

MENU INSIGHTS: CALIFORNIA INDEPENDENT ACCOUNTS

Q1 2026 YoY


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

 **8.7K**
Accounts w/
Menu

 **8.3K**
Accounts w/
Cocktail Menu

 **127K**
Total # of
Cocktails

 **\$14.40**
Average
Cocktail Price

Breakdown by Spirits Category

 **6.2K**
Menus w/
Tequila Cocktail 











 **6.1K**
Menus w/
Vodka Cocktail 

 **5.7K**
Menus w/
Liqueur Cocktail 

 **5.2K**
Menus w/
Whiskey Cocktail 

 **4.7K**
Menus w/
Rum Cocktail 

Most Popular Classic Cocktails

COCKTAIL	MENU SHARE*
 MARGARITA	52%
 OLD FASHIONED	32%
 MARTINI	29%
 MIMOSA	27%
 ESPRESSO MARTINI	25%
 BLOODY MARY	25%
 PALOMA	22%
 MULE	19%
 MOJITO	18%
 MANHATTAN	17%

*Percentage of cocktail menus that feature this cocktail



VODKA

MENU PERFORMANCE

CALIFORNIA INDEPENDENT ACCOUNTS

Q1 2026 YoY



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: Belvedere is the 9th-ranked Vodka brand on California Independent cocktail menus, appearing on 2.7% of cocktail menus that have at least one Vodka cocktail.




RANK	BRAND	SUPPLIER	MENU SHARE
1	TITO'S	<i>Tito's</i> Handmade VODKA	24%
2	KETEL ONE	DIAGEO	15%
3	GREY GOOSE	BACARDÍ	12%
4	ABSOLUT	Pernod Ricard	10%
5	STOLI	STOLI GROUP	5.2%
6 ▼ ³	SKYY	CAMPARI	3.1%
7 ▲ ¹	SMIRNOFF	DIAGEO	3.1%
8 ▲ ¹	HAKU	SUNTORY	3.0%

RANK	BRAND	SUPPLIER	MENU SHARE
9 ▼ ¹	BELVEDERE	Moët Hennessy	2.7%
10 ▲ ²	DEEP EDDY	HEAVEN HILL BRANDS	2.5%
11 ▼ ²	HANSONS VODKA	TRINCHERO FAMILY WINE AND SPIRITS	1.8%
12	WHEATLEY	SAZERAC	1.8%
12 ▼ ⁴	HANGAR ONE	PROXIMO	1.8%
14 ▲ ³	CÎROC	DIAGEO	1.6%
15 ▲ ²	EFFEN	SUNTORY	1.4%
16 ▲ ¹	NEW AMSTERDAM	GALLO	1.3%






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 19 Vodka brands with at least 1% Menu Share in California Independent.)



 **Vodka in California Independent: Trending Up**
Q1 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
HANGAR ONE	 PROXIMO	1.8%	▲ 23%
BELVEDERE	Moët Hennessy	2.7%	▲ 17%
SKYY	CAMPARI	3.1%	▲ 16%
THREE OLIVES	 PROXIMO	1.0%	▲ 16%
HANSONS VODKA	TRINCHERO FAMILY WINE AND SPIRITS	1.8%	▲ 12%
WHEATLEY	SAZERAC	1.8%	▲ 5.2%
CHOPIN		1.2%	▲ 4.2%

 **Vodka in California Independent: Trending Down**
Q1 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
EFFEN	SUNTORY	1.4%	▼ 16%
NEW AMSTERDAM		1.3%	▼ 15%
ABSOLUT	 Pernod Ricard	10%	▼ 14%
SMIRNOFF	DIAGEO	3.1%	▼ 12%
CÎROC	DIAGEO	1.6%	▼ 12%
DEEP EDDY	 HEAVEN HILL BRANDS	2.5%	▼ 9.8%
STOLI	 STOLI GROUP	5.2%	▼ 8.2%
TITO'S	 Tito's  Handmade VODKA	24%	▼ 6.4%

*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, a 10% would mean that cocktail's Menu Share grew by 10% (e.g., went from 10.0% to 11.0%), not that it gained 10 percentage points.

