

2024 HONEY OVERVIEW

restaurant trends | honey dishes by type | C&U spotlight



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key findings

1

Leverage honey's popularity in fine dining and its growth in fast casual. Honey is highly popular in fine dining, appearing on almost 70% of menus, and is projected to grow substantially in fast casual segments. Capitalize on this trend by incorporating honey into new menu items across these sectors.

2

Innovate with honey flavor mash-ups. Although honey's menu presence is stable, there is potential for innovation by pairing it with other popular sauces like BBQ, vinaigrette, and buffalo. This can create unique flavor profiles that attract customers and expand the space honey plays in.

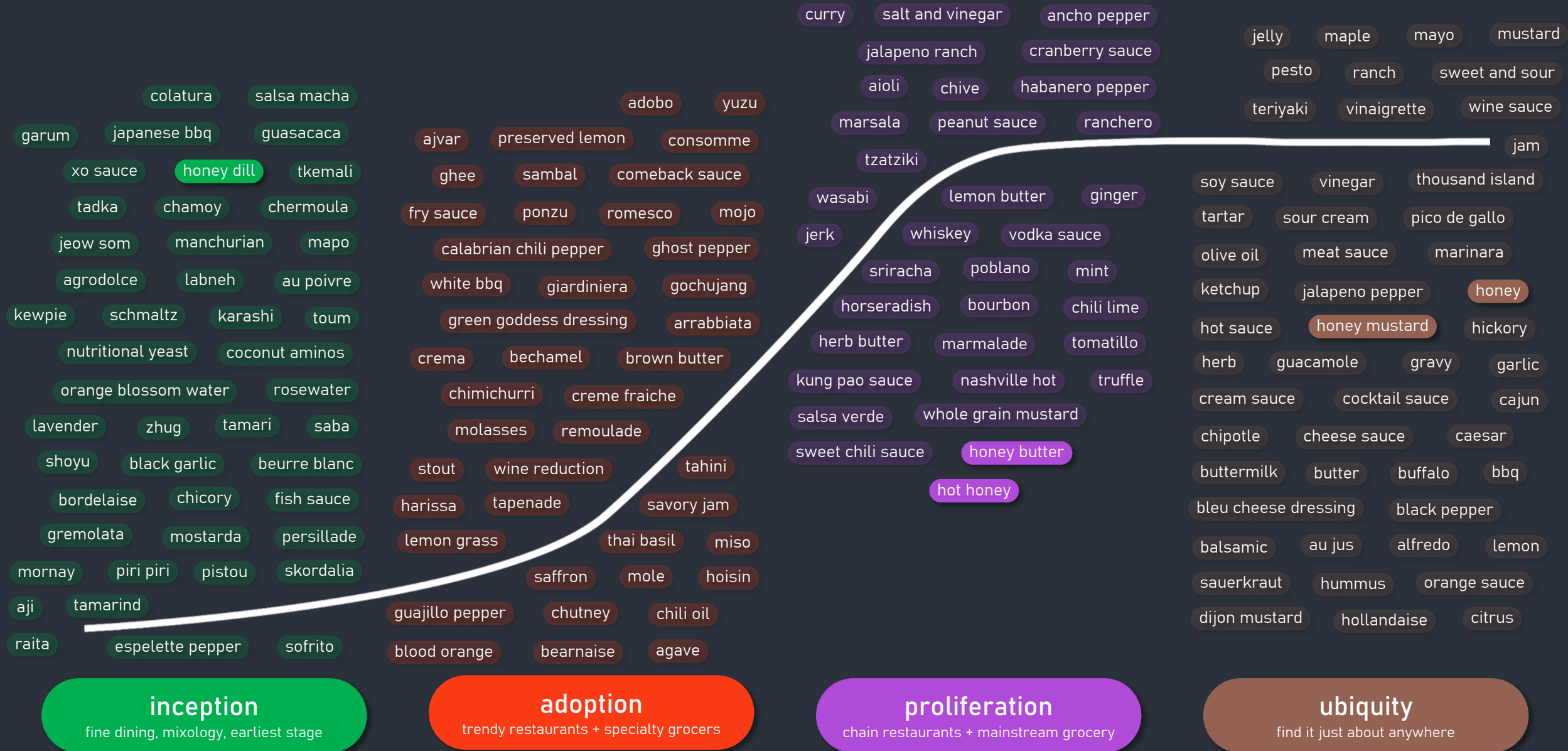
3

Expand honey use beyond entrées. While honey is predominantly used in entrées, its presence is growing in appetizers, sides, and beverages. Explore opportunities to incorporate honey into diverse menu categories to drive interest and variety.

4

Highlight honey in versatile and indulgent pairings. American pub favorites and heavy dishes featuring honey, like wings and fries, are highly popular. Emphasize honey's versatility by pairing it with bold and mild flavors in both indulgent and gourmet dishes to appeal to a broad range of diners.

SAVORY SAUCES & FLAVORS

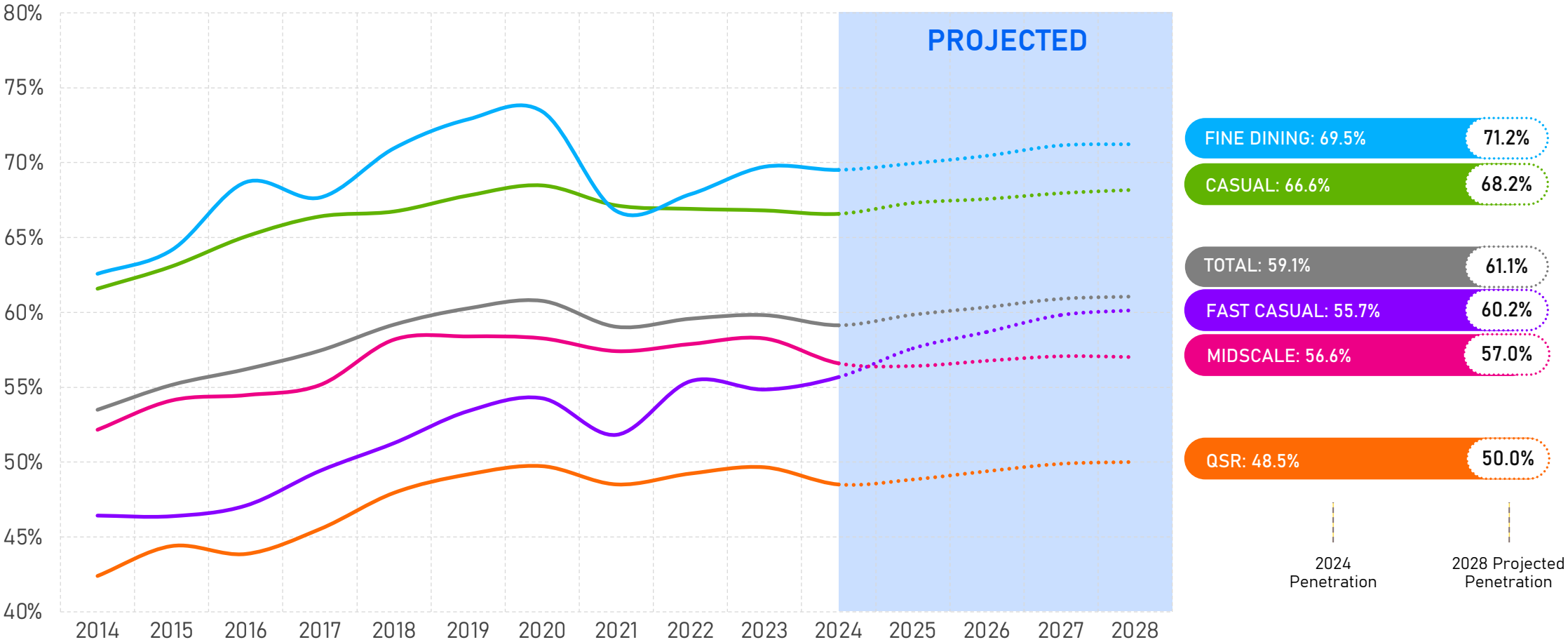


Honey enjoys the highest menu penetration at fine dining restaurants, appearing on almost seven in ten menus.

Honey is anticipated to grow across all segments over the next four years, with fast casual operators expected to see the highest growth.

