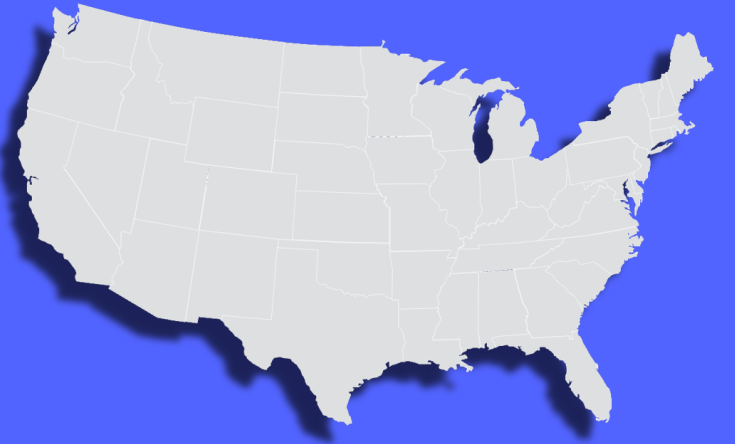


MENU INSIGHTS INDEPENDENT COCKTAIL-FOCUSED DINING

Q1 2026 YOY

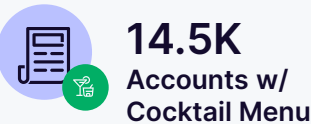
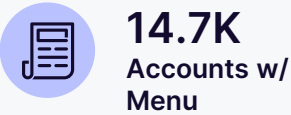
GROUND SIGNAL



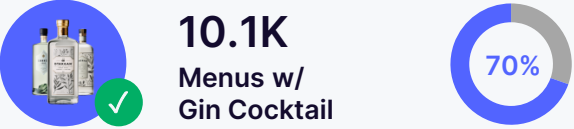
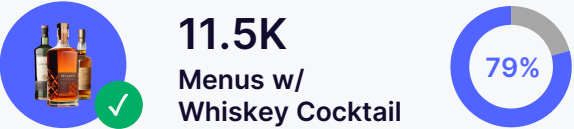
Ground Signal captures online menus at over 120,000 venues nationwide. Using sophisticated AI tools, we extract relevant information and provide it in an easy-to-analyze format.



Independent Accounts Overview



Breakdown by Spirits Category



Most Popular Classic Cocktails

COCKTAIL	MENU SHARE*
MARGARITA	54%
OLD FASHIONED	42%
MARTINI	40%
ESPRESSO MARTINI	36%
MIMOSA	30%
BLOODY MARY	28%
SANGRIA	28%
MULE	26%
MANHATTAN	22%
SPRITZ	21%

*Percentage of cocktail menus that feature this cocktail





VODKA

MENU PERFORMANCE

INDEPENDENT COCKTAIL-FOCUSED DINING

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

RANK	BRAND	SUPPLIER	MENU SHARE
1	TITO'S	 	30%
2	KETEL ONE	DIAGEO	14%
3	GREY GOOSE	 BACARDÍ	13%
4	ABSOLUT	 Pernod Ricard	11%
5	STOLI	 STOLI GROUP	8.3%
6	DEEP EDDY	 HEAVEN HILL BRANDS	5.7%
7 ▲1	WHEATLEY	SAZERAC	4.2%
8 ▼1	SMIRNOFF	DIAGEO	4.0%

For example: Belvedere is the 9th-ranked Vodka brand on independent Cocktail-Focused Dining cocktail menus, appearing on 2.6% of cocktail menus that have at least one Vodka cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
9	BELVEDERE	LVMH	2.6%
10	NEW AMSTERDAM	GALLO	2.5%
11	HAKU	SUNTORY	2.4%
12	VAN GOGH	 CONECUH BRANDS	2.0%
13	THREE OLIVES	 PROXIMO	1.9%
14	SKYY	CAMPARI	1.9%
15	PEARL	luxco	1.7%
16 ▼1	EFFEN	SUNTORY	1.6%

INDEPENDENT COCKTAIL-FOCUSED DINING

TRENDS AMONG VODKA BRANDS

NATIONAL MENU INSIGHTS REPORT

Q1 2026 YOY

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 23 Vodka brands with at least 1% Menu Share in Independent Cocktail-Focused Dining.)