Bloody Mary is the most popular Vodka cocktail in California Independent accounts, appearing on 32.0% of menus with at least one Vodka cocktail. Lemon Drop Martini grew the most, gaining 635.9% Menu Share.



Top Vodka Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
BLOODY MARY	32%	▼ 1.4%
MARTINI	32%	▲ 3.1%
ESPRESSO MARTINI	31%	▲ 17%
MULE	19%	▼ 3.6%
LEMON DROP MARTINI	17%	▲ 636%
COSMOPOLITAN	13%	▼ 0.3%
MOSCOW MULE	12%	▼ 9.0%

Trending Vodka Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
LEMON DROP MARTINI	17%	▲ 636%
LYCHEE MARTINI	3.5%	▲ 24%
ESPRESSO MARTINI	31%	▲ 17%
SPRITZ	3.9%	▲ 13%
LONG ISLAND ICED TEA	5.2%	▲ 6.6%
SCREWDRIVER	3.3%	▲ 6.3%
DIRTY MARTINI	2.6%	▲ 4.2%

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, a 10% would mean that cocktail's Menu Share grew by 10% (e.g., went from 10.0% to 11.0%), not that it gained 10 percentage points.





TEQUILA MENU PERFORMANCE

CALIFORNIA INDEPENDENT ACCOUNTS

Q1 2026 YoY



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: Milagro is the 9th-ranked Tequila brand on California Independent cocktail menus, appearing on 3.3% of cocktail menus that have at least one Tequila cocktail.


RANK	BRAND	SUPPLIER	MENU SHARE
1	PATRÓN	BACARDÍ	11%
2	DON JULIO	DIAGEO	8.8%
3	CASAMIGOS	DIAGEO	6.8%
4 ▼1	CAZADORES	BACARDÍ	6.3%
5 ▲1	HERRADURA	BROWN-FORMAN	5.8%
6	HORNITOS	SUNTORY	4.7%
7	1800	PROXIMO	3.8%
8 ▼1	JOSE CUERVO	PROXIMO	3.4%

RANK	BRAND	SUPPLIER	MENU SHARE
9 ▲1	MILAGRO	WILLIAM GRANT & SONS <small>INDEPENDENT FAMILY DISTILLERS SINCE 1887</small>	3.3%
9 ▼3	ESPOLÓN	CAMPARI	3.3%
11 ▲1	EL JIMADOR	BROWN-FORMAN	2.9%
12 ▼1	MAESTRO DOBEL	PROXIMO	2.7%
13 ▲2	SAUZA	SUNTORY	2.6%
14 ▼5	LALO	Fifth Generation, Inc.	2.6%
15 ▼8	CODIGO 1530	Pernod Ricard	2.5%
16 ▼1	TEREMANA	TEREMANA <small>TEQUILA</small> Jägermeister	2.2%







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 31 Tequila brands with at least 1% Menu Share in California Independent.)



 **Tequila in California Independent: Trending Up**
Q1 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
CODIGO 1530	 Pernod Ricard	2.5%	▲ 89%
LALO	Fifth Generation, Inc.	2.6%	▲ 53%
ASTRAL	DIAGEO	1.9%	▲ 46%
VOLCAN DE MI TIERRA	Moët Hennessy	1.3%	▲ 41%
CORAZÓN	SAZERAC	2.1%	▲ 39%
DON FULANO	 SPIRIT of GALLO	1.7%	▲ 36%
ESPOLÓN	CAMPARI	3.3%	▲ 26%
MI CAMPO	 Constellation Brands	1.5%	▲ 19%

