



# HONEY OVERVIEW

category trends | honey on menus



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# key findings

1

While honey has a strong presence across the restaurant industry (on roughly six-in-ten menus), it tends to show up more on casual and fine dining segment menus because of the way the flavor can play into cocktail beverages.

2

Honey has remained stable on menus in recent years growing just 1% in menu penetration, however, at the same time it has grown 26% in menu incidence. This indicates honey has seen a huge uptick in menu featurings despite being on roughly the same number of menus overall.

3

Entrées capture over half of all honey menu appearances with savory parts of the menu (apps, entrées, sides) accounting for roughly three-quarters. Classic cuisines American, sandwich, and pizza operators are where honey menus most.

4

Of specific honey sauces, honey mustard is the most common and the fastest growing. Honey sauces tend to have a spicy element to them like hot honey, sriracha honey, or honey ginger. These sweet and spicy infusions can balance out the spice and cater to consumers who have a lower heat tolerance.

5

Honey's most common ingredient pairing is chicken. Chicken is found in the most common dishes featuring honey (salads, sandwiches, chicken strips) along with the fastest growing dishes (fried chicken sandwiches, boneless wings, chicken and waffles).

honey trends on  
the menu



# SAVORY SAUCES & FLAVORS

MAC

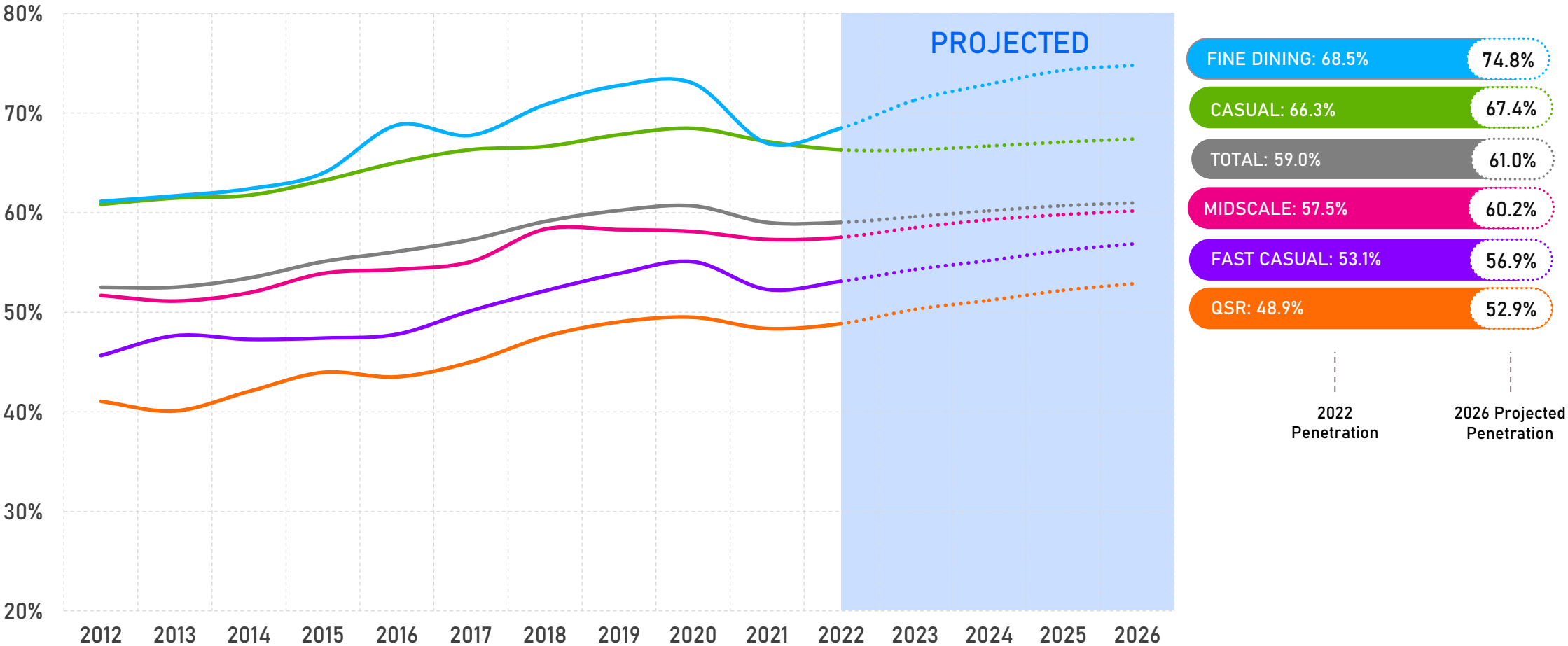


Despite being a ubiquitous flavor, honey has seen very strong growth on menus in the past decade and even rebounded slightly this past year after the pandemic driven menu cuts.

■ Largely due to cocktail menus, honey has the highest presence on casual and fine dining menus.

