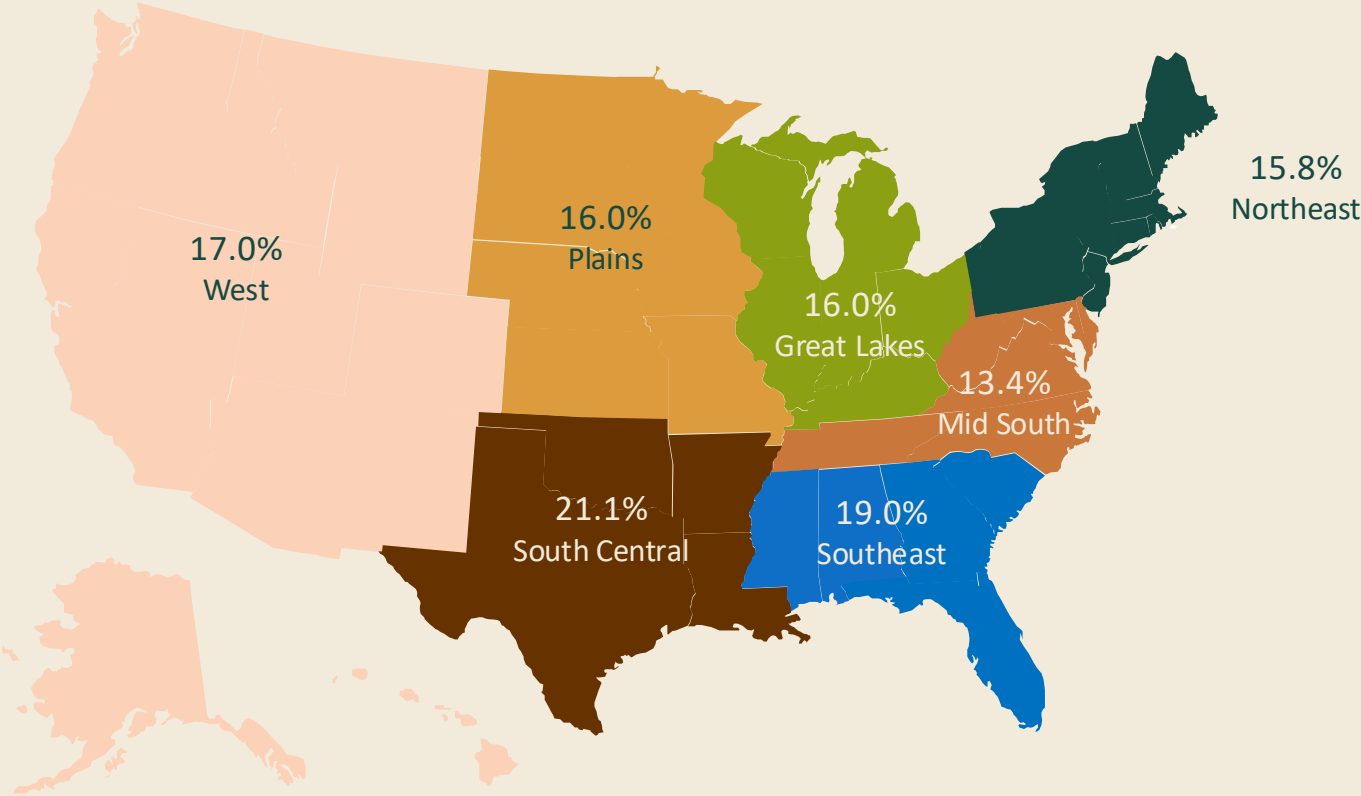
**Operators have plenty of runway to innovate and menu fresh watermelon more**

Source: 2025 proprietary NWPB survey fielded by Menu Matters  
Which of the following is true for you? (n=1034)



# Watermelon is still more common in the South, but growing in the West

Share of Restaurants in each Region Currently Menuing Watermelon (2025)



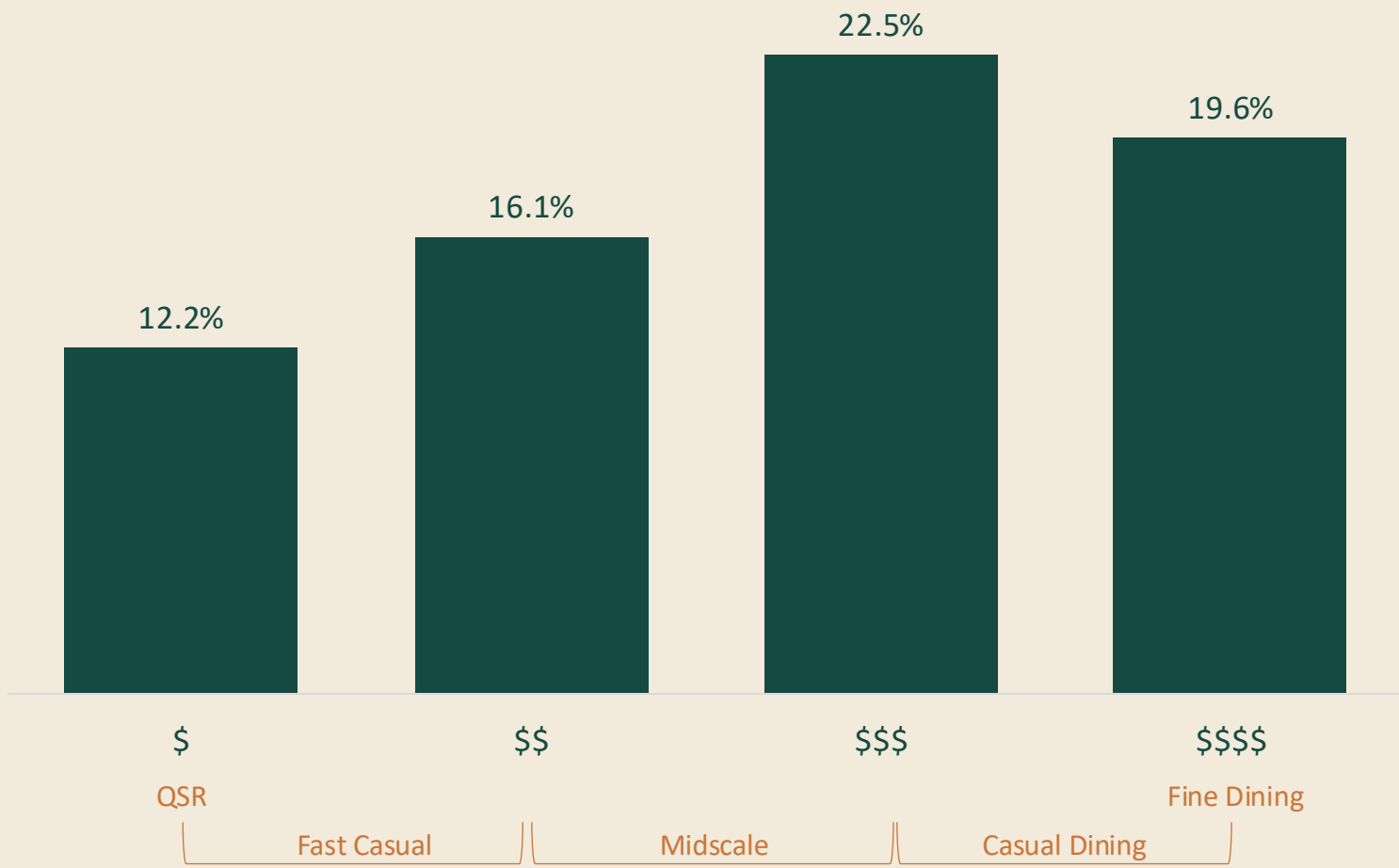
Datassential 2021	
West (comparable)	12.7%
Midwest (comparable to Plains & Great Lakes, but excludes KY)	12.6%
South (comparable to Mid-south, Southeast & South Central, but includes KY)	13.9%
Northeast (comparable)	12.9%

Source: 2025 data from Menu Data; 2021 data from Datassential  
 NOTE: Penetration represents the percent of all restaurants currently menuing at least one item featuring "watermelon." Note this may include both watermelon flavored items as well as fresh watermelon.



