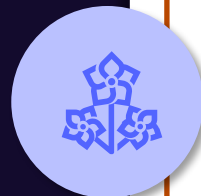


AUGUST DEEP DIVE

Independent Account
Cocktail Menus
Q2 2026 Update



GROUND SIGNAL



HOUSE COCKTAILS

Green Ghoul • \$ 17
tequila, mezcal, poblano, cucumber, lime, salt

Wolf Whistle • \$ 18
tequila, espresso, cinnamon, coffee liqueurs

Cat Five • \$ 16
mezcal, strawberry campari, sweet vermouth and dry vermouths,
passion fruit

Circus Permit • \$ 17
tequila, watermelon, elderflower, madeira, lime, chili

Guava Cosmopolitan • \$ 16
house citrus vodka, orange liqueur, guava, cranberry, lime

Sun Spot • \$ 17
agricole rum, coconut water, pineapple, lemongrass, currant, lime,
mint

Jailbreak • \$ 18
bourbon, coffee-infused rum, japanese whisky, demarera, bitters

Living Dead • \$ 17
clairin, absinthe, passion fruit, ginger, hard spices, lime, tabasco

MARTINI

our way or as you like it

GIN

hayman's
bombay sapphire +1
Ford's +2
hendricks +3
old raj 110° +3

16 / 24

single / double
dry, 50/50, or dirty (or filthy)
twist, olive, or onion
house blue cheese olives +2
for the experienced martini drinker:
perfect (sweet & dry vermouth)
improved (puritan, obituary, fino, etc)

VODKA

wodka
tito's +1
grey goose +2
ketel 1 +2
chopin +3
belvedere +3



INTRODUCTION



Our Q2 Cocktail Menu Review covers how cocktails are built, across 81K+ independent on-premise accounts nationwide, where the category is heading, and where brands can win. Specifically, we cover:

The category landscape

Menu share, cocktail share, and pricing across all nine spirit categories

Cocktail & flavor trends

The classics anchoring menus today, and the drinks and flavors climbing fastest

Brand performance, category by category

Vodka, Tequila, Rum, Gin, Whiskey, and Liqueur: who leads, who's ranked where, and which challengers are gaining

Momentum from two angles

Each category tracked both quarter-over-quarter and year-over-year, so you can separate seasonal swings from durable trends





COCKTAIL MENU SUMMARY

NATIONAL INDEPENDENT ACCOUNTS

Shares Soften as Prices Climb

Vodka, tequila, and liqueur remain the backbone of the cocktail menu, but menu share is easing across nearly every category — even as the average cocktail climbs to \$13.09.

Where the share sits

Vodka leads menu presence (76%), while liqueur leads cocktail share (29%) — but both are softening year-over-year.

The exceptions

Whiskey is the only major category gaining cocktail share (▲1.3%), and non-alcoholic spirits — still small at 2% — are the fastest-growing category on the menu.



CATEGORY OVERVIEW



266K
On-Premise
Accounts



81.0K
Accounts w/
Cocktail Menu



1.2M
Total # of
Cocktails



\$13.09
Average
Cocktail Price

CATEGORY	COCKTAIL MENUS	COCKTAIL MENU SHARE (Share Change)	NUMBER OF COCKTAILS	COCKTAIL SHARE (Share Change)	COCKTAIL PRICE AVG (Price Change)
VODKA	59.6K	76% ▼ 4.6%	295K	25% ▼ 1.6%	\$12.78 ▲ 4.1%
TEQUILA	56.8K	73% ▼ 4.3%	264K	23% ▼ 0.9%	\$13.44 ▲ 3.1
LIQUEUR	54.9K	70% ▼ 5.5%	335K	29% ▼ 1.4%	\$13.74 ▲ 3.8%
WHISKEY	50.3K	64% ▼ 3.4%	177K	15% ▲ 1.3%	\$13.90 ▲ 3.7%
RUM	46.6K	60% ▼ 5.7%	151K	13% ▼ 7.1%	\$12.90 ▲ 3.2%
GIN	40.5K	52% ▼ 4.4%	103K	8.9% ▼ 1.1%	\$14.24 ▲ 2.9%
AMARO / APERITIF / VERMOUTH	34.3K	43% ▼ 2.1%	100K	8.7% ▲ 1.2%	\$14.93 ▲ 2.1%
BRANDY / COGNAC	15.4K	20% ▼ 9.3%	26K	2.3% ▼ 8.0%	\$14.57 ▲ 4.3%
NON-ALCOHOLIC SPIRITS	1.6K	2% ▲ 53.9%	2.3K	0.2% ▲ 53.9%	\$13.54 ▲ \$0.8%



The Classics Are Fragmenting

The classics still dominate National menus, but the growth is coming from their modern, flavored, and shareable reinterpretations.

Most popular

Margarita (50%), Old Fashioned (32%), and Martini (29%) top the menu — yet most standards are losing share year-over-year.

Trending

Flavored and spritz-style serves are surging — Lemon Drop Martini (▲252%), Hugo Spritz (▲121%), and Appletini (▲100%) — with the Espresso Martini a top cocktail that is also gaining share (▲12.2%).

Most Popular Standard Cocktails

COCKTAIL	MENU SHARE	MENU SHARE YoY
 MARGARITA	50%	▼ 4.8%
 OLD FASHIONED	32%	▼ 1.5%
 MARTINI	29%	▼ 7.1%
 ESPRESSO MARTINI	25%	▲ 12.2%
 BLOODY MARY	24%	▼ 5.3%
 MIMOSA	23%	▼ 4.5%
 MULE	22%	▼ 3.1%
 SANGRIA	20%	▼ 15.6%
 MOJITO	18%	▼ 7.7%
 PALOMA	17%	-

Trending Standard Cocktails

COCKTAIL	MENU SHARE YoY	MENU SHARE
 LEMON DROP MARTINI	▲ 252%	11%
 HUGO SPRITZ	▲ 121%	4%
 APPLETONI	▲ 100%	3%
 FRUIT-FLAVORED MARGARITA	▲ 50%	3%
 LONG ISLAND ICED TEA	▲ 46%	8%
 CARAJILLO	▲ 31%	3%
 AMERICANO	▲ 19%	3%
 SPICY MARGARITA	▲ 16%	7%
 MICHELADA	▲ 14%	8%
 LYCHEE MARTINI	▲ 13%	3%



Palates Broaden Beyond Citrus

Familiar flavors still anchor the menu but are broadly softening, while more adventurous profiles gain ground.

