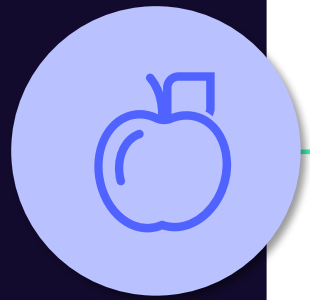
OCTOBER DEEP DIVE

Independent Cocktail Menus
Q3 2026 Review

GROUND SIGNAL



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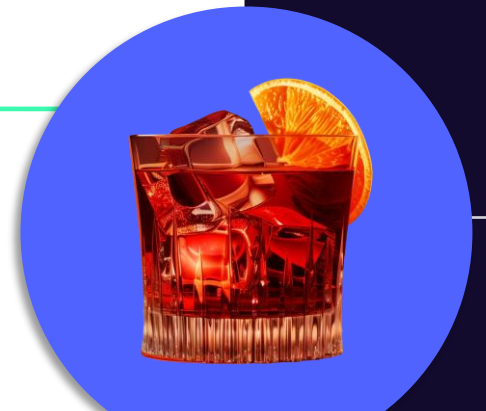


Introduction / A look at the brands, cocktails, and flavors driving cocktail menus in Q3

Why menus matter:

With volumes down and resources stretched, a cocktail-menu placement is one of the most effective ways to drive impact, so knowing what's on menus matters more than ever.

What this report covers:

Brand, cocktail and flavor trends across about 80K independent U.S. accounts with cocktail menus (1.2M cocktails, $13.23 average price), drawn from the 250K+ venues Ground Signal monitors.

How it's organized:

Seven spirit categories (tequila, vodka, whiskey, rum, gin, cordials and cognac), each with Menu Share rankings and the biggest movers, quarter over quarter and year over year. It also covers flavor trends in bespoke cocktails.

How to use it:

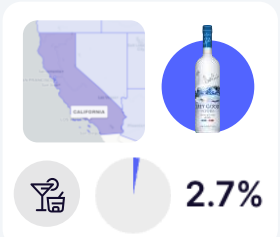
Benchmark where you stand, spot emerging brands and serves, and sharpen your menu strategy for the year ahead.

COCKTAIL SHARE

The proportion of total menu items (e.g., cocktails or drink listings) that feature a given brand, spirit category, flavor, or attribute within a selected set of menus.

This metric reflects how prominent an item or attribute is within menus themselves, not just whether it appears at least once.

Example: Grey Goose is used in 2.7% of all cocktails in independent California accounts - or its cocktail share is 2.7%.

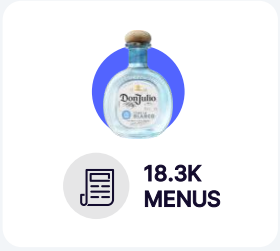


MENU COUNT

The total number of on-premise menus within a selected set that feature a given brand, cocktail, spirit category, or flavor at least once.

This metric provides an absolute count of menu visibility and is often used alongside Menu Share to understand both scale and proportional presence.

Example: Don Julio Blanco is featured on over 18.0K independent cocktail menus nationally; its menu count as of Q4 2025 is 18.3K.

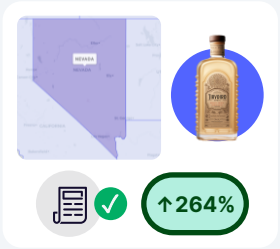


MENU FEATURE SALES LIFT

A comparative measure that evaluates how average sales volume for a brand or category differs between accounts where it is featured on the cocktail menu and accounts where it is not featured.

This metric is used to assess the impact of cocktail menu features on sales performance.

Example: In independent accounts in Nevada where Premium Tequila Brand A is featured on the cocktail menu its average account volume is +264% higher than in accounts where it is not featured on the menu; its Menu Feature Sales Lift is +264%.

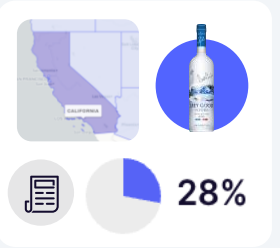


MENU SHARE

The percentage of on-premise menus that feature a given brand, cocktail, spirit category, or flavor at least once.

This metric indicates how widely an item appears across menus, regardless of how many times it is listed within any single menu.

Example: Grey Goose is featured on 28% of independent account menus in the state of California - or Grey Goose's menu share is 28%.

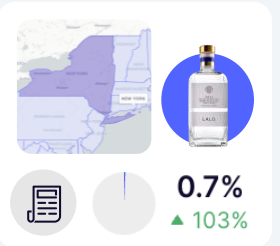


MENU / COCKTAIL SHARE CHANGE

The change in Menu Share or Cocktail Share over time, comparing the current period to a prior period *(e.g., year-over-year, half-over-half, quarter-over-quarter, or month-over-month).*

This metric is used to assess whether visibility on menus or within cocktail listings is increasing or declining over time, independent of absolute share levels.

Example: In Q4 of 2025, LALO Tequila was featured on 0.7% of independent accounts in New York state - which was +108% higher than the same period in 2024.



COCKTAIL TRENDS NATIONALLY

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.

