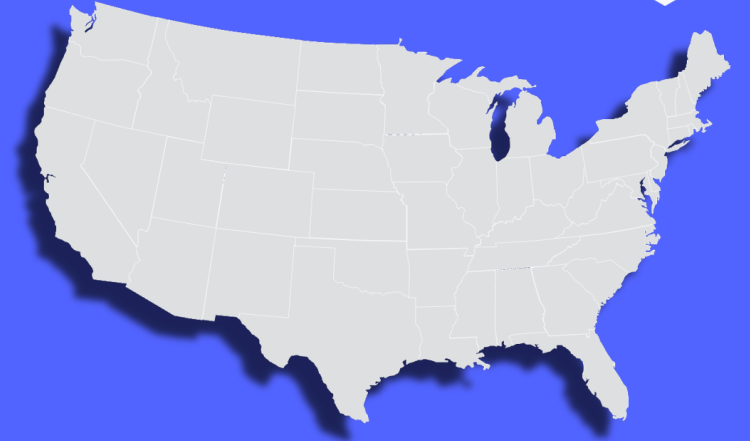


NATIONAL NEGRONI MENU INSIGHTS REPORT

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

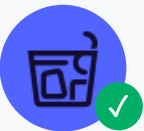
 **106K**
Accounts w/
Menu

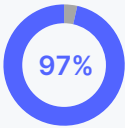
 **9.2K**
Accounts w/
Cocktail Menu

 **11.9K**
Total # of
Cocktails

 **\$14.89**
Average
Cocktail Price

Breakdown by Cocktail

 **8.9K**
Menus w/
Negroni



Most Popular Negroni Brands

COCKTAIL	MENU SHARE*
CAMPARI	63%
CARPANO	15%
COCCHI	5.8%
TANQUERAY	5.3%
HENDRICK'S	4.4%
APEROL	4.3%
BOMBAY	3.9%
BEEFEATER	3.1%
DOLIN	2.6%
LILLET	2.5%

*Percentage of cocktail menus that feature this cocktail



GIN

MENU PERFORMANCE

NATIONAL 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 2026

RANK	BRAND	SUPPLIER	MENU SHARE
1	TANQUERAY	DIAGEO	5.3%
2	HENDRICK'S	WILLIAM GRANT & SONS INDEPENDENT FAMILY DISTILLERS SINCE 1847	4.4%
3 ▲2	BOMBAY	BACARDÍ	3.9%
4 ▼1	BEEFEATER	Pernod Ricard	3.1%
5 ▲1	FORDS GIN	BROWN-FORMAN	2.4%
6 ▼2	THE BOTANIST	RÉMY COINTREAU	1.8%
7	DRUMSHANBO	PALM BAY INTERNATIONAL	1.5%
8 ▲2	AVIATION	DIAGEO	1.4%

For example: Malfy is the 9th-ranked Gin brand on National cocktail menus, appearing on 1.2% of cocktail menus that have at least one Gin cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
9	MALFY	Pernod Ricard	1.2%
10 ▼2	ROKU	SUNTORY	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 9 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**
MALFY	 Pernod Ricard	1.2%	▲ 14%
DRUMSHANBO	 PALM BAY INTERNATIONAL	1.5%	▲ 12%
FORDS GIN	 BROWN-FORMAN	2.4%	▲ 7.0%
ROKU	 SUNTORY	1.2%	▲ 3.9%
BOMBAY	 BACARDÍ	3.9%	▲ 3.0%
TANQUERAY	 DIAGEO	5.3%	▲ 1.8%

 Gin in National: Trending Down
Q2 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
THE BOTANIST	 RÉMY COINTREAU	1.8%	▼ 53%
BEEFEATER	 Pernod Ricard	3.1%	▼ 28%
HENDRICK'S	 WILLIAM GRANT & SONS INDEPENDENT FAMILY DISTILLERS SINCE 1867	4.4%	▼ 8.9%

*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.





VERMOUTH

MENU PERFORMANCE

NATIONAL ACCOUNTS

Q2 2026 YoY



Ground Signal calculates menu share for each Vermouth 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 Vermouth cocktail.