 **Tequila in California Independent: Trending Down**
Q1 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
EL JIMADOR	 BROWN-FORMAN	2.9%	▼ 21%
MILAGRO	WILLIAM GRANT & SONS <small>INDEPENDENT FAMILY DISTILLERS SINCE 1867</small>	3.3%	▼ 14%
HERRADURA	 BROWN-FORMAN	5.8%	▼ 13%
TANTEO	Apax	2.0%	▼ 12%
LUNAZUL	 HEAVEN HILL BRANDS	1.3%	▼ 11%
PUEBLO VIEJO	 CASA SAN MATÍAS <small>TEQUILA SINCE 1888</small>	1.5%	▼ 8.4%
JOSE CUERVO	 PROXIMO	3.4%	▼ 7.3%
1800	 PROXIMO	3.8%	▼ 6.1%

*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, a 10% would mean that cocktail's Menu Share grew by 10% (e.g., went from 10.0% to 11.0%), not that it gained 10 percentage points.



Margarita is the most popular Tequila cocktail in California Independent accounts, appearing on 67.8% of menus with at least one Tequila cocktail. Frozen Drinks grew the most, gaining 1851.6% Menu Share.



Top Tequila Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MARGARITA	68%	▲ 0.5%
PALOMA	27%	▲ 4.2%
SPICY MARGARITA	10%	▲ 14%
CADILLAC MARGARITA	8.1%	▲ 5.2%
SKINNY MARGARITA	5.8%	▲ 2.1%
CLASSIC MARGARITA	5.3%	▲ 9.3%
TEQUILA SUNRISE	4.7%	▼ 0.1%

Trending Tequila Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
FROZEN DRINKS	1.2%	▲ 1852%
CARAJILLO	1.5%	▲ 65%
ESPRESSO MARTINI	2.2%	▲ 32%
RANCH WATER	2.7%	▲ 26%
LONG ISLAND ICED TEA	1.5%	▲ 22%
SPRITZ	1.1%	▲ 20%
OLD FASHIONED	2.2%	▲ 19%

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, a 10% would mean that cocktail's Menu Share grew by 10% (e.g., went from 10.0% to 11.0%), not that it gained 10 percentage points.





RUM

MENU PERFORMANCE

CALIFORNIA INDEPENDENT ACCOUNTS

Q1 2026 YoY



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: Zacapa is the 9th-ranked Rum brand on California Independent cocktail menus, appearing on 2.4% of cocktail menus that have at least one Rum cocktail.









RANK	BRAND	SUPPLIER	MENU SHARE
1	BACARDÍ	BACARDÍ	18%
2	MALIBU	Pernod Ricard	14%
3	CAPTAIN MORGAN	DIAGEO	6.9%
4	MYERS'S	SAZERAC	6.4%
5 ▼ ¹	PLANTERAY	MAISON FERRAND	3.7%
6 ▲ ¹	CRUZAN	SUNTORY	3.7%
7	GOSLING'S	Gosling's	3.5%
8 ▼ ⁴	FLOR DE CAÑA	LUXURY SPIRITS INTERNATIONAL	3.1%

RANK	BRAND	SUPPLIER	MENU SHARE
9 ▼ ⁴	ZACAPA	DIAGEO	2.4%
10	APPLETON	CAMPARI	2.3%
11 ▲ ²	DON Q	SPIRALLES	2.2%
12 ▲ ⁴	SAILOR JERRY	WILLIAM GRANT & SONS	1.9%
13 ▲ ²	DIPLOMÁTICO	BROWN-FORMAN	1.9%
14 ▼ ²	THE KRAKEN	PROXIMO	1.4%
15 ▲ ¹	CLEMENT	SPIRIBAM	1.4%
16 ▲ ¹	MOUNT GAY	RÉMY COINTREAU	1.1%







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 18 Rum brands with at least 1% Menu Share in California Independent.)