HONEY

penetration trend by segment

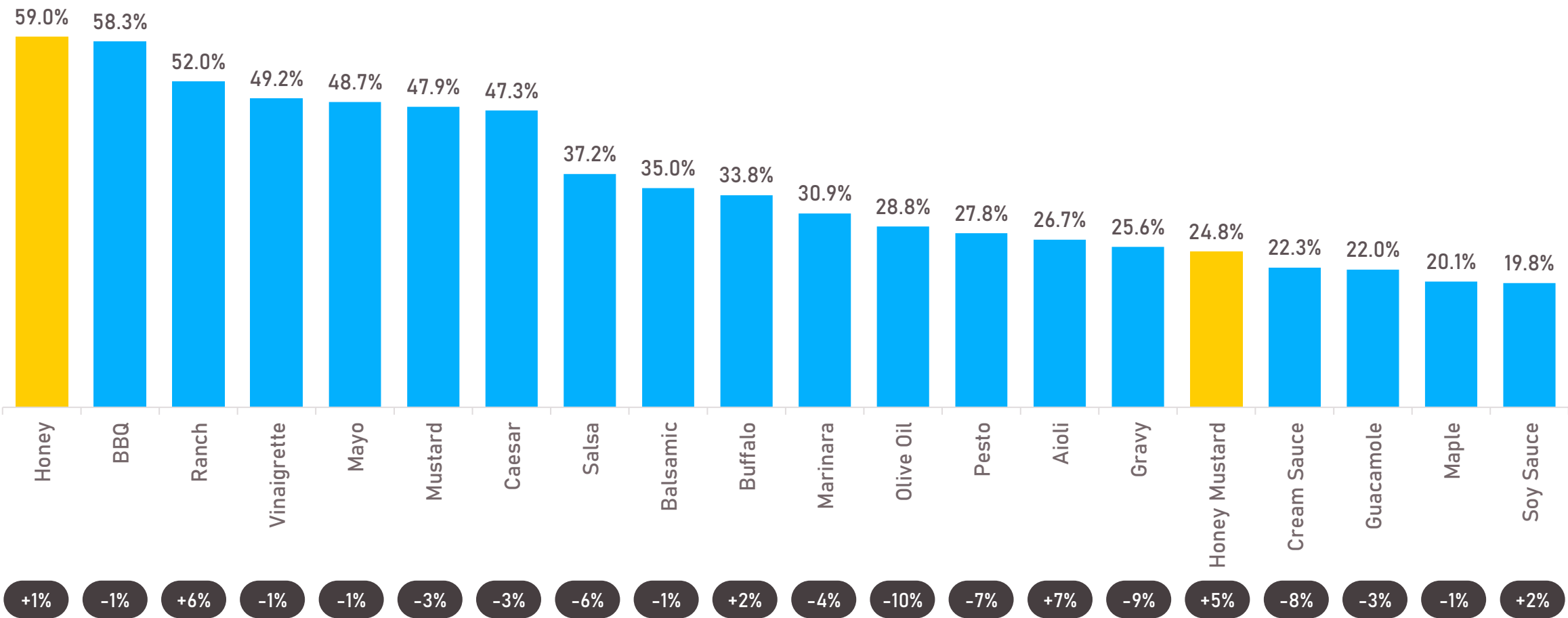


Honey is the top sauce callout on menus appearing on nearly six-in-ten menus.

■ Flavored variety, honey mustard is also one of the top sauces and is trending on menus.

TOP SAUCES

ranked by penetration and 4-year growth

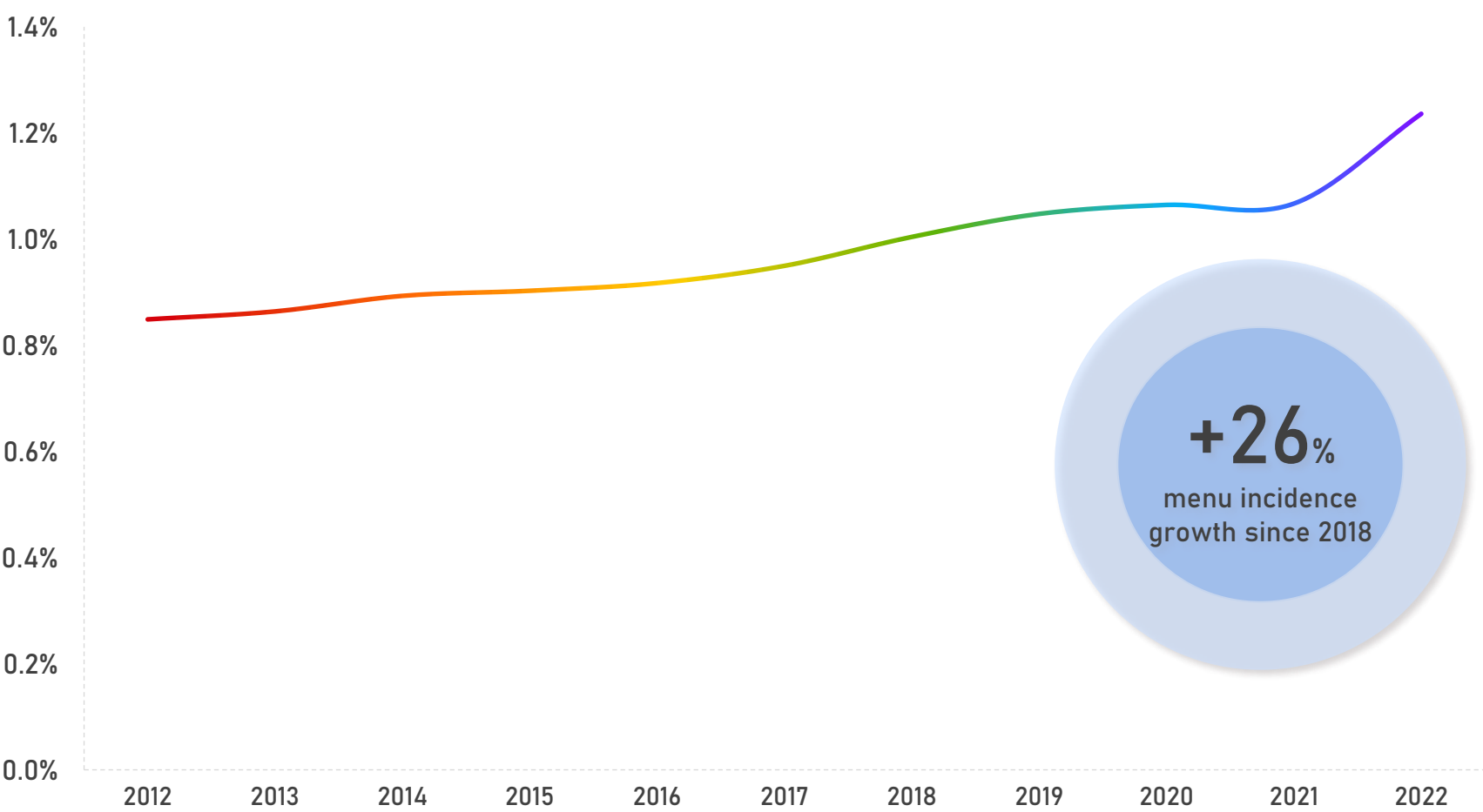


Applications for honey are very diverse but overall, honey most commonly appears in savory dishes on the menu.

Honey is appearing in far more items than it was four years ago with its boom in menu share.

