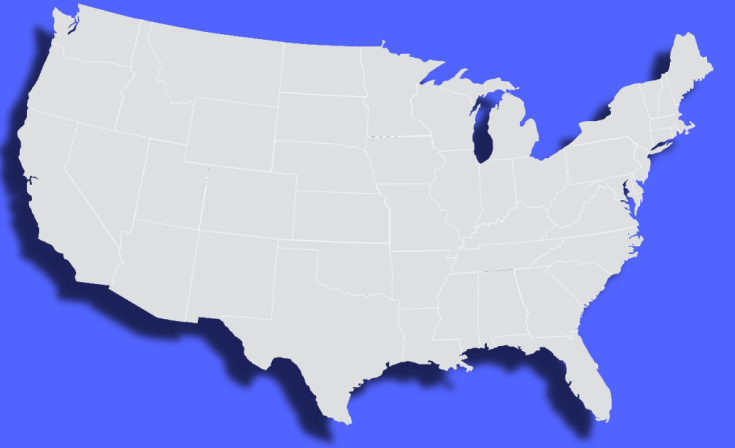


NATIONAL MENU INSIGHTS



Q1 2026 v Q4 2025

GROUND SIGNAL

Ground Signal captures online menus at over 120,000 venues nationwide. Using sophisticated AI tools, we extract relevant information and provide it in an easy-to-analyze format.



Independent Accounts Overview

83.1K
Accounts w/
Menu

79.6K
Accounts w/
Cocktail Menu

1.15M
Total # of
Cocktails

\$13.01
Average
Cocktail Price

Breakdown by Spirits Category

60.5K
Menus w/
Vodka Cocktail

56.3K
Menus w/
Tequila Cocktail

47.0K
Menus w/
Rum Cocktail

40.4K
Menus w/
Gin Cocktail

51.0K
Menus w/
Whiskey Cocktail

Most Popular Classic Cocktails

COCKTAIL	MENU SHARE*
MARGARITA	50%
OLD FASHIONED	32%
MARTINI	30%
BLOODY MARY	25%
ESPRESSO MARTINI	25%
MIMOSA	23%
MULE	22%
SANGRIA	20%
MOJITO	18%
PALOMA	16%

*Percentage of cocktail menus that feature this cocktail





VODKA

MENU PERFORMANCE

NATIONAL INDEPENDENT ACCOUNTS

Q1 2026 v Q4 2025



Ground Signal calculates menu share for each Vodka brand by taking the number of menus featuring a cocktail with that brand, then dividing that number by the total number of menus that have at least one Vodka cocktail.



Vodka Cocktail Menu Share
 March 2026

For example: New Amsterdam is the 9th-ranked Vodka brand on independent National cocktail menus, appearing on 2.2% of cocktail menus that have at least one Vodka cocktail.






RANK	BRAND	SUPPLIER	MENU SHARE
1	TITO'S	LALO TEQUILA	28%
2	KETEL ONE	DIAGEO	12%
3	ABSOLUT	Pernod Ricard	11%
4	GREY GOOSE	BACARDÍ	11%
5	STOLI	STOLI GROUP	7.4%
6	DEEP EDDY	HEAVEN HILL BRANDS	6.2%
7	SMIRNOFF	DIAGEO	4.9%
8	WHEATLEY	SAZERAC	3.0%


RANK	BRAND	SUPPLIER	MENU SHARE
9	NEW AMSTERDAM	GALLO	2.2%
10	THREE OLIVES	PROXIMO	2.0%
11	BELVEDERE	LVMH	1.9%
12	SKYY	CAMPARI	1.8%
13 ▲1	HAKU	SUNTORY	1.6%
14 ▼1	CÎROC	DIAGEO	1.5%
15	VAN GOGH	CONECUH BRANDS	1.5%
16	EFFEN	SUNTORY	1.4%



By retrieving and analyzing all on-premise venues nationally each month, Ground Signal can show which brands are having a moment — and which are lagging behind their peers. (Limited to the 20 Vodka brands with at least 1.0% Menu Share nationally.)