# Watermelon in all segments trending up

Share of Restaurants by Price Point Currently Menuing Watermelon (2025)



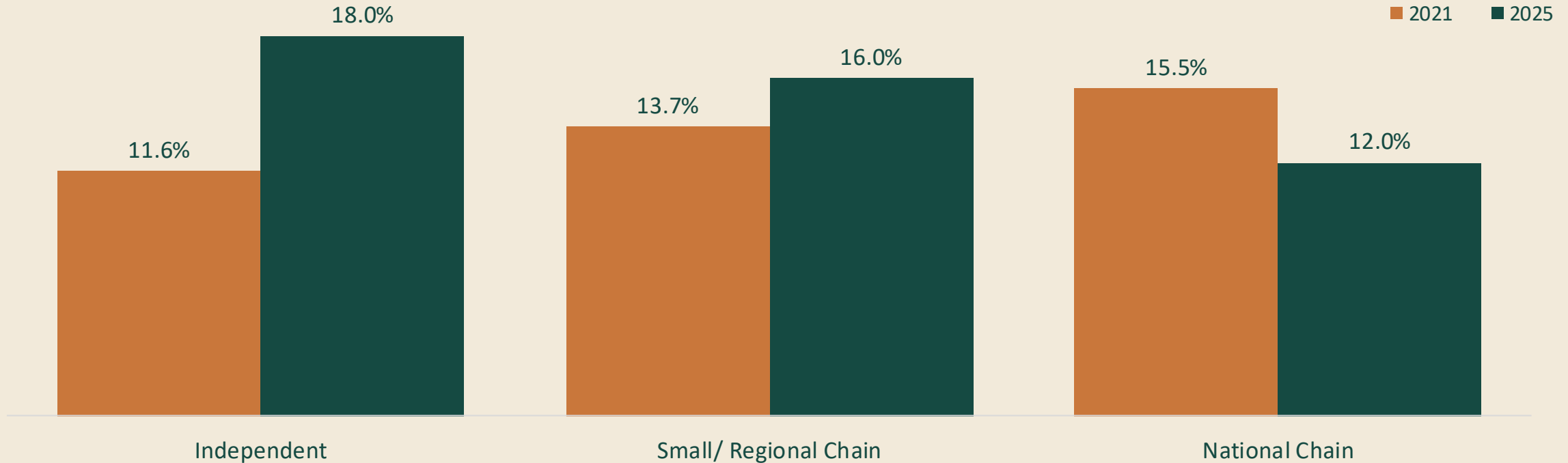
## Datassential 2021

Quick Service	8.3%
Fast Casual	9.8%
Midscale	11.0%
Casual Dining	16.9%
Fine Dining	11.5%

Source: 2025 data from Menu Data; 2021 data from Datassential  
 NOTE: Penetration represents the percent of all restaurants currently menuing at least one item featuring "watermelon." Note this may include both watermelon flavored items as well as fresh watermelon.

# Watermelons surged at independents and small chains, suggesting a renewed trend push

Share of Restaurants by System Size Currently Menuing Watermelon



Growth in small/ regional chain menuing matches NWPB spending for the 2024/2025 fiscal year.

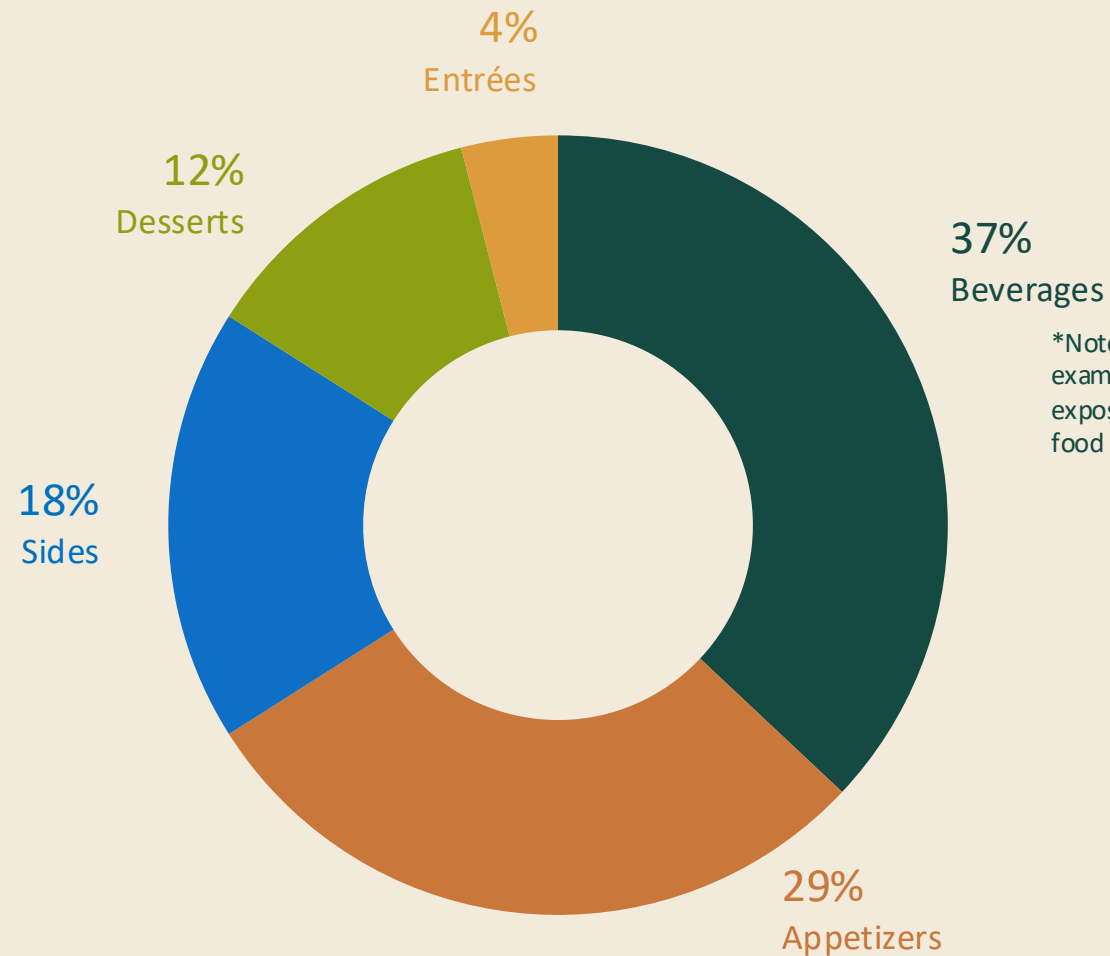
Source: 2025 data from Menu Data; 2021 data from Datassential  
NOTE: Penetration represents the percent of all restaurants currently menuing at least one item featuring "watermelon." Notethis may include both watermelon flavored items as well as fresh watermelon.

# HOW IS WATERMELON MENUED?



# Opportunities to leverage beverages, grow savory applications

Distribution of Restaurants Currently Menuing Watermelon by Menu Part (2025)



\*Note that beverages are likely to include non-fresh watermelon examples but have high consumer engagement and drive both exposure and innovation that can influence and shift into savory food categories.

