

HIGH VOLUME INDEPENDENT ACCOUNTS MENU INSIGHTS REPORT

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

19.0K
Accounts w/
Menu

18.3K
Accounts w/
Cocktail Menu

328K
Total # of
Cocktails

\$13.27
Average
Cocktail Price

Breakdown by Spirits Category

15.6K
Menus w/
Vodka Cocktail

14.5K
Menus w/
Liqueur Cocktail

14.1K
Menus w/
Tequila Cocktail

13.9K
Menus w/
Whiskey Cocktail

12.0K
Menus w/
Rum Cocktail

Most Popular Classic Cocktails

COCKTAIL	MENU SHARE*
MARGARITA	53%
OLD FASHIONED	42%
MARTINI	39%
ESPRESSO MARTINI	33%
MULE	29%
BLOODY MARY	26%
MIMOSA	24%
SANGRIA	23%
MANHATTAN	21%
PALOMA	20%

*Percentage of cocktail menus that feature this cocktail





VODKA

MENU PERFORMANCE

INDEPENDENT HIGH VOLUME 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
 Q1 2026

For example: Three Olives is the 9th-ranked Vodka brand on independent High Volume Independent cocktail menus, appearing on 3.1% of cocktail menus that have at least one Vodka cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
1	TITO'S	<i>Tito's</i> Handmade VODKA	34%
2	KETEL ONE	DIAGEO	18%
3 ▼ ¹	GREY GOOSE	BACARDÍ	15%
4 ▲ ¹	ABSOLUT	Pernod Ricard	15%
5	STOLI	STOLI GROUP	11%
6	DEEP EDDY	HEAVEN HILL BRANDS	9.0%
7	SMIRNOFF	DIAGEO	7.5%
8	WHEATLEY	SAZERAC	5.2%

RANK	BRAND	SUPPLIER	MENU SHARE
9	THREE OLIVES	PROXIMO	3.1%
10	SKYY	CAMPARI	2.7%
11	BELVEDERE	LVMH	2.6%
12	NEW AMSTERDAM	GALLO	2.5%
13	CÎROC	DIAGEO	2.3%
14 ▼ ¹	VAN GOGH	CONECUH BRANDS	2.2%
15 ▲ ¹	EFFEN	SUNTORY	2.2%
16	HAKU	SUNTORY	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 22 Vodka brands with at least 1% Menu Share in High Volume Independent.)



 **Vodka in High Volume Independent: Trending Up**
Q1 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
HAKU	SUNTORY	2.2%	▲ 3.5%
GREY GOOSE	BACARDÍ	15%	▲ 3.2%
WHEATLEY	SAZERAC	5.2%	▲ 1.9%
HANSONS VODKA	TRINCHERO FAMILY WINE AND SPIRITS	1.1%	▲ 1.0%
FIGENZA	CARRIAGE HOUSE Wines & Spirits IMPORTS, LTD.	1.1%	▲ 1.0%
KETEL ONE	DIAGEO	18%	▲ 0.8%

 **Vodka in High Volume Independent: Trending Down**
Q1 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
PINNACLE	SUNTORY	1.6%	▼ 21%
STOLI	STOLI GROUP	11%	▼ 14%
ABSOLUT	Pernod Ricard	15%	▼ 14%
EFFEN	SUNTORY	2.2%	▼ 13%
VAN GOGH	COONECUB BRANDS	2.2%	▼ 10%
CÎROC	DIAGEO	2.3%	▼ 10.0%
360 VODKA	MCCORMICK DISTILLING COMPANY BORN 1864 WITH THE PONY EXPRESS	1.3%	▼ 8.6%
THREE OLIVES	PROXIMO	3.1%	▼ 7.5%

*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.

Martini is the most popular Vodka cocktail in independent High Volume Independent accounts, appearing on 39.6% of menus with at least one Vodka cocktail. Frozen Drinks grew the most, gaining 592.2% Menu Share.