Vermouth Cocktail Menu Share

Q2 2026

RANK	BRAND	SUPPLIER	MENU SHARE
1	CARPANO		15%
2	COCCHI		5.8%
3	DOLIN		2.6%
4	LILLET		2.5%
5	CINZANO		1.5%
6	PUNT E MES		1.2%

For example: Punt e Mes is the 6th-ranked Vermouth brand on National cocktail menus, appearing on 1.2% of cocktail menus that have at least one Vermouth cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
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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 6 Vermouth brands with at least 1% Menu Share in National.)



 Vermouth in National: Trending Up
Q2 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
COCCHI	HAUS ALPENZ	5.8%	▲ 40%
PUNT E MES	BRANCA	1.2%	▲ 9.0%
DOLIN	HAUS ALPENZ	2.6%	▲ 8.3%
LILLET	Pernod Ricard	2.5%	▲ 7.5%

 Vermouth in National: Trending Down
Q2 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
CARPANO	BRANCA	15%	▼ 5.2%
CINZANO	CAMPARI	1.5%	▼ 2.1%

*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Vermouth 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.



MEZCAL

MENU PERFORMANCE

NATIONAL ACCOUNTS

Q2 2026 YoY



Ground Signal calculates menu share for each Mezcal 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 Mezcal cocktail.



Mezcal Cocktail Menu Share
Q2 2026

RANK	BRAND	SUPPLIER	MENU SHARE
1	DEL MAGUEY	Pernod Ricard	1.0%
2	ILEGAL MEZCAL	BACARDÍ	0.5%
3	BANHEZ	CNI BRANDS INDEPENDENT DISTILLERS & PRODUCERS	0.3%
4 ▲1	MONTELOBOS	CAMPARI	0.3%
5 ▼1	400 CONEJOS	PROXIMO	0.2%
6 ▲1	DOS HOMBRES	DOS HOMBRES	0.2%
7 ▼2	MEZCAL UNION	DIAGEO	0.2%
8 ▲4	LOS VECINOS	SAZERAC	0.1%

For example: Madre Mezcal is the 8th-ranked Mezcal brand on National cocktail menus, appearing on 0.1% of cocktail menus that have at least one Mezcal cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
8	MADRE MEZCAL		0.1%
10 ▼1	EL SILENCIO	EL SILENCIO	0.1%
11 ▲2	AMARAS	SUNTORY	0.1%
12 ▲6	SIETE MISTERIOS	CHATHAM IMPORTS, INC.	0.1%
12 ▼2	ROSALUNA	SHAW-ROSS	0.1%
14 ▲4	PELTON DE LA MUERTE	M&S WALKER VALUE BRANDS	0.1%
15 ▲10	LOS JAVIS	LeVecke®	0.1%
15 ▼5	BOZAL	SCHOMA CO. EST. 1913 3 BADGE BEVERAGE CORP. ★ ★ ★	0.1%

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



 Mezcal in National: Trending Up
Q2 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
DEL MAGUEY	 Pernod Ricard	1.0%	▲ 26%
ILEGAL MEZCAL	 BACARDÍ	0.5%	▲ 16%

 Mezcal in National: Trending Down
Q2 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
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*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Mezcal 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:

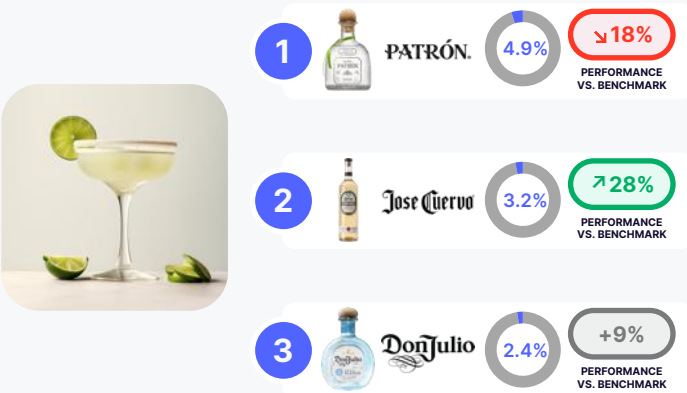
Venue Profile

Example: Top 3 Whiskey Brands in Steak Houses



Cocktails

Example: Top 3 Tequila Brands Used in Margaritas Nationwide



Chains vs. Non-Chain Accounts

Example:
Top Brands in Chain Accts Top Brands in Non-Chain 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