# Beverages may often include flavored options, but the push for natural ingredients coupled with beverage innovation bodes well for fresh watermelon



Frozen watermelon paloma  
Juniors on Harrison  
New Orleans, LA

Watermelon-infused Tyku Sake  
Aperol Spritz with Lillet Rouge and  
cold-pressed watermelon  
KMRA Tasting Club  
Kansas City, MO



Watermelon sugar High – jespolon tequila, fresh  
lime, simple syrup, muddle watermelon, black lava  
salt  
Jaime's Restaurant  
North Andover, MA



Watermelon and coconut  
tropical margarita  
El Patron  
Tecumseh, OK



La rebanadita – watermelon, house-made chamoy,  
vodka  
Amano  
Caldwell, ID

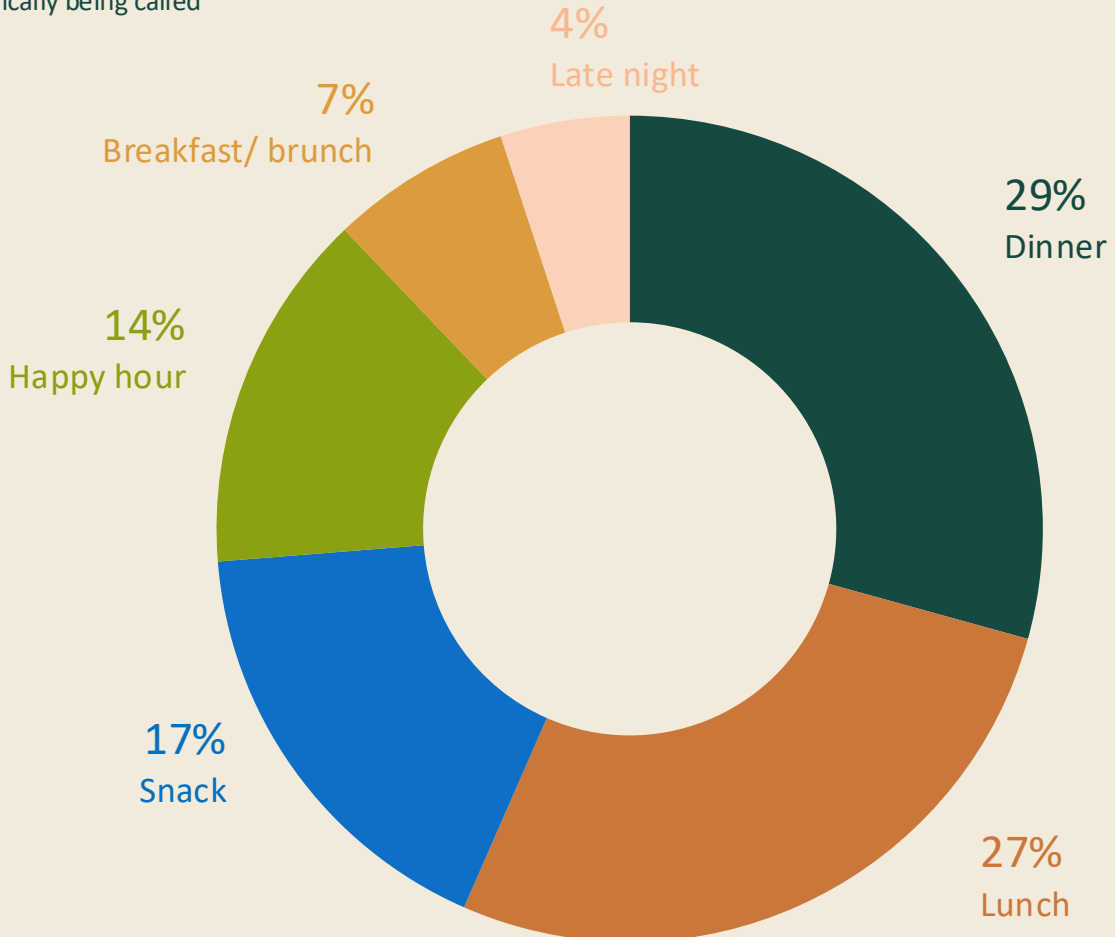


Watermelon margarita “up with a  
side of dirty rocks” – blanco  
tequila, triple sec, watermelon  
house-made sour mix  
One 53  
Rocky Hill, NJ

\*Note that watermelon is very likely under-represented at breakfast here as it may often be included in fresh fruit bowls/ plates, as a garnish and in other applications without specifically being called out

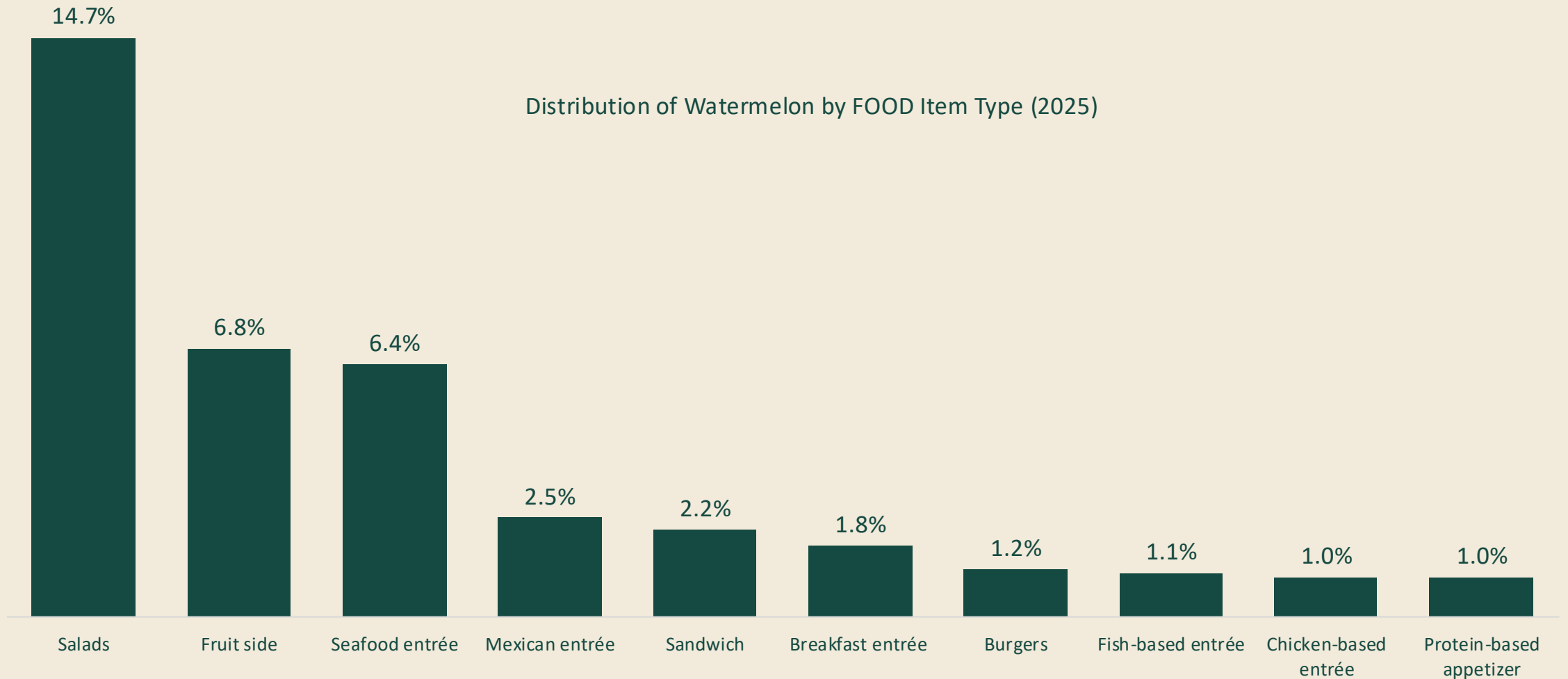
Watermelon is well distributed, but there are opportunities to grow at breakfast

Distribution of Items Featuring Watermelon by Daypart (2025)



Source: 2025 data from Menu Data; 2021 data from Datassential  
NOTE: This chart represents the share of all items featuring watermelon by daypart. For example, 29% of all items featuring watermelon are menued at dinner. Note this may include both watermelon flavored items as well as fresh watermelon.

# Salads dominate food menuing



Source: 2025 data from Menu Data; 2021 data from Datassential  
NOTE: This chart represents the share of all items featuring watermelon by daypart. For example, 18.3% of all items featuring watermelon are cocktails. Note this may include both watermelon flavored items as well as fresh watermelon.