Top Vodka Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MARTINI	40%	▲ 1.4%
ESPRESSO MARTINI	35%	▲ 14%
BLOODY MARY	30%	▼ 4.4%
MULE	25%	▼ 1.9%
COSMOPOLITAN	17%	▲ 0.5%
LEMON DROP MARTINI	15%	▲ 265%
MOSCOW MULE	11%	▼ 1.2%

Trending Vodka Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
FROZEN DRINKS	2.1%	▲ 592%
LEMON DROP MARTINI	15%	▲ 265%
TRANSFUSION	1.2%	▲ 32%
LONG ISLAND ICED TEA	5.4%	▲ 27%
LYCHEE MARTINI	2.9%	▲ 18%
VODKA LEMONADE	2.6%	▲ 15%
ESPRESSO MARTINI	35%	▲ 14%

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

INDEPENDENT HIGH VOLUME 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
 Q1 2026

For example: Herradura is the 9th-ranked Tequila brand on independent High Volume Independent cocktail menus, appearing on 5.7% of cocktail menus that have at least one Tequila cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
1	PATRÓN	BACARDÍ	15%
2	DON JULIO	DIAGEO	11%
3	CASAMIGOS	DIAGEO	9.0%
4 ▼ ¹	1800	PROXIMO	6.5%
5 ▼ ²	JOSE CUERVO	PROXIMO	6.4%
6 ▲ ²	HORNITOS	SUNTORY	6.3%
6 ▼ ⁴	ESPOLÓN	CAMPARI	6.3%
8	CAZADORES	BACARDÍ	5.9%

RANK	BRAND	SUPPLIER	MENU SHARE
9 ▲ ⁴	HERRADURA	BROWN-FORMAN	5.7%
10 ▲ ¹	MILAGRO	WILLIAM GRANT & SONS <small>INDEPENDENT FAMILY DISTILLERS SINCE 1867</small>	5.4%
11	CORAZÓN	SAZERAC	5.3%
12	EL JIMADOR	BROWN-FORMAN	4.1%
13 ▼ ¹	LUNAZUL	HEAVEN HILL BRANDS	3.4%
14	SAUZA	SUNTORY	3.4%
15 ▲ ²	OLMECA ALTOS	Pernod Ricard	3.3%
16 ▼ ²	MAESTRO DOBEL	PROXIMO	3.1%

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 34 Tequila brands with at least 1% Menu Share in High Volume Independent.)



 **Tequila in High Volume Independent: Trending Up**
Q1 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
FLECHA AZUL	 FLECHA AZUL TEQUILA	1.0%	▲ 76%
CODIGO 1530	 Pernod Ricard	2.4%	▲ 54%
DON FULANO	 GALLO	1.2%	▲ 45%
GRAN CENTENARIO	 PROXIMO	1.2%	▲ 33%
LALO	 Tito's  Handmade VODKA	2.4%	▲ 31%
MI CAMPO	 Constellation Brands	2.3%	▲ 21%
VOLCAN DE MI TIERRA	 LVMH	1.2%	▲ 21%
ASTRAL	 DIAGEO	1.8%	▲ 16%

 **Tequila in High Volume Independent: Trending Down**
Q1 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
HERRADURA	 BROWN-FORMAN	5.7%	▼ 15%
TRES GENERACIONES	 SUNTORY	1.1%	▼ 14%
OLMECA ALTOS	 Pernod Ricard	3.3%	▼ 11%
EL JIMADOR	 BROWN-FORMAN	4.1%	▼ 10%
PUEBLO VIEJO	 CASA SAN MATIAS TEQUILA SINCE 1888	1.1%	▼ 9.5%
DULCE VIDA	 MILESTONE	1.6%	▼ 9.5%
TANTEO	 Tanteo	3.0%	▼ 7.9%
HORNITOS	 SUNTORY	6.3%	▼ 7.2%

*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 independent High Volume Independent accounts, appearing on 65.8% of menus with at least one Tequila cocktail. Frozen Drinks grew the most, gaining 2495.9% Menu Share.



