

CALIFORNIA MENU INSIGHTS REPORT

Q2 2026 YoY

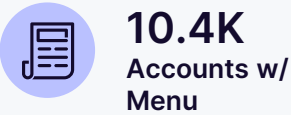
GROUND SIGNAL



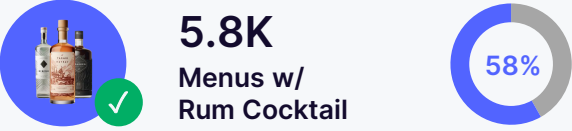
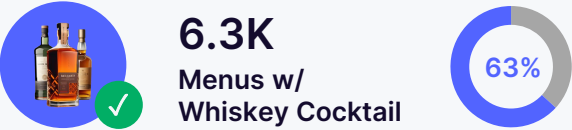
Ground Signal captures online menus at over 120,000 venues nationwide. Using sophisticated AI tools, we extract relevant information and provide it in an easy-to-analyze format.



Accounts Overview



Breakdown by Spirits Category



Most Popular Classic Cocktails

COCKTAIL	MENU SHARE*
MARGARITA	56%
OLD FASHIONED	37%
ESPRESSO MARTINI	29%
MARTINI	27%
BLOODY MARY	24%
MIMOSA	24%
PALOMA	21%
MULE	20%
MOJITO	20%
SANGRIA	19%

*Percentage of cocktail menus that feature this cocktail



TEQUILA

MENU PERFORMANCE

CALIFORNIA ACCOUNTS

Q2 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

Q2 26

RANK	BRAND	SUPPLIER	DISTRIBUTOR	MENU SHARE
1	PATRÓN	BACARDÍ		16%
2	DON JULIO	DIAGEO		12%
3	CASAMIGOS	DIAGEO		12%
4	ESPOLÓN	CAMPARI		6.1%
5	MILAGRO	WILLIAM GRANT & SONS INDEPENDENT FAMILY DISTILLERS SINCE 1887		5.8%
6	HERRADURA	 BROWN-FORMAN		5.6%
7	HORNITOS	SUNTORY		5.6%
8	CAZADORES	BACARDÍ		5.3%

For example: Lunazul is the 9th-ranked Tequila brand on California cocktail menus, appearing on 4.3% of cocktail menus that have at least one Tequila cocktail.

RANK	BRAND	SUPPLIER	DISTRIBUTOR	MENU SHARE
9	LUNAZUL			4.3%
10	TEREMANA	 TEREMANA SMALL BATCH TEQUILA Jägermeister		4.1%
11	1800	PROXIMO		4.0%
12	SAUZA	SUNTORY		4.0%
13	LALO	Tito's Handmade 100% AGAVE LALO TEQUILA		3.8%
14	JOSE CUERVO	PROXIMO		3.5%
15	EL JIMADOR	 BROWN-FORMAN		3.2%
16	CODIGO 1530	 Pernod Ricard		2.9%

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



Tequila in California: Trending Up
Q2 2026 YoY

BRAND	SUPPLIER	DISTRIBUTOR	MENU SHARE*	%Δ IN MENU SHARE**
LALO			3.8%	▲ 92%
TEREMANA			4.1%	▲ 79%
VOLCAN DE MI TIERRA			1.4%	▲ 78%
TRES AGAVES			1.1%	▲ 78%
FLECHA AZUL			1.1%	▲ 75%
818			1.1%	▲ 70%
ASTRAL			1.8%	▲ 66%
DON FULANO			1.6%	▲ 57%

Tequila in California: Trending Down
Q2 2026 YoY

BRAND	SUPPLIER	DISTRIBUTOR	MENU SHARE*	%Δ IN MENU SHARE**
PATRÓN			16%	▼ 0.6%
HORNITOS			5.6%	▼ 1.8%
MILAGRO			5.8%	▼ 5.0%
MAESTRO DOBEL			2.2%	▼ 6.1%
1800			4.0%	▼ 8.6%
CAZADORES			5.3%	▼ 9.2%
HERRADURA			5.6%	▼ 9.7%
TANTEO			2.0%	▼ 9.8%

*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Tequila cocktail.
**For example, a 10% would mean that cocktail's Menu Share grew by 10% (e.g., went from 10.0% to 11.0%), not that it gained 10 percentage points.