Independent Accounts Overview

83.8K
Accounts w/ Menu

79.5K
Accounts w/ Cocktail Menu

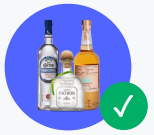
1.21M
Total # of Cocktails

$13.23
Average Cocktail Price

Breakdown by Spirits Category

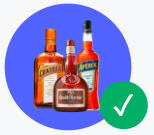
61.8K
Menus w/ Vodka Cocktail

78%



58.0K
Menus w/ Tequila Cocktail

73%

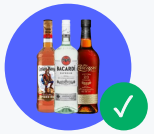


56.9K
Menus w/ Cordial Cocktail

72%

51.9K
Menus w/ Whiskey Cocktail

65%



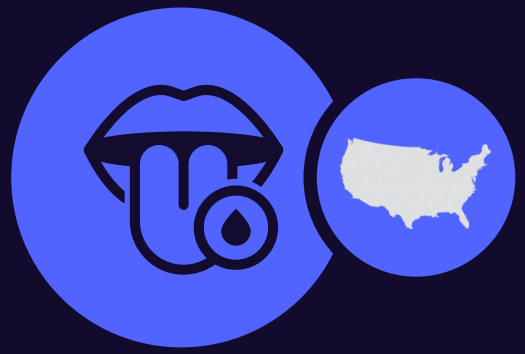
48.7K
Menus w/ Rum Cocktail

61%

Most Popular Classic Cocktails

COCKTAIL	MENU SHARE*
MARGARITA	51%
OLD FASHIONED	33%
MARTINI	30%
ESPRESSO MARTINI	27%
BLOODY MARY	25%
MIMOSA	23%
MULE	22%
SANGRIA	21%
MOJITO	19%
PALOMA	18%

*Percentage of cocktail menus that feature this cocktail



FLAVOR TRENDS

BESPOKE COCKTAILS

INDEPENDENT NATIONAL ACCOUNTS

Q3 2026

TEQUILA COCKTAILS OVERVIEW

Among bespoke Tequila cocktails (venue-created drinks, not standard named classics), Lime is the most popular flavor in independent accounts nationally, appearing on 62.1% of menus with at least one bespoke Tequila cocktail. Chocolate grew the most, increasing Menu Share by 13.8%.

Top Tequila Flavors

FLAVOR	MENU SHARE*	%Δ IN MENU SHARE**
LIME	62%	▼ 1.9%
SPICY	26%	▼ 3.4%
PINEAPPLE	21%	▼ 0.47%
ORANGE	20%	▼ 1.5%
LEMON	19%	▼ 4.9%
JALAPEÑO	15%	▼ 6.2%
GRAPEFRUIT	13%	▼ 6.5%
GINGER	8.8%	▲ 1.2%

Trending Tequila Flavors

FLAVOR	MENU SHARE*	%Δ IN MENU SHARE**
CHOCOLATE	3.3%	▲ 14%
PEACH	4.9%	▲ 12%
ALMOND	2.7%	▲ 8.0%
CITRUS	4.4%	▲ 7.3%
GUAVA	3.5%	▲ 6.3%
CREAM	5.2%	▲ 6.1%
TAMARIND	2.1%	▲ 5.0%

*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% to 11.0%), not that it gained 10 percentage points.

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

VODKA COCKTAILS OVERVIEW

Among bespoke Vodka cocktails (venue-created drinks, not standard named classics), Lemon is the most popular flavor used in independent accounts nationally, appearing on 39% of menus with at least one bespoke Vodka cocktail. Lychee grew the most, increasing Menu Share by 19.4%.

Top Vodka Flavors

FLAVOR	MENU SHARE*	%Δ IN MENU SHARE**
LEMON	39%	▼ 2.2%
LIME	33%	▼ 0.9%
LEMONADE	23%	▼ 1.3%
ORANGE	20%	▼ 4.7%
PINEAPPLE	19%	▼ 2.1%
PEACH	16%	▼ 4.1%
STRAWBERRY	15%	▲ 0.68%

Trending Vodka Flavors

FLAVOR	MENU SHARE*	%Δ IN MENU SHARE**
LYCHEE	3.7%	▲ 19%
PEPPER	2.4%	▲ 9.1%
COFFEE	10%	▲ 5.1%
PEAR	4.6%	▲ 4.6%
HIBISCUS	2.7%	▲ 3.9%
VANILLA	13%	▲ 3.8%
PASSION FRUIT	5.6%	▲ 3.7%

*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% to 11.0%), not that it gained 10 percentage points.

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

WHISKEY COCKTAILS OVERVIEW

Among bespoke Whiskey cocktails (venue-created drinks, not standard named classics), Lemon is the most popular flavor used in independent accounts nationally, appearing on 40% of menus with at least one bespoke Whiskey cocktail. Blackberry grew the most, increasing Menu Share by 15%.

Top Whiskey Flavors

FLAVOR	MENU SHARE*	%Δ IN MENU SHARE**
LEMON	40%	▼ 2.7%
ORANGE	23%	▼ 6.1%
PEACH	15%	▼ 2.0%
HONEY	15%	▲ 0.68%
GINGER	14%	▼ 6.5%
SOUR	13%	▲ 1.6%
LIME	13%	▼ 8.5%
CHERRY	12%	▼ 0.84%

Trending Whiskey Flavors

FLAVOR	MENU SHARE*	%Δ IN MENU SHARE**
BLACKBERRY	6.0%	▲ 15%
WALNUT	4.1%	▲ 11%
STRAWBERRY	4.0%	▲ 8.1%
PUNCH	2.8%	▲ 3.7%
SMOKE	6.8%	▲ 3.1%
BANANA	3.5%	▲ 2.9%
SOUR	13%	▲ 1.6%
SPICE	6.6%	▲ 1.5%

*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% to 11.0%), not that it gained 10 percentage points.