HONEY

penetration trend by segment

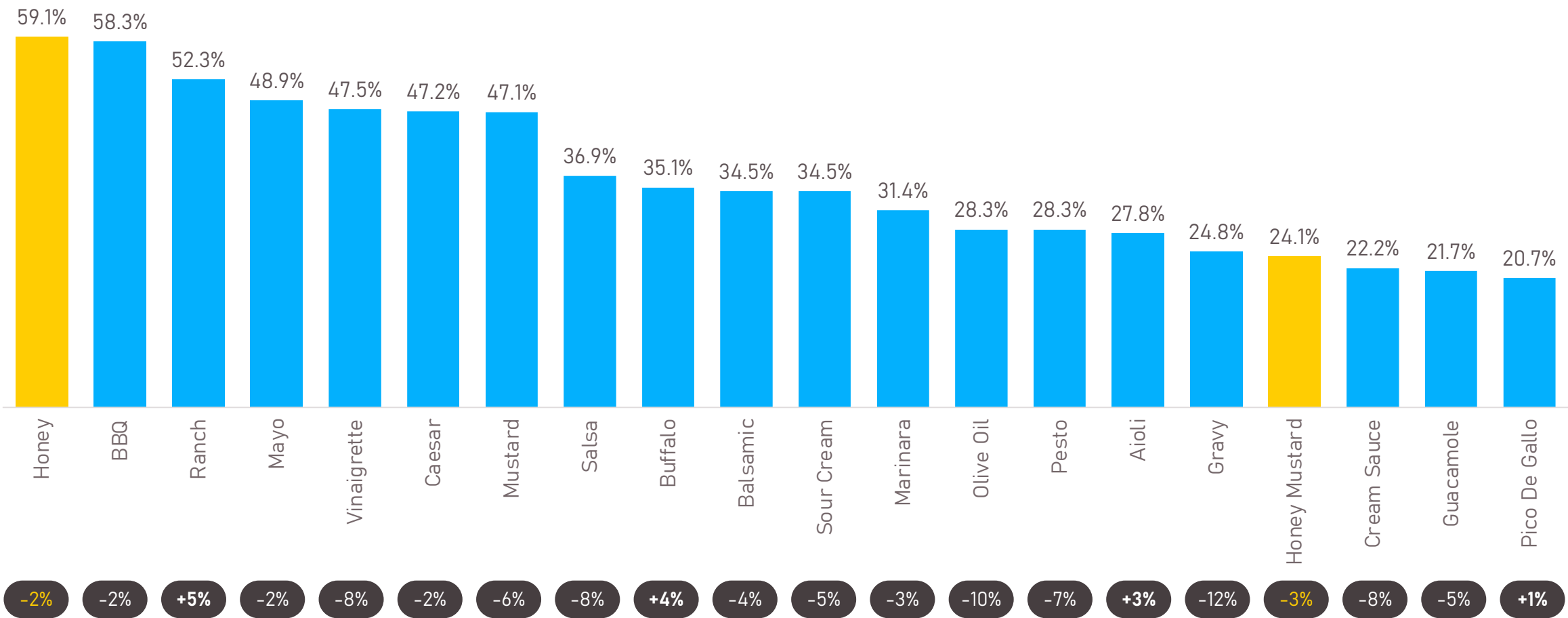


Although honey has not increased across restaurant menus recently, flavor mash-ups present an innovation opportunity. Focus on pairing honey with other top sauces like BBQ, vinaigrette, buffalo, and more.

- Honey is the top menued sauce at restaurants.
- Honey mustard is also among the top menued sauces.

TOP SAUCES

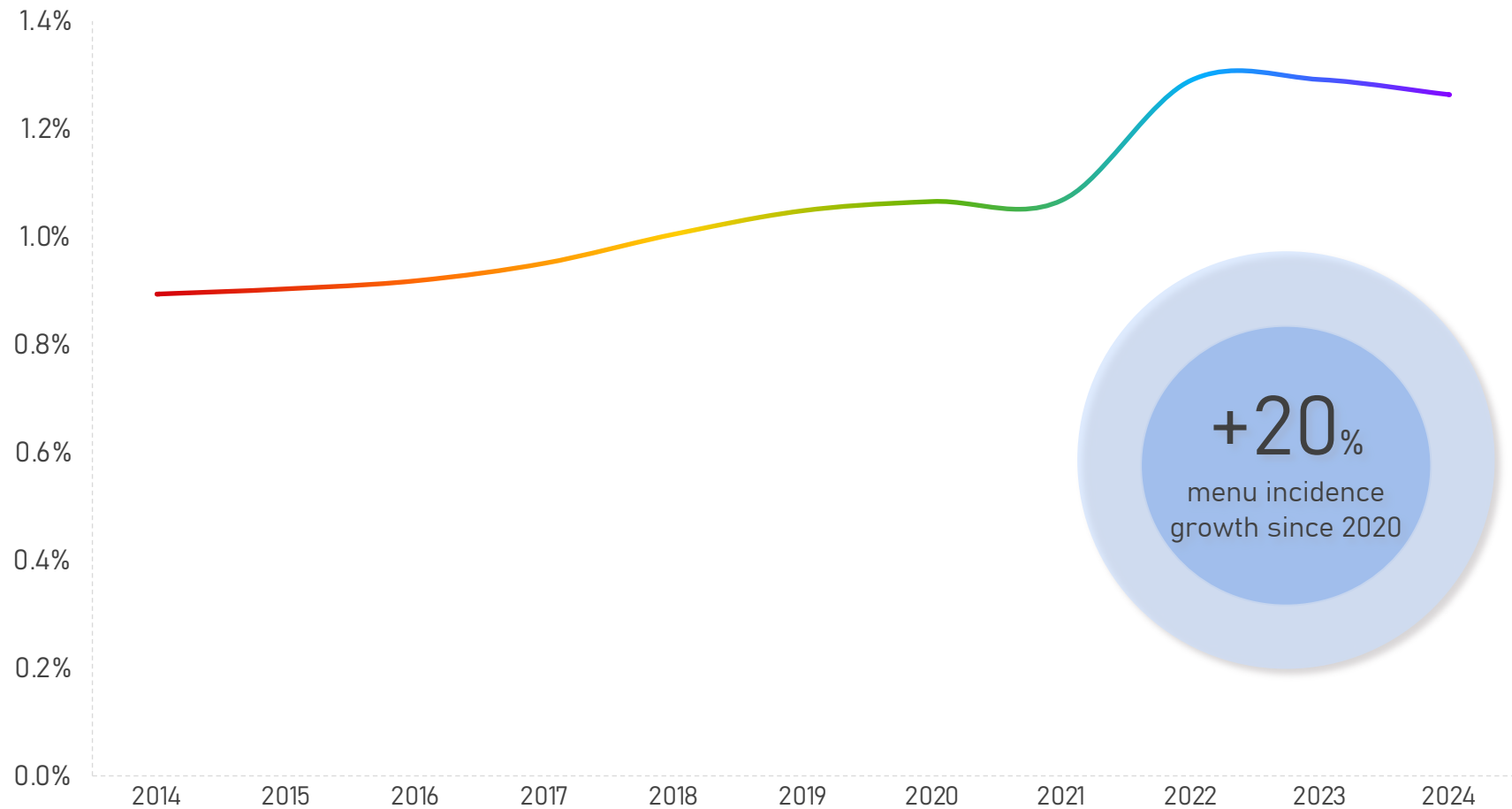
ranked by penetration and 4-year growth



Wings (bone in and boneless) hold the highest distribution of honey items – almost double that of combo/multi proteins, hot sandwiches, and entree salad menu items.

HONEY

incidence time trend & incidence distribution

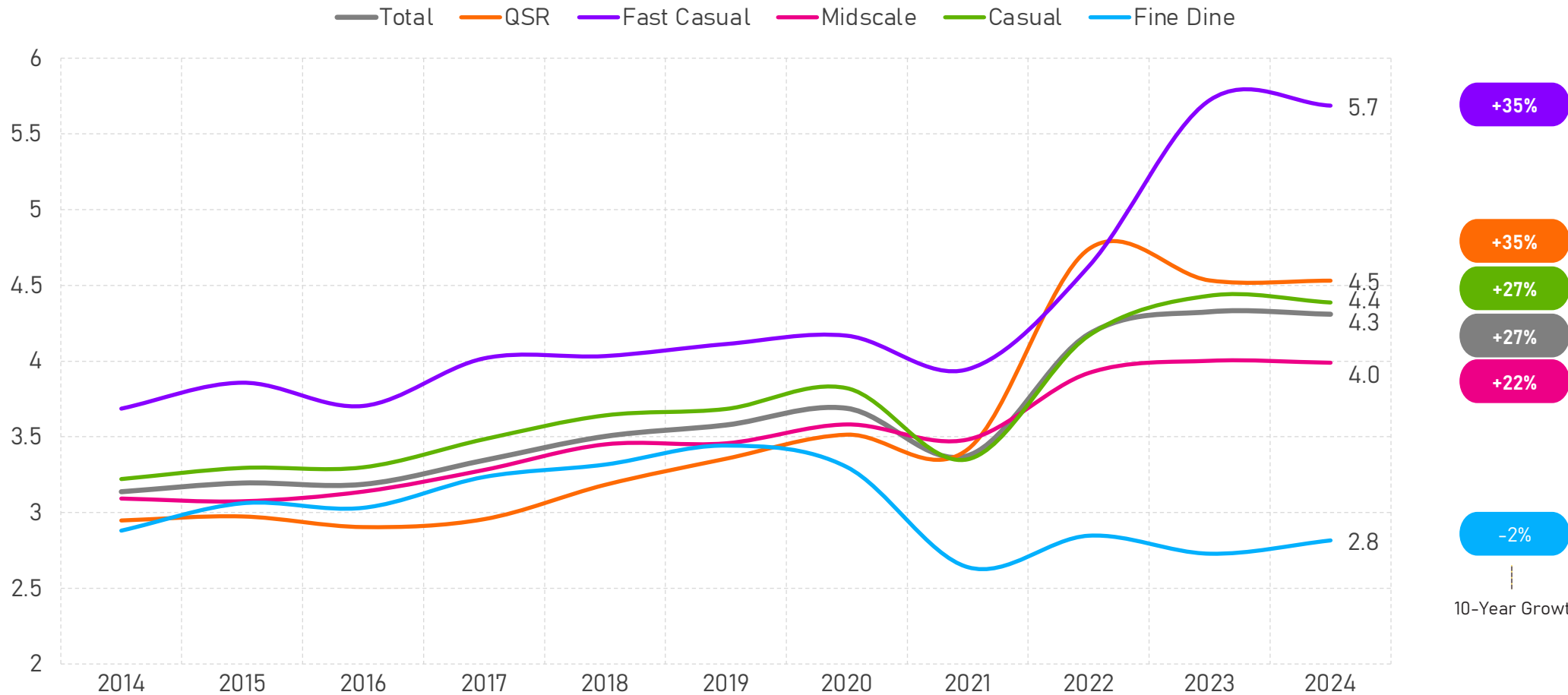


APPLICATIONS	DIST %
Wings	12.5%
Combos/Multi Protein	7.4%
Hot Sandwich	7.3%
Entrée Salad	6.3%
Chicken Main Entree	5.9%
Pizza	5.4%
Cold Sandwich	5.3%
Condiment/Topping	5.2%
Cocktail/Mixed Drink	4.8%
Fried Protein App	2.9%
Other Entree	2.5%
Appetizer Salad	1.9%
Bread Appetizer	1.7%
Ethnic Dessert	1.6%
Bottled Spirit	1.5%
Frozen Non-Alcoholic Drink	1.4%
All Other Item Types	25.7%

After a decline in items post COVID-19, the number of honey items on operator menus has rebounded across almost all segments, with the exception of fine dining restaurants.