Most popular

Lime (22%), lemon (14%), and orange (13%) remain the most common flavors — and all are declining.

Trending

Coffee is the standout, both a top-five flavor and still growing (▲10.3%), alongside earlier-stage risers like yuzu, lychee, tropical, and elderflower.

Most Popular Cocktail Flavors

FLAVOR / INGREDIENT	COCKTAIL SHARE	COCKTAIL SHARE YOY
 LIME	22%	▼ 2.2%
 LEMON	14%	▼ 2.1%
 ORANGE	13%	▼ 3.8%
 PINEAPPLE	8.8%	▼ 3.3%
 COFFEE	6.4%	▲ 10.3%
 GINGER	5.5%	▼ 5.2%
 STRAWBERRY	4.7%	▼ 4.1%
 PEACH	4.4%	▼ 6.5%
 SPICY	4.3%	-
 MINT	4.1%	▼ 2.4%

Trending Cocktail Flavors

FLAVOR / INGREDIENT	COCKTAIL SHARE YOY	COCKTAIL SHARE
 YUZU	▲ 12%	0.6%
 COFFEE	▲ 10%	6.4%
 LYCHEE	▲ 8.0%	0.8%
 TROPICAL	▲ 7.7%	1.4%
 CARAMEL	▲ 7.4%	0.6%
 VANILLA	▲ 6.7%	3.2%
 CITRUS	▲ 5.0%	2.1%
 ELDERFLOWER	▲ 3.7%	2.8%
 MAPLE	▲ 1.4%	0.7%
 GUAVA	▲ 1.3%	0.8%



VODKA

MENU PERFORMANCE

NATIONAL INDEPENDENT ACCOUNTS



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
Q2 26

RANK	BRAND	SUPPLIER	MENU SHARE
1	TITO'S		28%
2	KETEL ONE	DIAGEO	12%
3	ABSOLUT		11%
4	GREY GOOSE		11%
5	STOLI		7.3%
6	DEEP EDDY		6.4%
7	SMIRNOFF	DIAGEO	4.8%
8	WHEATLEY	SAZERAC	3.1%

For example: New Amsterdam is the 9th-ranked Vodka brand on independent National cocktail menus, appearing on 2.3% of cocktail menus that have at least one Vodka cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
9	NEW AMSTERDAM	GALLO	2.3%
10	BELVEDERE	LVMH	2.0%
11	SKYY	CAMPARI	2.0%
12	THREE OLIVES		1.9%
13	HAKU	SUNTORY	1.7%
14	CÎROC	DIAGEO	1.5%
15	VAN GOGH		1.5%
16	PEARL	luxco	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% Menu Share in National.)



 Vodka in National: Trending Up
Q2 2026 QoQ

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
HAKU	SUNTORY	1.7%	▲ 9.8%
BELVEDERE	LVMH	2.0%	▲ 7.8%
NEW AMSTERDAM	GALLO	2.3%	▲ 5.8%
SKYY	CAMPARI	2.0%	▲ 5.7%
KETEL ONE	DIAGEO	12%	▲ 4.6%
PEARL	luxco	1.4%	▲ 4.0%
WHEATLEY	SAZERAC	3.1%	▲ 3.6%
WESTERN SON	SAZERAC	1.1%	▲ 3.4%

 Vodka in National: Trending Down
Q2 2026 QoQ

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
STOLI	 STOLI GROUP	7.3%	▼ 0.5%
VAN GOGH	 CONE CUH BRANDS	1.5%	▼ 1.0%
CÎROC	DIAGEO	1.5%	▼ 1.7%
EFFEN	SUNTORY	1.3%	▼ 1.7%
SMIRNOFF	DIAGEO	4.8%	▼ 2.9%
THREE OLIVES	 PROXIMO	1.9%	▼ 3.6%
PINNACLE	SUNTORY	1.2%	▼ 6.3%

Martini is the most popular Vodka cocktail in independent National accounts, appearing on 32% of menus with at least one Vodka cocktail. Vesper Martini grew the most, gaining 452%.



Top Vodka Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MARTINI	32%	▼ 7.2%
BLOODY MARY	32%	▼ 0.2%
ESPRESSO MARTINI	31%	▲ 4.8%
MULE	21%	▼ 1.0%
COSMOPOLITAN	17%	▲ 7.9%
LEMON DROP MARTINI	14%	▲ 4.2%
MOSCOW MULE	11%	▲ 0.2%

Trending Vodka Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
VESPER MARTINI	1.7%	▲ 452%
APPLETINI	3.0%	▲ 89%
FROZEN DRINKS	3.3%	▲ 78%
LONG ISLAND ICED TEA	9.6%	▲ 33%
TRANSFUSION	1.6%	▲ 21%
SPRITZ	4.0%	▲ 16%
MARGARITA	2.2%	▲ 9.8%

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

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% Menu Share in National.)



 Vodka in National: Trending Up
Q2 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
BELVEDERE	LVMH	2.0%	▲ 16%
HAKU	SUNTORY	1.7%	▲ 16%
WHEATLEY	SAZERAC	3.1%	▲ 8.9%
GREY GOOSE	BACARDÍ	11%	▲ 8.3%
PEARL	luxco	1.4%	▲ 8.1%
SKYY	CAMPARI	2.0%	▲ 5.9%
SVEDKA	SAZERAC	1.0%	▲ 3.5%
NEW AMSTERDAM	GALLO	2.3%	▲ 3.2%

 Vodka in National: Trending Down
Q2 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
WESTERN SON	SAZERAC	1.1%	▼ 0.9%
DEEP EDDY	HEAVEN HILL BRANDS	6.4%	▼ 1.4%
THREE OLIVES	PROXIMO	1.9%	▼ 2.9%
SMIRNOFF	DIAGEO	4.8%	▼ 5.9%
ABSOLUT	Pernod Ricard	11%	▼ 8.4%
STOLI	STOLI GROUP	7.3%	▼ 8.6%
EFFEN	SUNTORY	1.3%	▼ 11%
PINNACLE	SUNTORY	1.2%	▼ 12%

*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 National accounts, appearing on 32% of menus with at least one Vodka cocktail. Vesper Martini grew the most, gaining 440%.