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

RUM COCKTAILS OVERVIEW

Among bespoke Rum cocktails (venue-created drinks, not standard named classics), Pineapple is the most popular flavor used in independent accounts nationally, appearing on 51% of menus with at least one bespoke Rum cocktail. Guava grew the most, increasing Menu Share by 15%.

Top Rum Flavors

FLAVOR	MENU SHARE*	%Δ IN MENU SHARE**
PINEAPPLE	51%	▼ 0.20%
LIME	41%	▼ 0.49%
COCONUT	37%	▲ 2.5%
ORANGE	25%	▼ 0.80%
LEMON	15%	▼ 0.67%
SPICE	15%	▼ 5.2%
CREAM	13%	▲ 1.5%

Trending Rum Flavors

FLAVOR	MENU SHARE*	%Δ IN MENU SHARE**
GUAVA	3.0%	▲ 15%
NUT	2.0%	▲ 11%
CINNAMON	5.2%	▲ 8.3%
WATERMELON	2.6%	▲ 8.3%
TROPICAL	8.5%	▲ 3.7%
HONEY	3.1%	▲ 3.3%
COCONUT	37%	▲ 2.5%

*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% to 11.0%), not that it gained 10 percentage points.

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

GIN COCKTAILS OVERVIEW

Among bespoke Gin cocktails (venue-created drinks, not standard named classics), Lemon is the most popular flavor used in independent accounts nationally, appearing on 54% of menus with at least one bespoke Gin cocktail. Lychee grew the most, increasing Menu Share by 25%.

Top Gin Flavors

FLAVOR	MENU SHARE*	%Δ IN MENU SHARE**
LEMON	54%	▲ 0.56%
LIME	32%	▼ 2.7%
ELDERFLOWER	22%	▲ 2.3%
CUCUMBER	17%	▼ 1.1%
HONEY	12%	▲ 3.5%
ORANGE	11%	▲ 0%
LAVENDER	11%	▲ 0%

Trending Gin Flavors

FLAVOR	MENU SHARE*	%Δ IN MENU SHARE**
LYCHEE	2.5%	▲ 25%
CREAM	6.3%	▲ 19%
YUZU	3.3%	▲ 18%
VANILLA	2.1%	▲ 17%
PEAR	2.2%	▲ 16%
SPICE	2.3%	▲ 15%
CRANBERRY	3.1%	▲ 15%

*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% to 11.0%), not that it gained 10 percentage points.

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

TEQUILA

MENU PERFORMANCE

INDEPENDENT NATIONAL ACCOUNTS

Q3 2026

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

Q3 26

For example: Herradura is the 9th-ranked Tequila brand on independent National cocktail menus, appearing on 4.0% of cocktail menus that have at least one Tequila cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
1	PATRÓN	BACARDÍ	12%
2	DON JULIO	DIAGEO	8.0%
3	CASAMIGOS	DIAGEO	7.1%
4	JOSE CUERVO	PROXIMO	6.2%
5 ▲1	ESPOLÒN	CAMPARI	5.4%
6 ▼1	1800	PROXIMO	5.4%
7	HORNITOS	SUNTORY	4.8%
8	MILAGRO	WILLIAM GRANT & SONS	4.0%

RANK	BRAND	SUPPLIER	MENU SHARE
9	HERRADURA	BROWN-FORMAN	4.0%
10	CAZADORES	BACARDÍ	3.9%
11 ▲1	CORAZÓN	SAZERAC	3.4%
12 ▼1	EL JIMADOR	BROWN-FORMAN	3.4%
13	LUNAZUL	HEAVEN HILL BRANDS	3.3%
14	SAUZA	SUNTORY	3.0%
15 ▲2	LALO	Tito's Handmade Vodka / LALO Tequila	2.4%
16 ▼1	OLMECA ALTOS	Pernod Ricard	2.3%

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 27 Tequila brands with at least 1% Menu Share nationally.)

Tequila Nationally: Trending Up

Q3 2026 QoQ

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
GRAN CENTENARIO	PROXIMO	1.1%	▲ 49%
LALO	Tito's Handmade Vodka / LALO Tequila	2.4%	▲ 14%
MI CAMPO	Constellation Brands	1.8%	▲ 11%
MAESTRO DOBEL	PROXIMO	2.2%	▲ 5.9%
CODIGO 1530	Pernod Ricard	1.6%	▲ 5.5%
TANTEO	Tanteo	2.3%	▲ 2.5%
CORAZÓN	SAZERAC	3.4%	▲ 1.8%
GHOST	M·S WALKER Value Brands	1.8%	▲ 1.4%

Tequila Nationally: Trending Down

Q3 2026 QoQ

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
HERRADURA	Brown-Forman	4.0%	▼ 0.1%
ASTRAL	DIAGEO	1.0%	▼ 0.2%
JOSE CUERVO	PROXIMO	6.2%	▼ 0.7%
LUNAZUL	Heaven Hill Brands	3.3%	▼ 1.1%
MILAGRO	William Grant & Sons	4.0%	▼ 1.1%
HORNITOS	SUNTORY	4.8%	▼ 1.1%
TEREMANA	Teremana Tequila / Jägermeister	2.0%	▼ 2.3%
EL JIMADOR	Brown-Forman	3.4%	▼ 2.7%

*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% to 11.0%), not that it gained 10 percentage points.

Margarita is the most popular Tequila cocktail in independent accounts nationally, appearing on 66.9% of menus with at least one Tequila cocktail. Spritz grew the most, gaining 9.8% Menu Share.