 **Rum in California Independent: Trending Up**
Q1 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
FLOR DE CAÑA	 WILLIAM GRANT & SONS <small>INDEPENDENT FAMILY DISTILLERS SINCE 1867</small>	3.1%	▲ 67%
ZACAPA	 DIAGEO	2.4%	▲ 51%
THE KRAKEN	 PROXIMO	1.4%	▲ 23%
TRADER VIC'S	 Phillips DISTILLING CO	1.1%	▲ 13%
MALIBU	 Pernod Ricard	14%	▲ 9.1%
BACARDÍ	 BACARDÍ	18%	▲ 8.8%
MYERS'S	 SAZERAC	6.4%	▲ 7.4%
CAPTAIN MORGAN	 DIAGEO	6.9%	▲ 7.3%

 **Rum in California Independent: Trending Down**
Q1 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
SAILOR JERRY	 WILLIAM GRANT & SONS <small>INDEPENDENT FAMILY DISTILLERS SINCE 1867</small>	1.9%	▼ 15%
DIPLOMÁTICO	 BROWN-FORMAN	1.9%	▼ 13%
MOUNT GAY	 RÉMY COINTREAU	1.1%	▼ 13%
CLEMENT	 SPIRIBAM <small>FINE SPIRITS FAMILY</small>	1.4%	▼ 10%
CRUZAN	 SUNTORY	3.7%	▼ 9.3%
PLANTERAY		3.7%	▼ 7.8%

*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, a 10% would mean that cocktail's Menu Share grew by 10% (e.g., went from 10.0% to 11.0%), not that it gained 10 percentage points.

Mojito is the most popular Rum cocktail in California Independent accounts, appearing on 28.2% of menus with at least one Rum cocktail. Grasshopper grew the most, gaining 59.4% Menu Share.



Top Rum Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MOJITO	28%	▼ 3.2%
MAI TAI	20%	▲ 1.0%
PIÑA COLADA	15%	▲ 58%
DAIQUIRI	8.7%	▼ 3.0%
TIKI	4.0%	▼ 3.9%
DARK & STORMY	3.8%	▼ 2.8%
MARTINI	3.4%	▼ 11%

Trending Rum Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
GRASSHOPPER	1.0%	▲ 59%
PIÑA COLADA	15%	▲ 58%
RUM PUNCH	2.5%	▲ 16%
ZOMBIE	1.8%	▲ 10%
SANGRIA	1.9%	▲ 7.5%
CAIPIRINHA	2.1%	▲ 6.3%
ADIOS	1.2%	▲ 6.3%

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, a 10% would mean that cocktail's Menu Share grew by 10% (e.g., went from 10.0% to 11.0%), not that it gained 10 percentage points.





GIN

MENU PERFORMANCE

CALIFORNIA INDEPENDENT ACCOUNTS

Q1 2026 YoY



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 California Independent cocktail menus, appearing on 3.5% 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	EMPRESS 1908	MILESTONE	8.3%
3 ▼1	TANQUERAY	DIAGEO	7.3%
4 ▲1	BOMBAY	BACARDÍ	6.1%
5	FORDS GIN	BROWN-FORMAN	4.9%
6	THE BOTANIST	RÉMY COINTREAU	4.8%
7	ROKU	SUNTORY	4.6%
8	BEEFEATER	Pernod Ricard	3.6%

RANK	BRAND	SUPPLIER	MENU SHARE
9 ▼3	AVIATION	DIAGEO	3.5%
10 ▼1	GRAY WHALE	DEUTSCH FAMILY <small>GIN & SPIRITS</small>	3.0%
11 ▲2	NOLET'S	NOLET'S <small>FINEST GINS</small>	2.8%
12 ▲2	SIPSMITH	SUNTORY	2.2%
13	MALFY	Pernod Ricard	1.7%
14	MONKEY 47	Pernod Ricard	1.5%
15	BULLDOG	CAMPARI	1.1%
16	JUNIPERO	Juniper gin	1.0%





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 16 Gin brands with at least 1% Menu Share in California Independent.)