HONEY

incidence time trend & incidence distribution



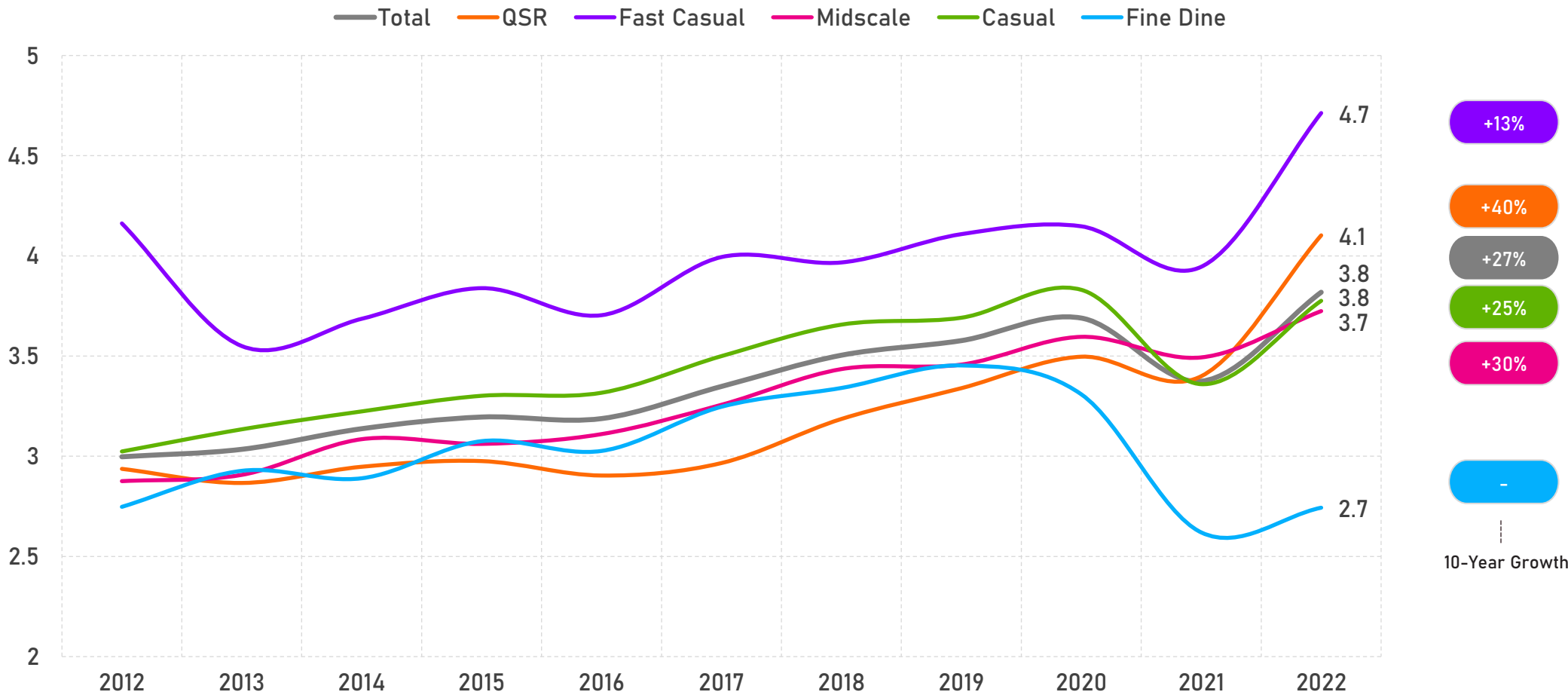
APPLICATIONS	DIST %
Combos/Multi Protein	8.6%
Entrée Salad	7.6%
Hot Sandwich	7.2%
Chicken Main Entree	6.6%
Cold Sandwich	5.7%
Condiment/Topping	5.4%
Cocktail/Mixed Drink	5.1%
Wings	4.9%
Appetizer Salad	3.4%
Fried Protein App	3.2%
Pizza	2.9%
Other Entree	2.6%
Bottled Spirit	2.1%
Bread Appetizer	2.0%
Ethnic Dessert	1.7%
Iced Tea	1.5%
All Other Item Types	29.7%



Fast casual operators tend to focus on expansive options and have consistently had the highest number of items featuring honey on menus.

HONEY

average number of items time trend by segment

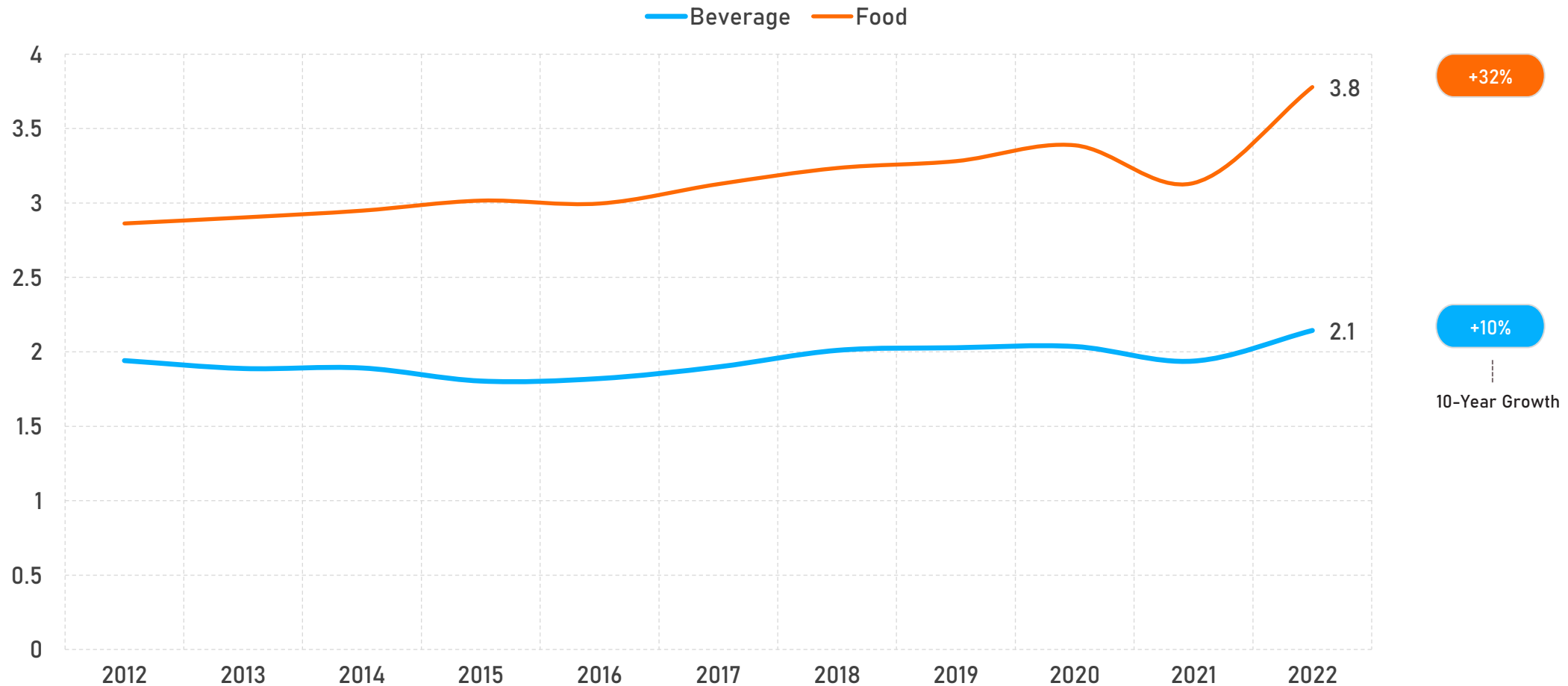


The number of honey menu items were slowly rising until COVID and then really spiked this past year.