Top Tequila Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MARGARITA	67%	▲ 0.3%
PALOMA	22%	▲ 1.3%
SPICY MARGARITA	9.3%	▲ 2.0%
TEQUILA SUNRISE	6.3%	▲ 1.8%
FROZEN MARGARITA	5.3%	▲ 0.5%
SKINNY MARGARITA	5.1%	▼ 1.0%
CLASSIC MARGARITA	5.0%	▲ 1.7%

Trending Tequila Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
SPRITZ	1.3%	▲ 9.8%
LONG ISLAND ICED TEA	4.2%	▲ 5.7%
FRUIT-FLAVORED MARGARITA	4.1%	▲ 3.2%
PIÑA COLADA	1.3%	▲ 3.2%
RANCH WATER	4.5%	▲ 2.8%
ESPRESSO MARTINI	2.0%	▲ 2.5%
SPICY MARGARITA	9.3%	▲ 2.0%

*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% to 11.0%), not that it gained 10 percentage points.

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

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

Q3 26

For example: Herradura is the 9th-ranked Tequila brand on independent National cocktail menus, appearing on 4.0% of cocktail menus that have at least one Tequila cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
1	PATRÓN	BACARDÍ	12%
2	DON JULIO	DIAGEO	8.0%
3	CASAMIGOS	DIAGEO	7.1%
4	JOSE CUERVO	PROXIMO	6.2%
5 ▲1	ESPOLÒN	CAMPARI	5.4%
6 ▼1	1800	PROXIMO	5.4%
7 ▼1	HORNITOS	SUNTORY	4.8%
8 ▲1	MILAGRO	WILLIAM GRANT & SONS	4.0%

RANK	BRAND	SUPPLIER	MENU SHARE
9 ▼1	HERRADURA	BROWN-FORMAN	4.0%
10	CAZADORES	BACARDÍ	3.9%
11 ▲1	CORAZÓN	SAZERAC	3.4%
12 ▼1	EL JIMADOR	BROWN-FORMAN	3.4%
13 ▼1	LUNAZUL	HEAVEN HILL BRANDS	3.3%
14	SAUZA	SUNTORY	3.0%
15 ▲2	LALO	Tito's Handmade Vodka / LALO Tequila	2.4%
16 ▼1	OLMECA ALTOS	Pernod Ricard	2.3%

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 27 Tequila brands with at least 1% Menu Share nationally.)

Tequila Nationally: Trending Up
Q3 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
GRAN CENTENARIO	PROXIMO	1.1%	▲ 76%
LALO	Tito's Handmade Vodka / LALO Tequila	2.4%	▲ 43%
CODIGO 1530	Pernod Ricard	1.6%	▲ 26%
ASTRAL	DIAGEO	1.0%	▲ 17%
MI CAMPO	Constellation Brands	1.8%	▲ 15%
MAESTRO DOBEL	PROXIMO	2.2%	▲ 14%
GHOST	M·S WALKER Value Brands	1.8%	▲ 11%
ESPOLÒN	CAMPARI	5.4%	▲ 8.2%

Tequila Nationally: Trending Down
Q3 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
CAZADORES	BACARDÍ	3.9%	▼ 2.1%
MILAGRO	William Grant & Sons	4.0%	▼ 2.1%
HERRADURA	Brown-Forman	4.0%	▼ 3.2%
SAUZA	Suntory	3.0%	▼ 4.9%
DULCE VIDA	Milestone	1.3%	▼ 5.0%
HORNITOS	Suntory	4.8%	▼ 5.7%
EL JIMADOR	Brown-Forman	3.4%	▼ 5.9%
1800	PROXIMO	5.4%	▼ 6.6%

*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% to 11.0%), not that it gained 10 percentage points.

Margarita is the most popular Tequila cocktail in independent accounts nationally, appearing on 66.9% of menus with at least one Tequila cocktail. Long Island Iced Tea grew the most, gaining 114.0% Menu Share.

Top Tequila Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MARGARITA	67%	▼ 0.3%
PALOMA	22%	▲ 3.6%
SPICY MARGARITA	9.3%	▲ 14%
TEQUILA SUNRISE	6.3%	▼ 4.3%
FROZEN MARGARITA	5.3%	▼ 6.2%
SKINNY MARGARITA	5.1%	▼ 1.5%
CLASSIC MARGARITA	5.0%	▼ 1.5%

Trending Tequila Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
LONG ISLAND ICED TEA	4.2%	▲ 114%
BLUE MARGARITA	1.7%	▲ 52%
FRUIT-FLAVORED MARGARITA	4.1%	▲ 45%
BEERGARITA	1.8%	▲ 28%
ESPRESSO MARTINI	2.0%	▲ 26%
SPRITZ	1.3%	▲ 17%
SPICY MARGARITA	9.3%	▲ 14%

*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% to 11.0%), not that it gained 10 percentage points.