 **Gin in California Independent: Trending Up**
Q1 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
AVIATION	DIAGEO	3.5%	▲ 63%
GRAY WHALE	 DEUTSCH FAMILY WINE & SPIRITS	3.0%	▲ 30%
MALFY	 Pernod Ricard	1.7%	▲ 6.6%
EMPRESS 1908	 MILESTONE	8.3%	▲ 3.7%
MONKEY 47	 Pernod Ricard	1.5%	▲ 2.1%
BEEFEATER	 Pernod Ricard	3.6%	▲ 2.0%
TANQUERAY	DIAGEO	7.3%	▲ 1.7%

 **Gin in California Independent: Trending Down**
Q1 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
SIPSMITH	SUNTORY	2.2%	▼ 28%
BOMBAY	 BACARDÍ	6.1%	▼ 18%
JUNIPERO	 Junipero gin	1.0%	▼ 12%
BULLDOG	CAMPARI	1.1%	▼ 11%
NOLET'S	 NOLET'S FINEST GINS	2.8%	▼ 7.4%
HENDRICK'S	WILLIAM GRANT & SONS <small>INDEPENDENT FAMILY DISTILLERS SINCE 1867</small>	12%	▼ 5.7%
FORDS GIN	 BROWN-FORMAN	4.9%	▼ 3.7%
ROKU	SUNTORY	4.6%	▼ 2.9%

*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, a 10% would mean that cocktail's Menu Share grew by 10% (e.g., went from 10.0% to 11.0%), not that it gained 10 percentage points.

Negroni is the most popular Gin cocktail in California Independent accounts, appearing on 21.4% of menus with at least one Gin cocktail. Corpse Reviver grew the most, gaining 449.1% Menu Share.



Top Gin Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
NEGRONI	21%	▲ 2.3%
MARTINI	18%	▲ 11%
FRENCH 75	6.7%	▲ 0.7%
GIMLET	6.6%	▼ 3.7%
GIN & TONIC	5.2%	▼ 4.4%
BEE'S KNEES	4.7%	▼ 7.0%
AVIATION	4.5%	▼ 16%

Trending Gin Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
CORPSE REVIVER	1.1%	▲ 449%
LAST WORD	2.7%	▲ 35%
WHITE NEGRONI	1.3%	▲ 27%
SPRITZ	4.0%	▲ 23%
MARTINI	18%	▲ 11%
SINGAPORE SLING	1.0%	▲ 10%
SMASH	1.1%	▲ 7.4%

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, a 10% would mean that cocktail's Menu Share grew by 10% (e.g., went from 10.0% to 11.0%), not that it gained 10 percentage points.





WHISKEY

MENU PERFORMANCE

CALIFORNIA INDEPENDENT ACCOUNTS

Q1 2026 YoY



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: Toki is the 9th-ranked Whiskey brand on California Independent cocktail menus, appearing on 3.9% 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	12%
4	BUFFALO TRACE	SAZERAC	9.5%
5 ▼ ¹	JACK DANIEL'S	BROWN-FORMAN	6.5%
6 ▲ ¹	WOODFORD RESERVE	BROWN-FORMAN	6.1%
7 ▼ ²	SAZERAC RYE	SAZERAC	4.9%
8	FOUR ROSES	KIRIN	4.1%

RANK	BRAND	SUPPLIER	MENU SHARE
9 ▼ ³	TOKI	SUNTORY	3.9%
10 ▼ ⁴	WHISTLEPIG	WHISTLEPIG	3.8%
11 ▲ ⁴	OLD FORESTER	BROWN-FORMAN	3.7%
12 ▲ ²	KNOB CREEK	SUNTORY	3.7%
13 ▲ ²	ELIJAH CRAIG	HEAVEN HILL BRANDS	3.6%
14 ▼ ¹	CROWN ROYAL	DIAGEO	3.1%
15 ▼ ⁴	MICHTER'S	CHATHAM IMPORTS, INC.	3.0%
16 ▲ ³	HIGH WEST	Constellation Brands	2.6%

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 33 Whiskey brands with at least 1% Menu Share in California Independent.)