Vodka in Independent Cocktail-Focused Dining: Trending Up

Q1 2026 YOY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
CHOPIN		1.0%	▲ 7.0%
HAKU		2.4%	▲ 6.9%
REYKA		1.0%	▲ 6.1%
HANSONS VODKA		1.2%	▲ 5.1%
SKYY		1.9%	▲ 3.9%
WHEATLEY		4.2%	▲ 2.6%
GREY GOOSE		13%	▲ 1.9%
VAN GOGH		2.0%	▲ 1.5%



Vodka in Independent Cocktail-Focused Dining: Trending Down

Q1 2026 YOY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
BELVEDERE		2.6%	▼ 0.2%
THREE OLIVES		1.9%	▼ 1.8%
NEW AMSTERDAM		2.5%	▼ 2.1%
PEARL		1.7%	▼ 3.1%
KETEL ONE		14%	▼ 3.7%
DEEP EDDY		5.7%	▼ 3.9%
WESTERN SON		1.1%	▼ 4.1%
CÎROC		1.3%	▼ 4.3%

*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 Cocktail-Focused Dining, appearing on 39.2% of menus with at least one Vodka cocktail. Lemon Drop Martini grew the most, gaining 320.0% Menu Share.



Top Vodka Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MARTINI	39%	▲ 3.5%
ESPRESSO MARTINI	38%	▲ 15%
BLOODY MARY	32%	▼ 1.5%
MULE	22%	▼ 0.6%
COSMOPOLITAN	15%	▲ 4.4%
LEMON DROP MARTINI	11%	▲ 320%
MOSCOW MULE	8.0%	▼ 4.7%

Trending Vodka Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
LEMON DROP MARTINI	11%	▲ 320%
FROZEN DRINKS	2.2%	▲ 138%
LONG ISLAND ICED TEA	2.5%	▲ 26%
ESPRESSO MARTINI	38%	▲ 15%
LYCHEE MARTINI	4.2%	▲ 14%
VODKA CRANBERRY	1.1%	▲ 9.3%
FRENCH MARTINI	2.2%	▲ 7.8%

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 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 COCKTAIL-FOCUSED DINING

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

RANK	BRAND	SUPPLIER	MENU SHARE
1	PATRÓN	BACARDÍ	11%
2	DON JULIO	DIAGEO	7.7%
3	CASAMIGOS	DIAGEO	7.3%
4 ▲1	ESPOLÓN	CAMPARI	5.8%
5 ▲1	MILAGRO	WILLIAM GRANT & SONS INDEPENDENT FAMILY DISTILLERS SINCE 1847	5.0%
6 ▼2	HERRADURA	BROWN-FORMAN	4.7%
7 ▲5	CORAZÓN	SAZERAC	4.6%
8 ▼1	HORNITOS	SUNTORY	4.5%

For example: Lunazul is the 9th-ranked Tequila brand on independent Independent Cocktail-Focused Dining cocktail menus, appearing on 4.4% of cocktail menus that have at least one Tequila cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
9 ▼1	LUNAZUL	HEAVEN HILL BRANDS	4.4%
10 ▼1	CAZADORES	BACARDÍ	4.3%
11 ▲2	JOSE CUERVO	PROXIMO	4.3%
12 ▼1	1800	PROXIMO	4.2%
13 ▼3	EL JIMADOR	BROWN-FORMAN	3.5%
14 ▲2	MAESTRO DOBEL	PROXIMO	3.0%
14	OLMECA ALTOS	Pernod Ricard	3.0%
16 ▼1	TANTEO	Tanteo®	2.7%

INDEPENDENT COCKTAIL-FOCUSED DINING

TRENDS AMONG TEQUILA BRANDS

NATIONAL MENU INSIGHTS REPORT

Q1 2026 YOY

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 Tequila brands with at least 1% Menu Share in Independent Cocktail-Focused Dining.)