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

VODKA

MENU PERFORMANCE

INDEPENDENT NATIONAL ACCOUNTS

Q3 2026

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

Q3 26

For example: New Amsterdam is the 9th-ranked Vodka brand on independent National cocktail menus, appearing on 2.2% of cocktail menus that have at least one Vodka cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
1	TITO'S	Tito's Handmade Vodka / LALO Tequila	29%
2	KETEL ONE	DIAGEO	12%
3 ▲1	GREY GOOSE	BACARDÍ	11%
4 ▼1	ABSOLUT	Pernod Ricard	11%
5	STOLI	STOLI GROUP	7.1%
6	DEEP EDDY	HEAVEN HILL BRANDS	6.5%
7	SMIRNOFF	DIAGEO	4.8%
8	WHEATLEY	SAZERAC	3.2%
9	NEW AMSTERDAM	GALLO	2.2%
10	BELVEDERE	LVMH	2.0%
11	SKYY	CAMPARI	2.0%
12	THREE OLIVES	PROXIMO	1.9%
13	HAKU	SUNTORY	1.8%
14 ▲2	PEARL	LUXCO	1.4%
14 ▲3	EFFEN	SUNTORY	1.4%
16 ▼2	CÎROC	DIAGEO	1.4%

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 nationally.)

Vodka Nationally: Trending Up

Q3 2026 QoQ

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
EFFEN	SUNTORY	1.4%	▲ 6.9%
GREY GOOSE	BACARDÍ	11%	▲ 3.2%
THREE OLIVES	PROXIMO	1.9%	▲ 3.1%
PINNACLE	SUNTORY	1.2%	▲ 3.1%
DEEP EDDY	HEAVEN HILL BRANDS	6.5%	▲ 2.7%
WESTERN SON	SAZERAC	1.1%	▲ 2.6%
WHEATLEY	SAZERAC	3.2%	▲ 2.6%
PEARL	LUXCO	1.4%	▲ 1.8%

Vodka Nationally: Trending Down

Q3 2026 QoQ

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
ABSOLUT	Pernod Ricard	11%	▼ 1.4%
BELVEDERE	LVMH	2.0%	▼ 3.1%
STOLI	STOLI GROUP	7.1%	▼ 3.8%
NEW AMSTERDAM	GALLO	2.2%	▼ 4.7%
CÎROC	DIAGEO	1.4%	▼ 5.1%
VAN GOGH	CONECUH BRANDS	1.3%	▼ 6.7%

*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% to 11.0%), not that it gained 10 percentage points.

Martini is the most popular Vodka cocktail in independent accounts nationally, appearing on 31.8% of menus with at least one Vodka cocktail. Transfusion grew the most, gaining 12.1% Menu Share.

Top Vodka Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MARTINI	32%	▲ 0.3%
ESPRESSO MARTINI	32%	▲ 2.2%
BLOODY MARY	31%	▼ 0.6%
MULE	21%	▲ 0.3%
COSMOPOLITAN	17%	▲ 0.1%
LEMON DROP MARTINI	14%	▲ 3.0%
MOSCOW MULE	11%	▲ 1.4%

Trending Vodka Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
TRANSFUSION	1.7%	▲ 12%
SPRITZ	4.4%	▲ 9.9%
VODKA LEMONADE	2.3%	▲ 7.9%
ORANGE CRUSH	2.2%	▲ 5.2%
LYCHEE MARTINI	3.4%	▲ 4.7%
SANGRIA	2.7%	▲ 4.3%
MARGARITA	2.3%	▲ 3.8%

*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% to 11.0%), not that it gained 10 percentage points.

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

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

Q3 26

For example: New Amsterdam is the 9th-ranked Vodka brand on independent National cocktail menus, appearing on 2.2% of cocktail menus that have at least one Vodka cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
1	TITO'S	Tito's Handmade Vodka / LALO Tequila	29%
2	KETEL ONE	DIAGEO	12%
3 ▲1	GREY GOOSE	BACARDÍ	11%
4 ▼1	ABSOLUT	Pernod Ricard	11%
5	STOLI	Stoli Group	7.1%
6	DEEP EDDY	Heaven Hill Brands	6.5%
7	SMIRNOFF	DIAGEO	4.8%
8	WHEATLEY	SAZERAC	3.2%

RANK	BRAND	SUPPLIER	MENU SHARE
9	NEW AMSTERDAM	GALLO	2.2%
10 ▲2	BELVEDERE	LVMH	2.0%
11	SKYY	CAMPARI	2.0%
12 ▼2	THREE OLIVES	PROXIMO	1.9%
13 ▲1	HAKU	SUNTORY	1.8%
14 ▲4	PEARL	LUXCO	1.4%
14 ▲1	EFFEN	SUNTORY	1.4%
16 ▼3	CÎROC	DIAGEO	1.4%

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 nationally.)

Vodka Nationally: Trending Up
Q3 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
HAKU	SUNTORY	1.8%	▲ 14%
GREY GOOSE	BACARDÍ	11%	▲ 11%
BELVEDERE	LVMH	2.0%	▲ 8.2%
PEARL	LUXCO	1.4%	▲ 7.8%
WHEATLEY	SAZERAC	3.2%	▲ 4.6%
SKYY	CAMPARI	2.0%	▲ 4.2%
SVEDKA	SAZERAC	1.0%	▲ 3.6%
TITO'S	Tito's Handmade Vodka / LALO Tequila	29%	▲ 2.8%

Vodka Nationally: Trending Down
Q3 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
ABSOLUT	Pernod Ricard	11%	▼ 0.2%
DEEP EDDY	Heaven Hill Brands	6.5%	▼ 0.3%
WESTERN SON	SAZERAC	1.1%	▼ 0.3%
THREE OLIVES	PROXIMO	1.9%	▼ 2.6%
NEW AMSTERDAM	GALLO	2.2%	▼ 5.1%
EFFEN	SUNTORY	1.4%	▼ 5.3%
SMIRNOFF	DIAGEO	4.8%	▼ 5.4%
VAN GOGH	Conecuh Brands	1.3%	▼ 7.3%

*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% to 11.0%), not that it gained 10 percentage points.