Whiskey in California Independent: Trending Up
Q1 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
JOHNNIE WALKER	DIAGEO	2.2%	▲ 49%
MICHTER'S	CHATHAM IMPORTS, INC.	3.0%	▲ 26%
ANGEL'S ENVY	BACARDÍ	2.6%	▲ 26%
WHISTLEPIG	WHISTLEPIG	3.8%	▲ 20%
SAZERAC RYE	SAZERAC	4.9%	▲ 11%
LAPHROAIG	SUNTORY	1.3%	▲ 9.9%
TOKI	SUNTORY	3.9%	▲ 9.2%
LARCENY	HEAVEN HILL BRANDS	1.1%	▲ 9.2%

Whiskey in California Independent: Trending Down
Q1 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
OLD FORESTER	BROWN-FORMAN	3.7%	▼ 23%
HIGH WEST	Constellation Brands	2.6%	▼ 19%
TEMPLETON	INFINIUM SPIRITS	2.3%	▼ 19%
EVAN WILLIAMS	HEAVEN HILL BRANDS	1.5%	▼ 17%
SKREWBALL	Pernod Ricard	1.8%	▼ 16%
MONKEY SHOULDER	WILLIAM GRANT & SONS <small>INDEPENDENT FAMILY DISTILLERS SINCE 1867</small>	1.4%	▼ 14%
RITTENHOUSE	HEAVEN HILL BRANDS	2.6%	▼ 13%
SOUTHERN COMFORT	SAZERAC	1.1%	▼ 13%

*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, a 10% would mean that cocktail's Menu Share grew by 10% (e.g., went from 10.0% to 11.0%), not that it gained 10 percentage points.



Old Fashioned is the most popular Whiskey cocktail in California Independent accounts, appearing on 47.3% of menus with at least one Whiskey cocktail. Godfather grew the most, gaining 65.3% Menu Share.



Top Whiskey Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
OLD FASHIONED	47%	▼ 0.6%
MANHATTAN	26%	▲ 0.2%
IRISH COFFEE	13%	▲ 8.3%
WHISKEY SOUR	8.0%	▲ 5.4%
PAPER PLANE	6.3%	▲ 15%
MULE	5.7%	▼ 1.9%
SHOT	5.1%	▼ 15%

Trending Whiskey Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
GODFATHER	1.2%	▲ 65%
BOURBON SMASH	1.4%	▲ 48%
ESPRESSO MARTINI	1.6%	▲ 44%
VIEUX CARRÉ	1.9%	▲ 41%
MARGARITA	1.2%	▲ 22%
HIGHBALL	2.5%	▲ 20%
SMASH	3.9%	▲ 19%

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, a 10% would mean that cocktail's Menu Share grew by 10% (e.g., went from 10.0% to 11.0%), not that it gained 10 percentage points.





LIQUEUR MENU PERFORMANCE

CALIFORNIA INDEPENDENT ACCOUNTS

Q1 2026 YoY






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: Chambord is the 9th-ranked Liqueur brand on California Independent cocktail menus, appearing on 8.9% of cocktail menus that have at least one Liqueur cocktail.









RANK	BRAND	SUPPLIER	MENU SHARE
1	COINTREAU	 RÉMY COINTREAU	24%
2	ST. GERMAIN	 BACARDÍ	23%
3	GRAND MARNIER	CAMPARI GROUP	20%
4 ▼ ¹	KAHLUA	 Pernod Ricard	20%
5 ▼ ¹	BAILEYS	DIAGEO	17%
6 ▼ ¹	CHARTREUSE	CHARTREUSE	12%
7 ▼ ¹	LICOR 43	 Zamora company	11%
8 ▲ ⁴	LUXARDO	 HOTALING & CO. IMPORTER - DISTILLER	9.2%

RANK	BRAND	SUPPLIER	MENU SHARE
9	CHAMBORD	 BROWN-FORMAN	8.9%
10 ▼ ²	ANCHO REYES	CAMPARI GROUP	7.4%
10 ▼ ¹	MR BLACK	DIAGEO	7.4%
12 ▲ ²	FRANGELICO	CAMPARI GROUP	7.3%
13 ▼ ¹	BENEDICTINE	 BACARDÍ	6.5%
14 ▲ ¹	MIDORI	SUNTORY	6.4%
15 ▼ ⁷	DE KUYPER	SUNTORY	6.2%
16 ▲ ¹	GIFFARD	 BACK BAR PROJECT	5.5%









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% Menu Share in California Independent.)