# Salad Innovation



Watermelon Salad – Halloumi, watermelon, arugula, pistachios, champagne vinaigrette, balsamic  
 Good News Restaurant & Bar  
 Woodbury, CT



Watermelon salad – grilled corn, basil, salsa verde, jalapeno, feta  
 Shavano  
 Salida, CO



Watermelon, arugula, tajin, mint  
 Salt & Lime Tacos  
 Costa Mesa, CA

Watermelon salad with heirloom tomatoes, stracciatella, grapefruit, Calabrian chilies, parsley  
 Veratina  
 Savannah, GA



Paradigm Gardens watermelon with lime, mint and cicada calling farm dried roselle hibiscus  
 Here Today  
 New Orleans, LA



# Salad Innovation – Watermelon as the Star



Watermelon, feta, balsamic glaze, Maldon sea salt,  
olive oil and mint  
Stix  
Findlay, OH

# Appetizer Innovations



Filipino Deep fried watermelon  
State Fair  
Dallas, TX



Pickle plate featuring an  
assortment of pickled items  
including sweet summer  
watermelon rind  
Forgotten Tonic  
St. Augustine, FL



Watermelon tajin boneless wings tossed  
in a homemade watermelon wing sauce  
Undisputed Craft House  
El Paso, TX

# Other Innovation



“southern comfort with a coastal twist” – chicken-fried grouper collar with purple cabbage slaw, watermelon hot honey and tajin  
1921 Mount Dora  
Mount Dora, Florida

Watermelon prosciutto pizza  
Paesanos  
Sacramento, CA



## Old-Fashioned vs On-Trend Perceptions of Watermelon



Indications are watermelon is breaking away a bit from its nostalgic connection

Source: 2025 proprietary NWPB survey fielded by Menu Matters  
 Consider the scale below. When you think of fresh watermelon, where would you place it on this scale? (n=1052)

## Emotional Connections with Watermelon

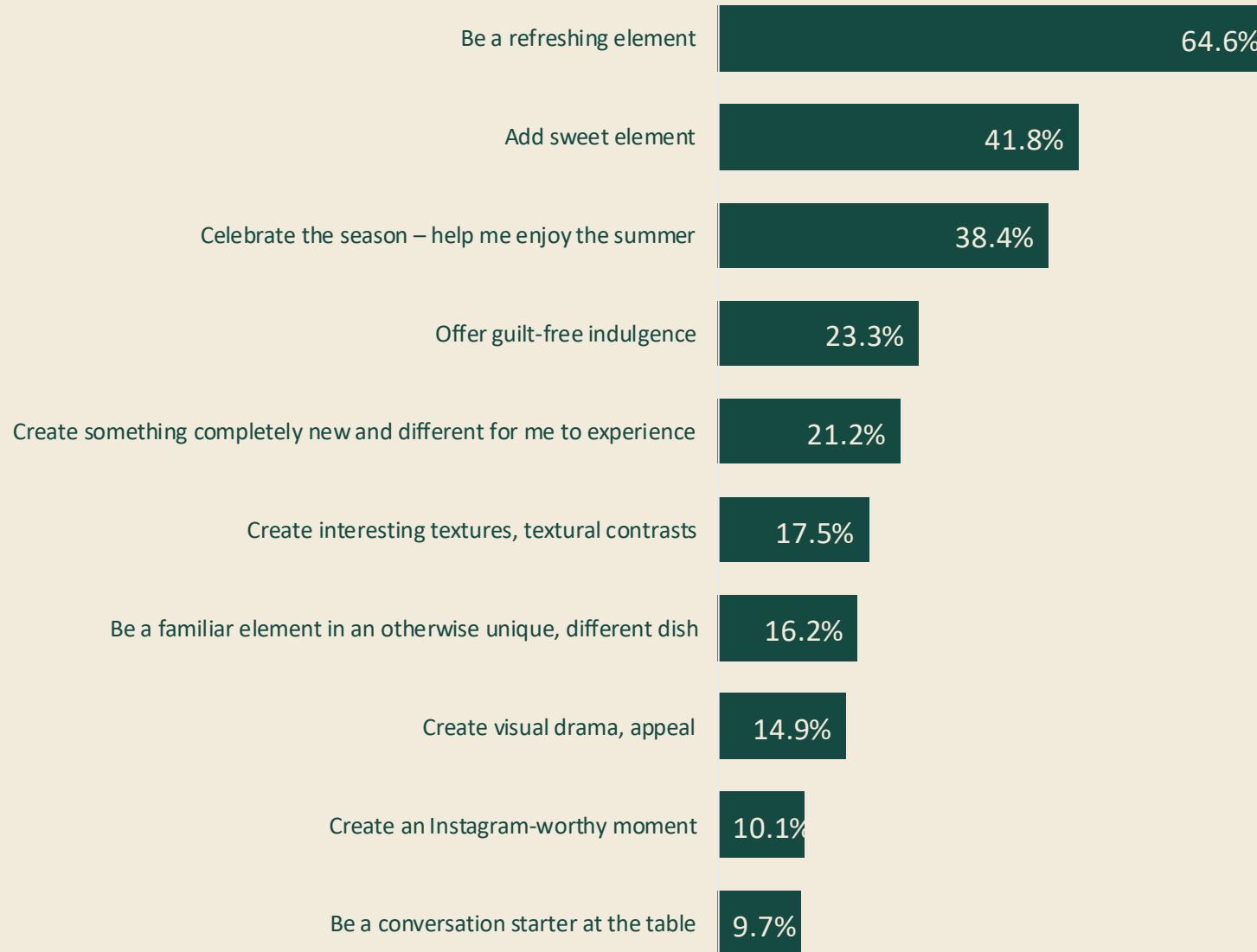
	Top Emotions (over 30% indicating)	Higher Indexing Emotions
Gen Z (n=174)	<ul style="list-style-type: none"> <li>Refreshed</li> <li>Joyful</li> <li>Satisfied</li> <li>Relaxed</li> <li>Energized</li> </ul>	<ul style="list-style-type: none"> <li>Joyful</li> <li>Amused</li> <li>Intrigued</li> </ul>
Millennials (n=350)	<ul style="list-style-type: none"> <li>Refreshed</li> <li>Joyful</li> <li>Satisfied</li> <li>Relaxed</li> <li>Comforted</li> <li>Energized</li> </ul>	<ul style="list-style-type: none"> <li>Joyful</li> <li>Comforted</li> <li>Inspired</li> <li>Proud</li> <li>Adventurous</li> </ul>
Gen X (n=169)	<ul style="list-style-type: none"> <li>Refreshed</li> <li>Satisfied</li> <li>Nostalgic</li> <li>Relaxed</li> </ul>	<ul style="list-style-type: none"> <li>Refreshed</li> <li>Nostalgic</li> </ul>
Boomers (n=310)	<ul style="list-style-type: none"> <li>Refreshed</li> <li>Satisfied</li> <li>Nostalgic</li> <li>Relaxed</li> <li>Delighted</li> <li>Joyful</li> </ul>	<ul style="list-style-type: none"> <li>Refreshed</li> <li>Nostalgic</li> <li>Satisfied</li> <li>Delighted</li> </ul>

**Younger generations are less likely to associate watermelon with nostalgia, allowing for far more innovation**

A photograph of watermelon slices on a wooden cutting board. In the background, a whole watermelon is cut in half. In the foreground, two triangular slices of watermelon are placed on a light-colored wooden cutting board. The watermelon has a vibrant red interior with visible seeds and a green rind. The background is a plain, light-colored surface.