HONEY

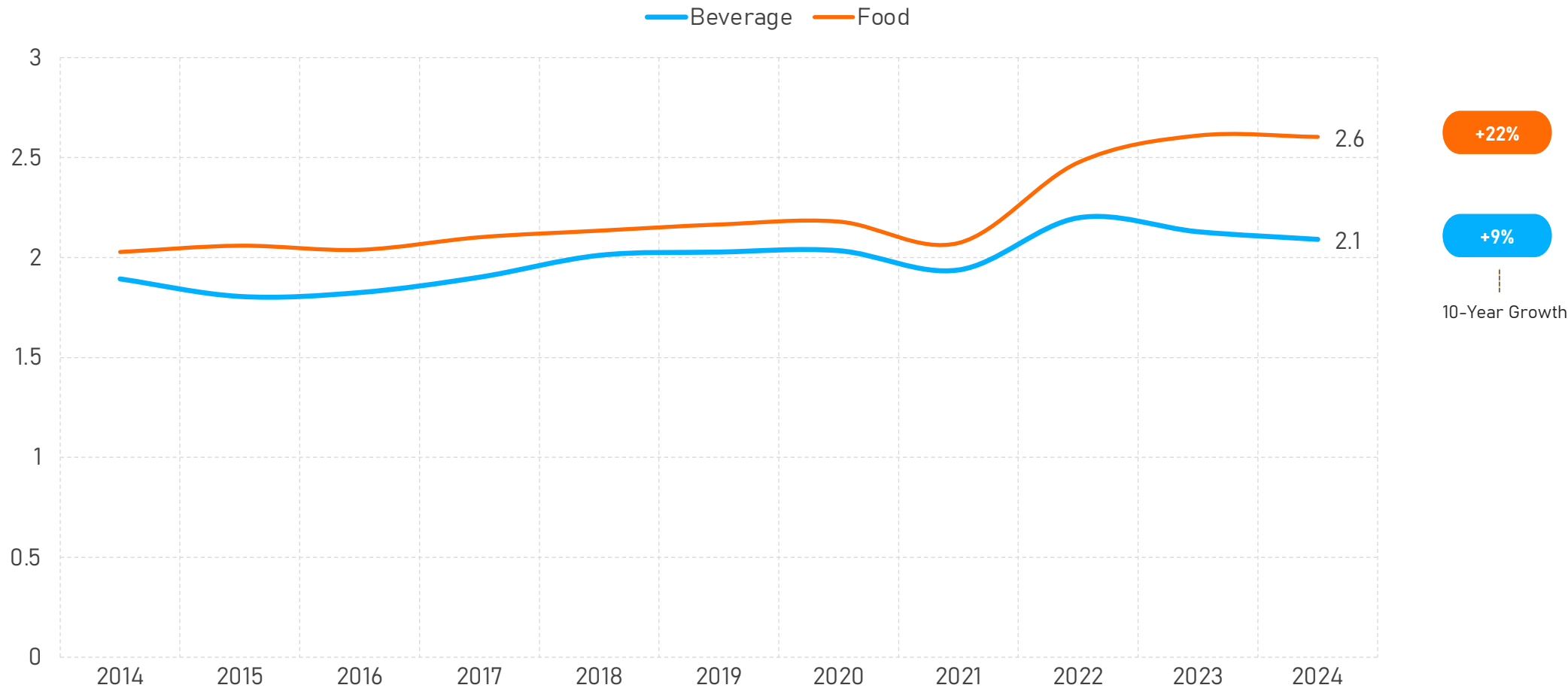
average number of items time trend by segment



While food menus average the most honey menu items, beverages aren't far behind leaving space for innovation focused on new alcoholic and non-alcoholic beverages featuring honey.

HONEY

average number of items time trend by segment

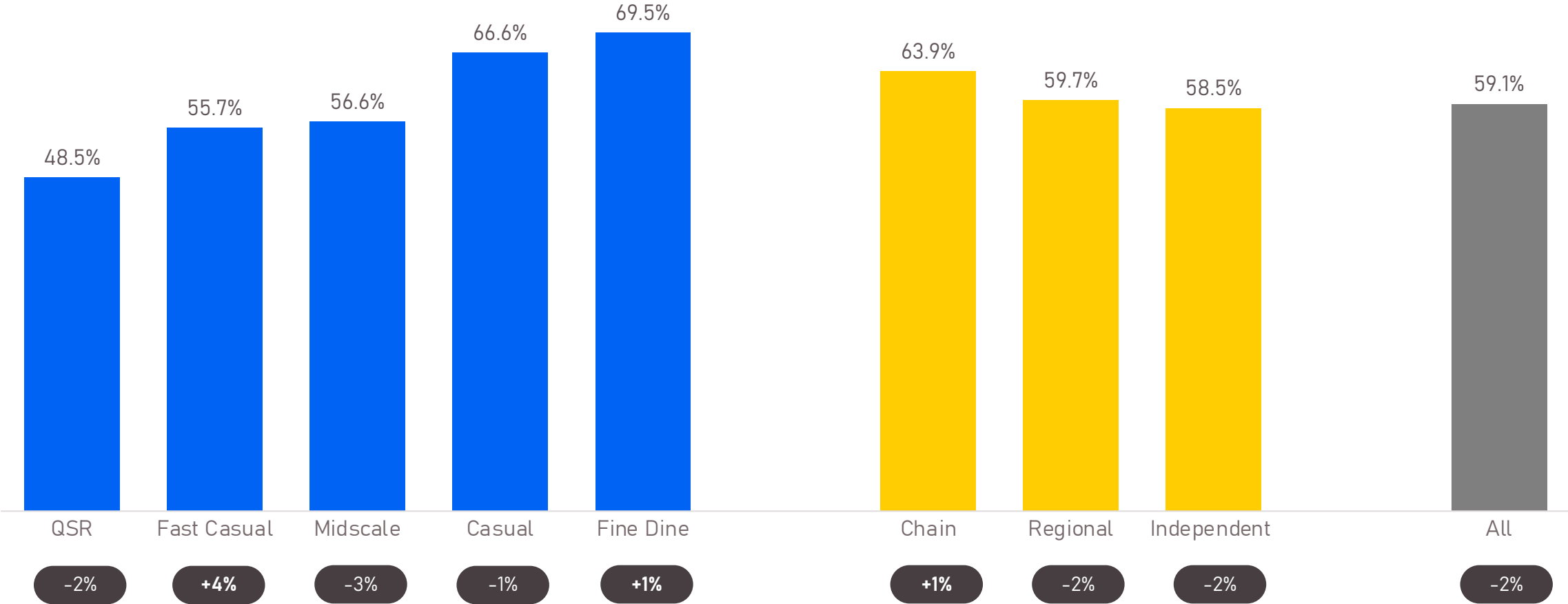


Chains feature honey on the menu slightly more than regional or independent operations.

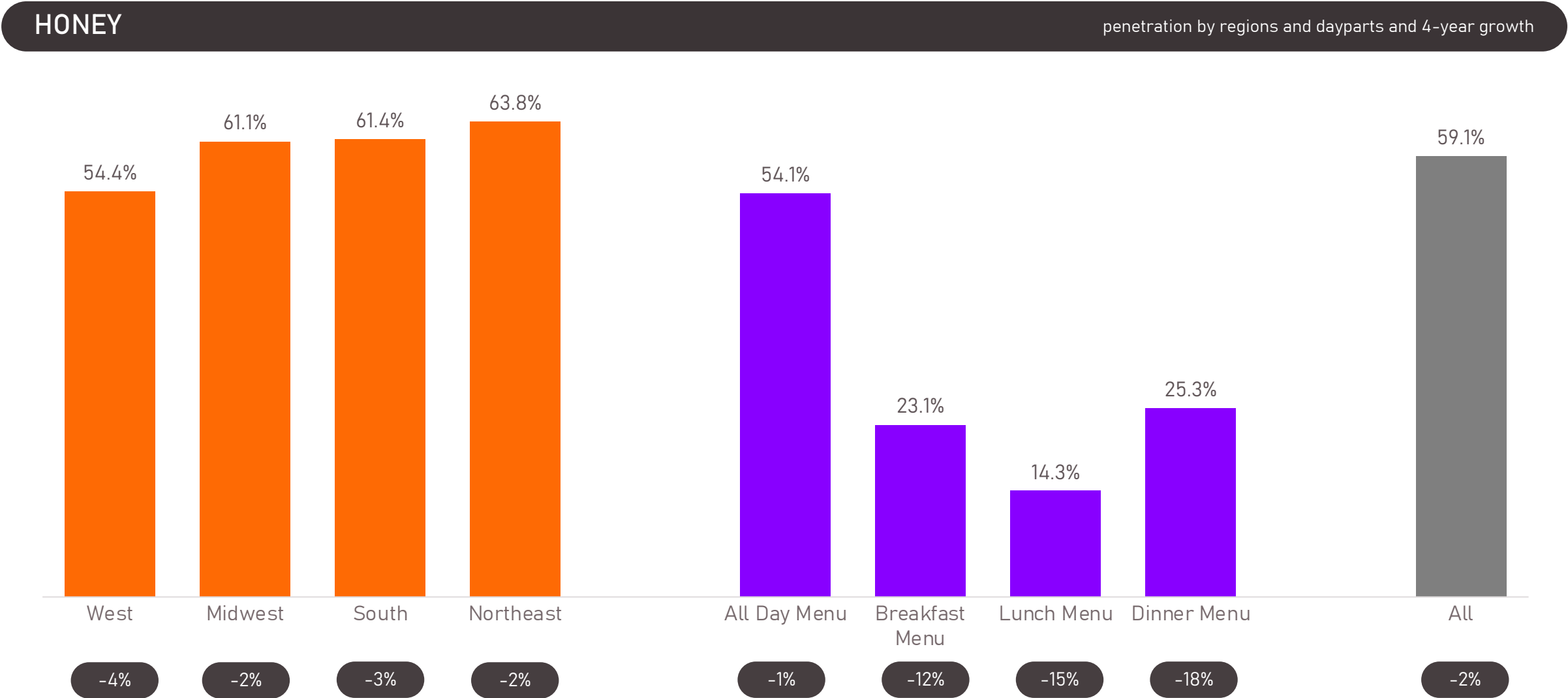
Fast casual, fine dining, and chain restaurants have all seen growth in honey items over the past four years.