Martini is the most popular Vodka cocktail in independent accounts nationally, appearing on 31.8% of menus with at least one Vodka cocktail. Vesper Martini grew the most, gaining 366.2% Menu Share.

Top Vodka Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MARTINI	32%	▼ 5.3%
ESPRESSO MARTINI	32%	▲ 14%
BLOODY MARY	31%	▼ 2.7%
MULE	21%	▼ 0.8%
COSMOPOLITAN	17%	▲ 11%
LEMON DROP MARTINI	14%	▲ 7.2%
MOSCOW MULE	11%	▼ 1.8%

Trending Vodka Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
VESPER MARTINI	1.7%	▲ 366%
APPLETINI	3.1%	▲ 97%
LONG ISLAND ICED TEA	9.8%	▲ 51%
TRANSFUSION	1.7%	▲ 35%
SPRITZ	4.4%	▲ 19%
LYCHEE MARTINI	3.4%	▲ 16%
ORANGE CRUSH	2.2%	▲ 14%

*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% to 11.0%), not that it gained 10 percentage points.

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

WHISKEY

MENU PERFORMANCE

INDEPENDENT NATIONAL ACCOUNTS

Q3 2026

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

Q3 26

For example: Sazerac Rye is the 9th-ranked Whiskey brand on independent National cocktail menus, appearing on 4.6% of cocktail menus that have at least one Whiskey cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
1	BULLEIT	DIAGEO	12%
2	JAMESON	Pernod Ricard	12%
3	MAKER'S MARK	SUNTORY	11%
4	BUFFALO TRACE	SAZERAC	7.8%
5	WOODFORD RESERVE	BROWN-FORMAN	7.4%
6	JACK DANIEL'S	BROWN-FORMAN	7.2%
7	CROWN ROYAL	DIAGEO	4.9%
8 ▲2	OLD FORESTER	BROWN-FORMAN	4.6%

RANK	BRAND	SUPPLIER	MENU SHARE
9 ▼1	SAZERAC RYE	SAZERAC	4.6%
10 ▼1	FOUR ROSES	KIRIN	4.5%
11 ▲1	JIM BEAM	SUNTORY	3.9%
12 ▼1	ELIJAH CRAIG	HEAVEN HILL BRANDS	3.9%
13	KNOB CREEK	SUNTORY	3.7%
14 ▲1	RITTENHOUSE	HEAVEN HILL BRANDS	2.6%
15 ▼1	FIREBALL	SAZERAC	2.5%
16	ANGEL'S ENVY	BACARDÍ	2.5%

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 30 Whiskey brands with at least 1% Menu Share nationally.)

Whiskey Nationally: Trending Up

Q3 2026 QoQ

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
MICHTER'S	CHATHAM IMPORTS, INC.	1.9%	▲ 7.3%
BUFFALO TRACE	SAZERAC	7.8%	▲ 3.8%
OLD FORESTER	BROWN-FORMAN	4.6%	▲ 3.3%
ANGEL'S ENVY	BACARDÍ	2.5%	▲ 3.1%
JEFFERSON'S	Pernod Ricard	1.2%	▲ 2.9%
JOHNNIE WALKER	DIAGEO	1.4%	▲ 2.3%
JIM BEAM	SUNTORY	3.9%	▲ 2.1%
ELIJAH CRAIG	HEAVEN HILL BRANDS	3.9%	▲ 1.4%

Whiskey Nationally: Trending Down

Q3 2026 QoQ

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
BASIL HAYDEN'S	SUNTORY	2.3%	—
WHISTLEPIG	WHISTLEPIG	2.2%	▼ 0.1%
MAKER'S MARK	SUNTORY	11%	▼ 0.5%
CROWN ROYAL	DIAGEO	4.9%	▼ 0.6%
JACK DANIEL'S	BROWN-FORMAN	7.2%	▼ 1.0%
RITTENHOUSE	HEAVEN HILL BRANDS	2.6%	▼ 1.1%
FOUR ROSES	KIRIN	4.5%	▼ 1.3%
BULLEIT	DIAGEO	12%	▼ 1.5%

*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% to 11.0%), not that it gained 10 percentage points.

WHISKEY COCKTAILS OVERVIEW

Old Fashioned is the most popular Whiskey cocktail in independent accounts nationally, appearing on 48.0% of menus with at least one Whiskey cocktail. Bourbon Smash grew the most, gaining 5.1% Menu Share.

Top Whiskey Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
OLD FASHIONED	48%	▲ 1.7%
MANHATTAN	22%	▲ 0.1%
WHISKEY SOUR	7.0%	—
IRISH COFFEE	7.0%	▼ 3.6%
MULE	6.9%	▼ 2.8%
SMASH	5.3%	▲ 5.1%
MARTINI	4.3%	▼ 2.3%

Trending Whiskey Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
BOURBON SMASH	2.9%	▲ 5.1%
SMASH	5.3%	▲ 5.1%
PAPER PLANE	4.2%	▲ 3.5%
VEGAS BOMB SHOT	1.2%	▲ 1.8%
OLD FASHIONED	48%	▲ 1.7%
WHISKEY SMASH	1.2%	▲ 1.6%
GOLD RUSH	1.8%	▲ 1.4%

*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% to 11.0%), not that it gained 10 percentage points.