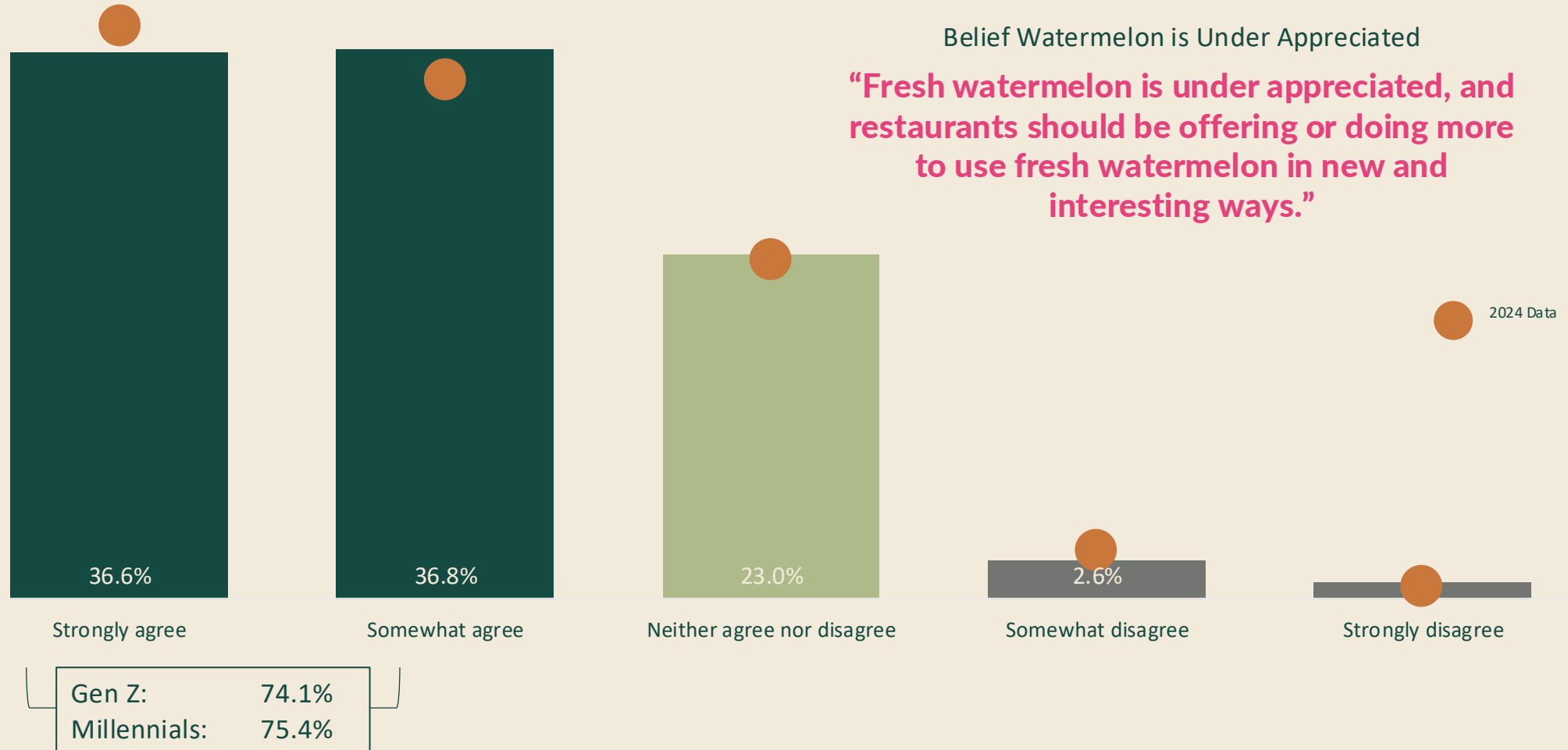
# WHAT ARE CONSUMER PERCEPTIONS AND PREFERENCES?