Margarita is the most popular Tequila cocktail in California accounts, appearing on 70.5% of menus with at least one Tequila cocktail. Cosmopolitan grew the most, gaining 413.6% Menu Share.



Top Tequila Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MARGARITA	71%	▲ 0.8%
PALOMA	25%	▲ 5.6%
SPICY MARGARITA	10%	▲ 0.6%
SKINNY MARGARITA	7.8%	▲ 17%
CADILLAC MARGARITA	7.7%	▲ 13%
FRUIT-FLAVORED MARGARITA	6.6%	▲ 106%
CLASSIC MARGARITA	6.0%	▼ 22%

Trending Tequila Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
COSMOPOLITAN	1.8%	▲ 414%
FRUIT-FLAVORED MARGARITA	6.6%	▲ 106%
CARAJILLO	2.0%	▲ 97%
ESPRESSO MARTINI	2.9%	▲ 88%
FROZEN DRINKS	5.3%	▲ 46%
FROZEN MARGARITA	3.5%	▲ 33%
MEXICAN COFFEE	2.1%	▲ 31%

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.



VODKA

MENU PERFORMANCE

CALIFORNIA ACCOUNTS

Q2 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
Q2 26

RANK	BRAND	SUPPLIER	DISTRIBUTOR	MENU SHARE
1	TITO'S			29%
2	KETEL ONE	DIAGEO		17%
3	GREY GOOSE	BACARDÍ		15%
4	ABSOLUT			13%
5	SMIRNOFF	DIAGEO		5.8%
6	NEW AMSTERDAM	GALLO		4.6%
7	STOLI	STOLI GROUP		4.6%
8	SKYY	CAMPARI		3.9%

For example: Haku is the 9th-ranked Vodka brand on California cocktail menus, appearing on 3.2% of cocktail menus that have at least one Vodka cocktail.

RANK	BRAND	SUPPLIER	DISTRIBUTOR	MENU SHARE
9	HAKU	SUNTORY		3.2%
10	BELVEDERE	LVMH		3.1%
11	DEEP EDDY	HEAVEN HILL BRANDS		3.1%
12	WHEATLEY	SAZERAC		2.7%
13	SVEDKA	SAZERAC		2.3%
14	REYKA	WILLIAM GRANT & SONS INDEPENDENT FAMILY DISTILLERS SINCE 1887		1.9%
15	CÎROC	DIAGEO		1.7%
16	HANGAR ONE	PROXIMO		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 Vodka brands with at least 1% Menu Share in California.)



 Vodka in California: Trending Up
Q2 2026 YoY

BRAND	SUPPLIER	DISTRIBUTOR	MENU SHARE*	%Δ IN MENU SHARE**
SMIRNOFF	DIAGEO		5.8%	▲ 51%
SVEDKA	SAZERAC		2.3%	▲ 49%
BELVEDERE	LVMH		3.1%	▲ 38%
REYKA	WILLIAM GRANT & SONS INDEPENDENT FAMILY DISTILLERS SINCE 1887		1.9%	▲ 27%
DEEP EDDY			3.1%	▲ 16%
SKYY	CAMPARI		3.9%	▲ 9.1%
GREY GOOSE	 BACARDÍ		15%	▲ 7.9%
WHEATLEY	SAZERAC		2.7%	▲ 7.1%

 Vodka in California: Trending Down
Q2 2026 YoY

BRAND	SUPPLIER	DISTRIBUTOR	MENU SHARE*	%Δ IN MENU SHARE**
PEARL	luxco		1.0%	▼ 1.5%
KETEL ONE	DIAGEO		17%	▼ 1.7%
ABSOLUT			13%	▼ 1.8%
CHOPIN			1.2%	▼ 2.6%
EFFEN	SUNTORY		1.4%	▼ 4.6%
HANGAR ONE			1.5%	▼ 6.4%
STOLI			4.6%	▼ 8.7%
NEW AMSTERDAM	GALLO		4.6%	▼ 15%

*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.



Espresso Martini is the most popular Vodka cocktail in California accounts, appearing on 35.4% of menus with at least one Vodka cocktail. Colada grew the most, gaining 594.7% Menu Share.