Tequila in Independent Cocktail-Focused Dining: Trending Up

Q1 2026 YOY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
LALO	 	2.6%	▲ 33%
CODIGO 1530		2.1%	▲ 31%
DON FULANO		1.2%	▲ 30%
GRAN CENTENARIO		1.1%	▲ 27%
ASTRAL		1.2%	▲ 18%
CORAZÓN		4.6%	▲ 13%
PATRÓN		11%	▲ 12%
MI CAMPO		2.1%	▲ 9.3%

Tequila in Independent Cocktail-Focused Dining: Trending Down

Q1 2026 YOY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
PUEBLO VIEJO		1.4%	▼ 0.5%
GHOST		2.4%	▼ 0.6%
CASAMIGOS		7.3%	▼ 1.5%
CAMARENA		1.1%	▼ 1.7%
EL TESORO		1.2%	▼ 2.5%
DON JULIO		7.7%	▼ 2.7%
LUNAZUL		4.4%	▼ 4.3%
DULCE VIDA		1.5%	▼ 4.7%

*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 COCKTAIL-FOCUSED DINING, appearing on 62.8% of menus with at least one Tequila cocktail. Frozen Drinks grew the most, gaining 557.9% Menu Share.



Top Tequila Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MARGARITA	63%	▲ 1.5%
PALOMA	22%	▲ 1.2%
SPICY MARGARITA	9.5%	▲ 14%
FROZEN MARGARITA	4.9%	▲ 5.5%
CLASSIC MARGARITA	4.7%	▲ 5.2%
SKINNY MARGARITA	4.3%	▲ 3.0%
RANCH WATER	4.2%	▲ 19%

Trending Tequila Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
FROZEN DRINKS	3.6%	▲ 558%
CARAJILLO	1.2%	▲ 54%
MEXICAN MARTINI	1.0%	▲ 25%
BLOODY MARY	3.4%	▲ 23%
ESPRESSO MARTINI	2.6%	▲ 21%
FRUIT-FLAVORED MARGARITA	2.5%	▲ 19%
RANCH WATER	4.2%	▲ 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.





WHISKEY

MENU PERFORMANCE

INDEPENDENT COCKTAIL-FOCUSED DINING

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

RANK	BRAND	SUPPLIER	MENU SHARE
1	BULLEIT	DIAGEO	12%
2	MAKER'S MARK	SUNTORY	11%
3	JAMESON	 Pernod Ricard	11%
4	BUFFALO TRACE	SAZERAC	9.0%
5	WOODFORD RESERVE	 BROWN-FORMAN	8.1%
6	FOUR ROSES	 KIRIN	6.5%
7 ▲1	SAZERAC RYE	SAZERAC	6.3%
8 ▼1	OLD FORESTER	 BROWN-FORMAN	5.8%

For example: Elijah Craig is the 9th-ranked Whiskey brand on independent Independent Cocktail-Focused Dining cocktail menus, appearing on 5.2% of cocktail menus that have at least one Whiskey cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
9	ELIJAH CRAIG	 HEAVEN HILL BRANDS	5.2%
10 ▲2	JACK DANIEL'S	 BROWN-FORMAN	4.2%
11 ▼1	KNOB CREEK	SUNTORY	4.1%
12 ▼1	RITTENHOUSE	 HEAVEN HILL BRANDS	3.6%
13 ▲4	JIM BEAM	SUNTORY	3.2%
14	ANGEL'S ENVY	 BACARDÍ	3.2%
15	HIGH WEST	 Constellation Brands	3.0%
16 ▼3	REDEMPTION	 DEUTSCH FAMILY VINE & SPIRITS	3.0%

INDEPENDENT COCKTAIL-FOCUSED DINING

TRENDS AMONG WHISKEY BRANDS

NATIONAL MENU INSIGHTS REPORT

Q1 2026 YOY

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 36 Whiskey brands with at least 1% Menu Share in Independent Cocktail-Focused Dining.)