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

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

Q3 26

For example: Sazerac Rye is the 9th-ranked Whiskey brand on independent National cocktail menus, appearing on 4.6% of cocktail menus that have at least one Whiskey cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
1 ▲1	BULLEIT	DIAGEO	12%
2 ▼1	JAMESON	Pernod Ricard	12%
3	MAKER'S MARK	SUNTORY	11%
4	BUFFALO TRACE	SAZERAC	7.8%
5	WOODFORD RESERVE	BROWN-FORMAN	7.4%
6	JACK DANIEL'S	BROWN-FORMAN	7.2%
7	CROWN ROYAL	DIAGEO	4.9%
8 ▲1	OLD FORESTER	BROWN-FORMAN	4.6%

RANK	BRAND	SUPPLIER	MENU SHARE
9 ▲1	SAZERAC RYE	SAZERAC	4.6%
10 ▼2	FOUR ROSES	KIRIN	4.5%
11 ▲1	JIM BEAM	SUNTORY	3.9%
12 ▲1	ELIJAH CRAIG	HEAVEN HILL BRANDS	3.9%
13 ▼2	KNOB CREEK	SUNTORY	3.7%
14 ▲1	RITTENHOUSE	HEAVEN HILL BRANDS	2.6%
15 ▼1	FIREBALL	SAZERAC	2.5%
16 ▲2	ANGEL'S ENVY	BACARDÍ	2.5%

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 30 Whiskey brands with at least 1% Menu Share nationally.)

Whiskey Nationally: Trending Up

Q3 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
DEWAR'S	BACARDÍ	1.2%	▲ 48%
JOHNNIE WALKER	DIAGEO	1.4%	▲ 45%
JEFFERSON'S	Pernod Ricard	1.2%	▲ 24%
SAZERAC RYE	SAZERAC	4.6%	▲ 20%
MICHTER'S	CHATHAM IMPORTS, INC.	1.9%	▲ 20%
ANGEL'S ENVY	BACARDÍ	2.5%	▲ 17%
BUFFALO TRACE	SAZERAC	7.8%	▲ 12%
WHISTLEPIG	WHISTLEPIG	2.2%	▲ 10%

Whiskey Nationally: Trending Down

Q3 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
CROWN ROYAL	DIAGEO	4.9%	▼ 0.9%
KNOB CREEK	SUNTORY	3.7%	▼ 1.4%
FOUR ROSES	KIRIN	4.5%	▼ 2.4%
WILD TURKEY	CAMPARI	1.7%	▼ 2.7%
TULLAMORE DEW	WILLIAM GRANT & SONS	1.5%	▼ 3.3%
JAMESON	Pernod Ricard	12%	▼ 5.5%
SOUTHERN COMFORT	SAZERAC	1.9%	▼ 8.0%
SKREWBALL	Pernod Ricard	2.1%	▼ 11%

*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% to 11.0%), not that it gained 10 percentage points.

WHISKEY COCKTAILS OVERVIEW

Old Fashioned is the most popular Whiskey cocktail in independent accounts nationally, appearing on 48.0% of menus with at least one Whiskey cocktail. Sazerac grew the most, gaining 2214.1% Menu Share.

Top Whiskey Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
OLD FASHIONED	48%	▲ 2.2%
MANHATTAN	22%	▼ 1.7%
WHISKEY SOUR	7.0%	▼ 0.6%
IRISH COFFEE	7.0%	▼ 4.0%
MULE	6.9%	▼ 3.2%
SMASH	5.3%	▲ 17%
MARTINI	4.3%	▼ 5.5%

Trending Whiskey Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
SAZERAC	1.2%	▲ 2214%
SMASH	5.3%	▲ 17%
PAPER PLANE	4.2%	▲ 11%
MAPLE OLD FASHIONED	2.1%	▲ 9.3%
BOURBON SMASH	2.9%	▲ 8.9%
ESPRESSO MARTINI	1.7%	▲ 6.4%
MARGARITA	1.6%	▲ 3.4%

*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% to 11.0%), not that it gained 10 percentage points.

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

RUM

MENU PERFORMANCE

INDEPENDENT NATIONAL ACCOUNTS

Q3 2026

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

Q3 26

For example: Flor de Caña is the 9th-ranked Rum brand on independent National cocktail menus, appearing on 1.9% of cocktail menus that have at least one Rum cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
1	BACARDÍ	BACARDÍ	22%
2	MALIBU	Pernod Ricard	17%
3	CAPTAIN MORGAN	DIAGEO	9.2%
4	MYERS'S	SAZERAC	4.7%
5	GOSLING'S	Pernod Ricard	4.5%
6 ▲1	PLANTERAY	MAISON FERRAND	4.1%
7 ▼1	CRUZAN	SUNTORY	3.9%
8	DON Q	SERRALLES	2.8%

RANK	BRAND	SUPPLIER	MENU SHARE
9	FLOR DE CAÑA	LUXURY SPIRITS INTERNATIONAL	1.9%
10	APPLETON	CAMPARI	1.9%
11	DIPLOMÁTICO	BROWN-FORMAN	1.8%
12	ZACAPA	DIAGEO	1.4%
13 ▲3	BUMBU	SOVEREIGN BRANDS	1.3%
14 ▲1	MOUNT GAY	RÉMY COINTREAU	1.3%
15 ▼2	THE KRAKEN	PROXIMO	1.3%
16 ▼2	PARROT BAY	SAZERAC	1.3%

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 18 Rum brands with at least 1% Menu Share nationally.)