Top Vodka Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
ESPRESSO MARTINI	35%	▲ 27%
BLOODY MARY	30%	▼ 3.2%
MARTINI	29%	▼ 5.3%
MULE	20%	▲ 0.8%
LEMON DROP MARTINI	18%	▲ 452%
COSMOPOLITAN	17%	▲ 35%
MOSCOW MULE	13%	▼ 13%

Trending Vodka Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
COLADA	1.1%	▲ 595%
LEMON DROP MARTINI	18%	▲ 452%
VESPER MARTINI	1.9%	▲ 239%
FROZEN DRINKS	1.9%	▲ 211%
MICHELADA	2.3%	▲ 95%
MARGARITA	3.0%	▲ 81%
APPLETINI	1.9%	▲ 70%

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.

Negroni is the most popular Gin cocktail in California accounts, appearing on 18.8% of menus with at least one Gin cocktail. Vesper Martini grew the most, gaining 216.3% Menu Share.



Top Gin Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
NEGRONI	19%	▲ 2.6%
MARTINI	17%	▲ 23%
LONG ISLAND ICED TEA	7.4%	▲ 31%
GIMLET	6.4%	▲ 6.6%
FRENCH 75	6.1%	▲ 4.5%
GIN & TONIC	5.0%	▲ 4.0%
BEE'S KNEES	4.8%	▲ 11%

Trending Gin Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
VESPER MARTINI	2.9%	▲ 216%
LAST WORD	2.9%	▲ 49%
DIRTY MARTINI	1.3%	▲ 31%
LONG ISLAND ICED TEA	7.4%	▲ 31%
MARTINI	17%	▲ 23%
BRAMBLE	1.3%	▲ 16%
BEE'S KNEES	4.8%	▲ 11%

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

*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Gin cocktail.
**For example, a 10% would mean that cocktail's Menu Share grew by 10% (e.g., went from 10.0% to 11.0%), not that it gained 10 percentage points.





WHISKEY

MENU PERFORMANCE

CALIFORNIA ACCOUNTS

Q2 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

Q2 26

RANK	BRAND	SUPPLIER	DISTRIBUTOR	MENU SHARE
1▲1	MAKER'S MARK	SUNTORY		14%
2▼1	JAMESON	 Pernod Ricard		13%
3	BULLEIT	DIAGEO		12%
4	BUFFALO TRACE	SAZERAC		11%
5	WOODFORD RESERVE	 BROWN-FORMAN		8.4%
6	JACK DANIEL'S	 BROWN-FORMAN		7.3%
7▲7	SAZERAC RYE	SAZERAC		4.4%
8▲7	ANGEL'S ENVY	 BACARDÍ		4.2%

For example: Old Forester is the 9th-ranked Whiskey brand on California cocktail menus, appearing on 4.1% of cocktail menus that have at least one Whiskey cocktail.

RANK	BRAND	SUPPLIER	DISTRIBUTOR	MENU SHARE
9	OLD FORESTER	 BROWN-FORMAN		4.1%
10	ELIJAH CRAIG	 HEAVEN HILL BRANDS		4.0%
11▼3	KNOB CREEK	SUNTORY		3.9%
12▼1	TOKI	SUNTORY		3.9%
13▼6	FOUR ROSES	 KIRIN		3.8%
14▼1	WHISTLEPIG	 WHISTLEPIG		3.8%
15▲1	CROWN ROYAL	DIAGEO		3.5%
16▼4	JIM BEAM	SUNTORY		3.2%

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



 Whiskey in California: Trending Up
Q2 2026 YoY

BRAND	SUPPLIER	DISTRIBUTOR	MENU SHARE*	%Δ IN MENU SHARE**
JEFFERSON'S	 Pernod Ricard		1.2%	▲ 84%
DEWAR'S	 BACARDÍ		1.0%	▲ 56%
ANGEL'S ENVY	 BACARDÍ		4.2%	▲ 29%
TINCUP	 PROXIMO		1.1%	▲ 29%
SAZERAC RYE	SAZERAC		4.4%	▲ 29%
BUFFALO TRACE	SAZERAC		11%	▲ 27%
BASIL HAYDEN'S	 SUNTORY		2.8%	▲ 20%
MAKER'S MARK	 SUNTORY		14%	▲ 19%