## Watermelon's Role in Meals



**Watermelon adds refreshment, sweetness and seasonal celebration to meals.**

# Consumers continue to agree restaurants should be doing more

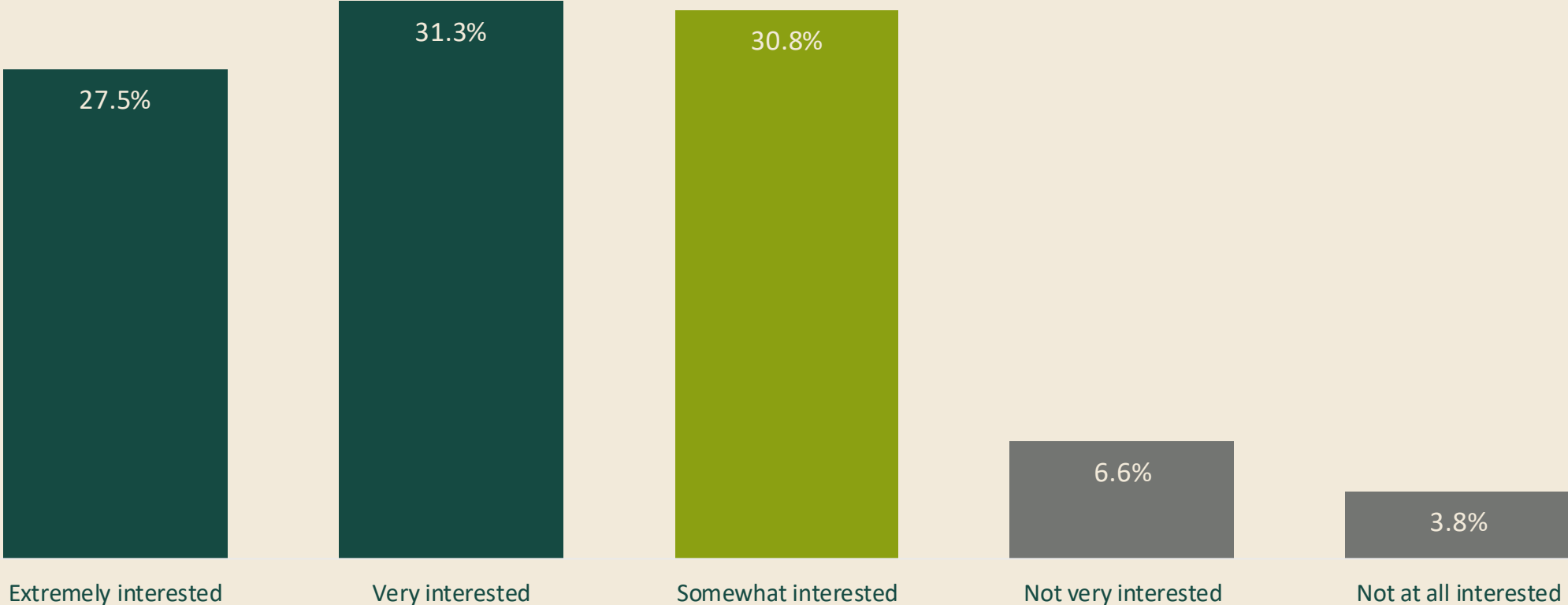


# WHAT ARE THE INNOVATION OPPORTUNITIES?



# Interest in fresh watermelon in innovative foods remains high

Interested in Trying Fresh Watermelon in Innovative Foods

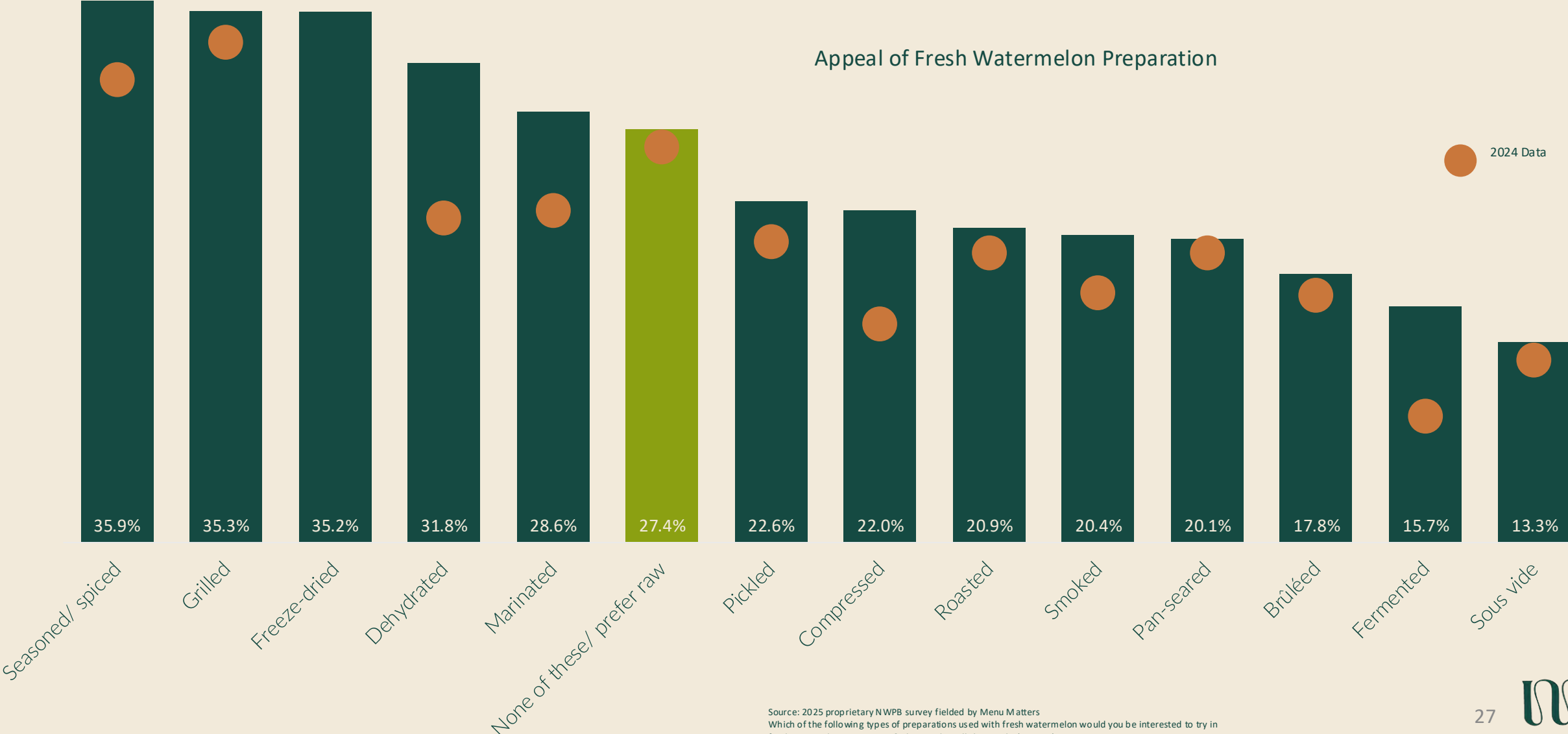


Gen Z:  
69.0% (+14.1 pts)

Source: 2025 proprietary NWPB survey fielded by Menu Matters  
Thinking about fresh watermelon at restaurants, how interested are you in trying fresh watermelon featured in an innovative food item that incorporates interesting, unexpected flavors, ingredients, or preparations? (n=1026)



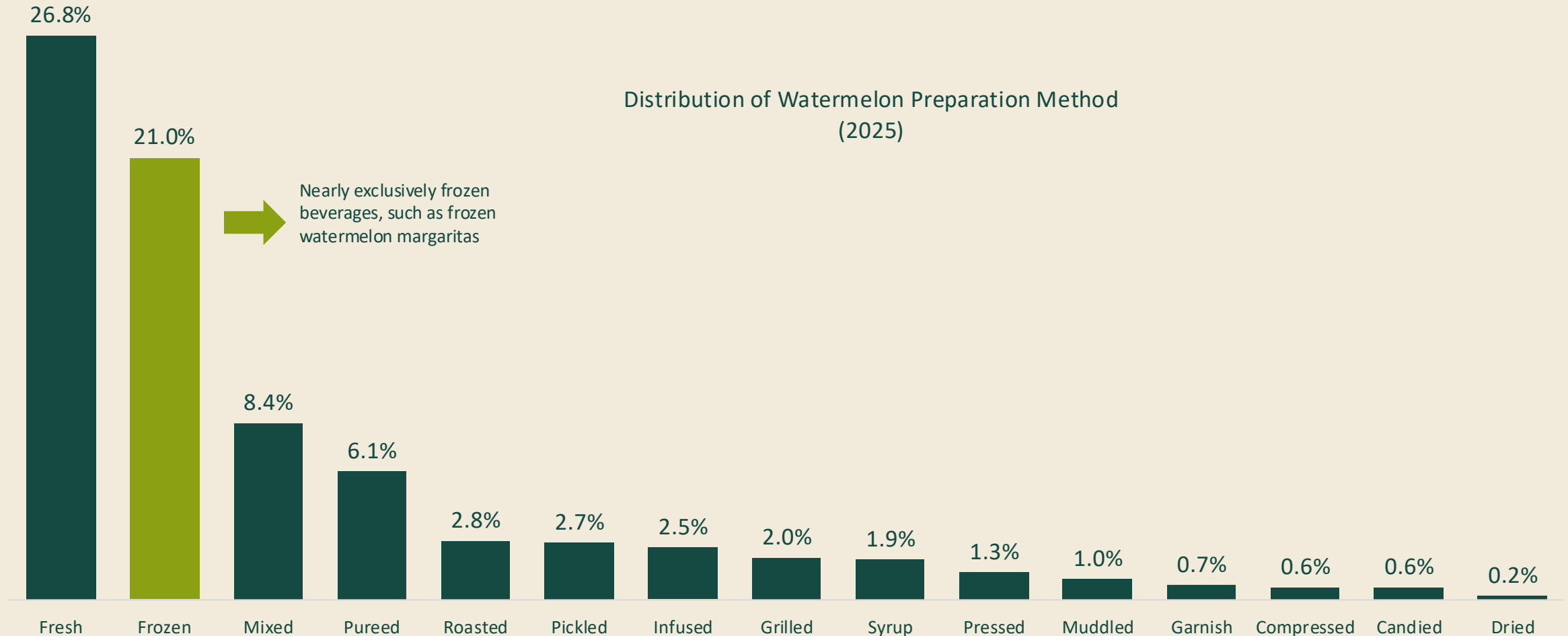
# Consumers embracing prepared watermelon



Source: 2025 proprietary NWPB survey fielded by Menu Matters  
Which of the following types of preparations used with fresh watermelon would you be interested to try in foods menued at a restaurant? Please select all that apply. (n=1024)



# Preparations identified with watermelon highlight the prevalence of beverage applications



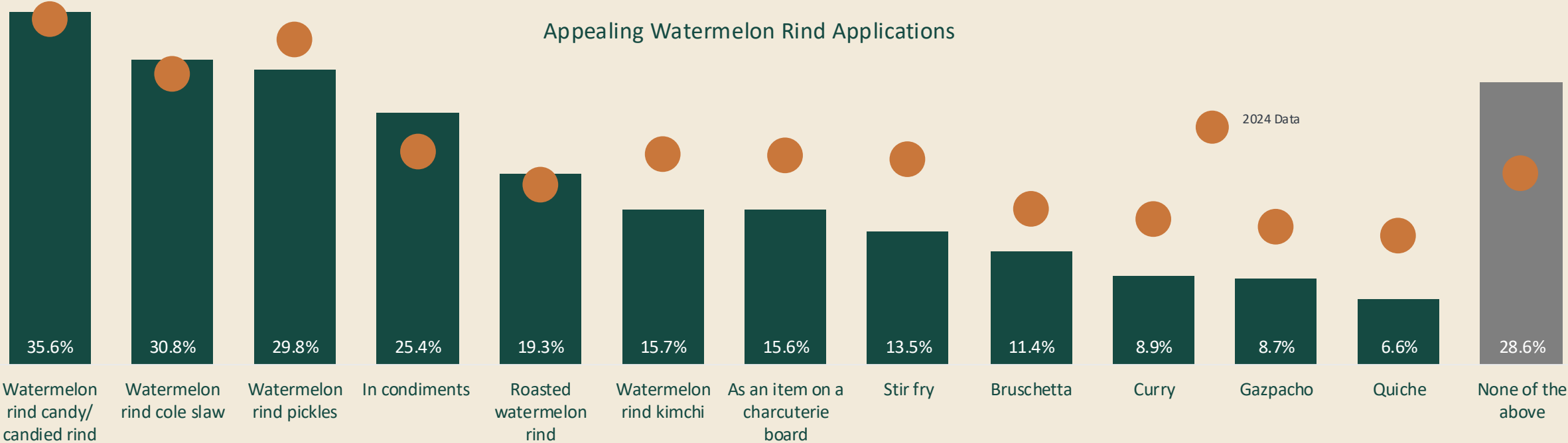
Source: 2025 data from Menu Data; 2021 data from Datassential  
NOTE: This chart represents the share of all items featuring watermelon by daypart. For example, 26.8% of all items featuring watermelon indicate "fresh" watermelon.