Whiskey in Independent Cocktail-Focused Dining: Trending Up

Q1 2026 YOY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
JOHNNIE WALKER	DIAGEO	1.4%	▲ 27%
1792	SAZERAC	1.0%	▲ 24%
SAZERAC RYE	SAZERAC	6.3%	▲ 23%
BRECKENRIDGE	Breckenridge Distillery	1.0%	▲ 20%
DEWAR'S	BACARDÍ	1.2%	▲ 19%
JEFFERSON'S	Pernod Ricard	1.4%	▲ 13%
JIM BEAM	SUNTORY	3.2%	▲ 11%
MICHTER'S	CHATHAM IMPORTS, INC.	2.7%	▲ 11%

Whiskey in Independent Cocktail-Focused Dining: Trending Down

Q1 2026 YOY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
WOODFORD RESERVE	BROWN-FORMAN	8.1%	▼ 1.9%
MAKER'S MARK	SUNTORY	11%	▼ 2.0%
REDEMPTION	DEUTSCH FAMILY WINE & SPIRITS	3.0%	▼ 3.0%
OLD FORESTER	BROWN-FORMAN	5.8%	▼ 4.3%
BULLEIT	DIAGEO	12%	▼ 5.3%
JAMESON	Pernod Ricard	11%	▼ 5.4%
KNOB CREEK	SUNTORY	4.1%	▼ 6.7%
WILD TURKEY	CAMPARI	1.7%	▼ 10%

*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 COCKTAIL-FOCUSED DINING, appearing on 49.4% of menus with at least one Whiskey cocktail. Highball grew the most, gaining 25.8% Menu Share.



Top Whiskey Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
OLD FASHIONED	49%	▲ 3.4%
MANHATTAN	27%	▲ 2.9%
IRISH COFFEE	9.8%	▲ 1.8%
MULE	6.1%	▼ 2.5%
WHISKEY SOUR	5.4%	▲ 5.0%
PAPER PLANE	5.3%	▲ 14%
MARTINI	4.9%	▲ 1.8%

Trending Whiskey Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
HIGHBALL	1.7%	▲ 26%
SMASH	4.8%	▲ 16%
PAPER PLANE	5.3%	▲ 14%
MAPLE OLD-FASHIONED	2.7%	▲ 12%
MARGARITA	1.5%	▲ 11%
MINT JULEP	1.0%	▲ 7.3%
VIEUX CARRÉ	1.7%	▲ 5.1%

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.





RUM

MENU PERFORMANCE

INDEPENDENT COCKTAIL-FOCUSED DINING

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

RANK	BRAND	SUPPLIER	MENU SHARE
1	BACARDÍ	 BACARDÍ	19%
2	MALIBU	 Pernod Ricard	9.9%
3	CAPTAIN MORGAN	DIAGEO	7.3%
4	GOSLING'S	 Pernod Ricard	5.6%
5	PLANTERAY	 MAISON FERRAND PRODUCTION INDEPENDANT DE SPIRITUEUX ARTISANALS	5.2%
6	CRUZAN	SUNTORY	4.3%
7	MYERS'S	SAZERAC	4.1%
8	DON Q	 SERRAVALLO'S	3.8%

For example: Flor de Caña is the 9th-ranked Rum brand on independent Independent Cocktail-Focused Dining cocktail menus, appearing on 2.8% of cocktail menus that have at least one Rum cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
9 ▲1	FLOR DE CAÑA	 LUXURY SPIRITS INTERNATIONAL	2.8%
10 ▼1	DIPLOMÁTICO	 BROWN-FORMAN	2.3%
11 ▲1	ZACAPA	DIAGEO	2.1%
12 ▼1	APPLETON	CAMPARI	2.0%
13	CLEMENT	 SPIRIBAM FINE SPIRITS FAMILY	1.8%
14	BUMBU	SOVEREIGN BRANDS	1.6%
15 ▲3	MOUNT GAY	 RÉMY COINTREAU	1.5%
16	PUSSER'S	 SHAW-ROSS	1.4%

INDEPENDENT COCKTAIL-FOCUSED DINING
TRENDS AMONG RUM BRANDS

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 21 Rum brands with at least 1% Menu Share in Independent Cocktail-Focused Dining.)