- The number of beverage menu items featuring honey has held stable at around 2 per menu.

## HONEY

average number of items time trend by segment

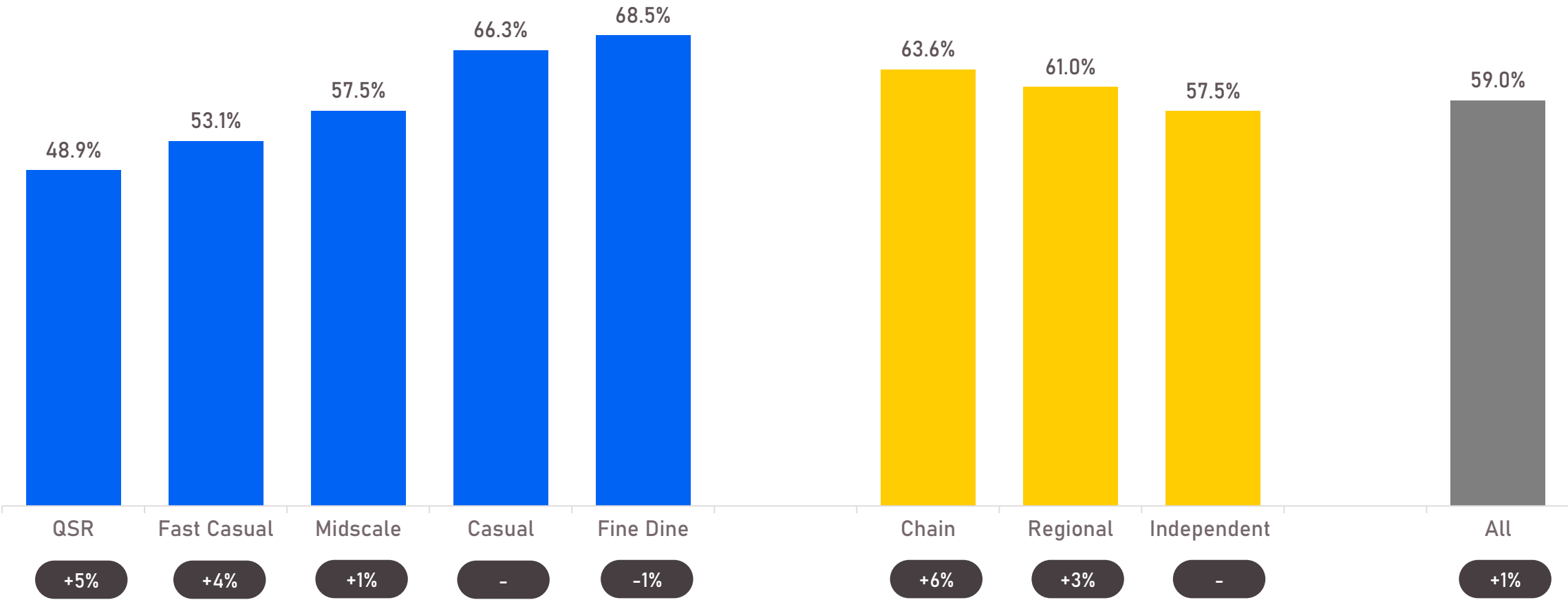


Consistent with the expansiveness of menus, honey progressively becomes more likely to be menued as you step up the staircase of segments.

■ As the number of units go up from independent, to regional, to chain, honey also becomes more common on menus there.