Top Tequila Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MARGARITA	66%	▲ 1.5%
PALOMA	24%	▼ 1.4%
SPICY MARGARITA	10%	▲ 21%
SKINNY MARGARITA	5.6%	▼ 2.3%
RANCH WATER	4.7%	▲ 19%
CLASSIC MARGARITA	4.6%	▲ 7.2%
FROZEN MARGARITA	4.5%	▲ 3.6%

Trending Tequila Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
FROZEN DRINKS	3.5%	▲ 2496%
CARAJILLO	1.0%	▲ 51%
ESPRESSO MARTINI	2.6%	▲ 22%
PIÑA COLADA	1.0%	▲ 21%
SPICY MARGARITA	10%	▲ 21%
BLOODY MARY	2.7%	▲ 20%
RANCH WATER	4.7%	▲ 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

INDEPENDENT HIGH VOLUME 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
 Q1 2026

For example: Zacapa is the 9th-ranked Rum brand on independent High Volume Independent cocktail menus, appearing on 2.5% of cocktail menus that have at least one Rum cocktail.






RANK	BRAND	SUPPLIER	MENU SHARE
1	BACARDÍ	BACARDÍ	26%
2	CAPTAIN MORGAN	DIAGEO	12%
3	GOSLING'S	Pernod Ricard	6.1%
4	MYERS'S	SAZERAC	5.8%
5	CRUZAN	SUNTORY	5.1%
6	PLANTERAY	MAISON FERRAND <small>PRODUCTS INDEPENDENT OF FINE FLAVOUR ECCELLENCE</small>	4.8%
7	DON Q	SERRAVALLO'S	3.2%
8 ▼3	FLOR DE CAÑA	LUXURY SPIRITS INTERNATIONAL	2.5%

RANK	BRAND	SUPPLIER	MENU SHARE
9	ZACAPA	DIAGEO	2.5%
10 ▲2	DIPLOMÁTICO	BROWN-FORMAN	2.4%
11 ▲1	APPLETON	CAMPARI	2.3%
12 ▼3	BUMBU	SOVEREIGN BRANDS	1.8%
13 ▲1	THE KRAKEN	PROXIMO	1.7%
14	CLEMENT	SPIRIBAM <small>FINE SPIRITS FAMILY</small>	1.7%
15 ▲2	SAILOR JERRY	WILLIAM GRANT & SONS <small>INDEPENDENT FAMILY DISTILLERS SINCE 1867</small>	1.7%
16	PARROT BAY	SAZERAC	1.5%





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 20 Rum brands with at least 1% Menu Share in High Volume Independent.)



 **Rum in High Volume Independent: Trending Up**
Q1 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
FLOR DE CAÑA	 LUXURY SPIRITS INTERNATIONAL	2.5%	▲ 21%
BUMBU	SOVEREIGN BRANDS	1.8%	▲ 13%
MOUNT GAY	 RÉMY COINTREAU	1.5%	▲ 6.9%
PLANTERAY	 MAISON FERRAND	4.8%	▲ 5.2%
CAPTAIN MORGAN	DIAGEO	12%	▲ 4.6%
DON Q		3.2%	▲ 3.2%
ZACAPA	DIAGEO	2.5%	▲ 2.3%
PUSSER'S	 SHAW-ROSS	1.4%	▲ 1.4%

 **Rum in High Volume Independent: Trending Down**
Q1 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
DIPLOMÁTICO	 BROWN-FORMAN	2.4%	▼ 12%
SAILOR JERRY	WILLIAM GRANT & SONS <small>INDEPENDENT FAMILY DISTILLERS SINCE 1867</small>	1.7%	▼ 9.8%
CRUZAN	SUNTORY	5.1%	▼ 9.4%
THE KRAKEN	 PROXIMO	1.7%	▼ 7.1%
GOSLING'S	 Pernod Ricard	6.1%	▼ 6.3%
LEBLON	 BACARDÍ	1.0%	▼ 6.0%
APPLETON	CAMPARI	2.3%	▼ 3.0%
CLEMENT	SPIRIBAM <small>FINE SPIRITS FAMILY</small>	1.7%	▼ 0.7%

*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 independent High Volume Independent accounts, appearing on 27.4% of menus with at least one Rum cocktail. Frozen Drinks grew the most, gaining 404.1% Menu Share.