 **Vodka Nationally: Trending Up**
Q1 2026 v Q4 2025

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
PEARL		1.3%	▲ 4.3%
WESTERN SON	SAZERAC	1.1%	▲ 3.0%
SKYY		1.8%	▲ 2.7%
GREY GOOSE		11%	▲ 2.4%
HAKU	SUNTORY	1.6%	▲ 1.8%
THREE OLIVES		2.0%	▲ 1.2%
SVEDKA	SAZERAC	1.0%	▲ 0.9%
DEEP EDDY		6.2%	▲ 0.8%

 **Vodka Nationally: Trending Down**
Q1 2026 v Q4 2025

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
WHEATLEY	SAZERAC	3.0%	▼ 0.3%
ABSOLUT		11%	▼ 0.4%
SMIRNOFF	DIAGEO	4.9%	▼ 1.3%
STOLI		7.4%	▼ 2.2%
NEW AMSTERDAM	GALLO	2.2%	▼ 2.8%
CÎROC	DIAGEO	1.5%	▼ 3.8%
EFFEN	SUNTORY	1.4%	▼ 3.8%
PINNACLE	SUNTORY	1.3%	▼ 5.1%

*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Vodka cocktail.

By scraping and enriching all on-premise venues nationally every month, Ground Signal can show which cocktails are popular — and which are growing in popularity.



Top Vodka Cocktails

COCKTAIL	MENU SHARE*	MENU SHARE CHANGE**	AVG PRICE
MARTINI	55%	▲ 1.4%	\$13.58
BLOODY MARY	32%	▲ 0.3%	\$11.33
MULE	30%	▼ 1.3%	\$11.63
ESPRESSO MARTINI	29%	▲ 3.8%	\$14.53
COSMOPOLITAN	16%	▲ 1.6%	\$12.46
LEMON DROP MARTINI	13%	—	\$11.97
COLA HIGHBALLS	7.5%	▲ 2.0%	\$10.83

Note: Includes both cocktail groups (e.g., any Martini) and more-specific cocktails (e.g., French Martini)

Trending Vodka Cocktails

COCKTAIL	MENU SHARE*	MENU SHARE CHANGE**	AVG PRICE
SOUR	3.3%	▲ 74%	\$12.98
FRENCH MARTINI	2.1%	▲ 5.2%	\$13.71
ESPRESSO MARTINI	29%	▲ 3.8%	\$14.53
DIRTY MARTINI	3.0%	▲ 2.7%	\$13.75
KAMIKAZE SHOT	1.1%	▲ 2.7%	\$8.82
COLA HIGHBALLS	7.5%	▲ 2.0%	\$10.83
S*X ON THE BEACH	3.0%	▲ 1.9%	\$10.54

Note: Limited to cocktails with at least 1.0% Menu Share

*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Vodka cocktail.

**For example, ▲100% would mean that brand's Menu Share doubled (e.g., went from 2.3% to 4.6%, or from 10% to 20%), not necessarily that the brand appears on twice as many cocktail menus.





TEQUILA MENU PERFORMANCE

NATIONAL INDEPENDENT ACCOUNTS

Q1 2026 v Q4 2025



Ground Signal calculates menu share for each Tequila brand by taking the number of menus featuring a cocktail with that brand, then dividing that number by the total number of menus that have at least one Tequila cocktail.



Tequila Cocktail Menu Share
 March 2026

For example: Herradura is the 9th-ranked Tequila brand on independent National cocktail menus, appearing on 4.0% of cocktail menus that have at least one Tequila cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
1	PATRÓN	BACARDÍ	12%
2	DON JULIO	DIAGEO	7.6%
3	CASAMIGOS	DIAGEO	6.6%
4	JOSE CUERVO	PROXIMO	6.2%
5	1800	PROXIMO	5.5%
6	ESPOLÓN	CAMPARI	5.1%
7	HORNITOS	SUNTORY	4.9%
8 ▲1	MILAGRO	WILLIAM GRANT & SONS <small>INDEPENDENT FAMILY DISTILLERS SINCE 1847</small>	4.1%


RANK	BRAND	SUPPLIER	MENU SHARE
9 ▼1	HERRADURA	BROWN-FORMAN	4.0%
10	CAZADORES	BACARDÍ	3.8%
11	EL JIMADOR	BROWN-FORMAN	3.3%
12	CORAZÓN	SAZERAC	3.2%
13	SAUZA	SUNTORY	3.1%
14	LUNAZUL	HEAVEN HILL BRANDS	3.1%
15	OLMECA ALTOS	Pernod Ricard	2.3%
16	TANTEO	Tanteo	2.1%









By retrieving and analyzing all on-premise venues nationally each month, Ground Signal can show which brands are having a moment — and which are lagging behind their peers. (Limited to the 26 Tequila brands with at least 1.0% Menu Share nationally.)