Top Vodka Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MARTINI	32%	▼ 3.5%
BLOODY MARY	32%	▼ 0.6%
ESPRESSO MARTINI	31%	▲ 19%
MULE	21%	▲ 2.1%
COSMOPOLITAN	17%	▲ 11%
LEMON DROP MARTINI	14%	▲ 261%
MOSCOW MULE	11%	▼ 1.6%

Trending Vodka Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
VESPER MARTINI	1.7%	▲ 440%
LEMON DROP MARTINI	14%	▲ 261%
FROZEN DRINKS	3.3%	▲ 129%
APPLETINI	3.0%	▲ 93%
LONG ISLAND ICED TEA	9.6%	▲ 52%
TRANSFUSION	1.6%	▲ 35%
ESPRESSO MARTINI	31%	▲ 19%

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



TEQUILA

MENU PERFORMANCE

NATIONAL INDEPENDENT ACCOUNTS



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
Q2 26

RANK	BRAND	SUPPLIER	MENU SHARE
1	PATRÓN	BACARDÍ	12%
2	DON JULIO	DIAGEO	7.9%
3	CASAMIGOS	DIAGEO	7.0%
4	JOSE CUERVO	PROXIMO	6.3%
5	1800	PROXIMO	5.6%
6 ▲1	ESPOLÓN	CAMPARI	5.4%
7 ▼1	HORNITOS	SUNTORY	4.8%
8 ▲1	MILAGRO	WILLIAM GRANT & SONS INDEPENDENT FAMILY DISTILLERS SINCE 1847	4.1%

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
9 ▼1	HERRADURA	BROWN-FORMAN	4.0%
10	CAZADORES	BACARDÍ	3.8%
11	EL JIMADOR	BROWN-FORMAN	3.4%
12 ▲2	CORAZÓN	SAZERAC	3.4%
13	LUNAZUL	HEAVEN HILL BRANDS	3.3%
14 ▼2	SAUZA	SUNTORY	3.2%
15	OLMECA ALTOS	Pernod Ricard	2.2%
16	TANTEO	Tanteo®	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 26 Tequila brands with at least 1% Menu Share in National.)



 Tequila in National: Trending Up
Q2 2026 QoQ

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
LALO	 	2.1%	▲ 14%
ASTRAL		1.0%	▲ 9.0%
CODIGO 1530		1.5%	▲ 9.0%
TEREMANA	 	2.0%	▲ 8.4%
TRES AGAVES		1.1%	▲ 6.4%
CASAMIGOS		7.0%	▲ 5.8%
ESPOLÒN		5.4%	▲ 5.5%
LUNAZUL		3.3%	▲ 4.5%

 Tequila in National: Trending Down
Q2 2026 QoQ

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
CAZADORES		3.8%	▼ 0.1%
HERRADURA		4.0%	▼ 0.3%
PATRÓN		12%	▼ 0.6%
HORNITOS		4.8%	▼ 0.6%
OLMECA ALTOS		2.2%	▼ 1.6%
GHOST		1.8%	▼ 2.5%

Margarita is the most popular Tequila cocktail in independent National accounts, appearing on 67% of menus with at least one Tequila cocktail. Frozen Drinks grew the most, gaining 116%.



Top Tequila Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MARGARITA	67%	▼ 1.3%
PALOMA	22%	▲ 4.5%
SPICY MARGARITA	9.1%	▲ 5.8%
FROZEN DRINKS	7.6%	▲ 116%
TEQUILA SUNRISE	6.2%	▼ 2.0%
FROZEN MARGARITA	5.2%	▼ 3.4%
SKINNY MARGARITA	5.2%	—

Trending Tequila Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
FROZEN DRINKS	7.6%	▲ 116%
LONG ISLAND ICED TEA	3.9%	▲ 104%
FRUIT-FLAVORED MARGARITA	4.0%	▲ 46%
ESPRESSO MARTINI	2.0%	▲ 17%
SPRITZ	1.1%	▲ 13%
SPICY MARGARITA	9.1%	▲ 5.8%
PALOMA	22%	▲ 4.5%

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

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% Menu Share in National.)



 Tequila in National: Trending Up
Q2 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
LALO	 	2.1%	▲ 40%
CODIGO 1530		1.5%	▲ 32%
ASTRAL		1.0%	▲ 25%
TRES AGAVES		1.1%	▲ 18%
MI CAMPO		1.6%	▲ 12%
ESPOLÒN		5.4%	▲ 11%
CORAZÓN		3.4%	▲ 9.0%
CASAMIGOS		7.0%	▲ 8.8%

 Tequila in National: Trending Down
Q2 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
SAUZA		3.2%	▼ 0.1%
21 SEEDS		1.7%	▼ 1.4%
1800		5.6%	▼ 2.3%
GHOST		1.8%	▼ 4.9%
HERRADURA		4.0%	▼ 5.0%
HORNITOS		4.8%	▼ 5.3%
CAZADORES		3.8%	▼ 5.5%
EL JIMADOR		3.4%	▼ 6.8%

Margarita is the most popular Tequila cocktail in independent National accounts, appearing on 67% of menus with at least one Tequila cocktail. Frozen Drinks grew the most, gaining 155%.