Top Rum Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MOJITO	27%	▲ 0.8%
PIÑA COLADA	13%	▲ 31%
MAI TAI	11%	▲ 0.4%
DAIQUIRI	11%	▲ 2.4%
MARTINI	8.2%	▼ 8.0%
RUM PUNCH	5.6%	▲ 15%
MULE	4.6%	▼ 5.2%

Trending Rum Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
FROZEN DRINKS	2.2%	▲ 404%
PIÑA COLADA	13%	▲ 31%
RUM PUNCH	5.6%	▲ 15%
GRASSHOPPER	1.3%	▲ 12%
RUM OLD-FASHIONED	1.0%	▲ 11%
PAINKILLER	3.6%	▲ 8.7%
BLUE HAWAIIAN	2.4%	▲ 8.0%

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

INDEPENDENT HIGH VOLUME 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
 Q1 2026

For example: Aviation is the 9th-ranked Gin brand on independent High Volume Independent cocktail menus, appearing on 3.8% 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>	16%
2 ▼ ¹	BOMBAY	BACARDÍ	9.8%
3 ▲ ¹	TANQUERAY	DIAGEO	9.6%
4	EMPRESS 1908	MILESTONE	8.9%
5	FORDS GIN	BROWN-FORMAN	4.8%
6	BEEFEATER	Pernod Ricard	4.6%
7 ▼ ¹	THE BOTANIST	RÉMY COINTREAU	4.6%
8 ▲ ¹	ROKU	SUNTORY	4.5%

RANK	BRAND	SUPPLIER	MENU SHARE
9 ▼ ²	AVIATION	DIAGEO	3.8%
10	GRAY WHALE	DEUTSCH FAMILY <small>GIN & SPIRITS</small>	3.0%
11 ▲ ²	NOLET'S	NOLET'S <small>FINEST GINS</small>	2.7%
12	MALFY	Pernod Ricard	1.7%
13 ▲ ¹	SIPSMITH	SUNTORY	1.5%
14	BULLDOG	CAMPARI	1.3%
15	MONKEY 47	Pernod Ricard	1.2%
16	CITADELLE	MAISON FERRAND <small>PRODUCEUR INDEPENDANT DE GIN ET LIQUEURS</small>	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 Gin brands with at least 1% Menu Share in High Volume Independent.)



 **Gin in High Volume Independent: Trending Up**
Q1 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
AVIATION	DIAGEO	3.8%	▲ 49%
DRUMSHANBO	 PALM BAY INTERNATIONAL	1.0%	▲ 23%
GRAY WHALE	 DEUTSCH FAMILY WINE & SPIRITS	3.0%	▲ 16%
THE BOTANIST	 RÉMY COINTREAU	4.6%	▲ 7.0%
BLUECOAT	 HEAVEN HILL BRANDS	1.0%	▲ 4.1%
CITADELLE	 MAISON FERRAND	1.1%	▲ 2.2%
MONKEY 47	 Pernod Ricard	1.2%	▲ 1.4%
HENDRICK'S	WILLIAM GRANT & SONS <small>INDEPENDENT FAMILY DISTILLERS SINCE 1847</small>	16%	▲ 0.5%