 Whiskey in California: Trending Down
Q2 2026 YoY

BRAND	SUPPLIER	DISTRIBUTOR	MENU SHARE*	%Δ IN MENU SHARE**
JAMESON	 Pernod Ricard		13%	▼ 1.7%
KNOB CREEK	 SUNTORY		3.9%	▼ 3.1%
RITTENHOUSE	 HEAVEN HILL BRANDS		2.4%	▼ 3.2%
JACK DANIEL'S	 BROWN-FORMAN		7.3%	▼ 3.5%
EVAN WILLIAMS	 HEAVEN HILL BRANDS		2.2%	▼ 3.8%
JIM BEAM	 SUNTORY		3.2%	▼ 8.8%
WILD TURKEY	 CAMPARI		1.4%	▼ 9.2%
FOUR ROSES	 KIRIN		3.8%	▼ 18%

*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Whiskey cocktail.
**For example, a 10% would mean that cocktail's Menu Share grew by 10% (e.g., went from 10.0% to 11.0%), not that it gained 10 percentage points.

Old Fashioned is the most popular Whiskey cocktail in California accounts, appearing on 56.0% of menus with at least one Whiskey cocktail. Green Tea Shot grew the most, gaining 49.5% Menu Share.



Top Whiskey Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
OLD FASHIONED	56%	▲ 9.3%
MANHATTAN	22%	▼ 2.7%
IRISH COFFEE	10%	▲ 4.0%
PAPER PLANE	6.6%	▲ 37%
WHISKEY SOUR	6.6%	▼ 18%
MULE	6.1%	▲ 8.9%
SMASH	4.7%	▲ 13%

Trending Whiskey Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
GREEN TEA SHOT	1.2%	▲ 50%
MAPLE OLD-FASHIONED	2.1%	▲ 46%
PAPER PLANE	6.6%	▲ 37%
HIGHBALL	2.7%	▲ 30%
GODFATHER	1.0%	▲ 27%
ESPRESSO MARTINI	1.1%	▲ 25%
BOURBON SMASH	2.5%	▲ 19%

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

*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Whiskey cocktail.
**For example, a 10% would mean that cocktail's Menu Share grew by 10% (e.g., went from 10.0% to 11.0%), not that it gained 10 percentage points.





RUM

MENU PERFORMANCE

CALIFORNIA ACCOUNTS

Q2 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
Q2 26

RANK	BRAND	SUPPLIER	DISTRIBUTOR	MENU SHARE
1	BACARDÍ	BACARDÍ		23%
2	MALIBU	Pernod Ricard		17%
3	MYERS'S	SAZERAC		8.7%
4	CAPTAIN MORGAN	DIAGEO		7.6%
5	CRUZAN	SUNTORY		5.5%
6	DON Q			4.7%
7 ▲2	PLANTERAY			3.7%
8 ▲2	FLOR DE CAÑA			3.2%

For example: Gosling's is the 9th-ranked Rum brand on California cocktail menus, appearing on 2.9% of cocktail menus that have at least one Rum cocktail.

RANK	BRAND	SUPPLIER	DISTRIBUTOR	MENU SHARE
9 ▼2	GOSLING'S	Pernod Ricard		2.9%
10 ▼2	SAILOR JERRY	WILLIAM GRANT & SONS INDEPENDENT FAMILY DISTILLERS SINCE 1867		2.8%
11 ▲2	APPLETON	CAMPARI		2.6%
12 ▼1	DIPLOMÁTICO	BROWN-FORMAN		2.4%
13 ▼1	ZACAPA	DIAGEO		1.7%
14 ▲3	MOUNT GAY	RÉMY COINTREAU		1.4%
15 ▲3	PARROT BAY	SAZERAC		1.2%
16 ▲3	THE KRAKEN	PROXIMO		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 17 Rum brands with at least 1% Menu Share in California.)