HONEY

penetration by segment and restaurant type and 4-year growth



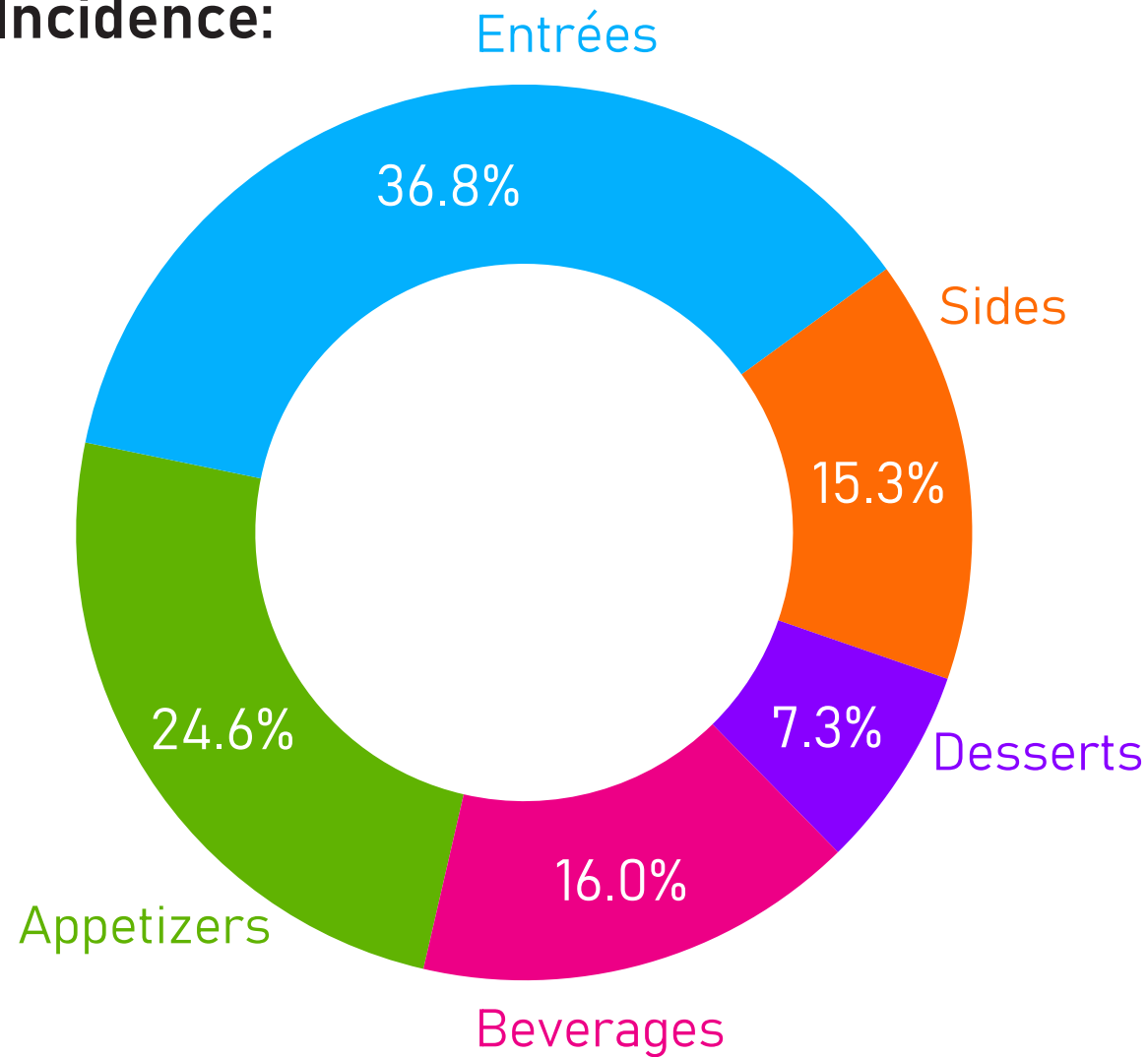
Across regions, honey is menued at a similar rate, with slightly more offerings in the Northeast and leaving opportunities for operations in the West.



While entrees hold the highest incidence and menu penetration of honey items, appetizers and sides are growing in penetration.

- Over a third of all menu items that feature honey are entrees, followed by appetizers and beverages.
- Honey is most commonly menued among entrees; it appears on roughly a quarter of appetizer menus and is evenly menued among sides and beverages.

Incidence:



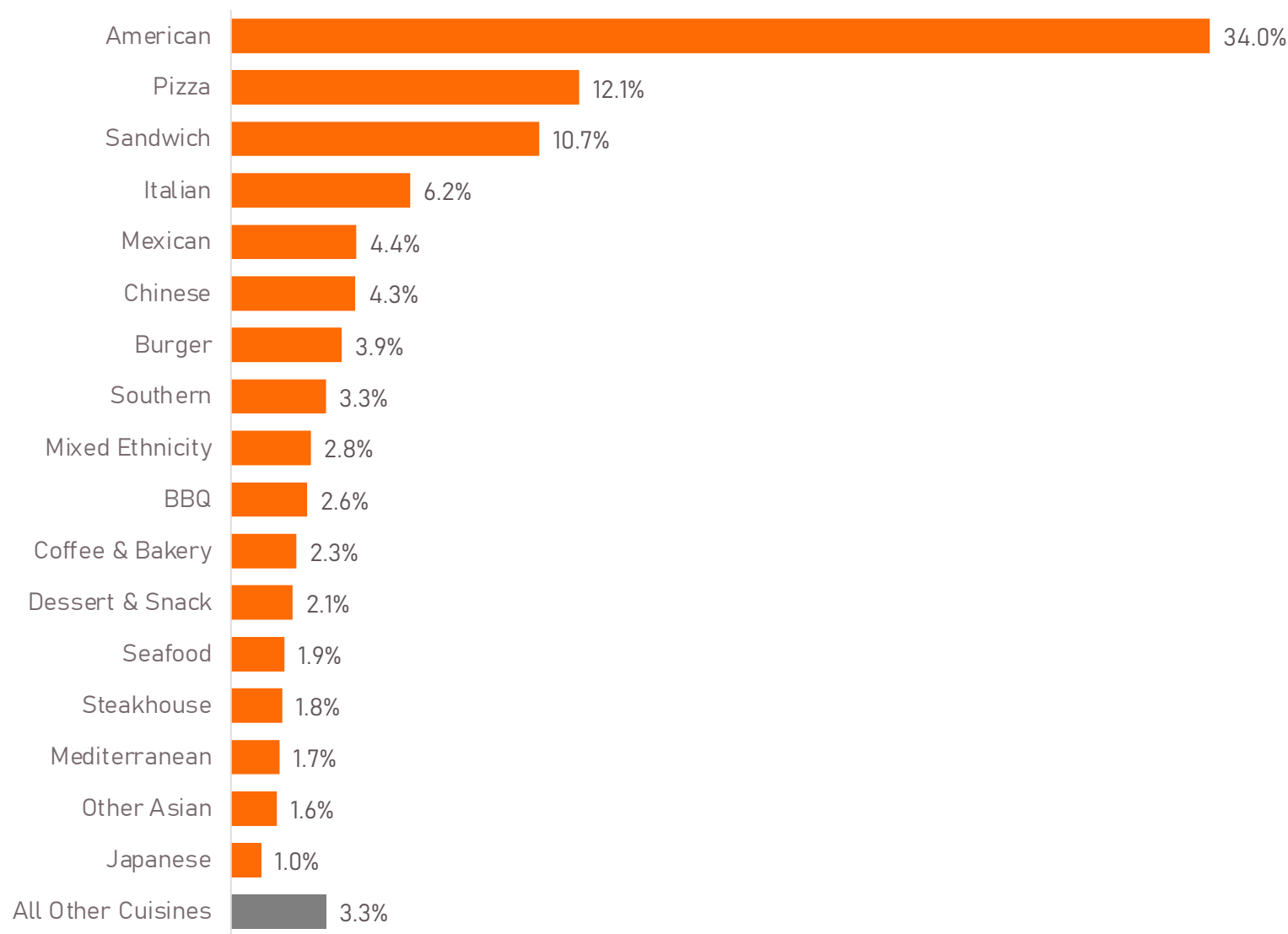
Penetration:

Menu Part	Penetration	4-Year Growth
Entrees	37.5%	-
Appetizers	26.6%	+6%
Sides	16.3%	+16%
Desserts	8.6%	-11%
Beverages	16.3%	-12%

American menus hold the majority of honey offerings but pizza, sandwich, Italian, Mexican, and Chinese are good potential avenues for innovation and exploration, focusing on pairing honey with other popular flavors and dishes.

HONEY

incidence distribution by cuisine type



MOST MENUED HONEY FLAVORS & PAIRINGS

The versatility of honey is present through various most menued flavor pairings. Bold flavors like mustard, BBQ, and garlic are growing, while milder flavors such as butter and lemon are also on the rise.