 **Tequila Nationally: Trending Up**
Q1 2026 v Q4 2025

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
CÓDIGO 1530	 Pernod Ricard	1.4%	▲ 8.5%
ASTRAL	 DIAGEO	1.0%	▲ 8.3%
DULCE VIDA		1.4%	▲ 3.2%
LALO	 Tito's LALO TEQUILA	1.8%	▲ 3.1%
MI CAMPO	 Constellation Brands	1.6%	▲ 2.1%
MAESTRO DOBEL	 PROXIMO	1.9%	▲ 1.9%
GHOST	 M-S WALKER VALUE BRANDS	1.9%	▲ 1.3%
JOSE CUERVO	 PROXIMO	6.2%	▲ 1.3%

 **Tequila Nationally: Trending Down**
Q1 2026 v Q4 2025

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
1800	 PROXIMO	5.5%	▼ 0.6%
DON JULIO	 DIAGEO	7.6%	▼ 1.2%
21 SEEDS	 DIAGEO	1.7%	▼ 1.3%
TEREMANA	 TEREMANA SMALL BATCH TEQUILA Jägermeister	1.8%	▼ 2.0%
EL JIMADOR	 BROWN-FORMAN	3.3%	▼ 2.1%
HERRADURA	 BROWN-FORMAN	4.0%	▼ 2.8%
OLMECA ALTOS	 Pernod Ricard	2.3%	▼ 3.4%
TRES AGAVES	 TRINCHERO FAMILY WINE AND SPIRITS	1.0%	▼ 5.6%

*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Tequila cocktail.

By scraping and enriching all on-premise venues nationally every month, Ground Signal can show which cocktails are popular — and which are growing in popularity.



Top Tequila Cocktails

COCKTAIL	MENU SHARE*	MENU SHARE CHANGE**	AVG PRICE
MARGARITA	74%	▼ 0.4%	\$12.68
PALOMA	21%	▲ 0.4%	\$12.77
SPICY MARGARITA	8.6%	▲ 0.8%	\$13.67
SUNRISE	8.0%	▼ 1.2%	\$10.64
MARTINI	6.4%	▲ 1.4%	\$14.94
MULE	5.6%	▼ 1.8%	\$11.80
SKINNY MARGARITA	5.2%	▲ 0.4%	\$12.47

Note: Includes both cocktail groups (e.g., any Martini) and more-specific cocktails (e.g., French Martini)

Trending Tequila Cocktails

COCKTAIL	MENU SHARE*	MENU SHARE CHANGE**	AVG PRICE
SOUR	4.5%	▲ 177%	\$12.02
SANGRIA	1.1%	▲ 3.3%	\$12.76
BLOODY MARY	4.8%	▲ 2.3%	\$11.96
LONG ISLAND ICED TEA	1.9%	▲ 2.3%	\$11.77
COLA HIGHBALLS	2.4%	▲ 2.1%	\$11.83
CADILLAC MARGARITA	3.3%	▲ 2.0%	\$15.08
RANCH WATER	4.3%	▲ 1.8%	\$11.35

Note: Limited to cocktails with at least 1.0% Menu Share

*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Tequila cocktail.

**For example, ▲100% would mean that brand's Menu Share doubled (e.g., went from 2.3% to 4.6%, or from 10% to 20%), not necessarily that the brand appears on twice as many cocktail menus.





RUM

MENU PERFORMANCE

NATIONAL INDEPENDENT ACCOUNTS

Q1 2026 v Q4 2025



Ground Signal calculates menu share for each Rum brand by taking the number of menus featuring a cocktail with that brand, then dividing that number by the total number of menus that have at least one Rum cocktail.



Rum Cocktail Menu Share

March 2026

For example: Flor de Caña is the 9th-ranked Rum brand on independent National cocktail menus, appearing on 1.9% of cocktail menus that have at least one Rum cocktail.


RANK	BRAND	SUPPLIER	MENU SHARE
1	BACARDÍ	BACARDÍ	21%
2	MALIBU	Pernod Ricard	16%
3	CAPTAIN MORGAN	DIAGEO	10.0%
4	GOSLING'S	Pernod Ricard	4.7%
5	MYERS'S	SAZERAC	4.6%
6	CRUZAN	SUNTORY	4.0%
7 ▲ ¹	PLANTERAY		3.3%
8 ▼ ¹	DON Q		2.8%