HONEY

penetration by segment and restaurant type and 4-year growth

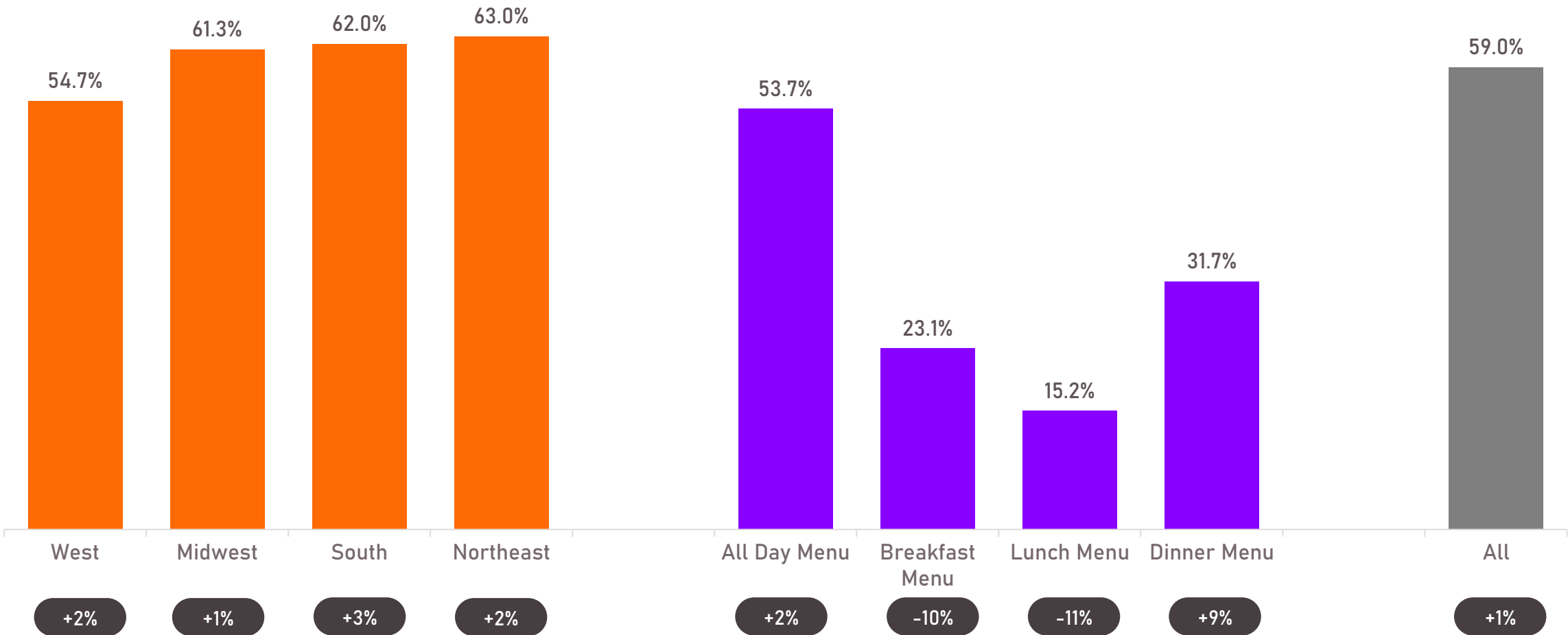




■ Honey appears on over half of all day menus with dinner menus having the second highest likelihood to menu honey.

## HONEY

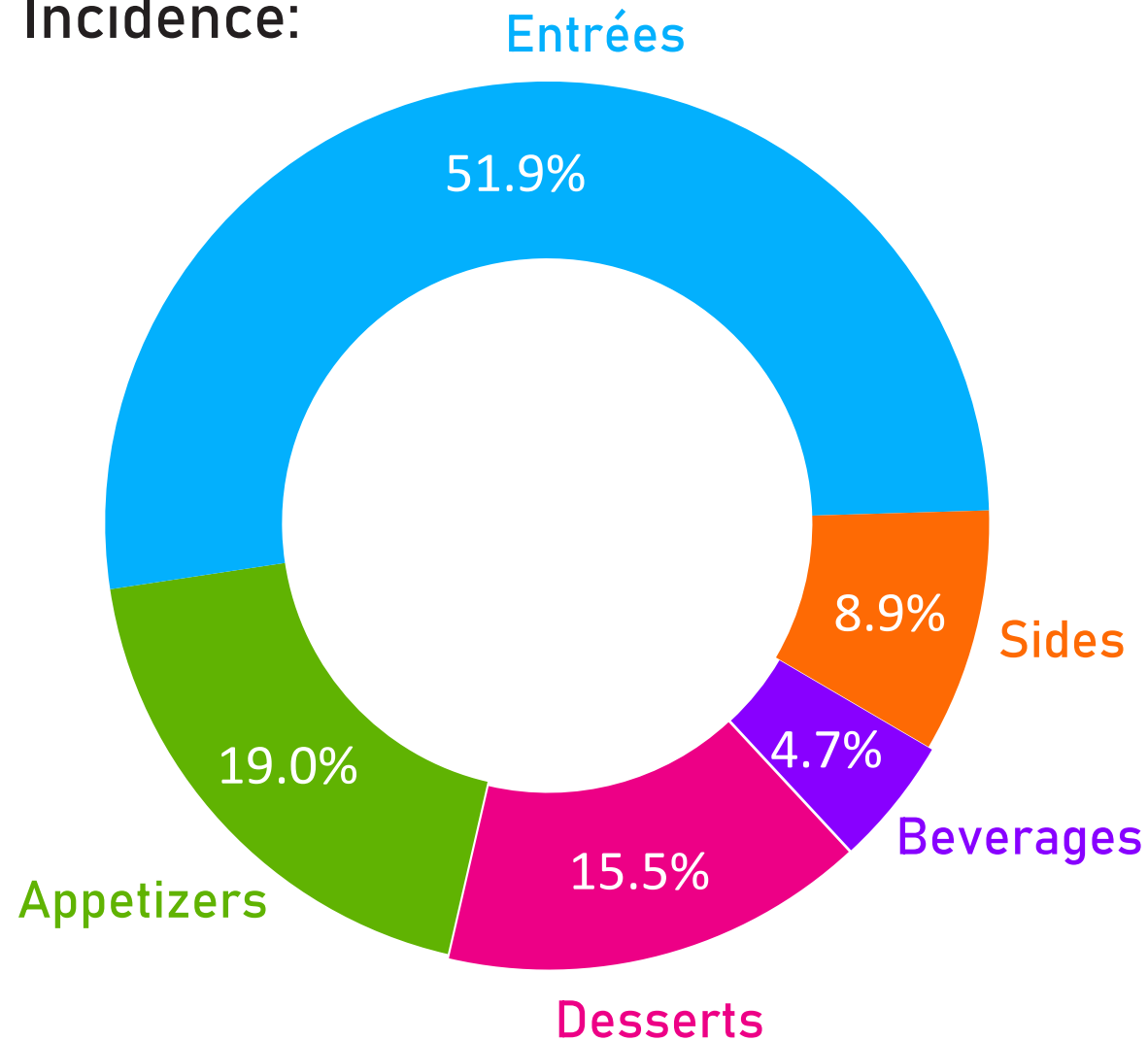
penetration by regions and dayparts and 4-year growth



Savory parts of the menu make up the majority of menu applications for honey with sides penetration seeing strong growth in the past four years.

- Despite its penetration, beverages with honey have a much lower share of the overall honey menu.