	MENU PENETRATION	4-YEAR GROWTH	1-YEAR GROWTH
Honey Mustard	24.1%	-3%	-4%
Hot Honey	6.4%	+128%	+36%
Honey BBQ	5.1%	+15%	+6%
Honey Butter	3.0%	+11%	-1%
Honey Dijon	2.8%	-14%	+5%
Honey Garlic	1.8%	+53%	+13%
Honey Sauce	1.6%	+17%	+15%
Honey Lime	1.3%	-	-10%
Honey Dressing	1.2%	-26%	-2%
Honey Lemon	1.1%	+13%	+4%
Honey Vinaigrette	1.0%	-25%	+4%
Honeycomb	0.9%	-10%	-8%
Honey Balsamic	0.8%	-25%	-13%
Chipotle Honey	0.7%	-11%	+7%
Truffle Honey	0.6%	-32%	-26%
Sriracha Honey	0.5%	-8%	+5%
Honey Cider	0.3%	+15%	+36%
Honey Garlic Sauce	0.2%	+20%	-8%
Jalapeno Honey	0.2%	-17%	0%
Habanero Honey*	0.1%	-44%	-17%

HOT HONEY

- A simple but very flavorful combination of sweet honey and spicy peppers.
- Is often spiced with chile peppers, but can also get heat from siracha, jalapeno, habanero and more.
- Frequently used as a drizzle on pizza or as a dipping sauce for fried chicken. Operations are also pairing hot honey with seafood, tacos, and cocktails.

6.4%

menu
penetration

+128%

4-year past
growth

Babalu Tapas & Tacos	Memphis Hot Honey Shrimp	crispy fried shrimp tossed in a house-made hot honey sauce , arugula, cotija dressing for dipping.
Lockeland Table	Crispy Pork Belly Tacos	with hot honey , cucumber, cabbage, and green onions.
Morton's The Steakhouse	Passion Margarita	casamigos reposado tequila, passion fruit, hot honey , lemon, basil.

HONEY GARLIC

- Sweet and sour in flavor, this sauce is a popular item in Canada.
- The balance in flavors pairs well with proteins like chicken, seafood, pork, and beef, as well as veggies.
- A fermented condiment that is believed to boost aide with cold and flu symptoms and has immune-boosting properties.

1.8%

menu
penetration

+53%

4-year past
growth



Bellagreen	Sticky Chicken Wings	eight crispy chicken wings tossed in house-made honey garlic spicy sticky sauce garnished with sesame seeds and green onions and served with our mango ranch dressing. gluten free.
East Side Kosher Deli	Honey Garlic Grilled Salmon	house fermented honey garlic , glazed over grilled salmon. served with a medley of dinner vegetables and your choice of rice, brown rice, baked potato, mashed potato, french fries or onion rings.
HG Sply Co	Honey-Garlic Brussels Sprouts	brussels sprouts, chile flake, honey-garlic dressing , and green onion

MOST MENUED HONEY TYPES

MENU PENETRATION

Local Honey	1.1%
Wildflower Honey	0.4%
Clover Honey	0.3%
Raw Honey	0.3%
Orange Blossom Honey	0.2%
Acacia Honey	0.1%
Buckwheat Honey	<0.1%
Manuka Honey	<0.1%
Alfalfa Honey	<0.1%

Local honey has the strongest presence on menus and can add an artisanal flare to more common menu items.

Note, please use data directionally as base size is small.

98 Center	Bee Golden	rye whiskey, domaine de canton, local honey, lemon, bitters golden bee pollen, ginger beer.
Honeygrow	Apple Pie Honeybar	apples, roasted apples, streusel crumble, candied pecans, whipped cream, and our local wildflower honey. gluten free.
Ristorante Massimo	Capesante Con Ceci	pan seared day boat scallops, roasted sunchokes, roasted garlic hummus, basil, clover honey, pink peppercorn.

SPOTLIGHT: Lavender Honey

Honey infused with lavender so that it has a distinct floral flavor.

Lavender honey can be used in any application you might use traditional honey, but with its floral flavor, it is well suited to include as a sweetener for tea or as a flavor for ice cream.

0.4%

menu
penetration

+6%

4-year growth

+29%

predicted 4-
year growth

Mi Piae Italian Kitchen	Homemade Ricotta Con Crostini	2 ways. sweet; organic lavender honey , tahitian vanilla. savory: lemon zest, extra virgin olive oil, fresh herbs, fleur de sel, grilled ciabatta.
Goen Dining + Bar	Burrata Caprese	waimanalo herb pesto, arugula, lavender honey , sourdough.
Theo's Bar & Dining Room	Pomegranate Mule	gin, pama liquor, lime, lavender honey syrup

top and trending
honey dishes by
type

MOST MENUED APPS & SIDES FEATURING HONEY

	MENU PENETRATION	4-YEAR GROWTH
Wing	29.2%	+65%
Salad	16.7%	-26%
Chicken Strip	15.4%	-16%
Boneless Wing	9.6%	+206%
Chicken Tender	9.5%	-14%
Fries	5.3%	+15%
Fried Chicken	4.5%	-16%
Chicken Finger	4.3%	-18%
Pretzel	3.6%	+14%
Brussels Sprouts	2.8%	+18%
Cornbread	1.9%	-16%
Biscuit	1.9%	-28%
Pizza	1.6%	+51%
Crostini	1.6%	-17%
Onion Ring	1.3%	-28%

American pub favorites like wings, chicken strips, fries, pretzels and more are the dishes featuring honey that enjoy the highest penetration on appetizer and side menus. Pairing honey's sweet flavor with savory foods increases appeal to diners craving indulgence.

FASTEST GROWING APPS & SIDES

FEATURING HONEY

	MENU PENETRATION	4-YEAR GROWTH
Barbecue Chicken Wing	1.4%	+628%
Honey Mustard Chicken Wing	3.0%	+482%
Honey Chicken Wing	3.0%	+288%
Charcuterie	0.8%	+209%
Boneless Wing	9.6%	+206%
Hot Chicken Wing	1.8%	+150%
Flatbread	0.7%	+63%
Dumpling	0.6%	+58%
Soft Pretzel	1.0%	+52%
Pizza	1.6%	+51%
Chicken Nugget	0.7%	+49%
Buffalo Chicken Wings	3.2%	+37%
Brussels Sprouts	2.8%	+18%
Fries	5.3%	+15%
Pretzel	3.6%	+14%

While chicken wing varieties (barbecue, honey mustard, hot chicken, etc.) dominate the list of fastest growing apps and sides featuring honey, upscale dishes are also increasingly being paired with honey on menus, such as charcuterie and flatbreads.



Honey Sriracha Wings

Mellow Mushroom | May 2024

9 wings tossed in honey sriracha sauce finished with chives and sesame seeds and served with lime and buttermilk ranch or blue cheese, carrots and celery.



Spiced Honey Cheese Curds

Burgerville USA | April 2024

Tillamook Breaded Cheese Curds tossed in Adobo Honey Spice. Served with Spicy Cilantro Mayo.



Bacon Cheddar Cornbread

First Watch | June 2023

Cornbread with cheddar and Monterey Jack cheeses, bacon, and scallions topped with whipped honey butter.

APPETIZERS

Restaurant	Item	Description
Abe Fisher	Parker House Challah Rolls	honey butter , borscht tartare, chicken liver mousse, pickles.
Alchemist Barrister	Fried Brussels Sprouts	coconut oil, toasted coconut flakes, pomegranate smoked honey aioli . gluten free, vegetarian.
Amore Seafood	Medici Salad	mixed greens, cucumbers, cherry tomato, walnuts, carrots, blue cheese, honey , and olive oil.
Buttermilk Channel	Popovers	with honey and sea salt.
Corner 17	Chicken Skewers	lightly fried chicken leg meat marinated in house-made honey sauce .
Feller	Foragers Crostini	local chevre, marinated mushrooms, IPA honey reduction , porcini crema, herbs.
Flinders Lane	Crispy Brussels Sprouts	truffle honey dressing , sage, chives. vegetarian
Glory Days Grill	Honey Old Bay Grilled Wings	gluten free. sweet savory.
Juniper	House Focaccia	whipped ricotta, calabrian honey .
Pizza Rock	Honey Pancetta Italian Fries	vegetarian.
S & V Urban Italian	Spicy Salami Bruschetta	calabrese puree, burrata cheese, spicy salami, mike's hot honey and baby greens.

SIDES

Restaurant	Item	Description
Planet Smoothie	Berry Brazilian Bowl	Strawberries, blueberries, bananas, granola, honey .
Kitchen 67	Whipped Sweet Potatoes	whipped and sweetened with cinnamon honey butter . gluten-free.
Oak & Ola	Charred Brussel Sprouts	dijon cream, florida honey , pickled red onion, parmigiano-reggiano.
Byblos	Roasted Carrots	harissa with cilantro cress, and orange blossom honey .
Deuxave	Sugar Snap Peas	with sundried tomato mint aioli, hot honey , za'atar.
Famous Dave's	Corn Bread Muffin	fresh baked honey buttered corn bread muffin.
Florian	House Side Salad	crisp lettuce, cherry tomato, red onion, honey citrus poppyseed dressing .
Mighty Quinn's Barbeque	Corn Fritters	with honey-chile dipping sauce . vegetarian.
The Topsy Pig	Thyme - Cheddar Biscuits	spiced honey butter .
Sportello	Roasted Baby Carrots	parmesan mousse, hot honey .
Wildflower Bread Co	Millionaires Bacon	caramelized to perfection and drizzled with honey .