 Rum in Independent Cocktail-Focused Dining: Trending Up
Q1 2026 YOY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
FLOR DE CAÑA	 LUXURY SPIRITS INTERNATIONAL	2.8%	▲ 26%
BUMBU	 SOVEREIGN BRANDS	1.6%	▲ 18%
MOUNT GAY	 RÉMY COINTREAU	1.5%	▲ 17%
PUSSER'S	 SHAW-ROSS	1.4%	▲ 6.5%
THE KRAKEN	 PROXIMO	1.4%	▲ 4.9%
BRUGAL	 EDRINGTON	1.3%	▲ 4.9%
ZACAPA	 DIAGEO	2.1%	▲ 4.2%
DON Q	 SERRAVALLO	3.8%	▲ 3.8%

 Rum in Independent Cocktail-Focused Dining: Trending Down
Q1 2026 YOY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
BACARDÍ	 BACARDÍ	19%	▼ 0.2%
MALIBU	 Pernod Ricard	9.9%	▼ 0.8%
MYERS'S	 SAZERAC	4.1%	▼ 1.6%
DIPLOMÁTICO	 BROWN-FORMAN	2.3%	▼ 3.0%
SAILOR JERRY	 WILLIAM GRANT & SONS INDEPENDENT FAMILY DISTILLERS SINCE 1867	1.3%	▼ 3.5%
CRUZAN	 SUNTORY	4.3%	▼ 4.0%
GOSLING'S	 Pernod Ricard	5.6%	▼ 6.2%
APPLETON	 CAMPARI	2.0%	▼ 7.7%

*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 Cocktail-Focused Dining, appearing on 26.8% of menus with at least one Rum cocktail. Frozen Drinks grew the most, gaining 199.7% Menu Share.



Top Rum Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MOJITO	27%	▼ 1.5%
PIÑA COLADA	10%	▲ 30%
MAI TAI	9.8%	▲ 3.0%
DAIQUIRI	8.9%	▲ 0.6%
MARTINI	6.8%	▼ 1.5%
RUM PUNCH	5.3%	▲ 12%
CAIPIRINHA	3.9%	▼ 1.4%

Trending Rum Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
FROZEN DRINKS	2.3%	▲ 200%
PIÑA COLADA	10%	▲ 30%
BLUE HAWAIIAN	1.1%	▲ 27%
GRASSHOPPER	1.2%	▲ 23%
RUM OLD-FASHIONED	1.1%	▲ 21%
SPRITZ	1.0%	▲ 13%
RUM PUNCH	5.3%	▲ 12%

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 COCKTAIL-FOCUSED DINING

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

RANK	BRAND	SUPPLIER	MENU SHARE
1	HENDRICK'S	WILLIAM GRANT & SONS INDEPENDENT FAMILY DISTILLERS SINCE 1867	13%
2	BOMBAY	BACARDÍ	8.2%
3	EMPRESS 1908		8.1%
4	TANQUERAY	DIAGEO	6.7%
5	ROKU	SUNTORY	4.3%
6 ▲2	THE BOTANIST	RÉMY COINTREAU	4.2%
7 ▼1	FORDS GIN	BROWN-FORMAN	4.1%
8 ▼1	BEEFEATER	Pernod Ricard	4.0%