Top Tequila Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MARGARITA	67%	▼ 0.6%
PALOMA	22%	▲ 4.7%
SPICY MARGARITA	9.1%	▲ 19%
FROZEN DRINKS	7.6%	▲ 155%
TEQUILA SUNRISE	6.2%	▼ 4.1%
FROZEN MARGARITA	5.2%	▼ 5.8%
SKINNY MARGARITA	5.2%	▲ 2.3%

Trending Tequila Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
FROZEN DRINKS	7.6%	▲ 155%
LONG ISLAND ICED TEA	3.9%	▲ 108%
FRUIT-FLAVORED MARGARITA	4.0%	▲ 47%
ESPRESSO MARTINI	2.0%	▲ 36%
BLOODY MARY	2.4%	▲ 21%
SPICY MARGARITA	9.1%	▲ 19%
SPRITZ	1.1%	▲ 18%

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



RUM

MENU PERFORMANCE

NATIONAL INDEPENDENT ACCOUNTS



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
Q2 26

RANK	BRAND	SUPPLIER	MENU SHARE
1	BACARDÍ	BACARDÍ	22%
2	MALIBU	Pernod Ricard	17%
3	CAPTAIN MORGAN	DIAGEO	9.5%
4 ▲1	MYERS'S	SAZERAC	4.7%
5 ▼1	GOSLING'S	Pernod Ricard	4.6%
6	CRUZAN	SUNTORY	3.9%
7	PLANTERAY	MAISON FERRAND	3.8%
8	DON Q	SERRAVALLO'S	2.9%

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
9	FLOR DE CAÑA	LUXURY SPIRITS INTERNATIONAL	1.9%
10	APPLETON	CAMPARI	1.8%
11	DIPLOMÁTICO	BROWN-FORMAN	1.8%
12 ▲3	ZACAPA	DIAGEO	1.5%
13 ▼1	THE KRAKEN	PROXIMO	1.3%
14 ▲2	PARROT BAY	SAZERAC	1.3%
15 ▲4	MOUNT GAY	RÉMY COINTREAU	1.2%
16 ▲2	BUMBU	SOVEREIGN BRANDS	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 18 Rum brands with at least 1% Menu Share in National.)



 Rum in National: Trending Up
Q2 2026 QoQ

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
PLANTERAY	 MAISON FERRAND	3.8%	▲ 15%
MOUNT GAY	 RÉMY COINTREAU	1.2%	▲ 14%
DIPLOMÁTICO	 BROWN-FORMAN	1.8%	▲ 14%
PUSSER'S	 SHAW-ROSS	1.2%	▲ 9.0%
APPLETON	 CAMPARI	1.8%	▲ 7.1%
PARROT BAY	 SAZERAC	1.3%	▲ 3.6%
BACARDÍ	 BACARDÍ	22%	▲ 3.3%
BUMBU	 SOVEREIGN BRANDS	1.2%	▲ 3.0%

 Rum in National: Trending Down
Q2 2026 QoQ

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
CRUZAN	 SUNTORY	3.9%	▼ 2.9%
GOSLING'S	 Pernod Ricard	4.6%	▼ 3.8%
CAPTAIN MORGAN	 DIAGEO	9.5%	▼ 4.1%
SAILOR JERRY	 WILLIAM GRANT & SONS INDEPENDENT FAMILY DISTILLERS SINCE 1867	1.2%	▼ 5.4%
THE KRAKEN	 PROXIMO	1.3%	▼ 10%

Mojito is the most popular Rum cocktail in independent National accounts, appearing on 28% of menus with at least one Rum cocktail. Long Island Iced Tea grew the most, gaining 109%.



Top Rum Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MOJITO	28%	▲ 2.7%
PIÑA COLADA	18%	▲ 0.6%
MAI TAI	11%	▲ 0.9%
DAIQUIRI	8.0%	▼ 33%
MARTINI	5.8%	▼ 5.0%
RUM PUNCH	5.5%	▲ 0.1%
LONG ISLAND ICED TEA	5.4%	▲ 109%

Trending Rum Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
LONG ISLAND ICED TEA	5.4%	▲ 109%
FROZEN DRINKS	4.0%	▲ 99%
JUNGLE BIRD	1.3%	▲ 15%
MARGARITA	3.1%	▲ 11%
TIKI	2.9%	▲ 9.5%
FROZEN DAIQUIRI	1.1%	▲ 8.1%
CAIPIRINHA	2.8%	▲ 6.5%

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

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 National.)



 Rum in National: Trending Up
Q2 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
MOUNT GAY	 RÉMY COINTREAU	1.2%	▲ 25%
ZACAPA	DIAGEO	1.5%	▲ 22%
PLANTERAY	 MAISON FERRAND	3.8%	▲ 21%
DIPLOMÁTICO	 BROWN-FORMAN	1.8%	▲ 17%
APPLETON	CAMPARI	1.8%	▲ 17%
BUMBU	SOVEREIGN BRANDS	1.2%	▲ 12%
FLOR DE CAÑA	 LUXURY SPIRITS INTERNATIONAL	1.9%	▲ 8.3%
CAPTAIN MORGAN	DIAGEO	9.5%	▲ 7.1%

 Rum in National: Trending Down
Q2 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
MALIBU	 Pernod Ricard	17%	▼ 0.9%
CRUZAN	SUNTORY	3.9%	▼ 4.3%
SAILOR JERRY	WILLIAM GRANT & SONS INDEPENDENT FAMILY DISTILLERS SINCE 1867	1.2%	▼ 6.4%
GOSLING'S	 Pernod Ricard	4.6%	▼ 6.7%
THE KRAKEN	 PROXIMO	1.3%	▼ 10%

Mojito is the most popular Rum cocktail in independent National accounts, appearing on 28% of menus with at least one Rum cocktail. Frozen Drinks grew the most, gaining 118%.



Top Rum Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MOJITO	28%	▼ 1.9%
PIÑA COLADA	18%	▲ 0.5%
MAI TAI	11%	▲ 0.8%
DAIQUIRI	8.0%	▼ 34%
MARTINI	5.8%	▼ 4.2%
RUM PUNCH	5.5%	▲ 13%
LONG ISLAND ICED TEA	5.4%	▲ 114%

Trending Rum Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
FROZEN DRINKS	4.0%	▲ 118%
LONG ISLAND ICED TEA	5.4%	▲ 114%
MARGARITA	3.1%	▲ 14%
ESPRESSO MARTINI	1.3%	▲ 13%
RUM PUNCH	5.5%	▲ 13%
FROZEN DAIQUIRI	1.1%	▲ 8.8%
JUNGLE BIRD	1.3%	▲ 4.9%