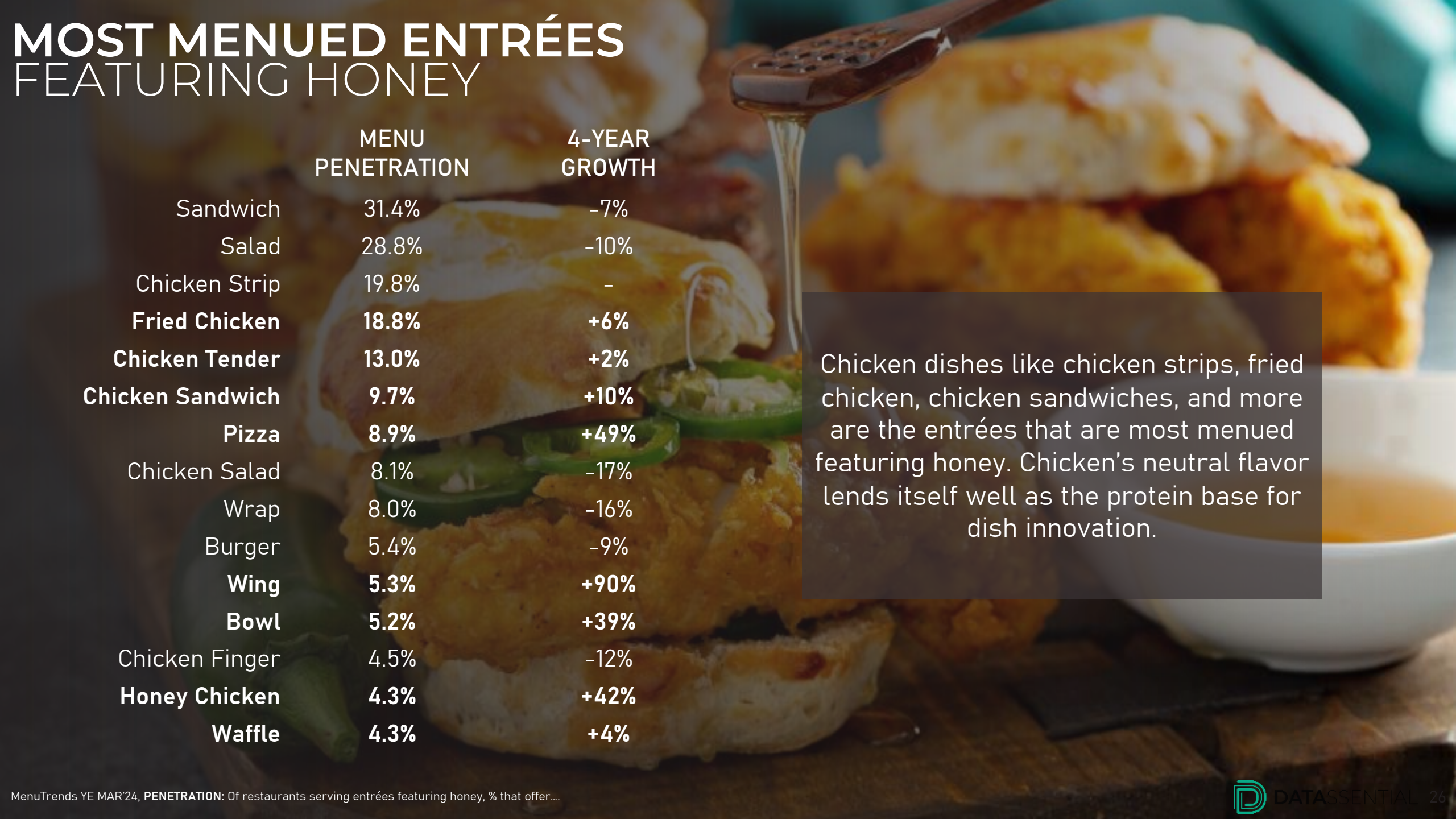
SPOTLIGHT: Honeycomb

Honeycomb most often appears on appetizer menus (0.5%) as part of cheese boards and other appetizers that feature cheese.

0.9%
menu
penetration

+57%
predicted 4-
year growth

Firefly	Artisanal Cheeses	cambozola, aurora manchego, brie, beehive barely buzzed, garrotxa goat cheese, honeycomb , dried fruits, grapes, nuts, caper raisin jam.
Trattoria Andiamo	Focaccia Di Recco	ligurian flatbread, soft cow's cheese, honeycomb .
Mediterranean Exploration Co.	Schmaltz Cornbread	Bourbon glaze, honeycomb butter , sea salt.



MOST MENUED ENTRÉES FEATURING HONEY

	MENU PENETRATION	4-YEAR GROWTH
Sandwich	31.4%	-7%
Salad	28.8%	-10%
Chicken Strip	19.8%	-
Fried Chicken	18.8%	+6%
Chicken Tender	13.0%	+2%
Chicken Sandwich	9.7%	+10%
Pizza	8.9%	+49%
Chicken Salad	8.1%	-17%
Wrap	8.0%	-16%
Burger	5.4%	-9%
Wing	5.3%	+90%
Bowl	5.2%	+39%
Chicken Finger	4.5%	-12%
Honey Chicken	4.3%	+42%
Waffle	4.3%	+4%

Chicken dishes like chicken strips, fried chicken, chicken sandwiches, and more are the entrées that are most menued featuring honey. Chicken's neutral flavor lends itself well as the protein base for dish innovation.

FASTEST GROWING ENTRÉES

FEATURING HONEY

	MENU PENETRATION	4-YEAR GROWTH
Gluten Free Pizza	0.6%	***
Avocado Toast	0.6%	+234%
Buffalo Chicken Wings	0.9%	+221%
Boneless Wing	1.7%	+201%
Seared Salmon	0.7%	+161%
Acai Bowl	0.9%	+143%
Wing	5.3%	+90%
Fried Chicken Sandwich	3.0%	+87%
Chicken Cobb	0.7%	+72%
Chicken Biscuit	0.7%	+63%
Buttermilk Chicken	1.9%	+55%
Pizza	8.9%	+49%
Burrito	0.6%	+43%
Grilled Pork	0.6%	+43%
Honey Chicken	4.3%	+42%

Although current menu penetration is low, items that might appeal to consumers focused on dietary restrictions or better-for-you options like gluten free pizza, avocado toast, seared salmon, and acai bowls have all enjoyed sustained four-year growth.



Honey Hot BLT Club Sandwich

Wawa | May 2024

Applewood smoked bacon, cheddar cheese, honey hot sauce, lettuce, and tomatoes served on white bread.



Bee Sting Chicken Tenders

Cracker Barrel | May 2024

Crispy chicken tenders drizzled with a sweet-heat honey glaze. Served with two Country Sides and choice of bread.



Miso Shrimp Salad

California Pizza Kitchen | February 2024

Napa and red cabbage, avocado, cucumber, edamame, crispy wontons, and scallions served with our signature honey-miso dressing.

ENTREES

Restaurant	Item	Description
110 Grill	Hot Honey Chicken	chicken breast brined in pickle juice, deep fried in cajun seasoned flour, shredded lettuce and pickle chips on a griddled pretzel bun, topped with hot honey .
54Th Street Grill And Bar	Fajita Salad	crumbled veggie patty, sautéed vegetables, cilantro, cotija, jalapeno, pico de gallo, sour cream, tortilla chips. honey lime vinaigrette or avocado ranch.
Brick House Tavern + Tap	Thai Chicken Salad	chicken, red bell peppers, napa cabbage, cilantro, wontons, peanut sauce and honey lime vinaigrette .
Dish	Honey Glazed Porterhouse Pork Chop	grilled 10 ounces porterhouse pork chop topped with a honey glaze , drizzled with a fig balsamic reduction, served sauteed brussel sprouts, sliced granny smith apples and sweet mashed potatoes.
Dolce Pane E Vino	Braised Short Rib Flatbread	garlic cream sauce, mozzarella, fontina, pickled red onion, chili flake, arugula, honey drizzle .
How To Cook A Wolf	Polenta Fritters	ricotta, chestnut honey , sage.
Hunan Coventry	Honey Lemon Chicken	deep fried chicken breast topped with a special honey lemon sauce .
In The Raw	Ahi Tuna Sashimi	with honey soy sauce .
Jue Lan Club	Grand Marnier Jumbo Prawns	with honey walnuts .
Jyoti Exotic Indian Cuisine	Chicken Dansik	boneless pieces of chicken marinated in honey, vinegar and spices , cooked with lentils. tastes sweet, sour and spicy, gluten free.
King & I	Honey Pork	sliced pork loin marinated in honey , garlic and black pepper, pan-fried with mushrooms.

MOST MENUED DESSERTS FEATURING HONEY

	MENU PENETRATION	4-YEAR GROWTH
Ice Cream	20.8%	-18%
Sopapilla	19.1%	-3%
Pastry	15.0%	-3%
Baklava	13.0%	+43%
Cake	8.6%	+15%
Vanilla Ice Cream	8.3%	-1%
Gulab Jamun	7.8%	+44%
Fried Ice Cream	6.6%	-11%
Cheesecake	5.0%	+42%
Parfait	4.4%	+46%
Pie	4.2%	-1%
Crumble	3.3%	+29%
Cookie	2.8%	-26%

Desserts featuring creamy textures (ice cream, cheesecake, parfait) and pastry-based desserts (sopapilla, baklava, gulab jamun, etc.) are those most menued with honey.



For the Love of Hot Honey

Cold Stone Creamery | January 2024

Mike's Hot Honey® Ice Cream, Brownie, Pecans & Mike's Hot Honey®.



Turkey Day Fixin's

Baskin Robbins | November 2023

An ice cream flavor combining sweet potato and autumn spice ice creams mixed with honey cornbread pieces and swirls of Ocean Spray cranberry sauce.



Grilled Stickies a la Mode

Eatn Park Restaurants | September 2023

Our award-winning signature dessert! Grilled stickies topped with premium hand-dipped vanilla ice cream and our warm honey sauce.