## Incidence:



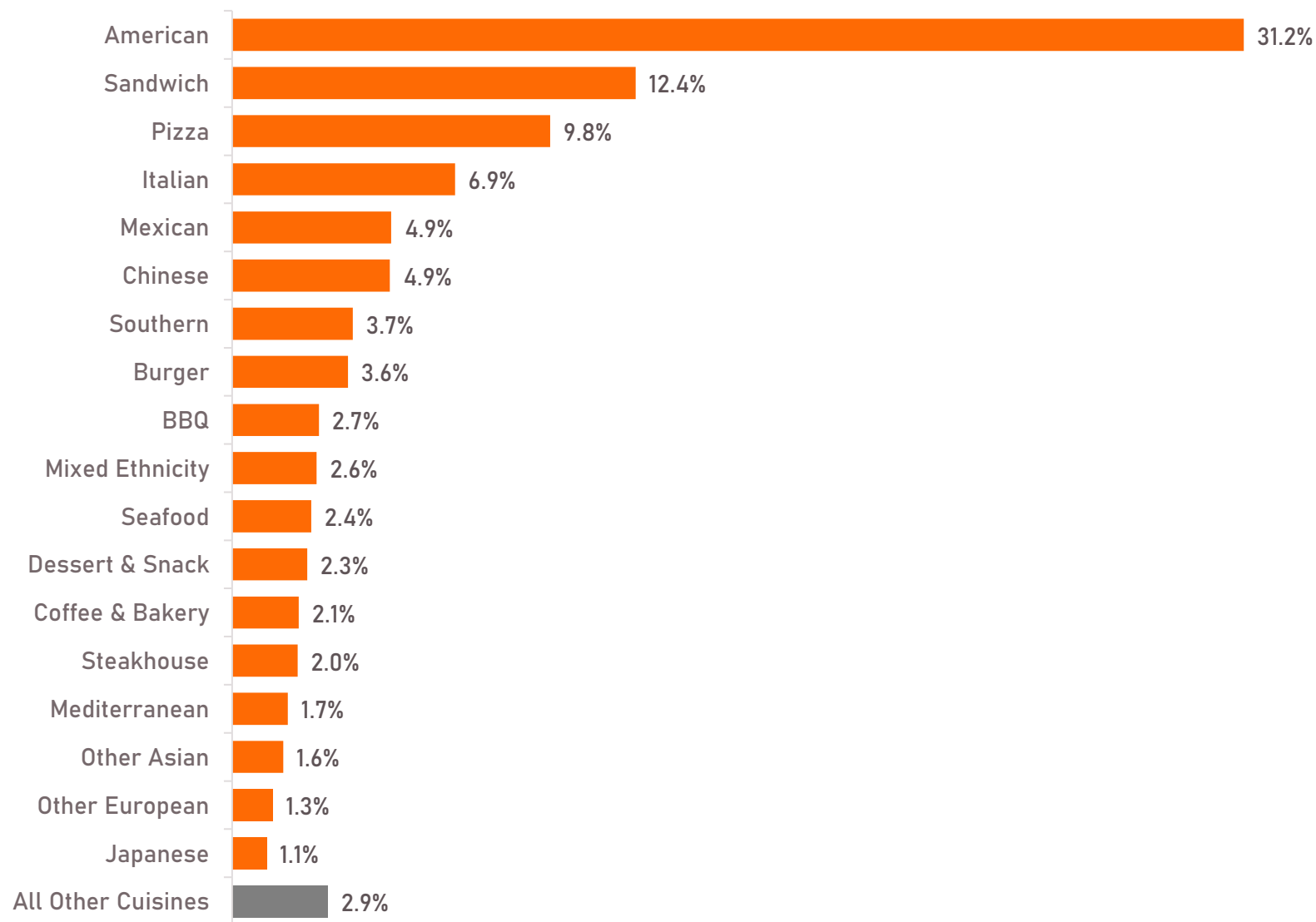
## Penetration:

Menu Part	Penetration	4-Year Growth
Entrees	37.5%	+2%
Appetizers	25.0%	+2%
Sides	15.3%	+33%
Dessert	8.8%	-5%
Beverage	17.0%	+2%

Honey has a lower presence at global operators with American, sandwich, and pizza specialty operators making up more than half of the menus featuring honey.

## HONEY

incidence distribution by cuisine type





# MOST MENUED HONEY VARIETALS AND FLAVOR PAIRINGS


Of the flavor pairings, honey mustard is by far the most common on menus. Spicy honey infusions like hot honey, sriracha honey, and honey ginger have shown strong growth in recent years.

	MENU PENETRATION	4-YEAR GROWTH
Honey Mustard	24.8%	+5%
Honey BBQ	4.3%	+3%
Hot Honey	3.5%	+103%
Honey Butter	2.9%	+7%
Honey Dijon	2.8%	-17%
Honey Syrup	2.2%	+20%
Sriracha Honey	1.5%	+60%
Honey Lime	1.3%	+12%
Honey Garlic	1.2%	+13%
Local Honey	1.2%	-
Chipotle Honey	1.2%	-7%
Real Honey	1.2%	+63%
Honey Lemon	1.1%	+18%
Honey Vinaigrette	0.9%	-25%
Honeycomb	0.9%	+7%
Honey Balsamic	0.9%	-14%
Honey Ginger	0.9%	+50%
"Honey Glaze"	0.8%	-20%
Truffle Honey	0.7%	-8%
Honey Chili	0.6%	+19%
Cinnamon Honey	0.6%	-17%



# MOST MENUED DISHES AND BEVERAGES FEATURING HONEY

	MENU PENETRATION	4-YEAR GROWTH
Salad	26.4%	-5%
Sandwich	19.9%	-9%
Chicken Strip	19.1%	-2%
Wing	13.1%	+10%
Fries	11.2%	+8%
Shrimp	8.3%	-5%
Tea	8.0%	+3%
Chicken Salad	6.0%	-11%
Chicken Sandwich	6.0%	+11%
Salmon	5.5%	-3%
Wrap	5.4%	-13%
Pizza	5.2%	+50%
Yogurt	4.9%	-35%
Beer	4.7%	+7%
Burger	3.9%	-7%
Bowl	3.7%	+53%



Staple dishes that touch many types of menus like salads, sandwiches, and chicken strips are the most common dishes paired with honey or honey mixed sauces.



# FASTEST GROWING DISHES AND BEVERAGES FEATURING HONEY

	MENU PENETRATION	4-YEAR GROWTH
Fried Chicken Sandwich	1.7%	+124%
Hot Toddy	1.1%	+80%
Bone In (Wing)	1.5%	+69%
Boneless Wing	2.6%	+66%
Chicken And Waffles	1.9%	+66%
Buttermilk Chicken	1.1%	+61%
Latte	1.4%	+54%
Bowl	3.7%	+53%
Pizza	5.2%	+50%
House Salad	2.3%	+43%
Honey Chicken	2.5%	+31%
Grilled Salmon	1.4%	+26%
Pie	1.7%	+21%
Baklava	1.4%	+19%
Ham Sandwich	1.0%	+18%
Green Tea	2.2%	+15%

The five fastest growing dishes with honey all include breaded chicken and two use bread as a component of the dish, like waffles or a sandwich carrier.





