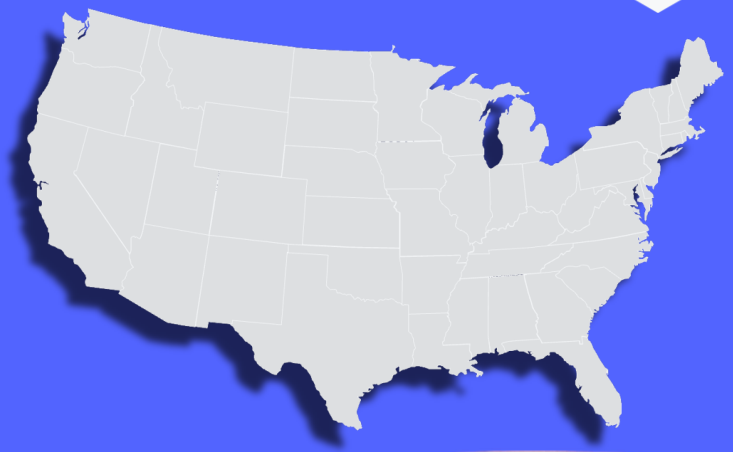
NATIONAL NEGRONI MENU INSIGHTS REPORT



Q2 2026 YoY

GROUND SIGNAL

TRENDS IN ALL ACCOUNTS

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/ Negroni on Cocktail Menu

11.9K
Total # of Cocktails

$14.89
Average Cocktail Price

Breakdown by Cocktail

9.2K
Menus w/ Negroni

Most Popular Negroni Brands

BRAND	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 Brand

GIN

MENU PERFORMANCE

NATIONAL

Q2 2026 YoY

MOST POPULAR GIN BRANDS

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 Negroni Menu Share

Q2 2026

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
1	TANQUERAY	DIAGEO	5.3%
2	HENDRICK'S	WILLIAM GRANT & SONS	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%

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	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

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 Negroni Menu Share

Q2 2026

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
1	CARPANO	BRANCA	15%
2	COCCHI	HAUS ALPENZ	5.8%
3	DOLIN	HAUS ALPENZ	2.6%
4	LILLET	Pernod Ricard	2.5%
5	CINZANO	CAMPARI	1.5%
6	PUNT E MES	BRANCA	1.2%

RANK	BRAND	SUPPLIER	MENU SHARE

TRENDS AMONG VERMOUTH BRANDS

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

Q2 2026 YoY

MOST POPULAR MEZCAL BRANDS

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 Negroni Menu Share

Q2 2026

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
1	DEL MAGUEY	Pernod Ricard	1.0%
2	ILEGAL MEZCAL	BACARDÍ	0.5%
3	BANHEZ	CNI BRANDS	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%

RANK	BRAND	SUPPLIER	MENU SHARE
8	MADRE MEZCAL		0.1%
10 ▼1	EL SILENCIO	Mezcal 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	PELOTON DE LA MUERTE	M·S WALKER VALUE BRANDS	0.1%
15 ▲10	LOS JAVIS	LeVecke	0.1%
15 ▼5	BOZAL	BADGE BEVERAGE CORP	0.1%

TRENDS AMONG MEZCAL BRANDS

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**

*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.

ADDITIONAL MENU CAPABILITIES

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

1	Maker's Mark	16%	PERFORMANCE VS. BENCHMARK
2	BULLEIT BOURBON	13%	↑86% PERFORMANCE VS. BENCHMARK
3	Woodford Reserve	12%	+12% PERFORMANCE VS. BENCHMARK

Cocktails

Example: Top 3 Tequila Brands Used in Margaritas Nationwide

1	PATRÓN	4.9%	↘18% PERFORMANCE VS. BENCHMARK
2	Jose Cuervo	3.2%	↗28% PERFORMANCE VS. BENCHMARK
3	DonJulio	2.4%	+9% PERFORMANCE VS. BENCHMARK

Chains vs. Non-Chain Accounts

Example:

Top Brands in Chain Accts

1	BACARDÍ	40%
2	Tito's	38%
3	Grand Marnier	32%

Top Brands in Non-Chain Accts

1	APEROL 1919	21%
2	Tito's	21%
3	COINTREAU	16%

Ground Signal can also provide insights into:

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

Flavor Profiles

Pricing

And more!

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