RANK	BRAND	SUPPLIER	MENU SHARE
9	FLOR DE CAÑA	WILLIAM GRANT & SONS <small>INDEPENDENT FAMILY DISTILLERS SINCE 1867</small>	1.9%
10	APPLETON	CAMPARI	1.7%
11	DIPLOMÀTICO	BROWN-FORMAN	1.6%
12	ZACAPA	DIAGEO	1.5%
13	THE KRAKEN	PROXIMO	1.4%
14	CLEMENT	SPIRIBAM <small>FINE SPIRITS FAMILY</small>	1.3%
15 ▲ ²	SAILOR JERRY	WILLIAM GRANT & SONS <small>INDEPENDENT FAMILY DISTILLERS SINCE 1867</small>	1.2%
16	PARROT BAY	SAZERAC	1.2%



By retrieving and analyzing all on-premise venues nationally each month, Ground Signal can show which brands are having a moment — and which are lagging behind their peers. (Limited to the 19 Rum brands with at least 1.0% Menu Share nationally.)



 **Rum Nationally: Trending Up**
Q1 2026 v Q4 2025

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
PLANTERAY		3.3%	▲ 32%
ZACAPA	DIAGEO	1.5%	▲ 8.3%
THE KRAKEN	PROXIMO	1.4%	▲ 5.6%
DON Q		2.8%	▲ 4.4%
CLEMENT	SPIRIBAM	1.3%	▲ 3.7%
SAILOR JERRY	WILLIAM GRANT & SONS	1.2%	▲ 3.7%
CRUZAN	SUNTORY	4.0%	▲ 1.3%
FLOR DE CAÑA	WILLIAM GRANT & SONS	1.9%	▲ 1.2%

 **Rum Nationally: Trending Down**
Q1 2026 v Q4 2025

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
MALIBU	Pernod Ricard	16%	▼ 0.2%
DIPLOMÀTICO	BROWN-FORMAN	1.6%	▼ 0.5%
BACARDÍ	BACARDÍ	21%	▼ 0.7%
BUMBU	SOVEREIGN BRANDS	1.2%	▼ 1.2%
CAPTAIN MORGAN	DIAGEO	10.0%	▼ 1.3%
GOSLING'S	Pernod Ricard	4.7%	▼ 1.3%
PUSSER'S	SHAW-ROSS	1.1%	▼ 2.4%
MOUNT GAY	RÉMY COINTREAU	1.1%	▼ 5.4%

*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Rum cocktail.



By scraping and enriching all on-premise venues nationally every month, Ground Signal can show which cocktails are popular — and which are growing in popularity.



Top Rum Cocktails

COCKTAIL	MENU SHARE*	MENU SHARE CHANGE**	AVG PRICE
MOJITO	28%	▼ 0.4%	\$12.25
PIÑA COLADA	18%	▼ 0.6%	\$11.91
DAIQUIRI	12%	▼ 1.8%	\$11.81
MAI TAI	11%	▲ 1.9%	\$12.99
MARTINI	7.8%	▲ 0.5%	\$13.41
MULE	7.4%	▲ 0.3%	\$11.58
COLA HIGHBALLS	5.0%	▲ 1.2%	\$11.02

Note: Includes both cocktail groups (e.g., any Martini) and more-specific cocktails (e.g., French Martini)

Trending Rum Cocktails

COCKTAIL	MENU SHARE*	MENU SHARE CHANGE**	AVG PRICE
SOUR	2.4%	▲ 145%	\$12.49
OLD FASHIONED	2.6%	▲ 5.0%	\$15.76
LONG ISLAND ICED TEA	2.6%	▲ 3.7%	\$11.70
BAHAMA MAMA	3.1%	▲ 3.1%	\$10.63
HURRICANE	4.5%	▲ 2.4%	\$11.98
ESPRESSO MARTINI	1.2%	▲ 2.3%	\$15.10
BLUE HAWAIIAN	2.7%	▲ 1.9%	\$11.03

Note: Limited to cocktails with at least 1.0% Menu Share

*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Rum cocktail.

**For example, ▲100% would mean that brand's Menu Share doubled (e.g., went from 2.3% to 4.6%, or from 10% to 20%), not necessarily that the brand appears on twice as many cocktail menus.





GIN MENU PERFORMANCE

NATIONAL INDEPENDENT ACCOUNTS

Q1 2026 v Q4 2025



Ground Signal calculates menu share for each Gin brand by taking the number of menus featuring a cocktail with that brand, then dividing that number by the total number of menus that have at least one Gin cocktail.