honey examples

## APPETIZERS

Restaurant	Item	Description
City Winery	Artisanal Cheese Board	chef's selection of cheeses, fresh fruit, roasted nuts, seasonal jam, honey.
Spiro's Pizza & Pasta	Spinach Bacon Salad	spinach and romaine lettuce tossed with mushrooms and honey mustard dressing topped with crumbled bacon, almonds, tomato, onion and hard boiled egg.
Barano	Brussels Sprout Salad	roasted and raw brussels sprouts, pear mostarda, mustard honey vinaigrette, ricotta salata. can be made in gluten free.
Bj's Restaurant & Brewhouse	Honey Sriracha Brussels Sprouts	crisp, lightly fried brussels sprouts ' big poppa smokers' desert gold seasoning ' sweet sriracha crema
Koy	Bang Bang Cauliflower	tempura batter, honey chili sauce, scallion. vegetarian.
Cotton Patch Cafe	Pan Cornbread	scratch-made, honey sweetened cornbread, served warm in a skillet with melted honey butter
S & V Urban Italian	Apricot	diced dried apricots, stracciatella cheese, micro-greens and local organic honey
Downtown Pizzeria	Honey Hot Boneless Jumbo Wings	spicy buffalo with sweet honey.
L'adresse	Josper Chicken Wings	honey sriracha glaze, crispy shallots
Bar Louie	Bavarian Pretzels	warm, everything bagel spice, queso, jalapeno honey mustard.
Deagan's Kitchen & Bar	Sweet Potato Fries	cinnamon-sugar, cayenne, honey-chipotle aioli.

## ENTREES

Restaurant	Item	Description
Park 600 Bar + Kitchen	Cauliflower Crust Inferno Pizza	hot soppressata, pepperoni, calabrian chili, buffalo mozzarella, fresh basil. local honey drizzle. gluten free.
Bear Dance Market	Cinnamon Sugar Oatmeal	with banana, chia seeds and honey, granola, hemp seeds
Fatz Cafe	Sweet And Cheesy Fried Chicken Sandwich	chicken breast hand breaded and golden fried, topped with ooey gooey southern pimento cheese with just a hint of jalapeño, honey and pickles, all on a fresh brioche bun.
Walnut Grill	Turkey Burger	greens, caramelized onions, honey aioli, feta.
Billy's Bar & Grill	Pretzel Burger	cheddar cheese, red onion, lettuce, tomato and honey bbq sauce on a pretzel bun.
Pick Up Stix	Chicken Crispy Honey	crispy white chicken in a sweet honey sauce, garnished with green onions.
Rockin Baja Lobster	Taste Of Baja Bucket	a taste of our famous big baja bucket char-grilled chicken, grilled carne asada, four baja style shrimp, two lobster tail pieces. served with rice and beans, tortillas, honey chill butter.
Café Selmarie	Kale And Orange Salad	kale, arugula, goat cheese, orange, candied pecans, shaved red onion, honey-cider vinaigrette
The Remington Restaurant At St Regis Houst	Banana Nut Pancakes	cinnamon honey butter, toasted pecans.
Ruth's Diner	Southern Fried Chicken Sandwich	boneless chicken breast dipped in buttermilk breadcrumbs or deep fried and tossed with ruths hot honey sauce on a toasted ciabatta roll with bleu cheese coleslaw.
Chili's	Caribbean Salad With Grilled Chicken	pineapple, mandarin oranges, dried cranberries, red bell peppers, green onions, cilantro, with honey-lime dressing.



## SIDES

Restaurant	Item	Description
Paramount	Crispy Brussels Sprout	sweet and sour peppers, feta cheese, honey sriracha.
Republique	Gioiella Ricotta Toast	brooks cherries, pistachios, wildflower honey.
Melt Shop	Asian Slaw	red cabbage slaw, cilantro, green onions, hot honey, sesame seeds and koji sauce.
The Peached Tortilla	Fuji Apple Salad	mixed greens, blue cheese, pecans, honey dijon vinaigrette. vegetarian, gluten free.
La Vie	Crispy Brussels	golden raisins, burnt honey, yogurt.
Tastee Freez	Corn Fritters	golden fried korn fritters served with in house honey butter.
Pearl Street Grill & Brewery	Oatmeal Bar	maple syrup, cinnamon, honey, milk, blueberries, bananas, walnuts, granola, apples.
Kitchen 67	Whipped Sweet Potatoes	whipped and sweetened with cinnamon honey butter. gluten free.
Red Hook Lobster Pound	Honey Roasted Carrots	rainbow baby carrots roasted and tossed with honey, mint and parsley
Another Broken Egg Cafe	Biscuit Beignets	southern-style beignets with powdered sugar and honey marmalade.. vegetarian.
Karl Strauss Breweries	Beer Pretzels	in partnership with our friends at san diego pretzel company. beer spritz, spice-rubbed with spicy honey mustard.

## DESSERTS

Restaurant	Item	Description
Indarra	Gulab Jamun	fried milk dumplings in a saffron-honey syrup.
Los Portales	Sopapillas	deep-fried crispy flour tortilla chip, topped with honey, cinnamon and ice cream.
Paladar Latin Kitchen & Rum Bar	Sweet Potato Donuts	bite-sized with caramel coffee sauce, honey, spiced almonds.
El Paso Mexican Restaurant	Churros	mexican pastry sticks rolled in cinnamon and sugar, covered with chocolate syrup and honey. served with ice cream.
Friendly Pizza	Baklava	a rich, sweet dessert pastry made of layers of filo filled with chopped nuts and covered in honey.
El Potro Mexican Restaurant	Fried Ice Cream	vanilla ice cream with a crispy delicately fried coating, lightly topped with honey, strawberry, cinnamon sugar and crowned with whipped cream.
Rafferty's Restaurant & Bar	Nutty Honey Butter Croissants	a new twist on a rafferty's classic. a basket of our hot-from-the-oven croissants drizzled with honey butter then topped with candied pecans.
Thyme Table	London Fog Creme Brulee	rich custard flavored with earl grey tea, vanilla bean, honey and orange zest. bruleed blood orange slice. almond shortbread cookies sandwiched with blood orange marmalade.
Chama Mama	Honey Cake	soft multilayer dulce de leche cake.
Siamese Basil Thai Restaurant	Golden Sundae	scoop of coconut ice cream served with crispy banana wraps topped with golden honey and toasted sesame seeds.
Coolgreens	Peanut Butter Bites	delicious bite sized snacks made with honey, oats, peanut butter, flax seed, vanilla, toasted coconut, and chocolate. (comes in pack of 4).