 **Gin in High Volume Independent: Trending Down**
Q1 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
SIPSMITH	SUNTORY	1.5%	▼ 23%
BULLDOG	CAMPARI	1.3%	▼ 20%
MALFY	 Pernod Ricard	1.7%	▼ 15%
TANQUERAY	DIAGEO	9.6%	▼ 4.2%
BEEFEATER	 Pernod Ricard	4.6%	▼ 2.6%
EMPRESS 1908	 MILESTONE	8.9%	▼ 1.8%
ROKU	SUNTORY	4.5%	▼ 1.7%
NOLET'S	 NOLET'S FINEST GINS	2.7%	▼ 1.1%

*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 independent High Volume Independent accounts, appearing on 17.0% of menus with at least one Gin cocktail. Corpse Reviver grew the most, gaining 421.8% Menu Share.



Top Gin Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
NEGRONI	17%	▼ 0.1%
MARTINI	17%	▲ 6.1%
FRENCH 75	9.4%	▲ 11%
GIMLET	6.0%	▼ 1.5%
AVIATION	5.6%	▼ 21%
BEE'S KNEES	5.3%	▲ 3.7%
GIN & TONIC	3.8%	▼ 10%

Trending Gin Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
CORPSE REVIVER	1.4%	▲ 422%
CLOVER CLUB	1.0%	▲ 40%
WHITE NEGRONI	1.2%	▲ 37%
DIRTY MARTINI	1.2%	▲ 24%
FRENCH 75	9.4%	▲ 11%
GIN FIZZ	2.8%	▲ 7.2%
LAST WORD	2.4%	▲ 6.8%

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

INDEPENDENT HIGH VOLUME 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
 Q1 2026

For example: Elijah Craig is the 9th-ranked Whiskey brand on independent High Volume Independent cocktail menus, appearing on 5.8% of cocktail menus that have at least one Whiskey cocktail.







RANK	BRAND	SUPPLIER	MENU SHARE
1	JAMESON	Pernod Ricard	16%
2	BULLEIT	DIAGEO	15%
3	MAKER'S MARK	SUNTORY	13%
4	BUFFALO TRACE	SAZERAC	11%
5	WOODFORD RESERVE	BROWN-FORMAN	9.0%
6 ▼1	JACK DANIEL'S	BROWN-FORMAN	7.6%
7 ▼2	SAZERAC RYE	SAZERAC	6.8%
8 ▲2	OLD FORESTER	BROWN-FORMAN	6.3%

RANK	BRAND	SUPPLIER	MENU SHARE
9 ▼3	ELIJAH CRAIG	HEAVEN HILL BRANDS	5.8%
10	CROWN ROYAL	DIAGEO	5.5%
11	FOUR ROSES	KIRIN	5.4%
12 ▲4	KNOB CREEK	SUNTORY	5.2%
13	JIM BEAM	SUNTORY	4.8%
14 ▼2	ANGEL'S ENVY	BACARDÍ	4.1%
15	SKREWBALL	Pernod Ricard	3.5%
16 ▲2	FIREBALL	SAZERAC	3.4%




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 41 Whiskey brands with at least 1% Menu Share in High Volume Independent.)



 **Whiskey in High Volume Independent: Trending Up**
Q1 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
DEWAR'S	 BACARDÍ	1.4%	▲ 32%
TINCUP	 PROXIMO	1.0%	▲ 22%
JOHNNIE WALKER	DIAGEO	1.8%	▲ 20%
LARCENY	 HEAVEN HILL BRANDS	1.3%	▲ 19%
SAZERAC RYE	SAZERAC	6.8%	▲ 19%
JEFFERSON'S	 Pernod Ricard	2.2%	▲ 17%
WHISTLEPIG	 WHISTLEPIG	3.3%	▲ 10%
ANGEL'S ENVY	 BACARDÍ	4.1%	▲ 9.3%

