

# FROZEN DRINKS INSIGHTS

NATIONAL





### Category Mentions

#### Top Categories

*For example: Consumers are 394% more likely to mention Rum when posting about Frozen Drinks than in their overall on-premise posts.*

Category	Volume	Index vs. Total On-Premise*
RUM	<div style="width: 40%;"></div>	↑ 394%
TEQUILA	<div style="width: 25%;"></div>	-9%
VODKA	<div style="width: 5%;"></div>	↓ 71%
LIQUEUR	<div style="width: 3%;"></div>	↓ 44%
AMERICAN WHISKEY	<div style="width: 2%;"></div>	↓ 83%
WHISKEY	<div style="width: 2%;"></div>	↓ 84%
GIN	<div style="width: 2%;"></div>	↓ 66%

\*Index compared to share of occasion mentions nationally

#### Trending Categories

*For example: Tequila share of Frozen Drinks category mentions increased by 2% nationally over the past two years.*

Category	Index vs. Total On-Premise*	2-Year Growth**
TEQUILA	-9%	▲ 2.2%

\*\*Change in share of mentions from Jan 2023 to Dec 2025

### Occasion Mentions

#### Top Occasions

*For example: Consumers are 523% more likely to mention Happy Hour when posting about Frozen Drinks than in their overall on-premise posts.*

Occasion	Volume	Index vs. Total On-Premise*
HAPPY HOUR	<div style="width: 40%;"></div>	↑ 523%
FRIENDS	<div style="width: 25%;"></div>	↓ 29%
PARTY	<div style="width: 25%;"></div>	↑ 18%
DINNER	<div style="width: 20%;"></div>	↓ 26%
BRUNCH	<div style="width: 15%;"></div>	↑ 43%
TRAVEL	<div style="width: 10%;"></div>	↑ 34%
BIRTHDAY	<div style="width: 10%;"></div>	↓ 64%

\*Index compared to share of occasion mentions nationally

#### Trending Occasions

*For example: Drag Brunch share of Frozen Drinks occasion mentions increased by 61% nationally over the past two years.*

Occasion	Index vs. Total On-Premise*	2-Year Growth**
DRAG BRUNCH	↑ 128%	▲ 61%
SUPER BOWL	↑ 19%	▲ 54%
TAILGATE	↑ 101%	▲ 47%
BACHELOR PARTY	↑ 19%	▲ 42%
HOCKEY	↑ 54%	▲ 29%
TRIVIA	↑ 50%	▲ 28%
PRE-GAME	↑ 101%	▲ 27%

\*\*Change in share of mentions from Jan 2023 to Dec 2025





### Categories in Frozen Drinks



For example: 60% of accounts nationally with a Frozen Drinks feature Tequila flavor; that category's menu share of Frozen Drinks has declined 15% year-over-year. American Whiskey is the fastest-growing, with 473% growth since the prior year.

Category	Cocktail Share	Growth
<b>TEQUILA</b>	60%	↓15%
<b>RUM</b>	15%	↑108%
<b>VODKA</b>	11%	↑170%
<b>WHISKEY</b>	3.8%	↑162%
<b>AMERICAN WHISKEY</b>	1.7%	↑473%
<b>GIN</b>	1.3%	↑46%
<b>MEZCAL</b>	1.0%	↓50%

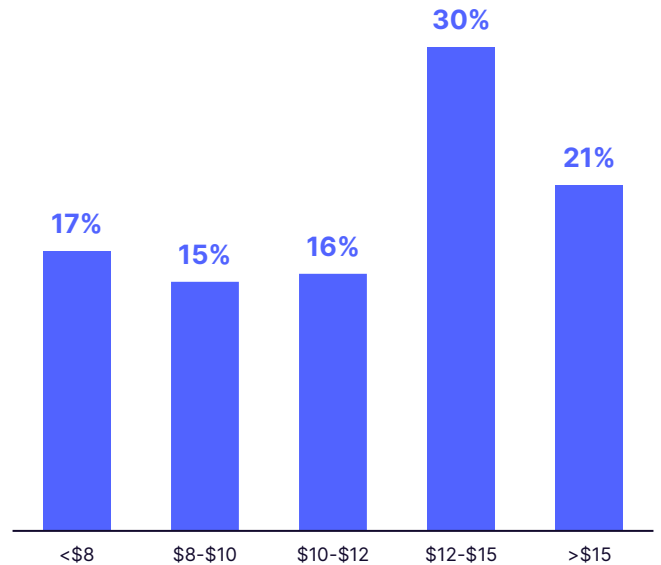
\*Change in share of menu placements from Dec 2024 to Dec 2025