**35.1%**  
 Extremely/ very interested in edible rind dishes,  
 with over 50% of Gen Z and Millennials indicating  
 the same

# Younger generations are interested in edible watermelon rind

Appealing Watermelon Rind Applications



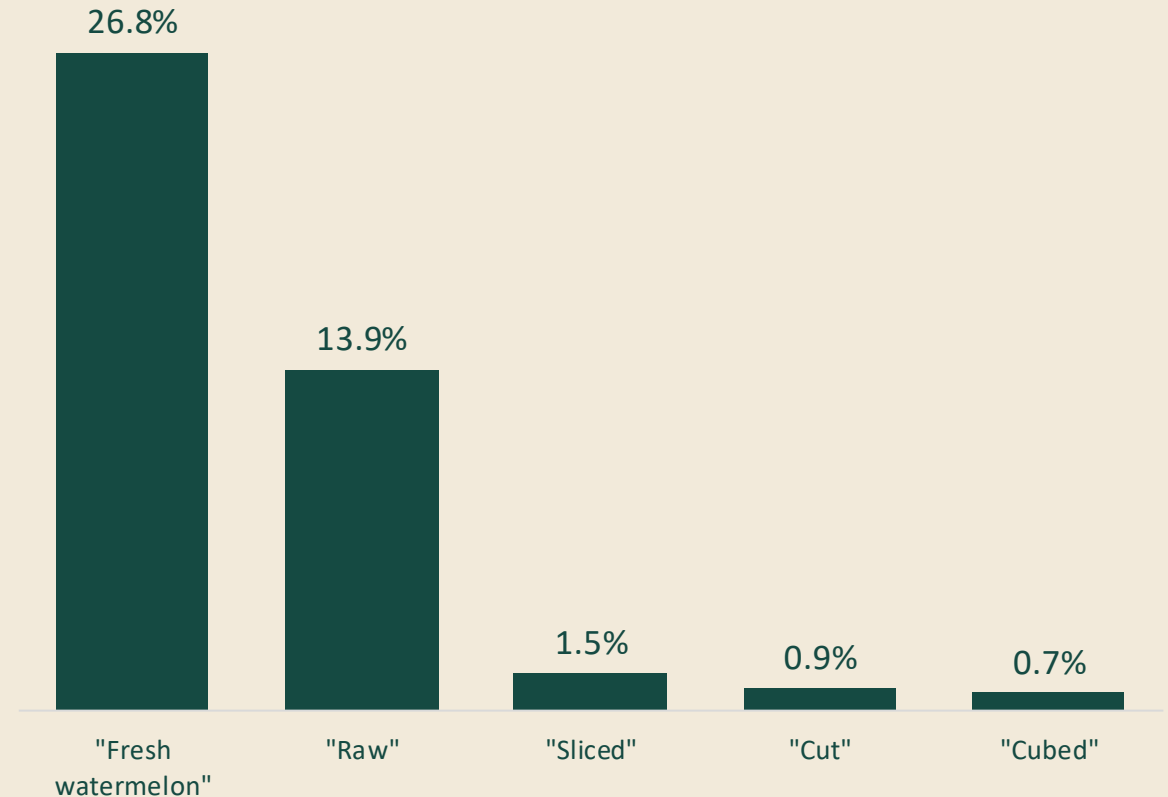
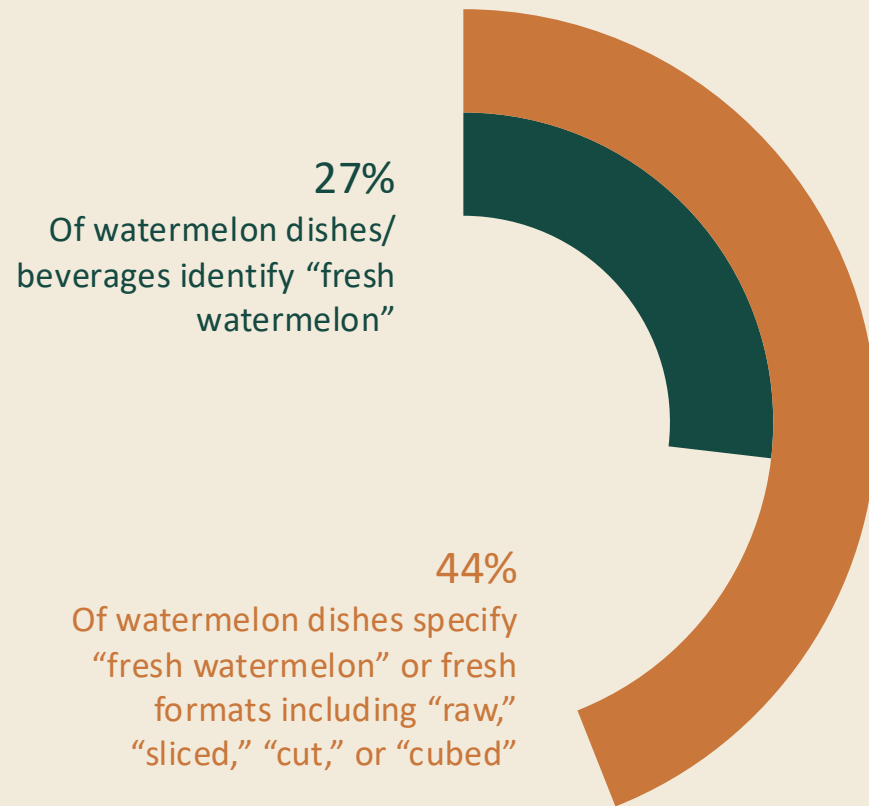
2024 Data

Source: 2025 proprietary NWPB survey fielded by Menu Matters  
 Assuming the dish was appealing to you, how interested would you be in trying the following types of dishes that incorporate fresh watermelon rind?  
 Please select all that apply. (n=1014)



# Plenty of runway to grow fresh watermelon use among operators already featuring watermelon on menus

Penetration of Fresh Watermelon across Menu Featuring Watermelon (2025)

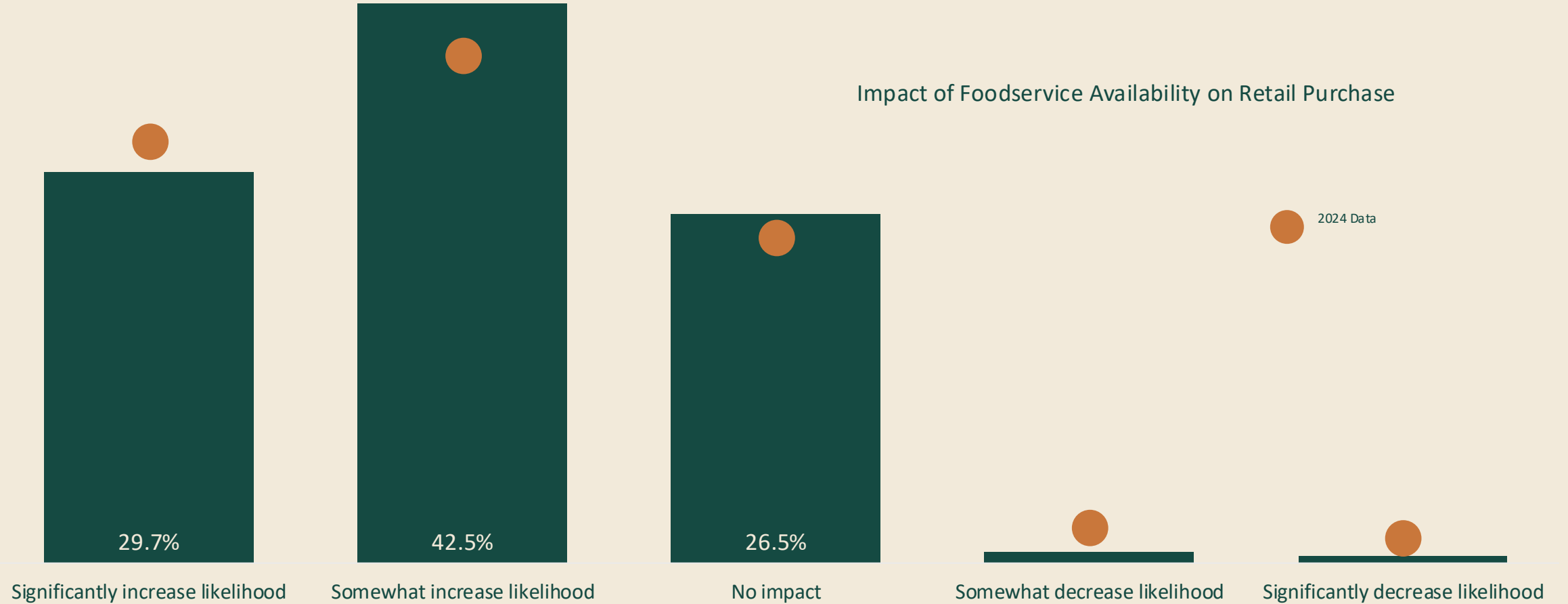


Source: 2025 data from Menu Data; 2021 data from Datassential  
NOTE: This chart represents the share of all items featuring watermelon by daypart. For example, 29% of all items featuring watermelon are menued at dinner. Note this may include both watermelon flavored items as well as fresh watermelon.