DESSERTS

Restaurant	Item	Description
85 Degrees C Bakery Cafe	Honey Cake	fragrant and sweet honey sponge cake.
Aamantran	Gulab Jamun	custard balls in a honey and saffron syrup .
Afro Deli & Coffee	Baklava	layered pastry dessert made of filo pastry, filled with chopped nuts, and sweetened with syrup or honey .
Ajo Al's Mexican Cafe	Fried Ice Cream	crunchy coated ice cream with whipped cream, honey and strawberries.
Aling's Hakka Chinese Cuisine	Mockingbird Nest	crispy fried noodles with dollop of vanilla ice cream drizzled with honey .
Blue Mesa Grill	Tres Flans	honey , cheesecake and chocolate.
Caffe Mingo	Panna Cotta	honey and lavender cooked cream' with amarena cherries and anise pizzelle.
Daniel	Mont Blanc	chestnut-rum mousse, grapefruit pâte de fruits honey biscuit
Goen Dining + Bar	Basque Cheesecake	mixed berries, honey , whipped cream, matcha dust.
Javier's Sabor Mexicano	Bunuelos	crispy triangles topped with honey , white glaze, and a bit of cinnamon.
Josephine House	Strawberry Pie	texas strawberry, caramelized honey ice cream

MOST MENUED ALCOHOLIC BEVERAGES FEATURING HONEY

	MENU PENETRATION	4-YEAR GROWTH
Bee's Knees	8.9%	+6%
Margarita	4.1%	+12%
Penicillin	3.6%	+5%
Hot Toddy	3.6%	-7%
Mule	3.6%	-12%
Cider	3.4%	+42%
Old Fashioned	3.1%	-15%
Smash	2.4%	+40%

Drinks that feature heavier, full-bodied liquors like scotch, bourbon, or whiskey (penicillin, hot toddy, old fashioned, etc.) are also those most menued with honey – likely due to the sweetness of the honey being able to cut through the strong, bitter taste of the alcohol base.



Purple Reign

Bar Louie | May 2024

Deep Eddy Lemon vodka, Las Californias Citrico gin, honey, pineapple lemon, butterfly pea flower, and lemon zest in a cocktail glass.



Sweet Heat Paloma

Benihana | April 2024

Casamigos Reposado Tequila mixed with hot honey, blood orange cordial, lime juice and Q Sparkling Grapefruit. Garnished with spicy orange and Japanese chili-salt rim.



Sweet and Smoky

Famous Dave's | July 2023

Kurvball Original Barbeque Whiskey, pineapple, lemon, honey, dry rub rim.

COCKTAILS

Restaurant	Item	Description
Alessa Laguna	VIP Moscow Mule	big shot of stoli elit, organic ginger honey , caribbean recipe of ginger beer, fresh lime.
Atlas	Legendary Penicillin	macallan rare cask, lemon, honey , ginger
Bar La Tosca	Bee Sting	sauza silver tequila, lemon, honey , jalapeno.
Bedford Hall	Peach Blossom	ketel one peach and orange titos handmade vodka, elderflower liquor, honey simple syrup , dash of lime juice, organic ginger beer.
Blue Duck Tavern	Raspberry Smash	rye, sweet vermouth, raspberry honey , lemon, mint.
Cafe Escadrille	Watermelon Fizz	watermelon infused titos vodka, lemon juice and honey simple syrup . topped with soda water to give the fizz. served on the rocks with a watermelon garnish.
Catania Coastal Italian	Centaury	monkey shoulder scotch, all spice dram, lime, tamarind syrup, honey , and thyme.
Cosmo's Cucina	Hot Toddy	cinnamon jameson, lemon and honey .
Emigration Cafe	Cucumber Cooler	wahaka mezcal, ancho reyes liqueur, honey , lime, cucumber.
Good Dog Bar	Bee's Zzz's Cocktail	bluecoat, honey lavender syrup , fresh lemon.
Caprock Cafe	R and R Old Fashioned	rye whiskey, rock candy, honey , bitters, bing cherry.

MOST MENUED NON-ALCOHOLIC BEVERAGES FEATURING HONEY

	MENU PENETRATION	4-YEAR GROWTH
Tea	41.1%	-24%
Hot Tea	24.9%	-30%
Smoothie	18.2%	-10%
Green Tea	14.2%	-32%
Specialty Coffee	13.0%	+8%
Latte	11.1%	-2%
Juice	10.3%	+6%
Soda	7.1%	+47%
Lemonade	6.7%	-2%
Black Tea	6.7%	-21%
Milk Tea	6.3%	+96%
Orange Juice	5.1%	-9%
Milkshake	4.3%	-10%
Tonic	4.0%	+227%
Iced Tea	4.0%	-46%

Tea varieties (hot tea, green tea, black tea, etc.) are the most menued non-alcoholic beverages featuring honey. Growing on menus are specialty coffee, juices, sodas, milk tea and beverages with tonic that include honey.



Hot Honey Affogato

Starbucks | March 2024

A decadent sweet and spicy affogato. Vanilla gelato drenched in Starbucks Reserve® Espresso, Scrappy's Orange and Firewater Bitters – topped with a drizzle of hot honey and an Amarena cherry.



Yuzu Honey Lemonade

Shake Shack | March 2024

Yuzu and sudachi citrus juices mixed in house with real lemonade and honey.



Iced Honey Almond Latte with Almond Milk

Peet's Coffee & Tea | March 2024

Our Honey Almond Latte with Almond Milk infuses sweet and nutty flavors into rich Espresso Forte™ and almond milk for a delightful spring drink.

NON-ALCOHOLIC BEVERAGES

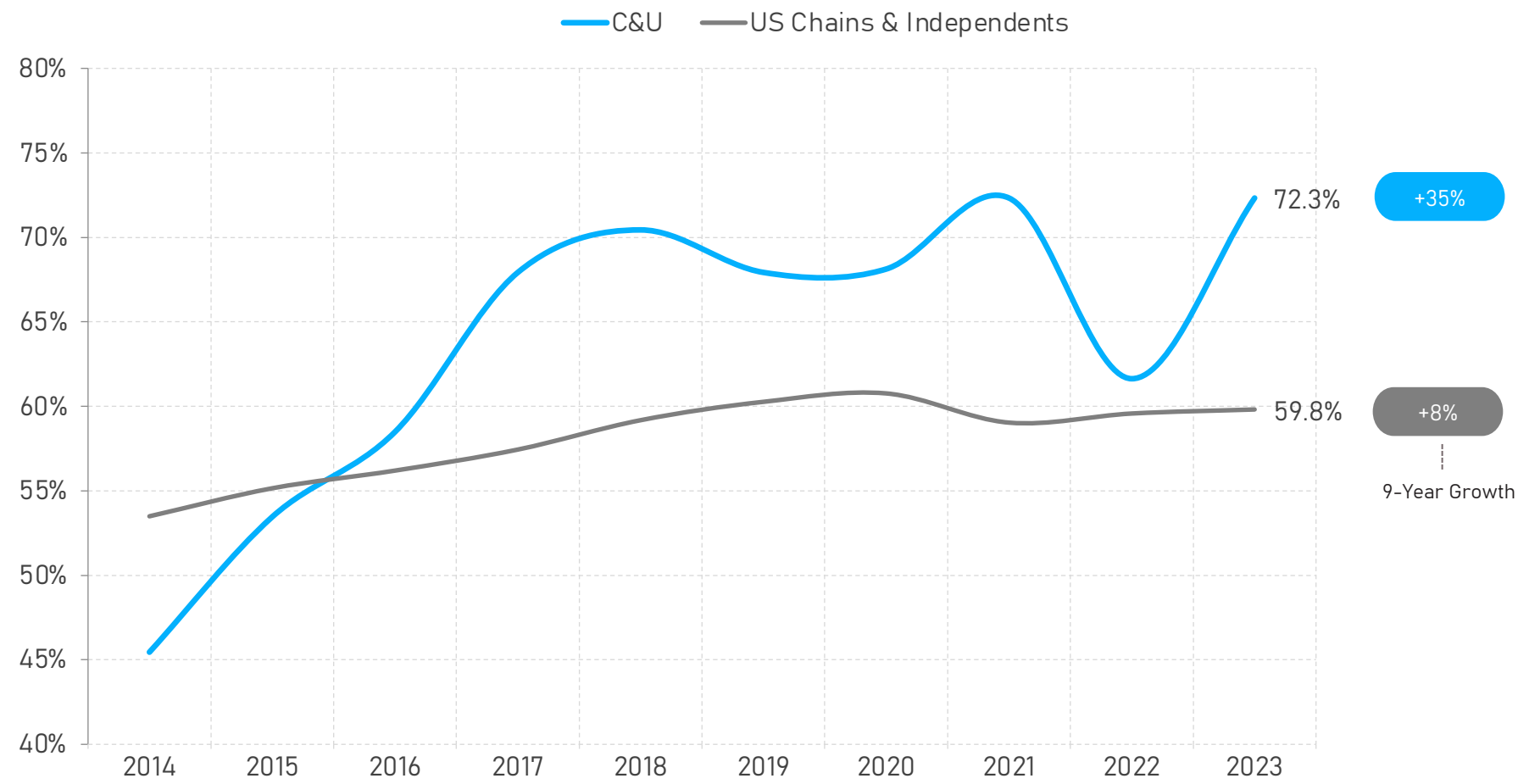
Restaurant	Item	Description
Ritual Social House	Cooler	strawberry, basil, lemon, honey , pineapple and soda.
Adams's Subs & Salads	PB And J Smoothie	peanut butter with strawberries and honey , apple, banana. vegan. gluten free.
Aladdin's Eatery	Carrot Smoothie	freshly squeezed carrot juice, banana and honey . vegetarian, gluten-free.
Bella Vista Coffee Shop	Honey Cappuccino	double espresso shot, milk, organic honey , and cinnamon.
Boqueria	Peacock	seedlip 'garden', thyme, buttery pea flower, honey , lime, ginger beer.
Café Gratitude	Adrenal Latte	ashwaganda, pine pollen, cordyceps, maca, raw honey
Hibernian Restaurant & Pub	No Paloma	grapefruit juice, lime juice, honey and tonic with a salt rim.
Freshii	Immune Elixir	lemon, ginger, honey .
Green & Tonic	Chamomile Passion Fruit	organic chamomile tea, passion fruit, apple cider, raw honey .
Bento Asian Kitchen and Sushi	Jasmine Milk Tea	the perfect blend of our creamy milk tea and delicate jasmine green tea served with honey boba .
Koy	Rose Water Spritz	rose water, honey , and aloe juice.

honey trends at
college & university

Honey has had wavering presence at colleges and universities, with a decline in 2022 but overall has grown on C&U menus.