Gin Cocktail Menu Share
 March 2026

For example: Aviation is the 9th-ranked Gin brand on independent National cocktail menus, appearing on 2.8% of cocktail menus that have at least one Gin cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
1	HENDRICK'S	WILLIAM GRANT & SONS <small>INDEPENDENT FAMILY DISTILLERS SINCE 1840</small>	12%
2	BOMBAY	BACARDÍ	8.3%
3	TANQUERAY	DIAGEO	8.3%
4	EMPRESS 1908		7.1%
5	BEEFEATER	Pernod Ricard	4.0%
6	THE BOTANIST	RÉMY COINTREAU	3.5%
7	ROKU	SUNTORY	3.3%
8	FORDS GIN	BROWN-FORMAN	3.2%

RANK	BRAND	SUPPLIER	MENU SHARE
9	AVIATION	DIAGEO	2.8%
10	GRAY WHALE	DEUTSCH FAMILY <small>BLISS & SPIRITS</small>	1.8%
11 ▲1	NOLET'S	NOLET'S <small>FINEST GINS</small>	1.4%
12 ▼1	BULLDOG	CAMPARI	1.3%
13	MALFY	Pernod Ricard	1.3%
14	SIPSMITH	SUNTORY	1.0%
15	CITADELLE	MAISON FERRAND <small>PRODUCEUR INDÉPENDANT DE SPIRITUEUX EXCELLENTS</small>	1.0%
16	MONKEY 47	Pernod Ricard	0.8%

By retrieving and analyzing all on-premise venues nationally each month, Ground Signal can show which brands are having a moment — and which are lagging behind their peers. (Limited to the 15 Gin brands with at least 1.0% Menu Share nationally.)



Gin Nationally: Trending Up
Q1 2026 v Q4 2025

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
AVIATION	DIAGEO	2.8%	▲ 57%
NOLET'S	NOLET'S FINEST GINS	1.4%	▲ 5.9%
ROKU	SUNTORY	3.3%	▲ 3.3%
GRAY WHALE	DEUTSCH FAMILY WINE & SPIRITS	1.8%	▲ 3.3%
THE BOTANIST	RC RÉMY COINTREAU	3.5%	▲ 3.1%
MALFY	Pernod Ricard	1.3%	▲ 2.1%
TANQUERAY	DIAGEO	8.3%	▲ 1.6%
FORDS GIN	BROWN-FORMAN	3.2%	▲ 1.1%

Gin Nationally: Trending Down
Q1 2026 v Q4 2025

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
EMPRESS 1908	MILESTONE	7.1%	▼ 0.3%
BOMBAY	BACARDÍ	8.3%	▼ 1.2%
BEEFEATER	Pernod Ricard	4.0%	▼ 1.3%
BULLDOG	CAMPARI	1.3%	▼ 2.8%
CITADELLE	MAISON FERRAND	1.0%	▼ 4.3%
SIPSMITH	SUNTORY	1.0%	▼ 6.4%

*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Gin cocktail.



By scraping and enriching all on-premise venues nationally every month, Ground Signal can show which cocktails are popular — and which are growing in popularity.



Top Gin Cocktails

COCKTAIL	MENU SHARE*	MENU SHARE CHANGE**	AVG PRICE
MARTINI	22%	▼ 0.8%	\$14.44
NEGRONI	18%	▲ 1.1%	\$14.57
SOUR	14%	▲ 2.8%	\$13.24
FRENCH 75	8.6%	▲ 1.4%	\$13.00
GIMLET	5.8%	▲ 0.7%	\$13.16
GIN & TONIC	5.2%	▼ 2.6%	\$12.95
BEE'S KNEES	4.6%	▼ 0.7%	\$13.35

Note: Includes both cocktail groups (e.g., any Martini) and more-specific cocktails (e.g., French Martini)

Trending Gin Cocktails

COCKTAIL	MENU SHARE*	MENU SHARE CHANGE**	AVG PRICE
DIRTY MARTINI	1.5%	▲ 4.6%	\$13.17
WHITE NEGRONI	1.0%	▲ 3.1%	\$15.50
SOUR	14%	▲ 2.8%	\$13.24
COLA HIGHBALLS	3.0%	▲ 2.3%	\$11.67
LONG ISLAND ICED TEA	2.9%	▲ 1.9%	\$11.74
GIN FIZZ	2.7%	▲ 1.6%	\$12.72
FRENCH 75	8.6%	▲ 1.4%	\$13.00

Note: Limited to cocktails with at least 1.0% Menu Share

*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Gin cocktail.

**For example, ▲100% would mean that brand's Menu Share doubled (e.g., went from 2.3% to 4.6%, or from 10% to 20%), not necessarily that the brand appears on twice as many cocktail menus.