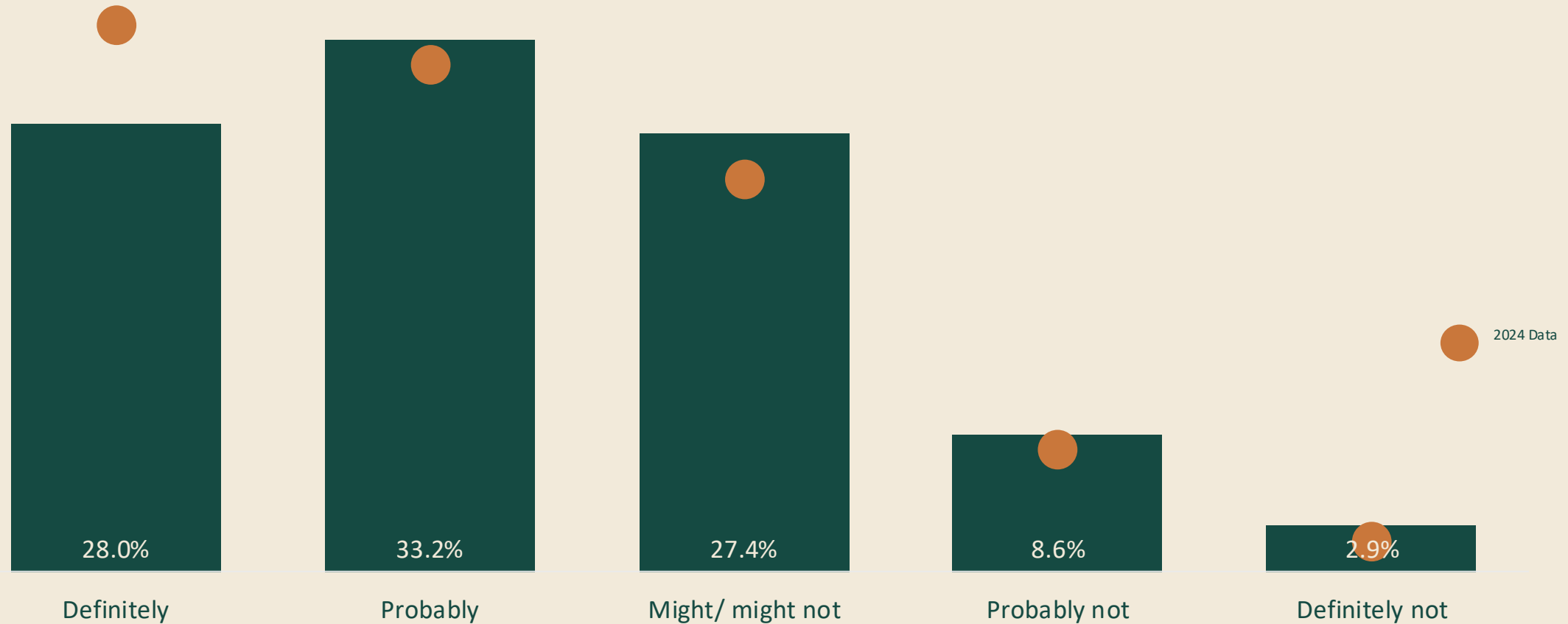
# IMPACT OF AFH BEHAVIOR ON AH

# Foodservice activity does impact retail activity



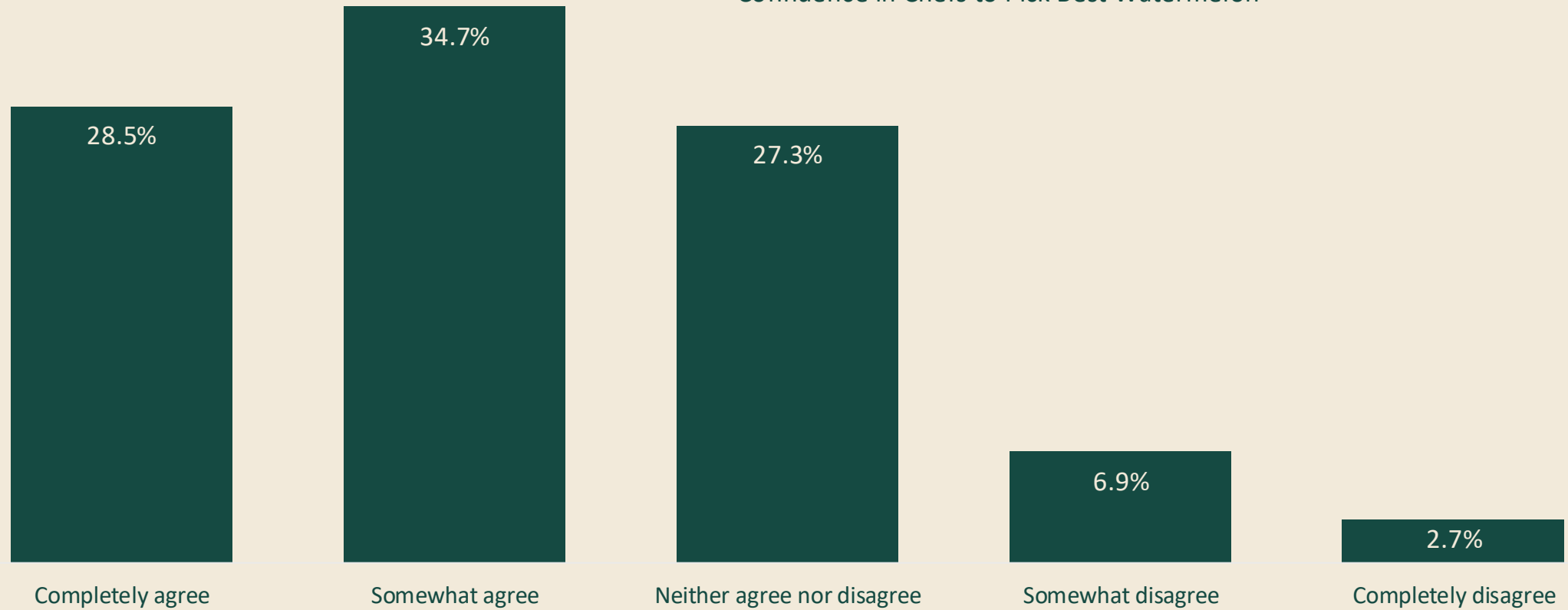
# Restaurants will inspire at home experimentation

Impact of Foodservice Innovation on At Home Experimentation



# Consumers Trust Chefs more than Themselves

Confidence in Chefs to Pick Best Watermelon



HUMAN-FOCUSED INSIGHTS

# Menu Matters

FOR THE F+B INDUSTRY



MAEVE WEBSTER  
PO Box 750  
Arlington, VT 05250  
O: (802) 430-7085  
C: (312) 420-0724  
[maeve@menumatters.com](mailto:maeve@menumatters.com)

[menumatters.com](http://menumatters.com)