 **Whiskey in High Volume Independent: Trending Down**
Q1 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
TEMPLETON	INFINIUM SPIRITS	1.1%	▼ 20%
FIREBALL	SAZERAC	3.4%	▼ 19%
OLD OVERHOLT	SUNTORY	1.1%	▼ 18%
RITTENHOUSE	 HEAVEN HILL BRANDS	3.0%	▼ 17%
WOODINVILLE	LVMH	1.1%	▼ 17%
BUSHMILLS	 PROXIMO	1.0%	▼ 15%
SOUTHERN COMFORT	SAZERAC	2.0%	▼ 14%
SAGAMORE	 ILLVA SARONNO	1.0%	▼ 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 independent High Volume Independent accounts, appearing on 51.9% of menus with at least one Whiskey cocktail. Smash grew the most, gaining 20.2% Menu Share.



Top Whiskey Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
OLD FASHIONED	52%	▲ 0.4%
MANHATTAN	27%	▼ 3.2%
IRISH COFFEE	12%	▼ 0.6%
MULE	8.6%	▼ 5.8%
SHOT	6.7%	▼ 22%
WHISKEY SOUR	6.6%	▲ 2.7%
MARTINI	6.6%	▼ 3.7%

Trending Whiskey Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
SMASH	5.5%	▲ 20%
PAPER PLANE	5.1%	▲ 19%
HIGHBALL	1.6%	▲ 14%
VIEUX CARRÉ	1.9%	▲ 12%
GODFATHER	1.1%	▲ 11%
MAPLE OLD-FASHIONED	3.1%	▲ 9.3%
BOURBON SMASH	2.8%	▲ 6.5%

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

INDEPENDENT HIGH VOLUME 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
 Q1 2026

For example: Luxardo is the 9th-ranked Liqueur brand on independent High Volume Independent cocktail menus, appearing on 8.6% of cocktail menus that have at least one Liqueur cocktail.





RANK	BRAND	SUPPLIER	MENU SHARE
1	COINTREAU	 RÉMY COINTREAU	25%
2	KAHLUA	 Pernod Ricard	25%
3	ST. GERMAIN	 BACARDÍ	25%
4	BAILEYS	DIAGEO	22%
5	GRAND MARNIER	CAMPARI	21%
6 ▼1	CHAMBORD	 BROWN-FORMAN	12%
7 ▼1	FRANGELICO	CAMPARI	10%
8 ▼1	LICOR 43	 Zamora company	10%

RANK	BRAND	SUPPLIER	MENU SHARE
9 ▲3	LUXARDO	 HOTALING & CO. IMPORTER-DISTILLER	8.6%
10	CHARTREUSE	 FREDERICK WILDMAN IMPORTER	7.7%
11 ▼1	MR BLACK	DIAGEO	7.1%
12 ▲1	ANCHO REYES	CAMPARI	6.7%
13 ▼16	DE KUYPER	SUNTORY	5.8%
14 ▲1	PAMA	 HEAVEN HILL BRANDS	5.4%
15 ▼19	GIFFARD	 BACK BAR PROJECT	5.4%
16 ▲2	BENEDICTINE	 BACARDÍ	4.9%





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 37 Liqueur brands with at least 1% Menu Share in High Volume Independent.)



 **Liqueur in High Volume Independent: Trending Up**
Q1 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
BORGHETTI	 BRANCA	3.4%	▲ 1301%
GIFFARD		5.4%	▲ 337%
DE KUYPER	SUNTORY	5.8%	▲ 298%
MR BLACK	DIAGEO	7.1%	▲ 11%
LICOR 43		10%	▲ 11%
DISARONNO	 ILVA SARONNO	4.9%	▲ 10%
JAGERMEISTER	Jägermeister	2.4%	▲ 8.4%
CHAREAU	chareau	1.4%	▲ 7.9%