WHISKEY MENU PERFORMANCE

NATIONAL INDEPENDENT ACCOUNTS

Q1 2026 v Q4 2025











Ground Signal calculates menu share for each Whiskey brand by taking the number of menus featuring a cocktail with that brand, then dividing that number by the total number of menus that have at least one Whiskey cocktail.



Whiskey Cocktail Menu Share
 March 2026

For example: Sazerac Rye is the 9th-ranked Whiskey brand on independent National cocktail menus, appearing on 4.5% of cocktail menus that have at least one Whiskey cocktail.









RANK	BRAND	SUPPLIER	MENU SHARE
1	JAMESON	 Pernod Ricard	13%
2	BULLEIT	 DIAGEO	12%
3	MAKER'S MARK	 SUNTORY	11%
4	JACK DANIEL'S	 BROWN-FORMAN	7.2%
5	BUFFALO TRACE	 SAZERAC	7.1%
6	WOODFORD RESERVE	 BROWN-FORMAN	7.1%
7	CROWN ROYAL	 DIAGEO	5.0%
8	FOUR ROSES	 KIRIN	4.5%

RANK	BRAND	SUPPLIER	MENU SHARE
9	SAZERAC RYE	 SAZERAC	4.5%
10	OLD FORESTER	 BROWN-FORMAN	4.2%
11 ▲1	JIM BEAM	 SUNTORY	3.8%
12 ▲1	ELIJAH CRAIG	 HEAVEN HILL BRANDS	3.7%
13 ▼2	KNOB CREEK	 SUNTORY	3.7%
14	FIREBALL	 SAZERAC	3.0%
15	RITTENHOUSE	 HEAVEN HILL BRANDS	2.5%
16	SKREWBALL	 Pernod Ricard	2.3%









By retrieving and analyzing all on-premise venues nationally each month, Ground Signal can show which brands are having a moment — and which are lagging behind their peers. (Limited to the 31 Whiskey brands with at least 1.0% Menu Share nationally.)



 **Whiskey Nationally: Trending Up**
Q1 2026 v Q4 2025

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
MONKEY SHOULDER	 WILLIAM GRANT & SONS <small>INDEPENDENT FAMILY DISTILLERS SINCE 1840</small>	1.1%	▲ 6.9%
JEFFERSON'S	 Pernod Ricard	1.2%	▲ 5.7%
JOHNNIE WALKER	 DIAGEO	1.4%	▲ 5.2%
HIGH WEST	 Constellation Brands	2.1%	▲ 4.4%
MICHTER'S	 CHATHAM <small>IMPORTS, INC.</small>	1.7%	▲ 4.2%
EVAN WILLIAMS	 HEAVEN HILL <small>BRANDS</small>	1.4%	▲ 3.2%
SAZERAC RYE	 SAZERAC	4.5%	▲ 2.5%
JAMESON	 Pernod Ricard	13%	▲ 2.4%

 **Whiskey Nationally: Trending Down**
Q1 2026 v Q4 2025

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
ELIJAH CRAIG	 HEAVEN HILL <small>BRANDS</small>	3.7%	▼ 1.0%
JACK DANIEL'S	 BROWN-FORMAN	7.2%	▼ 1.0%
SKREWBALL	 Pernod Ricard	2.3%	▼ 1.3%
CROWN ROYAL	 DIAGEO	5.0%	▼ 2.3%
SOUTHERN COMFORT	 SAZERAC	1.9%	▼ 2.5%
WILD TURKEY	 CAMPARI	1.7%	▼ 2.7%
FIREBALL	 SAZERAC	3.0%	▼ 4.1%
KNOB CREEK	 SUNTORY	3.7%	▼ 4.2%

*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Whiskey cocktail.

By scraping and enriching all on-premise venues nationally every month, Ground Signal can show which cocktails are popular — and which are growing in popularity.



Top Whiskey Cocktails

COCKTAIL	MENU SHARE*	MENU SHARE CHANGE**	AVG PRICE
OLD FASHIONED	48%	▲ 1.0%	\$14.35
MANHATTAN	24%	▲ 0.9%	\$14.89
SOUR	13%	▲ 4.5%	\$13.40
MULE	11%	▲ 1.0%	\$11.75
IRISH COFFEE	9.8%	▲ 1.5%	\$11.37
SMASH	8.4%	▼ 1.3%	\$13.03
MARTINI	6.6%	▼ 0.1%	\$13.88

Note: Includes both cocktail groups (e.g., any Martini) and more-specific cocktails (e.g., French Martini)

Trending Whiskey Cocktails

COCKTAIL	MENU SHARE*	MENU SHARE CHANGE**	AVG PRICE
HOT TODDY	2.8%	▲ 6.2%	\$12.49
VIEUX CARRÉ	1.3%	▲ 5.0%	\$16.27
SOUR	13%	▲ 4.5%	\$13.40
ESPRESSO MARTINI	1.6%	▲ 3.9%	\$15.12
PAPER PLANE	3.7%	▲ 3.5%	\$15.20
COLA HIGHBALLS	1.2%	▲ 3.3%	\$9.22
PENICILLIN	1.4%	▲ 3.1%	\$15.64

Note: Limited to cocktails with at least 1.0% Menu Share

*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Whiskey cocktail.