### Cocktail Price Insights



## \$11.55

Average Frozen Drinks price nationally



### Frozen Drinks Flavors

#### Top Frozen Drinks Flavors



Strawberry is the most common flavor in Frozen Drinkss, appearing in 24% of Frozen Drinkss on menu in December 2025.

Flavor	Cocktail Share	YoY Growth*
<b>STRAWBERRY</b>	24%	↑23%
<b>LIME</b>	22%	↑66%
<b>MANGO</b>	17%	↑17%
<b>PEACH</b>	9.4%	↑46%
<b>RASPBERRY</b>	6.5%	↑98%
<b>ORANGE</b>	6.1%	↑65%
<b>PINEAPPLE</b>	5.7%	↑127%

\*Change in share of menu placements from Dec 2024 to Dec 2025

#### Growing Frozen Drinks Flavors



Pear is the fastest-growing flavor in Frozen Drinkss, with 3817% growth since the prior year.

Flavor	Cocktail Share	YoY Growth*
<b>PEAR</b>	1.7%	↑3817%
<b>GINGER</b>	1.2%	↑840%
<b>MINT</b>	1.4%	↑759%
<b>COFFEE</b>	2.1%	↑641%
<b>HIBISCUS</b>	1.0%	↑552%
<b>GRAPEFRUIT</b>	1.1%	↑383%
<b>VANILLA</b>	1.8%	↑363%

\*Change in share of menu placements from Dec 2024 to Dec 2025





### Sales by Category in Top Frozen Drinks Accounts

For example: In top Frozen Drinks accounts, Tequila is the best-selling category, averaging 82.8 9L depletions per account in the R12 period ending December 2025. On average, top Frozen Drinks accounts sell 152% more Tequila than the average account nationally.

CATEGORY	SHARE OF ALL SPIRITS DEPLETIONS (%)	AVERAGE TOTAL ACCOUNT DEPLETIONS (9L/YR)		AVERAGE ACCOUNT DEPLETIONS VS. BENCHMARK	2-YEAR TREND IN AVERAGE ACCOUNT DEPLETIONS
		TOP ACCOUNTS	ALL ACCOUNTS		
TEQUILA	43%	82.8	32.8	↑152%	-9%
LIQUEUR	15%	30.5	14.6	↑109%	-2%
WHISKEY	15%	29.1	29.3	-1%	-8%
VODKA	13%	26.9	23.3	↑16%	—
RUM	11%	22.5	12.9	↑75%	-7%
GIN	2.5%	6.0	5.2	↑16%	-6%
COGNAC	0.7%	4.0	3.1	↑28%	-7%

### Sales by Price Tier in Top Frozen Drinks Accounts

For example: In top Frozen Drinks accounts, Standard is the best-selling price tier overall, averaging 85.8 9L depletions per account in the R12 period ending December 2025. That is 94% more Standard depletions than the average account nationally. Over the past two years, average Standard depletions in top Frozen Drinks accounts have declined by 5%.

PRICE TIER (ALL SPIRITS)	SHARE OF ALL SPIRITS DEPLETIONS (%)	AVERAGE TOTAL ACCOUNT DEPLETIONS (9L/YR)		AVERAGE ACCOUNT DEPLETIONS VS. BENCHMARK	2-YEAR TREND IN AVERAGE ACCOUNT DEPLETIONS
		TOP ACCOUNTS	ALL ACCOUNTS		
LUXURY	0.0%	0.54	0.49	+10%	+7%
PRESTIGE	0.3%	1.2	1.1	+8%	+4%
ULTRA PREMIUM	11%	23.0	13.9	↑66%	↓15%
SUPER PREMIUM	12%	24.8	14.6	↑70%	+2%
PREMIUM	25%	49.2	33.8	↑46%	-9%
STANDARD	44%	85.8	44.3	↑94%	-5%
VALUE	7.0%	25.4	18.7	↑36%	+1%