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



GIN

MENU PERFORMANCE

NATIONAL INDEPENDENT ACCOUNTS



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
Q2 26

RANK	BRAND	SUPPLIER	MENU SHARE
1	HENDRICK'S	WILLIAM GRANT & SONS INDEPENDENT FAMILY DISTILLERS SINCE 1840	13%
2 ▲2	EMPRESS 1908		9.0%
3 ▼1	BOMBAY	 BACARDÍ	8.6%
4 ▼1	TANQUERAY	DIAGEO	8.5%
5	BEEFEATER	 Pernod Ricard	4.1%
6 ▲1	THE BOTANIST	 RÉMY COINTREAU	3.7%
7 ▼1	ROKU	SUNTORY	3.6%
8	FORDS GIN	 BROWN-FORMAN	3.5%

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
9	AVIATION	DIAGEO	2.8%
10	GRAY WHALE	 DEUTSCH FAMILY VINE & SPIRITS	2.0%
11 ▲2	NOLET'S	 NOLET'S FINEST GINS	1.5%
12 ▼1	MALFY	 Pernod Ricard	1.3%
13 ▼1	BULLDOG	CAMPARI	1.2%
14 ▲1	CITADELLE	 MAISON FERRAND PRODUCTION INDEPENDANT DE SPIRITUEUX DESTILLÉS	1.1%
15 ▼1	SIPSMITH	SUNTORY	1.0%
16	MONKEY 47	 Pernod Ricard	0.9%

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 15 Gin brands with at least 1% Menu Share in National.)



 Gin in National: Trending Up
Q2 2026 QoQ

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
EMPRESS 1908		9.0%	▲ 27%
CITADELLE		1.1%	▲ 13%
GRAY WHALE		2.0%	▲ 11%
FORDS GIN		3.5%	▲ 9.4%
NOLET'S		1.5%	▲ 9.3%
ROKU	SUNTORY	3.6%	▲ 9.2%
THE BOTANIST	 RÉMY COINTREAU	3.7%	▲ 7.5%
HENDRICK'S	WILLIAM GRANT & SONS INDEPENDENT FAMILY DISTILLERS SINCE 1847	13%	▲ 5.4%

 Gin in National: Trending Down
Q2 2026 QoQ

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
BULLDOG	CAMPARI	1.2%	▼ 4.3%
SIPSMITH	SUNTORY	1.0%	▼ 5.5%

*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 National accounts, appearing on 18% of menus with at least one Gin cocktail. Vesper Martini grew the most, gaining 413%.



Top Gin Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
NEGRONI	18%	▲ 1.1%
MARTINI	16%	—
FRENCH 75	8.6%	▼ 0.9%
GIMLET	6.2%	▲ 6.5%
LONG ISLAND ICED TEA	6.1%	▲ 108%
GIN & TONIC	5.1%	▲ 0.1%
BEE'S KNEES	4.7%	▲ 3.6%

Trending Gin Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
VESPER MARTINI	2.8%	▲ 413%
LONG ISLAND ICED TEA	6.1%	▲ 108%
SPRITZ	4.2%	▲ 23%
SMASH	1.4%	▲ 14%
WHITE NEGRONI	1.1%	▲ 9.6%
BRAMBLE	1.8%	▲ 9.3%
DIRTY MARTINI	1.6%	▲ 8.7%

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

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% Menu Share in National.)



 Gin in National: Trending Up
Q2 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
AVIATION	DIAGEO	2.8%	▲ 53%
GRAY WHALE		2.0%	▲ 28%
EMPRESS 1908		9.0%	▲ 21%
NOLET'S		1.5%	▲ 14%
THE BOTANIST		3.7%	▲ 13%
FORDS GIN		3.5%	▲ 11%
CITADELLE		1.1%	▲ 6.2%
TANQUERAY	DIAGEO	8.5%	▲ 3.9%

 Gin in National: Trending Down
Q2 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
BULLDOG	CAMPARI	1.2%	▼ 8.1%
MALFY		1.3%	▼ 8.9%
SIPSMITH	SUNTORY	1.0%	▼ 22%

Negroni is the most popular Gin cocktail in independent National accounts, appearing on 18% of menus with at least one Gin cocktail. Vesper Martini grew the most, gaining 414%.



Top Gin Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
NEGRONI	18%	▲ 6.6%
MARTINI	16%	▲ 4.3%
FRENCH 75	8.6%	▲ 6.8%
GIMLET	6.2%	▲ 4.5%
LONG ISLAND ICED TEA	6.1%	▲ 112%
GIN & TONIC	5.1%	▼ 4.8%
BEE'S KNEES	4.7%	▼ 0.7%

Trending Gin Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
VESPER MARTINI	2.8%	▲ 414%
LONG ISLAND ICED TEA	6.1%	▲ 112%
DIRTY MARTINI	1.6%	▲ 22%
WHITE NEGRONI	1.1%	▲ 22%
SPRITZ	4.2%	▲ 21%
CORPSE REVIVER	1.1%	▲ 14%
SMASH	1.4%	▲ 10%

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



WHISKEY

MENU PERFORMANCE

NATIONAL INDEPENDENT ACCOUNTS



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

Q2 26

RANK	BRAND	SUPPLIER	MENU SHARE
1	JAMESON	 Pernod Ricard	13%
2	BULLEIT	DIAGEO	12%
3	MAKER'S MARK	SUNTORY	11%
4 	BUFFALO TRACE	SAZERAC	7.5%
5 	WOODFORD RESERVE	 BROWN-FORMAN	7.3%
6	JACK DANIEL'S	 BROWN-FORMAN	7.2%
7	CROWN ROYAL	DIAGEO	4.9%
8 	SAZERAC RYE	SAZERAC	4.7%

For example: Four Roses 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
9 	FOUR ROSES	 KIRIN	4.5%
10 	OLD FORESTER	 BROWN-FORMAN	4.4%
11 	JIM BEAM	SUNTORY	3.8%
12 	ELIJAH CRAIG	 HEAVEN HILL BRANDS	3.8%
13 	KNOB CREEK	SUNTORY	3.6%
14	FIREBALL	SAZERAC	2.6%
15	RITTENHOUSE	 HEAVEN HILL BRANDS	2.6%
16 	ANGEL'S ENVY	 BACARDÍ	2.4%

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 31 Whiskey brands with at least 1% Menu Share in National.)