 Rum in California: Trending Up
Q2 2026 YoY

BRAND	SUPPLIER	DISTRIBUTOR	MENU SHARE*	%Δ IN MENU SHARE**
APPLETON	CAMPARI		2.6%	▲ 37%
MOUNT GAY	 RÉMY COINTREAU		1.4%	▲ 22%
PARROT BAY	SAZERAC		1.2%	▲ 22%
MYERS'S	SAZERAC		8.7%	▲ 21%
PLANTERAY			3.7%	▲ 17%
DON Q			4.7%	▲ 13%
FLOR DE CAÑA	 LUXURY SPIRITS INTERNATIONAL		3.2%	▲ 13%
THE KRAKEN	 PROXIMO		1.1%	▲ 13%

 Rum in California: Trending Down
Q2 2026 YoY

BRAND	SUPPLIER	DISTRIBUTOR	MENU SHARE*	%Δ IN MENU SHARE**
BACARDÍ	 BACARDÍ		23%	▼ 3.8%
CRUZAN	SUNTORY		5.5%	▼ 7.0%
SAILOR JERRY	WILLIAM GRANT & SONS INDEPENDENT FAMILY DISTILLERS SINCE 1847		2.8%	▼ 13%
ZACAPA	DIAGEO		1.7%	▼ 13%
GOSLING'S	 Pernod Ricard		2.9%	▼ 14%

*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Rum cocktail.
**For example, a 10% would mean that cocktail's Menu Share grew by 10% (e.g., went from 10.0% to 11.0%), not that it gained 10 percentage points.



Mojito is the most popular Rum cocktail in California accounts, appearing on 31.3% of menus with at least one Rum cocktail. Margarita grew the most, gaining 126.2% Menu Share.



Top Rum Cocktails

Cocktail	Menu Share*	%Δ in Menu Share**
Mojito	31%	▼ 7.3%
Mai Tai	22%	▲ 14%
Piña Colada	13%	▼ 15%
Long Island Iced Tea	6.8%	▲ 39%
Daiquiri	5.7%	▼ 46%
Margarita	5.1%	▲ 126%
Colada	4.9%	▲ 5.3%

Trending Rum Cocktails

Cocktail	Menu Share*	%Δ in Menu Share**
Margarita	5.1%	▲ 126%
Long Island Iced Tea	6.8%	▲ 39%
Frozen Drinks	3.4%	▲ 17%
Mai Tai	22%	▲ 14%
Zombie	1.6%	▲ 12%
Tiki	4.8%	▲ 9.3%
Old Fashioned	1.9%	▲ 6.9%

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

*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Rum cocktail.
**For example, a 10% would mean that cocktail's Menu Share grew by 10% (e.g., went from 10.0% to 11.0%), not that it gained 10 percentage points.





GIN

MENU PERFORMANCE

CALIFORNIA ACCOUNTS

Q2 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
Q2 26

RANK	BRAND	SUPPLIER	DISTRIBUTOR	MENU SHARE
1	HENDRICK'S	WILLIAM GRANT & SONS INDEPENDENT FAMILY DISTILLERS SINCE 1867	REYES	14%
2 ▲1	EMPRESS 1908	MILESTONE	SG	8.7%
3 ▼1	TANQUERAY	DIAGEO	SG	8.2%
4	BOMBAY	BACARDÍ	SG	6.5%
5	THE BOTANIST	RC RÉMY COINTREAU	SG	6.3%
6 ▲1	FORDS GIN	BROWN-FORMAN	REYES	5.4%
7 ▼1	ROKU	SUNTORY	SG	4.8%
8	BEEFEATER	Pernod Ricard	SG	4.3%

For example: Gray Whale is the 9th-ranked Gin brand on California cocktail menus, appearing on 3.3% of cocktail menus that have at least one Gin cocktail.

RANK	BRAND	SUPPLIER	DISTRIBUTOR	MENU SHARE
9 ▲1	GRAY WHALE	DEUTSCH FAMILY WINE & SPIRITS	SG	3.3%
10 ▲2	AVIATION	DIAGEO	SG	2.9%
11 ▼2	NOLET'S	NOLET'S FINEST GINS	SG	2.9%
12 ▼1	SIPSMITH	SUNTORY	SG	1.5%
13	MALFY	Pernod Ricard	SG	1.4%
14	MONKEY 47	Pernod Ricard	SG	1.3%
15 ▲2	BROKER'S	MCCORMICK DISTILLING COMPANY BORN 1866 WITH THE PONT EXPRESS		0.8%
16	JUNIPERO	HOTALING & CO. IMPORTER - DISTILLER	SG	0.7%



