

RANCH WATER INSIGHTS

NATIONAL





Occasion Mentions

Top Occasions



For example: Consumers are 760% more likely to mention Happy Hour when posting about Ranch Water than in their overall on-premise posts.

Occasion	Volume	Index vs. Total On-Premise*
HAPPY HOUR		↑760%
FRIENDS		-1%
PARTY		↑22%
DINNER		↓22%
BRUNCH		↑78%
CINCO DE MAYO		↑1430%
SPORTS		↑19%

*Index compared to share of occasion mentions nationally

Trending Occasions



For example: Tailgate share of Ranch Water occasion mentions increased by 48% nationally over the past two years.

Occasion	Index vs. Total On-Premise*	2-Year Growth**
TAILGATE	↑817%	▲48%
FOOTBALL	↑234%	▲43%
DATE NIGHT	+8%	▲33%
MEMORIAL DAY	↑29%	▲33%
GIRLS NIGHT	↑152%	▲11%
HAPPY HOUR	↑760%	▲9.5%
BRUNCH	↑78%	▲8.3%

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

Environment Mentions

Top Environments



For example: Consumers are 325% more likely to mention Patio when posting about Ranch Water than in their overall on-premise posts.

Environment	Volume	Index vs. Total On-Premise*
PATIO		↑325%
DANCING		↑25%
LIVE MUSIC		↓52%
ROOFTOP		↑250%
KARAOKE		↑70%
DIVE BAR		↑733%
BEACH		↓43%

*Index compared to share of occasion mentions nationally

Trending Environments



For example: Rooftop share of Ranch Water environment mentions increased by 126% nationally over the past two years.

Environment	Index vs. Total On-Premise*	2-Year Growth**
ROOFTOP	↑250%	▲126%
DIVE BAR	↑733%	▲60%
NIGHTCLUB	↑83%	▲60%
SWIMMING POOL	↑43%	▲30%
KARAOKE	↑70%	▲23%
DANCING	↑25%	▲13%
DOG FRIENDLY	↑139%	▲6.4%

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





Flavors in Ranch Water



For example: 72% of accounts nationally with a Ranch Water feature Lime flavor; that flavor's menu share of Ranch Water has declined 11% year-over-year. Prickly Pear is the fastest-growing, with 165% growth since the prior year.

Flavor	Cocktail Share	YoY Growth*
LIME	72%	-11%
GRAPEFRUIT	5.0%	↗46%
SPICY	4.5%	-9%
PINEAPPLE	4.0%	↗42%
ORANGE	2.9%	↗19%
PRICKLY PEAR	2.5%	↑165%
MANGO	2.1%	↑163%

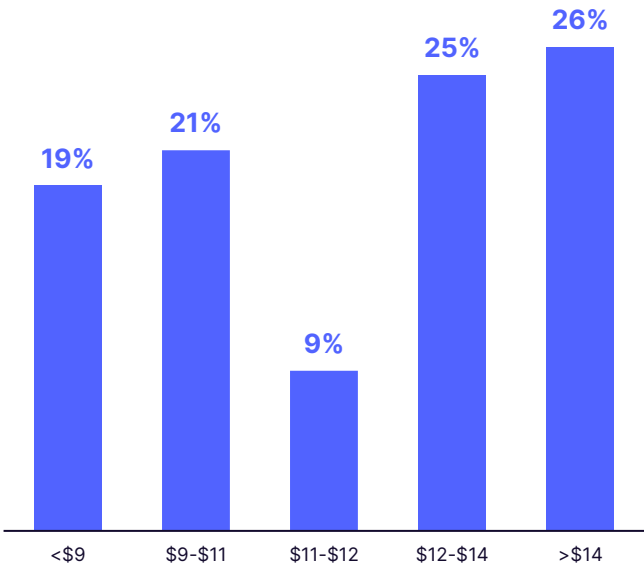
*Change in share of menu placements from Dec 2024 to Dec 2025

Cocktail Price Insights



\$11.49

Average Ranch Water price nationally





Sales by Category in Top Ranch Water Accounts

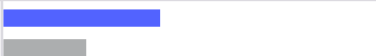
For example: In top Ranch Water accounts, Tequila is the best-selling category, averaging 81.9 9L depletions per account in the R12 period ending December 2025. On average, top Ranch Water accounts sell 150% more Tequila than the average account nationally.

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	 44%		81.9 32.8	↑150%	-10%
WHISKEY	 19%		35.1 29.3	↗20%	-11%
LIQUEUR	 15%		27.3 14.6	↑87%	-4%
VODKA	 13%		26.4 23.3	+13%	-7%
RUM	 6.4%		13.0 12.9	+1%	-10%
GIN	 2.4%		5.5 5.2	+6%	-5%
COGNAC	 0.3%		2.1 3.1	↘32%	-11%



Sales by Price Tier in Top Ranch Water Accounts

For example: In top Ranch Water accounts, Standard is the best-selling price tier overall, averaging 66.4 9L depletions per account in the R12 period ending December 2025. That is 50% more Standard depletions than the average account nationally. Over the past two years, average Standard depletions in top Ranch Water accounts have declined by 6%.

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	 0.1%		0.41 0.49	↘17%	↘22%
PRESTIGE	 0.3%		1.1 1.1	+1%	+1%
ULTRA PREMIUM	 11%		22.4 13.9	↑61%	↘21%
SUPER PREMIUM	 15%		27.6 14.6	↑90%	-1%
PREMIUM	 33%		60.9 33.8	↑80%	-9%
STANDARD	 35%		66.4 44.3	↑50%	-6%
VALUE	 5.4%		22.3 18.7	↗19%	-3%