 Whiskey in National: Trending Up
Q2 2026 QoQ

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
TOKI	SUNTORY	2.3%	▲ 10%
ANGEL'S ENVY	BACARDÍ	2.4%	▲ 7.5%
SAZERAC RYE	SAZERAC	4.7%	▲ 5.9%
OLD FORESTER	BROWN-FORMAN	4.4%	▲ 5.7%
BULLEIT	DIAGEO	12%	▲ 5.3%
BUFFALO TRACE	SAZERAC	7.5%	▲ 5.1%
WOODFORD RESERVE	BROWN-FORMAN	7.3%	▲ 4.2%
HIGH WEST	Constellation Brands	2.2%	▲ 4.0%

 Whiskey in National: Trending Down
Q2 2026 QoQ

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
BASIL HAYDEN'S	SUNTORY	2.3%	▼ 0.1%
SOUTHERN COMFORT	SAZERAC	1.9%	▼ 0.2%
MAKER'S MARK	SUNTORY	11%	▼ 0.6%
JOHNNIE WALKER	DIAGEO	1.4%	▼ 0.6%
WHISTLEPIG	WHISTLEPIG	2.1%	▼ 0.7%
CROWN ROYAL	DIAGEO	4.9%	▼ 1.0%
KNOB CREEK	SUNTORY	3.6%	▼ 1.3%
JAMESON	Pernod Ricard	13%	▼ 1.3%

*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 National accounts, appearing on 47% of menus with at least one Whiskey cocktail. Sazerac grew the most, gaining 1713%.



Top Whiskey Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
OLD FASHIONED	47%	▲ 0.4%
MANHATTAN	22%	▼ 1.9%
IRISH COFFEE	9.7%	▼ 3.2%
MULE	7.0%	▼ 2.1%
WHISKEY SOUR	7.0%	▼ 1.2%
SHOT	5.1%	▼ 2.7%
SMASH	5.0%	▲ 12%

Trending Whiskey Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
SAZERAC	1.2%	▲ 1713%
FROZEN DRINKS	1.3%	▲ 127%
SMASH	5.0%	▲ 12%
MINT JULEP	1.1%	▲ 10.0%
PAPER PLANE	4.0%	▲ 7.9%
GREEN TEA SHOT	1.0%	▲ 7.7%
BOURBON SMASH	2.7%	▲ 6.7%

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

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% Menu Share in National.)



 Whiskey in National: Trending Up
Q2 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
DEWAR'S	 BACARDÍ	1.3%	▲ 44%
JOHNNIE WALKER	DIAGEO	1.4%	▲ 33%
SAZERAC RYE	SAZERAC	4.7%	▲ 28%
JEFFERSON'S	 Pernod Ricard	1.2%	▲ 20%
MICHTER'S	 CHATHAM IMPORTS, INC.	1.8%	▲ 16%
EVAN WILLIAMS	 HEAVEN HILL BRANDS	1.5%	▲ 12%
ANGEL'S ENVY	 BACARDÍ	2.4%	▲ 12%
BUFFALO TRACE	SAZERAC	7.5%	▲ 11%

 Whiskey in National: Trending Down
Q2 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
FOUR ROSES	 KIRIN	4.5%	▼ 0.2%
REDEMPTION	 DEUTSCH FAMILY WINE & SPIRITS	2.0%	▼ 0.5%
OLD FORESTER	 BROWN-FORMAN	4.4%	▼ 1.1%
KNOB CREEK	SUNTORY	3.6%	▼ 1.4%
RITTENHOUSE	 HEAVEN HILL BRANDS	2.6%	▼ 1.4%
TULLAMORE DEW	WILLIAM GRANT & SONS INDEPENDENT FAMILY DISTILLERS SINCE 1867	1.7%	▼ 2.1%
JAMESON	 Pernod Ricard	13%	▼ 3.0%
WILD TURKEY	CAMPARI	1.7%	▼ 4.1%

Old Fashioned is the most popular Whiskey cocktail in independent National accounts, appearing on 47% of menus with at least one Whiskey cocktail. Frozen Drinks grew the most, gaining 158%.



Top Whiskey Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
OLD FASHIONED	47%	▲ 2.2%
MANHATTAN	22%	▼ 1.3%
IRISH COFFEE	9.7%	▲ 0.5%
MULE	7.0%	▲ 0.4%
WHISKEY SOUR	7.0%	▲ 1.9%
SHOT	5.1%	▼ 23%
SMASH	5.0%	▲ 28%

Trending Whiskey Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
FROZEN DRINKS	1.3%	▲ 158%
SMASH	5.0%	▲ 28%
MAPLE OLD-FASHIONED	2.3%	▲ 16%
HIGHBALL	1.8%	▲ 15%
PAPER PLANE	4.0%	▲ 13%
ESPRESSO MARTINI	1.7%	▲ 10%
BOURBON SMASH	2.7%	▲ 7.7%

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



LIQUEUR

MENU PERFORMANCE

NATIONAL INDEPENDENT ACCOUNTS



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
Q2 26

RANK	BRAND	SUPPLIER	MENU SHARE
1	COINTREAU	 RÉMY COINTREAU	22%
2	KAHLUA	 Pernod Ricard	22%
3	ST. GERMAIN	 BACARDÍ	20%
4	GRAND MARNIER	CAMPARI	19%
5	BAILEYS	DIAGEO	18%
6 ▲2	LUXARDO	 HOTALING & CO. IMPORTER-DISTILLER	14%
7 ▼1	CHAMBORD	 BROWN-FORMAN	9.1%
8 ▲1	LICOR 43	 Zamora company	8.0%

For example: Frangelico is the 9th-ranked Liqueur brand on independent National cocktail menus, appearing on 7.4% of cocktail menus that have at least one Liqueur cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
9 ▼2	FRANGELICO	CAMPARI	7.4%
10	CHARTREUSE	 FREDERICK WILDMAN IMPORTERS	6.1%
11 ▲1	ANCHO REYES	CAMPARI	5.5%
12 ▼1	MIDORI	SUNTORY	5.1%
13 ▲5	DE KUYPER	SUNTORY	5.0%
14 ▼1	MR BLACK	DIAGEO	4.5%
15 ▲1	GIFFARD	 BACK BAR PROJECT	4.0%
16 ▲1	DISARONNO	 ILLVA SARONNO	4.0%

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 36 Liqueur brands with at least 1% Menu Share in National.)