 **Liqueur in California Independent: Trending Up**
Q1 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
DE KUYPER		6.2%	▲ 231%
BORGHETTI		2.9%	▲ 107%
DOMAINE DE CANTON		1.0%	▲ 54%
SOHO		1.2%	▲ 33%
NIXTA		1.4%	▲ 33%
LICOR 43		11%	▲ 29%
DRAMBUIE		1.7%	▲ 20%
CHAREAU		2.6%	▲ 18%

 **Liqueur in California Independent: Trending Down**
Q1 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
LUXARDO		9.2%	▼ 48%
HEERING		1.6%	▼ 32%
VELVET FALERNUM		2.0%	▼ 19%
TUACA		1.3%	▼ 18%
GODIVA		1.9%	▼ 16%
RUM CHATA		1.4%	▼ 13%
GIFFARD		5.5%	▼ 7.3%
COMBIER		1.3%	▼ 6.8%

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

**For example, a 10% would mean that cocktail's Menu Share grew by 10% (e.g., went from 10.0% to 11.0%), not that it gained 10 percentage points.



Margarita is the most popular Liqueur cocktail in California Independent accounts, appearing on 35.8% of menus with at least one Liqueur cocktail. Frozen Drinks grew the most, gaining 898.8% Menu Share.



Top Liqueur Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MARGARITA	36%	▲ 0.5%
ESPRESSO MARTINI	26%	▲ 19%
MARTINI	20%	▲ 2.3%
LEMON DROP MARTINI	8.6%	▲ 650%
COSMOPOLITAN	8.4%	▲ 3.8%
MAI TAI	7.3%	▲ 8.0%
OLD FASHIONED	7.0%	▼ 32%

Trending Liqueur Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
FROZEN DRINKS	1.0%	▲ 899%
LEMON DROP MARTINI	8.6%	▲ 650%
HUGO SPRITZ	3.6%	▲ 84%
PIÑA COLADA	1.2%	▲ 67%
GODFATHER	1.0%	▲ 51%
LYCHEE MARTINI	1.9%	▲ 40%
HIGHBALL	1.0%	▲ 37%

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 Liqueur cocktail.

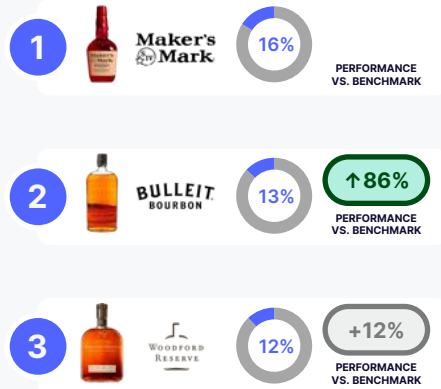
**For example, a 10% would mean that cocktail's Menu Share grew by 10% (e.g., went from 10.0% to 11.0%), not that it gained 10 percentage points.



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

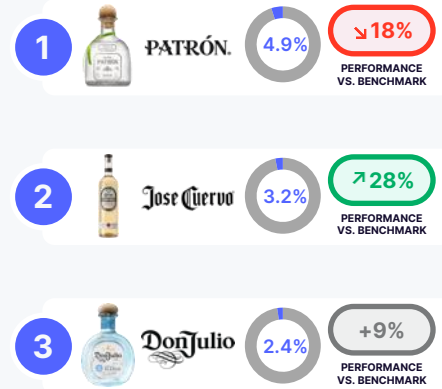
Venue Profile

Example: Top 3 Whiskey Brands in Independent Steak Houses



Cocktails

Example: Top 3 Tequila Brands Used in Margaritas Nationwide



Chains vs. Independent Accounts

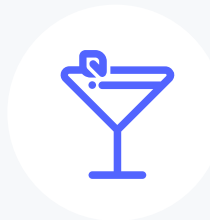
Example:

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





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