

AMERICAN WHISKEY INSIGHTS

NATIONAL





Cocktail Mentions

Top Cocktails



For example: Consumers are 35% less likely to mention Martini when posting about American Whiskey than in their overall on-premise posts.

Cocktail	Volume	Index vs. Total On-Premise*
MARTINI		↓35%
OLD FASHIONED		↑782%
MARGARITA		↓60%
HOT TODDY		↑2344%
ESPRESSO MARTINI		↓27%
MINT JULEP		↑633%
SPRITZ		↓23%

*Index compared to share of occasion mentions nationally

Trending Cocktails



For example: Screwdriver share of American Whiskey cocktail mentions increased by 104% nationally over the past two years.

Cocktail	Index vs. Total On-Premise*	2-Year Growth**
SCREWDRIVER	↑70%	▲ 104%
DIRTY SHIRLEY	↗22%	▲ 104%
VESPER MARTINI	↗21%	▲ 104%
CARAJILLO	+4%	▲ 77%
RUM COKE	↑198%	▲ 59%
GIN RICKEY	↑131%	▲ 44%
IRISH TRASH CAN	↑83%	▲ 44%

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



Occasion Mentions

Top Occasions



For example: Consumers are 30% more likely to mention Dinner when posting about American Whiskey than in their overall on-premise posts.

Occasion	Volume	Index vs. Total On-Premise*
DINNER		↗30%
FRIENDS		-13%
HAPPY HOUR		↑246%
PARTY		+9%
BBQ (OCCASION)		↑436%
BRUNCH		↗29%
SPORTS		↗46%

*Index compared to share of occasion mentions nationally

Trending Occasions



For example: Fourth of July share of American Whiskey occasion mentions increased by 40% nationally over the past two years.

Occasion	Index vs. Total On-Premise*	2-Year Growth**
FOURTH OF JULY	↗21%	▲ 40%
MARCH MADNESS	↑188%	▲ 40%
PRE-GAME	↑101%	▲ 31%
GAME NIGHT	↑58%	▲ 27%
MARDI GRAS	↑519%	▲ 25%
SUPER BOWL	↑64%	▲ 19%
TRIVIA	↑125%	▲ 15%

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





Flavors in American Whiskey Cocktails



For example: 43% of accounts nationally with an American Whiskey cocktail feature an Orange American Whiskey cocktail; that flavor's menu share of American Whiskey has declined 8% year-over-year. Peach is the fastest-growing, with 12% growth since the prior year.

Flavor	Menu Share	YoY Growth*
ORANGE	43%	-8%
LEMON	37%	-2%
GINGER	17%	-1%
HONEY	13%	+4%
LIME	13%	-13%
PEACH	11%	+12%
MINT	9.0%	-9%

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

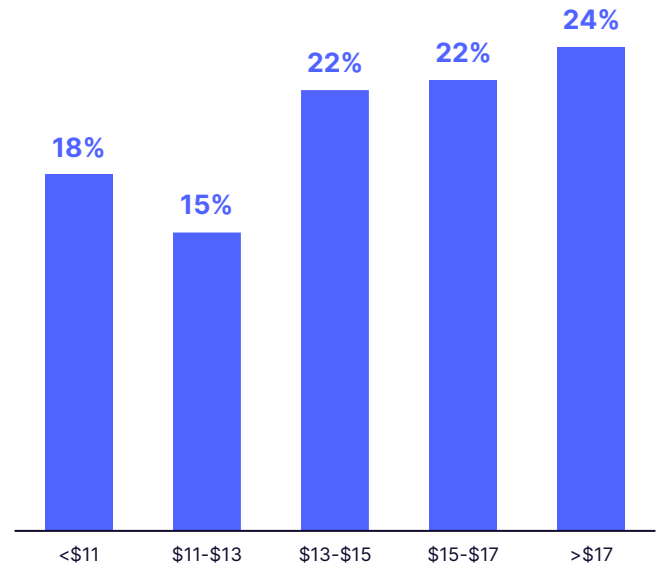


Cocktail Price Insights



\$14.41

Average American Whiskey cocktail price nationally



American Whiskey Cocktails

Top American Whiskey Cocktails



Old Fashioned is the most common American Whiskey cocktail on menus nationally, appearing on 50% of American Whiskey cocktail menus in December 2025.

Cocktail	Menu Share	Growth
OLD FASHIONED	50%	+1%
MANHATTAN	22%	-9%
MULE	4.7%	-5%
PAPER PLANE	4.0%	+9%
SMASH	3.1%	-11%
BOULEVARDIER	3.0%	-12%
MAPLE OLD FASHIONED	2.9%	↗16%

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

Trending American Whiskey Cocktails



Carajillo is the fastest-growing American Whiskey cocktail nationally, with 800% growth since the prior year.

Cocktail	Menu Share	Growth
CARAJILLO	0.5%	↑800%
BRAMBLE	0.6%	↗19%
MAPLE OLD FASHIONED	2.9%	↗16%
ESPRESSO MARTINI	1.4%	↗15%
PAPER PLANE	4.0%	+9%
MARGARITA	0.9%	+4%
SPRITZ	0.6%	+2%

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





Sales by Category in Top American Whiskey Accounts

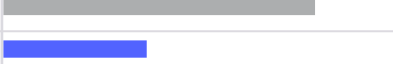
For example: In top American Whiskey accounts, Tequila is the best-selling category, averaging 44.7 9L depletions per account in the R12 period ending December 2025. On average, top American Whiskey accounts sell 36% more Tequila than the average account nationally.

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	 29%		44.7 32.8	↗ 36%	-9%
WHISKEY	 25%		37.6 29.3	↗ 28%	-8%
VODKA	 20%		31.6 23.3	↗ 36%	+1%
LIQUEUR	 12%		19.3 14.6	↗ 32%	+1%
RUM	 8.9%		14.8 12.9	↗ 15%	-8%
GIN	 4.4%		7.5 5.2	↗ 44%	-1%
COGNAC	 0.8%		3.0 3.1	-3%	-9%



Sales by Price Tier in Top American Whiskey Accounts

For example: In top American Whiskey accounts, Standard is the best-selling price tier overall, averaging 53.6 9L depletions per account in the R12 period ending December 2025. That is 21% more Standard depletions than the average account nationally. Over the past two years, average Standard depletions in top American Whiskey accounts have declined by 4%.

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%		0.53 0.49	+7%	+3%
PRESTIGE	 0.4%		1.4 1.1	↗ 22%	-7%
ULTRA PREMIUM	 12%		19.3 13.9	↗ 39%	-12%
SUPER PREMIUM	 16%		25.7 14.6	↑ 76%	+3%
PREMIUM	 31%		47.9 33.8	↗ 42%	-8%
STANDARD	 34%		53.6 44.3	↗ 21%	-4%
VALUE	 6.4%		20.4 18.7	+9%	-2%