 Liqueur in National: Trending Up
Q2 2026 QoQ

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
LUXARDO	 HOTALING & CO. IMPORTER-DISTILLER	14%	▲ 114%
CHAREAU	 chareau	1.2%	▲ 26%
STREGA	 S R SHAW-ROSS	1.3%	▲ 12%
VELVET FALERNUM	 HAUS ALPENZ	1.9%	▲ 10%
GIFFARD	 BACK BAR PROJECT	4.0%	▲ 9.7%
BORGHETTI	 Dist. 1962 BRANCA	2.6%	▲ 9.6%
COMBIER	 CNIBRANDS INDEPENDENT DISTILLERS & PRODUCERS	1.2%	▲ 8.7%
ST. GERMAIN	 BACARDÍ	20%	▲ 8.0%

 Liqueur in National: Trending Down
Q2 2026 QoQ

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
CHINOLA	 CHINOLA	1.8%	—
GRAN GALA	 SAZERAC	2.5%	▼ 0.3%
DISARONNO	 ILLVA SARONNO	4.0%	▼ 1.4%
KAHLUA	 Pernod Ricard	22%	▼ 1.5%
JAGERMEISTER	 Jägermeister	2.0%	▼ 2.7%
DE KUYPER	 SUNTORY	5.0%	▼ 2.8%
BAILEYS	 DIAGEO	18%	▼ 3.2%
FRANGELICO	 CAMPARI	7.4%	▼ 3.2%

*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 National accounts, appearing on 39% of menus with at least one Liqueur cocktail. Frozen Drinks grew the most, gaining 93%.



Top Liqueur Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MARGARITA	39%	▼ 0.2%
ESPRESSO MARTINI	26%	▲ 6.4%
MARTINI	21%	▼ 11%
COSMOPOLITAN	13%	▲ 7.7%
OLD FASHIONED	9.2%	▲ 64%
SANGRIA	7.8%	▲ 4.4%
LEMON DROP MARTINI	7.0%	▲ 5.5%

Trending Liqueur Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
FROZEN DRINKS	4.9%	▲ 93%
LONG ISLAND ICED TEA	4.3%	▲ 88%
APPLETINI	2.1%	▲ 80%
OLD FASHIONED	9.2%	▲ 64%
MANHATTAN	4.4%	▲ 57%
HUGO SPRITZ	4.3%	▲ 55%
FRUIT-FLAVORED MARGARITA	1.9%	▲ 46%

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

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 Liqueur brands with at least 1% Menu Share in National.)



 Liqueur in National: Trending Up
Q2 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
LUXARDO	 HOTALING & CO. IMPORTER-DISTILLER	14%	▲ 87%
DE KUYPER	 SUNTORY	5.0%	▲ 45%
LICOR 43	 Zamora company	8.0%	▲ 22%
BORGHETTI	 BRANCA Since 1782	2.6%	▲ 20%
MR BLACK	 DIAGEO	4.5%	▲ 15%
STREGA	 SR SHAW-ROSS	1.3%	▲ 11%
CHAREAU	 chateau	1.2%	▲ 11%
MOZART	 MARUSSIA Beverages USA	1.0%	▲ 8.2%

 Liqueur in National: Trending Down
Q2 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
CHINOLA	 CHINOLA	1.8%	—
VELVET FALERNUM	 HAUS ALPENZ	1.9%	▼ 0.4%
FRANGELICO	 CAMPARI	7.4%	▼ 1.2%
TUACA	 SAZERAC	1.2%	▼ 1.5%
GRAN GALA	 SAZERAC	2.5%	▼ 1.7%
RUM CHATA	 GALLO	2.9%	▼ 1.7%
DRAMBUIE	 WILLIAM GRANT & SONS INDEPENDENT FAMILY DISTILLERS SINCE 1867	1.2%	▼ 1.7%
COINTREAU	 RC RÉMY COINTREAU	22%	▼ 1.8%

*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 independent National accounts, appearing on 39% of menus with at least one Liqueur cocktail. Lemon Drop Martini grew the most, gaining 249%.



Top Liqueur Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MARGARITA	39%	▼ 1.2%
ESPRESSO MARTINI	26%	▲ 20%
MARTINI	21%	▼ 5.3%
COSMOPOLITAN	13%	▲ 11%
OLD FASHIONED	9.2%	▲ 62%
SANGRIA	7.8%	▼ 2.0%
LEMON DROP MARTINI	7.0%	▲ 249%

Trending Liqueur Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
LEMON DROP MARTINI	7.0%	▲ 249%
FROZEN DRINKS	4.9%	▲ 172%
APPLETINI	2.1%	▲ 141%
HUGO SPRITZ	4.3%	▲ 108%
LONG ISLAND ICED TEA	4.3%	▲ 105%
OLD FASHIONED	9.2%	▲ 62%

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.

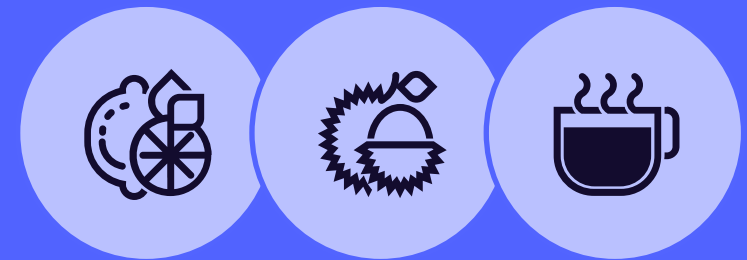
Executive Summary

Across brands, cocktails, and flavors, the same pattern holds: the **classics still dominate** menus but are **slowly ceding share**.

With a few exceptions, the momentum sits in:

challenger brands,
modern variations,
and emerging flavors

For those looking to secure menu placements, **providing a secondary option from the emerging groups** as a supplement to an established classic may appeal to venue **operators looking to refresh** their cocktail menus.



Brand Performance

Category Leaders are entrenched, but not all are growing.

Tito's Vodka, Bacardí Rum and Cointreau Liqueur hold commanding category leads, yet several icons are treading water or slipping including Jameson (−3.0%), Cointreau (−1.8%) and Absolut (−8.4%) who all lost share year-over-year.

The clearest winners are established *and* climbing.