For example: Aviation is the 9th-ranked Gin brand on independent Independent Cocktail-Focused Dining cocktail menus, appearing on 2.7% of cocktail menus that have at least one Gin cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
9 ▲2	AVIATION	DIAGEO	2.7%
10 ▼1	GRAY WHALE	DEUTSCH FAMILY VINE & SPIRITS	2.6%
11 ▲1	NOLET'S	NOLET'S FINEST GINS	1.8%
12 ▼2	MALFY	Pernod Ricard	1.8%
13	SIPSMITH	SUNTORY	1.3%
14	CITADELLE	MAISON FERRAND PRODUCTION INDEPENDANT DE SPIRITUEUX DESTILLÉS	1.2%
15	MONKEY 47	Pernod Ricard	1.1%
16	BULLDOG	CAMPARI	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 17 Gin brands with at least 1% Menu Share in Independent Cocktail-Focused Dining.)



 Gin in Independent Cocktail-Focused Dining: Trending Up
Q1 2026 YOY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
AVIATION	DIAGEO	2.7%	▲ 46%
GRAY WHALE	DEUTSCH FAMILY WINE & SPIRITS	2.6%	▲ 18%
BLUECOAT	HEAVEN HILL BRANDS	1.0%	▲ 15%
THE BOTANIST	RÉMY COINTREAU	4.2%	▲ 11%
CITADELLE	MAISON FERRAND	1.2%	▲ 7.9%
HENDRICK'S	WILLIAM GRANT & SONS INDEPENDENT FAMILY DISTILLERS SINCE 1907	13%	▲ 4.3%
MONKEY 47	Pernod Ricard	1.1%	▲ 1.7%
NOLET'S	NOLET'S FINEST GINS	1.8%	▲ 1.2%

 Gin in Independent Cocktail-Focused Dining: Trending Down
Q1 2026 YOY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
FORDS GIN	BROWN-FORMAN	4.1%	▼ 2.1%
BULLDOG	CAMPARI	1.0%	▼ 2.1%
EMPRESS 1908	MILESTONE	8.1%	▼ 3.5%
BOMBAY	BACARDÍ	8.2%	▼ 4.2%
TANQUERAY	DIAGEO	6.7%	▼ 6.4%
ROKU	SUNTORY	4.3%	▼ 8.5%
MALFY	Pernod Ricard	1.8%	▼ 11%
SIPSMITH	SUNTORY	1.3%	▼ 20%

*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 COCKTAIL-FOCUSED DINING, appearing on 20.3% of menus with at least one Gin cocktail. Corpse Reviver grew the most, gaining 561.6% Menu Share.



Top Gin Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
NEGRONI	20%	▲ 3.3%
MARTINI	18%	▲ 7.6%
FRENCH 75	8.7%	▲ 7.0%
GIMLET	6.5%	▼ 1.5%
GIN & TONIC	4.7%	▼ 9.7%
BEE'S KNEES	4.7%	▲ 1.9%
AVIATION	4.6%	▼ 17%

Trending Gin Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
CORPSE REVIVER	1.3%	▲ 562%
WHITE NEGRONI	1.3%	▲ 25%
MARGARITA	1.0%	▲ 18%
DIRTY MARTINI	1.1%	▲ 18%
SPRITZ	4.3%	▲ 11%
SMASH	1.3%	▲ 7.8%
MARTINI	18%	▲ 7.6%

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.





LIQUEUR

MENU PERFORMANCE

INDEPENDENT COCKTAIL-FOCUSED DINING

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

RANK	BRAND	SUPPLIER	MENU SHARE
1	ST. GERMAIN	 BACARDÍ	26%
2 	KAHLUA	 Pernod Ricard	24%
3 	COINTREAU	 RÉMY COINTREAU	24%
4	GRAND MARNIER	CAMPARI	18%
5	BAILEYS	DIAGEO	18%
6 	LICOR 43	 Zamora company	12%
7	FRANGELICO	CAMPARI	10.0%
8 	LUXARDO	 HOTALING & CO. IMPORTER-DISTILLER	9.2%