**For example, ▲100% would mean that brand's Menu Share doubled (e.g., went from 2.3% to 4.6%, or from 10% to 20%), not necessarily that the brand appears on twice as many cocktail menus.





LIQUEUR MENU PERFORMANCE

NATIONAL INDEPENDENT ACCOUNTS

Q1 2026 v Q4 2025



Ground Signal calculates menu share for each Liqueur brand by taking the number of menus featuring a cocktail with that brand, then dividing that number by the total number of menus that have at least one Liqueur cocktail.



Liqueur Cocktail Menu Share
 March 2026

For example: Luxardo is the 9th-ranked Liqueur brand on independent National cocktail menus, appearing on 6.4% of cocktail menus that have at least one Liqueur cocktail.







RANK	BRAND	SUPPLIER	MENU SHARE
1	KAHLUA	Pernod Ricard	22%
2	COINTREAU	RÉMY COINTREAU	22%
3 ▲1	ST. GERMAIN	BACARDÍ	19%
4 ▼1	GRAND MARNIER	CAMPARI	18%
5	BAILEYS	DIAGEO	18%
6	CHAMBORD	BROWN-FORMAN	9.2%
7	FRANGELICO	CAMPARI	7.6%
8	LICOR 43	Zamora company	7.5%

RANK	BRAND	SUPPLIER	MENU SHARE
9	LUXARDO	HOTALING & CO. IMPORTER-DISTILLER	6.4%
10	CHARTREUSE	FREDERICK WILDMAN AND SONS, LTD. WINE MERCHANTS	5.9%
11 ▲2	ANCHO REYES	CAMPARI	5.1%
11	DE KUYPER	SUNTORY	5.1%
13 ▼1	MIDORI	SUNTORY	5.1%
14	MR BLACK	DIAGEO	4.4%
15	DISARONNO	ILLVA SARONNO	4.1%
16	PAMA	HEAVEN HILL BRANDS	3.7%



By retrieving and analyzing all on-premise venues nationally each month, Ground Signal can show which brands are having a moment — and which are lagging behind their peers. (Limited to the 34 Liqueur brands with at least 1.0% Menu Share nationally.)



 **Liqueur Nationally: Trending Up**
Q1 2026 v Q4 2025

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
GIFFARD		3.6%	▲ 24%
TUACA	SAZERAC	1.2%	▲ 4.9%
SOLERNO	WILLIAM GRANT & SONS <small>INDEPENDENT FAMILY DISTILLERS SINCE 1847</small>	1.1%	▲ 4.7%
BORGHETTI		2.4%	▲ 4.4%
ST. GERMAIN	 BACARDÍ	19%	▲ 4.2%
STREGA		1.2%	▲ 3.9%
BENEDICTINE	 BACARDÍ	3.7%	▲ 3.5%
CHARTREUSE		5.9%	▲ 2.9%

 **Liqueur Nationally: Trending Down**
Q1 2026 v Q4 2025

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
DOMAINE DE CANTON		1.7%	▼ 3.2%
MOZART	MARUSSIA <small>Beverages U.S.A.</small>	1.0%	▼ 3.3%
VELVET FALERNUM	HAUS ALPENZ	1.7%	▼ 3.3%
DE KUYPER	SUNTORY	5.1%	▼ 4.6%
GALLIANO	LUCAS BOLS	1.1%	▼ 4.8%
GODIVA	DIAGEO	2.3%	▼ 5.9%
COMBIER	 CNI BRANDS <small>INDEPENDENT DISTILLERS & PRODUCERS</small>	1.1%	▼ 6.1%
RUM CHATA	GALLO	3.2%	▼ 6.4%

*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Liqueur cocktail.

By scraping and enriching all on-premise venues nationally every month, Ground Signal can show which cocktails are popular — and which are growing in popularity.