HONEY

penetration by segment



Incidence is slightly lower at C&U (0.9%) compared to restaurant chains & independents (1.3%), but honey applications are growing across both segments.

+22%
9-Year incidence growth at C&U

MOST MENUED HONEY PAIRINGS (DISHES, PROTEINS, VARIETIES)

Top menued protein items – chicken, tofu, ham, and corn dog – are also on the rise as pairings with honey at C&U, potentially due to their versatility and subtle flavor profiles making them an ideal pairing for the sweeter taste of honey.

	C&U PENETRATION	4-YEAR GROWTH
Honey Mustard	50.4%	-3%
Salad	34.8%	+109%
Chicken	33.9%	+26%
Granola	27.0%	+4%
Carrot	22.6%	-6%
Honey Glazed	14.8%	-47%
Orange	13.0%	-26%
Pork	11.3%	-24%
Potato	11.3%	-42%
Honey Dijon	10.4%	-13%
Honey Butter	9.6%	+29%
Tofu	9.6%	+15%
Turkey	9.6%	-26%
Ham	8.7%	+57%
Honey Sriracha	8.7%	+213%
Honey BBQ*	7.8%	-66%
Honey Lemon*	7.8%	+41%
Yogurt	7.8%	+69%
Oatmeal*	7.0%	+651%
Sandwich*	7.0%	-6%
Corn Dog*	6.1%	+10%

College/University	Item	Description
Albany State University	Honey Glazed Carrots	sliced steamed carrots with a honey glaze. vegetarian.
Augsburg University	Pickled Beet Salad	sliced beet and yellow onions tossed with balsamic- honey dressing. vegetarian. gluten free.
Boise State University	Balsamic Brussels And Pumpkin Seeds	balsamic and honey -glazed brussels sprouts with cranberries and pumpkin seeds. 4 ounce. vegetarian.
Creighton University	Honey Dijon Potato Salad	vegetarian. mindful
Grand View University	Peanut Butter Power Toast	smooth peanut butter and banana slices with chia seeds and honey on multigrain artisan toast. vegetarian.
Indiana University Of Pennsylvania- Main Campus	Lemon Almond Sugar Cookie	sugar cookie coated in almond then glazed with lemon and honey .
Jacksonville University	Honey Butter Kale	seasoned kale sauteed with garlic, butter and honey , vegetarian.
James Madison University	Mini Elvis Cake	honey -banana cake topped with creamy peanut butter icing and bacon crumbles.
King's College	Honey Ginger Glazed Chicken	ginger, garlic, and honey lacquered chicken. gluten free.
Marywood University	Honey Bourbon Pork Loin	tender pork loin roasted with an aromatic southern glaze. 4 ounces.
North Carolina Central University	Kentucky Bruschetta	grilled baguette topped with creamy goat cheese, bourbon pickled peaches, crispy ham, basil and drizzled with honey .
University Of California-Irvine	Kale Ginger Juice	fresh kale with ginger root, cucumbers, apples, celery, and honey . vegetarian.
West Virginia State University	Chicken Cordon Bleu Sandwich	grilled chicken breast with shaved ham, swiss cheese and honey dijon sauce.

metrics

Food trends follow a predictable life cycle.

The MAC helps you determine a trend's current life stage, as well as its potential for future advancement



inception

Trends start here. Inception-stage trends exemplify originality in flavor, preparation, and presentation.

IN FOODSERVICE

Ethnic Indies
Fine Dining

AT RETAIL

Ethnic Markets
Farmers Markets
(Rare Elsewhere)

adoption

Adoption-stage trends grow their base via lower price points and simpler prep methods. Still differentiated, these trends often feature premium and/or generally authentic ingredients.

IN FOODSERVICE

Gastro Pubs
Upper Casual
Fast-Casual
Food Trucks

AT RETAIL

Specialty Grocery
Gourmet Food
Shops
Food Hall

proliferation

Proliferation-stage trends are adjusted for mainstream appeal. Often combined with popular applications (on a burger, pasta, etc.).

IN FOODSERVICE

Casual Chains
QSR Chains
Progressive C-Stores
Colleges

AT RETAIL

Mainline Grocery
Mass Merchant
Club Stores

ubiquity

Ubiquity-stage trends have reached maturity and can be found across all sectors of the food industry. Though often diluted by this point, their inception-stage roots are still recognizable.

IN FOODSERVICE

Family
Restaurants
Traditional C-Stores
K-12
Healthcare

AT RETAIL

Drug Stores
Dollar Stores

excitement

volume

MAC

menu
adoption
cycle

EXCITEMENT

VOLUME

inception

fine dining, mixology, earliest stage

adoption

trendy restaurants + specialty grocers

proliferation

chain restaurants + mainstream grocery

ubiquity

find it just about anywhere

RESTAURANT SEGMENTS



ON-SITE SEGMENTS



K-12 SCHOOLS

Food served at schools grades kindergarten through 12th, both public and private/parochial. (n=800)

- Cafeteria Style Dining
- Student Feeding



COLLEGE & UNIVERSITY

Food served at post-secondary institutions including technical/trade, 2-year, and 4-year colleges and universities. (n=150)

- Cafeteria Style/Buffer
- Student Feeding Focus



HOSPITALS

Food served at healthcare facilities which provide patient treatment for medical conditions over the short term. (n=150)

- Cafeteria Style/Buffer
- Patient, Visitor, & Employee Feeding



LONG TERM CARE

Food served at facilities which care for people with chronic illness or disability who cannot care for themselves over long periods. (n=150)

- Some Cafeteria Style/Buffer
- Patient Feeding Focus

MENUTRENDS METRICS

MenuTrends is the industry's most accurate system for tracking trends at commercial and non-commercial restaurants. The primary U.S. Chains & Independents database is comprised of 4,800 restaurants which are balanced to the U.S. restaurant landscape. Data is reported using two key metrics:

PENETRATION | INCIDENCE

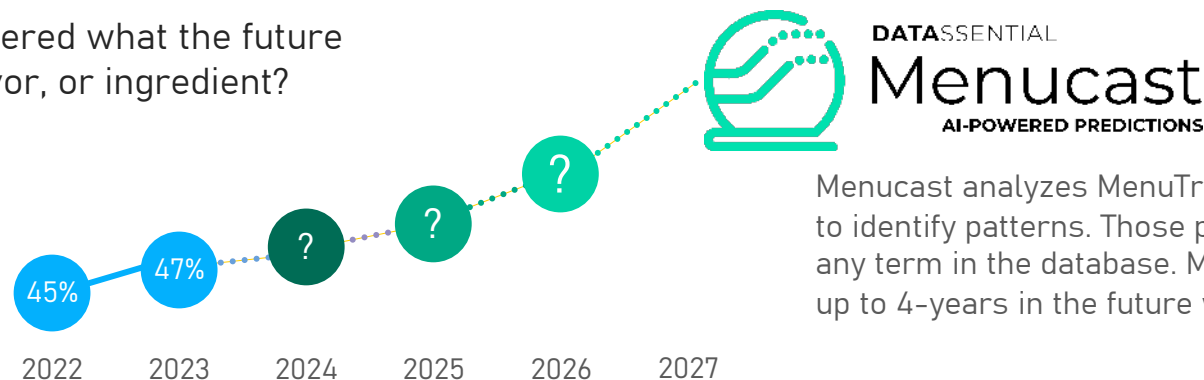
% of RESTAURANTS that serve that food, flavor, or ingredient.

This is a measure of adoption. Increases in penetration indicate that more restaurants are adding the item to their menu. Penetration is the most important statistic and the best indicator of trend movement.

% of MENU ITEMS that feature that food, flavor, or ingredient.

This is a measure of versatility. A restaurant adding yet another chicken dish to its menu will result in an increase in incidence. Incidence is a supporting statistic, to be used as a complement to penetration.

Have you ever wondered what the future holds for a food, flavor, or ingredient?



Menucast analyzes MenuTrends' historic library of millions of menu items to identify patterns. Those patterns are used to forecast future trends for any term in the database. Menucast can predict an item's menu penetration up to 4-years in the future with a directional accuracy of 97%.

Launches & Ratings **METRICS**



Launches & Ratings

Track, analyze, and report on several thousand LTOs each year. Each month, Item Launches & Ratings captures new items, returning items, LTOs, and even test market items. Chain websites, social media outlets, trade publications, and email promotions are monitored to capture every item release by top chains and more!

Coverage

Chains & Retailers Tracked

- US Chain Restaurants (n=263)
- C-Stores (28)
- Grocery Deli (n=41)
- Canadian Chains (n=57)
- Meal Kits (n=31)

Capabilities

- **Search** over 170,000 item releases with full descriptions and pricing
- **Visualize** it with pictures of thousands of new items and LTOs each year
- **Customize** monthly alerts for the chains and food categories you care about
- **Analyze** major chains and menu categories with instant presentations

FOOD WITH A STORY™

Datassential is your best source for food industry insights, from the latest menu trends to the products shoppers want at the grocery store.