 **Liqueur in High Volume Independent: Trending Down**
Q1 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
LUXARDO	 HOTALING & CO. IMPORTER-DISTILLER	8.6%	▼ 51%
GODIVA	DIAGEO	3.1%	▼ 27%
HEERING	SUNTORY	1.4%	▼ 22%
TUACA	SAZERAC	1.5%	▼ 18%
COMBIER	 CNI BRANDS INDEPENDENT DISTILLERS & PRODUCERS	1.4%	▼ 15%
DOMAINE DE CANTON	 HEAVEN HILL BRANDS	2.0%	▼ 12%
GALLIANO	 LUCAS BOLS	1.3%	▼ 10%
RUM CHATA	GALLO	4.2%	▼ 10%

*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 independent High Volume Independent accounts, appearing on 40.9% of menus with at least one Liqueur cocktail. Energy Bomb Shot grew the most, gaining 17468.0% Menu Share.



Top Liqueur Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MARGARITA	41%	▲ 2.4%
MARTINI	30%	▲ 2.2%
ESPRESSO MARTINI	30%	▲ 13%
COSMOPOLITAN	14%	▲ 0.9%
SANGRIA	9.0%	▼ 4.4%
LEMON DROP MARTINI	7.6%	▲ 276%
SHOT	7.5%	▼ 27%

Trending Liqueur Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
ENERGY BOMB SHOT	1.2%	▲ 17468%
FROZEN DRINKS	2.9%	▲ 827%
CORPSE REVIVER	1.0%	▲ 450%
LEMON DROP MARTINI	7.6%	▲ 276%
HUGO SPRITZ	3.5%	▲ 91%
APPLETINI	1.4%	▲ 54%
LIMONCELLO SPRITZ	1.7%	▲ 43%

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.

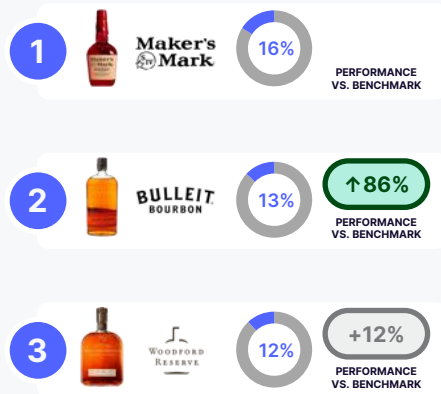
**For example, a 10% would mean that cocktail's Menu Share grew by 10% (e.g., went from 10.0% to 11.0%), not that it gained 10 percentage points.



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

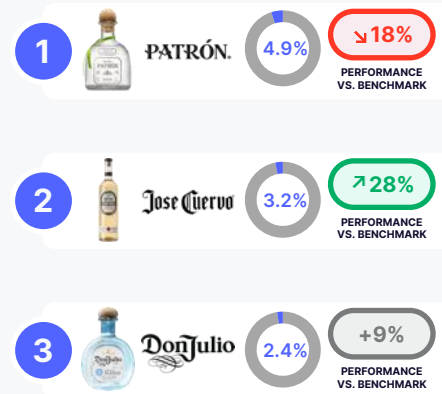
Venue Profile

Example: Top 3 Whiskey Brands in Independent Steak Houses



Cocktails

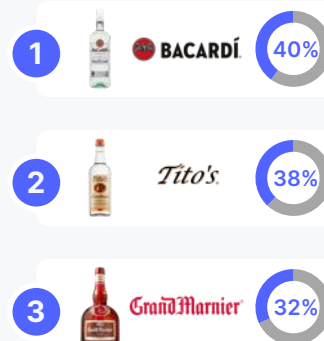
Example: Top 3 Tequila Brands Used in Margaritas Nationwide



Chains vs. Independent Accounts

Example:

Top Brands in Chain Accts



Top Brands in Independent Accts



Ground Signal can also provide insights into:



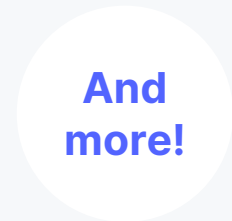
Popular cocktails & their variants
e.g. Tequila Espresso Martini



Flavor Profiles



Pricing



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