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



 Gin in California: Trending Up
Q2 2026 YoY

BRAND	SUPPLIER	DISTRIBUTOR	MENU SHARE*	%Δ IN MENU SHARE**
AVIATION	DIAGEO		2.9%	▲ 55%
GRAY WHALE	 DEUTSCH FAMILY WINE & SPIRITS		3.3%	▲ 39%
FORDS GIN	 BROWN-FORMAN	REYES	5.4%	▲ 35%
EMPRESS 1908			8.7%	▲ 25%
BEEFEATER	 Pernod Ricard		4.3%	▲ 16%
THE BOTANIST	 RÉMY COINTREAU		6.3%	▲ 13%
NOLET'S	 NOLET'S FINEST GINS		2.9%	▲ 6.9%
MALFY	 Pernod Ricard		1.4%	▲ 6.2%

 Gin in California: Trending Down
Q2 2026 YoY

BRAND	SUPPLIER	DISTRIBUTOR	MENU SHARE*	%Δ IN MENU SHARE**
HENDRICK'S	WILLIAM GRANT & SONS INDEPENDENT FAMILY DISTILLERS SINCE 1840	REYES	14%	▼ 1.5%
ROKU	SUNTORY		4.8%	▼ 2.4%
BOMBAY	 BACARDÍ		6.5%	▼ 4.4%
SIPSMITH	SUNTORY		1.5%	▼ 38%

*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

CALIFORNIA ACCOUNTS

Q2 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
Q2 26

RANK	BRAND	SUPPLIER	DISTRIBUTOR	MENU SHARE
1	COINTREAU	 RÉMY COINTREAU		28%
2	GRAND MARNIER	CAMPARI		25%
3	ST. GERMAIN	 BACARDÍ		24%
4	KAHLUA	 Pernod Ricard		20%
5 ▲2	LUXARDO	 HOTALING & CO. IMPORTER-DISTILLER		17%
6 ▼1	BAILEYS	DIAGEO		15%
7 ▲2	LICOR 43	 Zamora company		12%
8 ▼2	CHARTREUSE	 IMPORTER FREDERICK WILDMAN AND SONS, LTD. WINE & SPIRITS		11%

For example: Chambord is the 9th-ranked Liqueur brand on California cocktail menus, appearing on 9.6% of cocktail menus that have at least one Liqueur cocktail.

RANK	BRAND	SUPPLIER	DISTRIBUTOR	MENU SHARE
9 ▲1	CHAMBORD	 BROWN-FORMAN		9.6%
10 ▲1	FRANGELICO	CAMPARI		7.1%
11 ▼3	ANCHO REYES	CAMPARI		7.0%
12 ▼1	MIDORI	SUNTORY		6.9%
13	MR BLACK	DIAGEO		6.6%
14 ▲2	GIFFARD	 BACK BAR PROJECT		6.5%
15 ▼1	DE KUYPER	SUNTORY		6.2%
16 ▼1	BENEDICTINE	 BACARDÍ		5.2%



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



 Liqueur in California: Trending Up
Q2 2026 YoY

BRAND	SUPPLIER	DISTRIBUTOR	MENU SHARE*	%Δ IN MENU SHARE**
RUMHAVEN			2.7%	▲ 121%
LUXARDO			17%	▲ 88%
DOMAINE DE CANTON			1.2%	▲ 66%
LICOR 43			12%	▲ 48%
SOHO			1.0%	▲ 40%
GIFFARD			6.5%	▲ 29%
CHAREAU			2.7%	▲ 27%
CHAMBORD			9.6%	▲ 26%

 Liqueur in California: Trending Down
Q2 2026 YoY

BRAND	SUPPLIER	DISTRIBUTOR	MENU SHARE*	%Δ IN MENU SHARE**
CHINOLA			1.4%	—
MIDORI			6.9%	▼ 0.9%
HEERING			1.4%	▼ 1.9%
DRAMBUIE			1.2%	▼ 2.9%
RUM CHATA			1.7%	▼ 3.7%
STREGA			1.2%	▼ 4.4%
BENEDICTINE			5.2%	▼ 4.5%
NIXTA			1.0%	▼ 8.2%

*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 California accounts, appearing on 41.2% of menus with at least one Liqueur cocktail. Lemon Drop Martini grew the most, gaining 731.1% Menu Share.