## NA BEVERAGES

Restaurant	Item	Description
Blended	Bulletproof Coffee	coconut milk, agave, honey, sugar.
Fellini Restaurant & Pizzeria	Hot Chocolate	mod option: cream, milk, sugar, sweetener, honey and lemon.
Honeygrow	Honest Honey Green Tea	real-brewed green tea leaves with organic cane sugar and a touch of organic honey.
Mccormick & Schmick's	Cucumber Mint Lemonade	fresh cucumber, mint, honey, fresh lemon juice.club soda
Melting Pot	The Bee's Tea	orange juice, honey, lemon, lavender syrup, iced tea. gluten free.
C C's Gourmet Coffee House	Latte	steamed milk poured over our signature espresso and topped with a touch of frothed milk. sweetener options, splenda, sugar, equal, stevia, sweet and low, honey,raw sugar.
Nature's Way Cafe	Triathlete Shake	banana, peanut butter, chocolate chips, wheat germ and honey blended with milk.
The Lunch Box	Iced Honey Rose Latte	espresso, rose water, local enchanted mountain honey and milk over ice.
Smoothie Factory	Blueberry Smash Smoothie	blueberry, banana, coconut milk, yogurt, oats, lemon juice, honey.
Robeks Juice	Lean Green Smoothie	fresh spinach, fresh cucumber, pineapple, raw honey, pineapple sherbet, non-fat frozen yogurt, vanilla almond milk, low calorie active water, fat burner.
Din Tai Fung	Classic Black Iced Tea	our premium teas are imported from taiwan, freshly brewed in-house, and hand-shaken to order. add our signature honey boba to this classic taiwanese drink for a satisfying chew with every sip.

## COCKTAILS

Restaurant	Item	Description
Gigglewaters	Cake Eater Margarita	camarena reposado tequila with lime, honey, cucumber and a salted cookie butter rim.
Corner Bistro	Don't Call Me Shirley	bluecoat gin. pomegrante liquer. honey. orange. club soda. rocks.
Firefly	Dark Horse	horse soldier bourbon, fresh lemon, honey simple syrup, muddles blackberries.
Lahaina Grill	Bee Sting	hawaiian moonshine, lavender honey, fresh lemon juice, lavender sugar rim
Serious Pie	Black Pepper'd Old Fashioned	bourbon, black pepper'd honey syrup, bitters.
Hyde Park Grille	Bee's Knees	aviation gin, lemon, honey simple syrup
Southside 815	Hot Toddy	bourbon, brown sugar, nutmeg spiced honey, lemon.
Craft'd	Honey Pear Margarita	jose cuervo traditional, triple sec, honey, fresh pear juice.
Rustic Canyon	Hot Toddy	asian pear brandy, rye, honey, angostura, lemon/apple sherbet.
Tribeca Grill	Doctor's Orders	cardamom infused mezcal, lemon juice, honey and ginger.
Javier's	El Silencio	el silencio mezcal, honey and fresh lime juice.



## Wings Tossed Hot Honey Dry Rub Wings

Wingstop | July 2022

A spicy and sweet dry rub with flavors of honey, cayenne pepper and ancho chile.



## Chicken Tender Nachos

O'Charley's | June 2022

O'Charley's famous chicken tenders, chopped and on top of warm tortilla chips and queso, layered with shredded cheddar, Pico de Gallo, and fresh jalapenos. Drizzled with our special smokey honey-mustard and topped with chopped cilantro.



## Blue Ribbon Bacon

Bob Evans | November 2021

Five strips of center-cut hardwood-smoked bacon glazed with black pepper maple honey.





## Hawaii Five-0 Flatbread

Twin Peaks | September 2022

Ham, spiced rum pineapple, bacon bits, green onion, mozzarella, Parmesan, marinara, parsley, crushed red pepper, hot honey drizzle.



## Honey Ginger Glazed Salmon

Marie Callender's | August 2022

Honey Ginger Glazed Salmon Delightful Dishes Item Grilled salmon fillet brushed with a house-made honey ginger glaze, atop rice and served with seasonal vegetables.



## Honey-Chipotle Grilled Chicken Fajitas

On The Border | June 2022

Mesquite fire-grilled chicken fajitas topped with our favorite sweet-heat honey-chipotle sauce and fried onion strings. Served with hand-pressed flour tortillas, pico de gallo, cheese, Mexican rice and choice of beans.



## Ice Honey Oat Milk Crated Press

Caribou Coffee | May 2022

Cold press with a splash of oatmilk and a hint of real honey.



## Chai Tea Latte

Panera Bread | March 2022

Brewed with black tea, honey, vanilla, cardamom, cinnamon, ginger & foamed milk.



## Red Medicine

First Watch | November 2021

A beverage of pomegranate and cranberry juices, black tea, honey and cinnamon.



## Cinnamon Crunch Fried Ice Cream

Dave & Busters | June 2022

Cinnamon brown sugar ice cream crusted with cinnamon toast crunch cereal, finished with a drizzle of Mike's Hot Honey.



## Golden Hour Ice Cream

Baskin Robbins | May 2022

Golden Salted Honey Ice Cream shines with a vibrant Strawberry Lemonade flavored Swirl.



## Honey Cake Doughnut

Krispy Kreme | May 2022

A glazed Sour Cream Cake donut drizzled with honey icing and finished with an oat crisp topping .

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



# 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

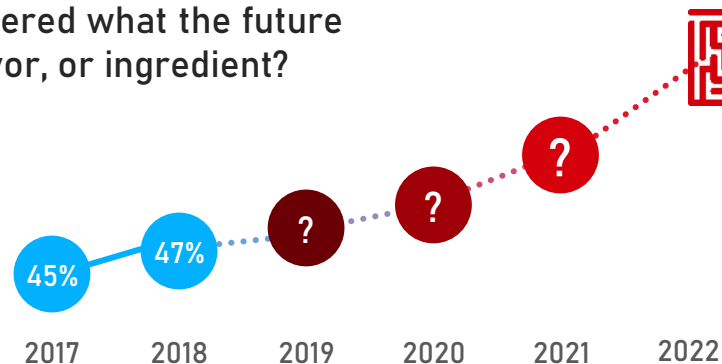
*% of RESTAURANTS that serve that food, flavor, or ingredient.*

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?



**Haiku**

Datassential's machine learning platform

Haiku 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. Haiku can predict an item's menu penetration up to 4-years in the future with a directional accuracy of 97%.

Track, analyze, and report on several thousand LTOs each year. Each month, INSIDER 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.