For example: Chambord is the 9th-ranked Liqueur brand on independent Cocktail-Focused Dining cocktail menus, appearing on 8.9% of cocktail menus that have at least one Liqueur cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
9	CHAMBORD	 BROWN-FORMAN	8.9%
10	CHARTREUSE	 FREDERICK WILDMAN IMPORTERS CHARTREUSE AND HUNTER, LTD. NEW YORK, N.Y.	8.6%
11	ANCHO REYES	CAMPARI	7.6%
12	GIFFARD	 BACK BAR PROJECT	5.6%
13 	MR BLACK	DIAGEO	5.2%
14 	BENEDICTINE	 BACARDÍ	5.1%
15 	PAMA	 HEAVEN HILL BRANDS	5.0%
16	DISARONNO	 ILLVA SARONNO	4.6%

INDEPENDENT COCKTAIL-FOCUSED DINING

TRENDS AMONG LIQUEUR BRANDS

NATIONAL MENU INSIGHTS REPORT

Q1 2026 YOY

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 35 Liqueur brands with at least 1% Menu Share in Independent Cocktail-Focused Dining.)



Liqueur in Independent Cocktail-Focused Dining: Trending Up

Q1 2026 YOY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
BORGHETTI		3.0%	▲ 602%
DE KUYPER		2.5%	▲ 275%
LICOR 43		12%	▲ 21%
DISARONNO		4.6%	▲ 15%
MR BLACK		5.2%	▲ 12%
KAHLUA		24%	▲ 4.5%
GIFFARD		5.6%	▲ 3.1%
STREGA		2.0%	▲ 2.9%

Liqueur in Independent Cocktail-Focused Dining: Trending Down

Q1 2026 YOY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
ANCHO REYES		7.6%	▼ 0.1%
MOZART		1.2%	▼ 0.5%
RUM CHATA		3.1%	▼ 2.0%
FRANGELICO		10.0%	▼ 2.7%
CHAREAU		1.3%	▼ 2.9%
COINTREAU		24%	▼ 3.7%
PAMA		5.0%	▼ 4.2%
BAILEYS		18%	▼ 4.2%

*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 Cocktail-Focused Dining, appearing on 37.6% of menus with at least one Liqueur cocktail. Corpse Reviver grew the most, gaining 638.1% Menu Share.



Top Liqueur Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MARGARITA	38%	▲ 0.2%
ESPRESSO MARTINI	30%	▲ 14%
MARTINI	26%	▼ 0.1%
COSMOPOLITAN	11%	▲ 4.0%
SANGRIA	9.7%	▼ 3.7%
SPRITZ	7.8%	▲ 26%
OLD FASHIONED	7.1%	▼ 32%

Trending Liqueur Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
CORPSE REVIVER	1.1%	▲ 638%
FROZEN DRINKS	2.8%	▲ 367%
LEMON DROP MARTINI	5.4%	▲ 354%
HUGO SPRITZ	3.9%	▲ 96%
LIMONCELLO SPRITZ	2.2%	▲ 45%
CARAJILLO	6.6%	▲ 44%
PIÑA COLADA	1.1%	▲ 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 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:

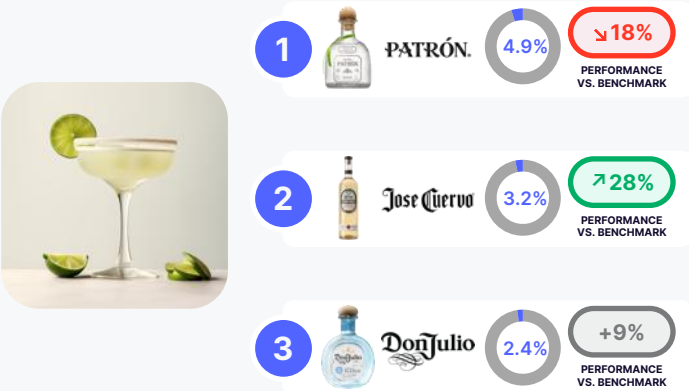
Venue Profile

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