Top Liqueur Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MARGARITA	41%	▼ 2.1%
ESPRESSO MARTINI	27%	▲ 17%
MARTINI	18%	▼ 5.8%
OLD FASHIONED	13%	▲ 84%
COSMOPOLITAN	9.7%	▲ 16%
LEMON DROP MARTINI	9.5%	▲ 731%
CARAJILLO	8.0%	▲ 72%

Trending Liqueur Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
LEMON DROP MARTINI	9.5%	▲ 731%
APPLETINI	1.1%	▲ 138%
HUGO SPRITZ	4.6%	▲ 115%
OLD FASHIONED	13%	▲ 84%
FRUIT-FLAVORED MARGARITA	2.0%	▲ 77%
CARAJILLO	8.0%	▲ 72%
MIMOSA	2.1%	▲ 72%

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

*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Liqueur cocktail.
**For example, a 10% would mean that cocktail's Menu Share grew by 10% (e.g., went from 10.0% to 11.0%), not that it gained 10 percentage points.

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

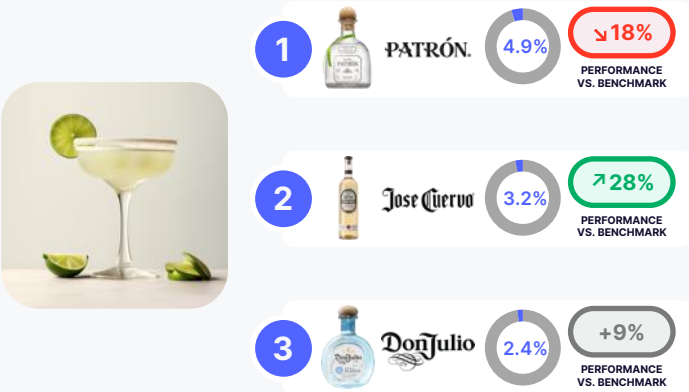
Venue Profile

Example: Top 3 Whiskey Brands in Independent Steak Houses



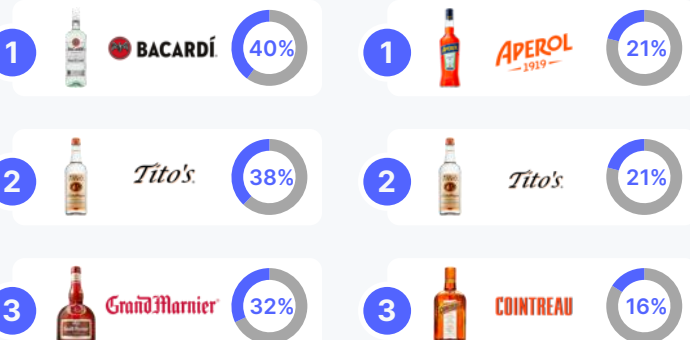
Cocktails

Example: Top 3 Tequila Brands Used in Margaritas Nationwide



Chains vs. Independent Accounts

Example:
Top Brands in Chain Accts Top Brands in Independent Accts



Ground Signal can also provide insights into:



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



Flavor Profiles



Pricing





AI Solutions for the Beverage Alcohol Industry

Ground Signal's mission is to **empower businesses** across the three-tier system to make better business decisions. Leveraging **sophisticated AI** and **unique large-scale data sources**, we give our clients unparalleled visibility into consumer behavior in the On-Premise and allow the industry to **better align its offerings, delight consumers** and **increase sales!**

CAPABILITIES:

CONSUMER INSIGHTS

MENU ANALYSIS

MARKET TRENDS

GO-TO-MARKET STRATEGY

NATIONAL ACCOUNTS

TARGET ACCOUNT LIST
(GS TARGET)

ACCOUNT SEGMENTATION
& KEY TRADE CHANNELS

CONSUMER

VENUE

DEPLETIONS

MENU

1B+

Monthly
Social Posts

250K+

On-Premise
Venues

3+

Years Depletion
History

120K+

On-Premise
Menus

100M

U.S. Legal
Drinking Age
Consumers

600+

Unique
Venue
Attributes

2K+

SKUs at
Account Level

3K+

Spirits,
Cocktails, Wine
Varietals and
Flavor Profiles

For more information on menu or other capabilities
please contact sales@groundsignal.ai