Top Rum Cocktails

COCKTAIL	MENU SHARE*	MENU SHARE CHANGE**	AVG PRICE
MOJITO	28%	▼ 0.4%	\$12.25
PIÑA COLADA	18%	▼ 0.6%	\$11.91
DAIQUIRI	12%	▼ 1.8%	\$11.81
MAI TAI	11%	▲ 1.9%	\$12.99
MARTINI	7.8%	▲ 0.5%	\$13.41
MULE	7.4%	▲ 0.3%	\$11.58
COLA HIGHBALLS	5.0%	▲ 1.2%	\$11.02

Note: Includes both cocktail groups (e.g., any Martini) and more-specific cocktails (e.g., French Martini)

Trending Rum Cocktails

COCKTAIL	MENU SHARE*	MENU SHARE CHANGE**	AVG PRICE
SOUR	2.4%	▲ 145%	\$12.49
OLD FASHIONED	2.6%	▲ 5.0%	\$15.76
LONG ISLAND ICED TEA	2.6%	▲ 3.7%	\$11.70
BAHAMA MAMA	3.1%	▲ 3.1%	\$10.63
HURRICANE	4.5%	▲ 2.4%	\$11.98
ESPRESSO MARTINI	1.2%	▲ 2.3%	\$15.10
BLUE HAWAIIAN	2.7%	▲ 1.9%	\$11.03

Note: Limited to cocktails with at least 1.0% Menu Share

*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Rum cocktail.

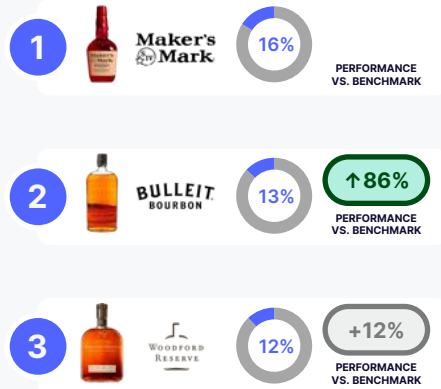
**For example, ▲100% would mean that brand's Menu Share doubled (e.g., went from 2.3% to 4.6%, or from 10% to 20%), not necessarily that the brand appears on twice as many cocktail menus.



In addition to analyzing menu statistics by geography, Ground Signal also allows you see menu performance by:

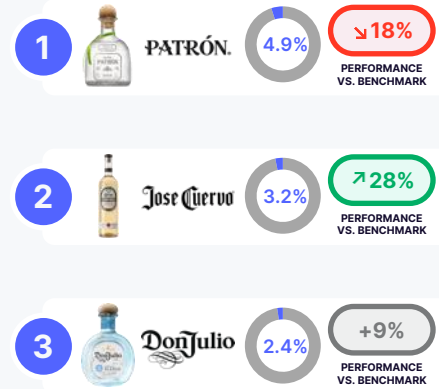
Venue Profile

Example: Top 3 Whiskey Brands in Independent Steak Houses



Cocktails

Example: Top 3 Tequila Brands Used in Margaritas Nationwide



Chains vs. Independent Accounts

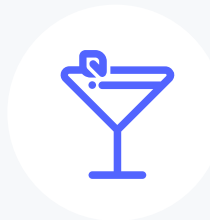
Example:

Top Brands in Chain Accts

Top Brands in Independent Accts



Ground Signal can also provide insights into:



Popular cocktails & their variants
e.g. Tequila Espresso Martini



Flavor Profiles



Pricing



And more!



AI Solutions for the Beverage Alcohol Industry

Ground Signal's mission is to **empower businesses** across the three-tier system to make better business decisions. Leveraging **sophisticated AI** and **unique large-scale data sources**, we give our clients unparalleled visibility into consumer behavior in the On-Premise and allow the industry to **better align its offerings, delight consumers** and **increase sales!**

CAPABILITIES:

CONSUMER INSIGHTS

MENU ANALYSIS

MARKET TRENDS

GO-TO-MARKET STRATEGY

NATIONAL ACCOUNTS

TARGET ACCOUNT LIST
(GS TARGET)

ACCOUNT SEGMENTATION
& KEY TRADE CHANNELS

CONSUMER	VENUE	DEPLETIONS	MENU
1B+ Monthly Social Posts	250K+ On-Premise Venues	3+ Years Depletion History	120K+ On-Premise Menus
100M U.S. Legal Drinking Age Consumers	600+ Unique Venue Attributes	2K+ SKUs at Account Level	3K+ Spirits, Cocktails, Wine Varietals and Flavor Profiles

For more information on menu or other capabilities please contact sales@groundsignal.ai