Luxardo (+87%), Empress 1908 Gin (+21%), and Planteray Rum (+21%) rank near the top of their categories while also posting some of the fastest growth.

The steepest growth is coming from challengers.

LALO and Codigo 1530 Tequila, Belvedere and Haku Vodka, Mount Gay Rum and Aviation Gin lead their categories' year-over-year gains — real momentum, though mostly off smaller menu share bases

Cocktail Trends

Classics still anchor the menu, but most are softening.

The Margarita (50%), Old Fashioned (32%), and Martini (29%) remain the most-listed serves, yet nearly all are losing share year-over-year — Martini (−7.1%), Margarita (−4.8%) and Sangria (−15.6%) among the steepest.

Variations on classic serves are gaining steam.

The base recipes are down, but their modern spins are surging: the Martini gives way to the Lemon Drop Martini (+252%), Appletini (+100%) and Lychee Martini (+13%), and the Margarita to Fruit-Flavored (+50%) and Spicy (+16%) versions.

A few risers combine scale with growth.

The Espresso Martini is the standout — the only top-5 cocktail still climbing (25% share, +12.2%) — alongside the Long Island Iced Tea (8% share, +46%) and the Hugo Spritz (+121%), signaling appetite for premium, flavored and spritz-style serves.

Flavor Dynamics

The familiar flavors still lead, but each is fading.

Lime (22%), Lemon (14%) and Orange (13%) remain the most common cocktail flavors, yet all are down year-over-year, along with Pineapple, Ginger and Peach — a broad, gentle softening of the citrus-and-orchard core.

Coffee is the exception that's both big *and* growing.

At 6.4% share and +10% year-over-year, it's the rare established flavor still climbing — reinforced by the parallel rise of the Espresso Martini and coffee-forward Liqueurs.

Emerging profiles are gaining fast off small bases.

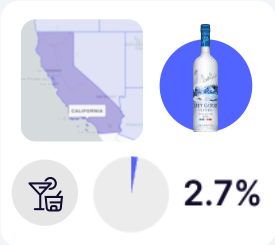
Yuzu (+12%), Lychee (+8%), Tropical (+7.7%), Caramel, Vanilla, and Elderflower are all rising — and notably, while classic citrus slips, novel citrus like Yuzu climbs, pointing to more adventurous, exotic palates.

COCKTAIL SHARE

The proportion of total menu items (e.g., cocktails or drink listings) that feature a given brand, spirit category, flavor, or attribute within a selected set of menus.

This metric reflects how prominent an item or attribute is within menus themselves, not just whether it appears at least once.

Example: Grey Goose is used in 2.7% of all cocktails in independent California accounts - or its cocktail share is 2.7%.

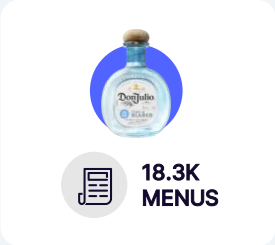


MENU COUNT

The total number of on-premise menus within a selected set that feature a given brand, cocktail, spirit category, or flavor at least once.

This metric provides an absolute count of menu visibility and is often used alongside Menu Share to understand both scale and proportional presence.

Example: Don Julio Blanco is featured on over 18.0K independent cocktail menus nationally; its menu count as of Q4 2025 is 18.3K.

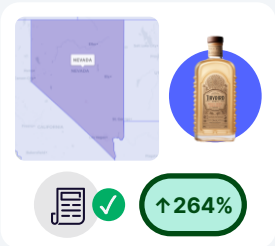


MENU FEATURE SALES LIFT

A comparative measure that evaluates how average sales volume for a brand or category differs between accounts where it is featured on the cocktail menu and accounts where it is not featured.

This metric is used to assess the impact of cocktail menu features on sales performance.

Example: In independent accounts in Nevada where Premium Tequila Brand A is featured on the cocktail menu its average account volume is +264% higher than in accounts where it is not featured on the menu, its Menu Feature Sales Lift is +264%.

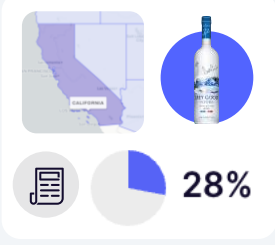


MENU SHARE

The percentage of on-premise menus that feature a given brand, cocktail, spirit category, or flavor at least once.

This metric indicates how widely an item appears across menus, regardless of how many times it is listed within any single menu.

Example: Grey Goose is featured on 28% of independent account menus in the state of California - or Grey Goose's menu share is 28%.

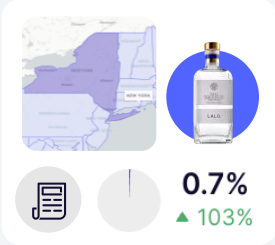


MENU / COCKTAIL SHARE CHANGE

The change in Menu Share or Cocktail Share over time, comparing the current period to a prior period (e.g., year-over-year, half-over-half, quarter-over-quarter, or month-over-month).

This metric is used to assess whether visibility on menus or within cocktail listings is increasing or declining over time, independent of absolute share levels.

Example: In Q4 of 2025, LALO Tequila was featured on 0.7% of independent accounts in New York state - which was +108% higher than the same period in 2024.



AI Solutions for the Beverage Alcohol Industry

Ground Signal is leading a revolution in the beverage alcohol industry. Our 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 empower the industry to better align its offerings, delight consumers, and increase sales.

Ground Signal Data Used In This Analysis

CONSUMER

1B+

Monthly
Social Posts &
Engagements

150M+

Consumer Profiles
Analyzed

VENUE

270K+

On-Premise
Venues

600+

Unique Venue
Attributes

DEPLETIONS

4+

Years Depletion
History

2.8K+

SKUs at
Account Level

MENU

125K+

On-Premise Accounts
w/Monthly Menu
Collection

8.0K+

Spirits, Cocktails, Wine,
Beer, and Flavor Profiles

CAPABILITIES

Consumer Insights
Market Trends
Account Segmentation

Key Trade Channels
National Accounts
Menu Analysis

Go-To-Market Strategy
Target Account List (GS Target)



For more information on creating a cocktail strategy or to learn how Ground Signal can help power your business, please contact us sales@groundsignal.ai