



Pumpkin with a Purpose

Early and Intentional, SpotOn finds Independent Restaurants

Get Leaner and More Strategic with Pumpkin Menus in 2025

New data from SpotOn reveals that independent restaurants are rewriting the rules of seasonal marketing with bold, early, and innovative pumpkin-themed menu additions. By comparing menu data from January 1 to July 21 in both 2024 and 2025, SpotOn uncovered a significant year-over-year shift—not just in timing, but in strategy, creativity, and regional dynamics.

The insights come from SpotOn's point-of-sale platform, used by independent restaurants across the U.S. This real-time data offers visibility into when operators add new items to their POS menus, often weeks or months before they appear on guest-facing menus. As food costs rise and margins tighten, this early planning may be due to operators looking to streamline operations and be ready when seasonal demand spikes.

A More Strategic, More Selective Approach to Pumpkin Season

Pumpkin isn't going anywhere, but how restaurants are using it is changing

In 2025, independent restaurants added fewer pumpkin-themed items to their menus, with Spot on data showing a nearly 40% decrease compared to the same period last year. That drop doesn't point to declining interest or fading demand, but a sign of smarter planning.

Instead of overwhelming fall menus, operators are focusing on a handful of high-performing, low-lift seasonal items like pumpkin desserts and pumpkin beers that deliver stronger ROI. And they're planning early. In 2025, independent restaurants added over 1,000 pumpkin items between January and July, a stark contrast from 2024 when most items appeared later in the spring and summer months. This approach is easier on the kitchen and more cost-effective while still delivering appealing pumpkin season offerings.

The shift to quality over quantity reflects a smarter approach to seasonal limited-time offers. Restaurants are using pumpkin not just to check a seasonal box, but to:

- Stand out from national chains with thoughtful, curated offerings
- Keep menus manageable during the post-holiday and pre-fall transition
- Drive repeat visits by turning nostalgia into memorable experiences
- Plan additions earlier than ever to smooth out operational transitions

Pumpkin Menu Trends

Operators are leaning into comfort staples while exploring new applications across the menu.

The decline suggests that some operators may be reducing LTO frequency amid cost pressures, labor shortages, or ingredient availability. But while restaurants may be pulling back on the sheer volume of pumpkin offerings, they're churning out tighter, more strategic offerings. Baked Goods and N/A Beverages saw growth in 2025. Beverage numbers held steady, reinforcing the staying power of pumpkin coffee, beers, and cocktails. When it comes to flavor profiles, sweet menu items were up 5% in 2025, while savory grew by 1% with more items like pasta and soups hitting menus.

- *Most Popular Pumpkin Items:* The classics are holding strong.
 - Pumpkin Pie remains the #1 pumpkin dessert item in 2025, with Pumpkin Cheesecake close behind, underscoring operators anticipated demand for comfort-first desserts with nostalgic value.
 - Pumpkin beverages continue to diversify, with iced cold brews and crushes.
 - So far, variations on the 'pumpkin martini' are the most popular this year, knocking Pumpkin White Russians out of last years #1 spot.
 - 2024 saw more alcohol-forward diversity with scotch ales, espresso-tinis, while 2025 has less cocktails, and more beers, possibly driven by labor costs or prep complexity. N/A Beverages grew by 4% as well.

- Notably, Restaurants are adding Sloop's No Pumpkin to the menu, a seasonal IPA that promises fall flavors without the use of pumpkin or spices.
- *Emerging Favorites and Unique Offerings:* In 2024, operators experimented within familiar categories, like an Outrageous Pumpkin Dessert Dip. In 2025, offerings broadened to new categories:
 - Pumpkin Pastas like Pumpkin Ravioli, Pumpkin Mac and Cheese, and Pumpkin Seed Pesto Pasta signaled a growing appetite for savory, cross-category innovation.
 - Pumpkin Bread, Rolls, and Muffins introduced a homestyle, cozy feel, bridging nostalgia with menu versatility.

Regional Flavor: Where Pumpkin Popularity is Rising and Declining

Pumpkin trends vary widely by region, reflecting local tastes and operational pressures.

In 2024, pumpkin menus skewed more Mid-Atlantic and Southern. In 2025, the trend shifted west and northeast, with Missouri (150 items), Pennsylvania (88), California (76), Connecticut (73) rising in the rankings, possibly due to earlier planning or multi-location group testing.

- California continues to be a standout in 2025, ranking among the top five states with the most pumpkin menu items added. From raviolis to martinis, operators here are embracing bold, unexpected fall flavors.
- The Midwest, specifically Missouri, held strong with early additions of familiar favorites like pumpkin cheesecake and white russians, proving comfort sells.
- Northeast cities like Pennsylvania, New York and Connecticut favored elevated indulgence. Independent restaurants curated menus with pumpkin martinis and dessert dips striking a balance between nostalgia and sophistication. Notably, SpotOn found a 43% decrease in menu items added in New York in 2025.
- Southern states, including Florida and Texas, continue to adapt pumpkin flavor for warm weather, with chilled lattes, iced pumpkin cocktails, and lighter desserts designed to feel seasonal without being heavy.

What It All Means for Operators

The pumpkin craze isn't fading – it's evolving.

- **Less is more:** Operators are scaling back quantity and focusing on quality, margin, and operational efficiency.
- **Savory is growing:** Pumpkin is moving beyond lattes and pie, with savory applications the only category to increase year-over-year (+21%).
- **Drinks stay dominant:** Beverages remain a low-lift, high-return way to feature seasonal flavors.
- **Plan seasonal menus earlier:** Start with updating your POS menu and plan for ingredient sourcing, earlier preparation can help you better protect margins and get a head start of marketing ahead of fall.
- **Pumpkin isn't going anywhere:** But independent operators are getting smarter, more versatile, and better timed to meet both business needs and guest expectations.