Rum Nationally: Trending Up
Q3 2026 QoQ

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
BUMBU	SOVEREIGN BRANDS	1.3%	▲ 8.4%
PLANTERAY	MAISON FERRAND	4.1%	▲ 7.9%
MOUNT GAY	RÉMY COINTREAU	1.3%	▲ 5.4%
PUSSER'S	SHAW-ROSS	1.2%	▲ 4.8%
FLOR DE CAÑA	LUXURY SPIRITS INTERNATIONAL	1.9%	▲ 3.7%
APPLETON	CAMPARI	1.9%	▲ 2.7%
MALIBU	Pernod Ricard	17%	▲ 2.5%
CRUZAN	SUNTORY	3.9%	▲ 1.0%

Rum Nationally: Trending Down
Q3 2026 QoQ

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
DIPLOMÁTICO	BROWN-FORMAN	1.8%	▼ 0.3%
DON Q	SERRALLÉS	2.8%	▼ 1.0%
MYERS'S	SAZERAC	4.7%	▼ 1.4%
GOSLING'S	Pernod Ricard	4.5%	▼ 1.4%
CAPTAIN MORGAN	DIAGEO	9.2%	▼ 3.5%
SAILOR JERRY	WILLIAM GRANT & SONS	1.1%	▼ 4.0%
ZACAPA	DIAGEO	1.4%	▼ 7.2%

*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% to 11.0%), not that it gained 10 percentage points.

Mojito is the most popular Rum cocktail in independent accounts nationally, appearing on 28.8% of menus with at least one Rum cocktail. Colada grew the most, gaining 6.8% Menu Share.

Top Rum Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MOJITO	29%	▲ 1.5%
PIÑA COLADA	18%	▲ 0.8%
MAI TAI	11%	▲ 0.4%
DAIQUIRI	8.2%	▲ 1.7%
MARTINI	5.8%	▼ 0.1%
RUM PUNCH	5.7%	▲ 2.7%
LONG ISLAND ICED TEA	5.6%	▲ 3.0%

Trending Rum Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
COLADA	4.2%	▲ 6.8%
PAINKILLER	3.3%	▲ 5.2%
FRUIT-FLAVORED DAIQUIRI	4.5%	▲ 3.7%
LONG ISLAND ICED TEA	5.6%	▲ 3.0%
ESPRESSO MARTINI	1.3%	▲ 2.8%
RUM PUNCH	5.7%	▲ 2.7%
TIKI	3.0%	▲ 2.0%

*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% to 11.0%), not that it gained 10 percentage points.

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

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

Q3 26

For example: Flor de Caña is the 9th-ranked Rum brand on independent National cocktail menus, appearing on 1.9% of cocktail menus that have at least one Rum cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
1	BACARDÍ	BACARDÍ	22%
2	MALIBU	Pernod Ricard	17%
3	CAPTAIN MORGAN	DIAGEO	9.2%
4 ▲1	MYERS'S	SAZERAC	4.7%
5 ▼1	GOSLING'S	Pernod Ricard	4.5%
6 ▲1	PLANTERAY	MAISON FERRAND	4.1%
7 ▼1	CRUZAN	SUNTORY	3.9%
8	DON Q	SERRALLÉS	2.8%

RANK	BRAND	SUPPLIER	MENU SHARE
9	FLOR DE CAÑA	LUXURY SPIRITS INTERNATIONAL	1.9%
10	APPLETON	CAMPARI	1.9%
11	DIPLOMÁTICO	BROWN-FORMAN	1.8%
12	ZACAPA	DIAGEO	1.4%
13 ▲4	BUMBU	SOVEREIGN BRANDS	1.3%
14 ▲4	MOUNT GAY	RÉMY COINTREAU	1.3%
15 ▼2	THE KRAKEN	PROXIMO	1.3%
16 ▼1	PARROT BAY	SAZERAC	1.3%

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 18 Rum brands with at least 1% Menu Share nationally.)

Rum Nationally: Trending Up
Q3 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
PLANTERAY	MAISON FERRAND	4.1%	▲ 43%
MOUNT GAY	RÉMY COINTREAU	1.3%	▲ 18%
DIPLOMÁTICO	BROWN-FORMAN	1.8%	▲ 16%
APPLETON	CAMPARI	1.9%	▲ 14%
BUMBU	SOVEREIGN BRANDS	1.3%	▲ 13%
ZACAPA	DIAGEO	1.4%	▲ 8.7%
PUSSER'S	SHAW-ROSS	1.2%	▲ 5.0%
PARROT BAY	SAZERAC	1.3%	▲ 3.5%

Rum Nationally: Trending Down
Q3 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
MYERS'S	SAZERAC	4.7%	▼ 2.2%
THE KRAKEN	PROXIMO	1.3%	▼ 2.6%
CRUZAN	SUNTORY	3.9%	▼ 4.5%
SAILOR JERRY	WILLIAM GRANT & SONS	1.1%	▼ 7.2%
GOSLING'S	Pernod Ricard	4.5%	▼ 7.9%

*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% to 11.0%), not that it gained 10 percentage points.

Mojito is the most popular Rum cocktail in independent accounts nationally, appearing on 28.8% of menus with at least one Rum cocktail. Long Island Iced Tea grew the most, gaining 116% Menu Share.

Top Rum Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MOJITO	29%	▼ 2.2%
PIÑA COLADA	18%	▼ 3.0%
MAI TAI	11%	▼ 1.2%
DAIQUIRI	8.2%	▼ 35%
MARTINI	5.8%	▼ 4.0%
RUM PUNCH	5.7%	▲ 10%
LONG ISLAND ICED TEA	5.6%	▲ 116%

Trending Rum Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
LONG ISLAND ICED TEA	5.6%	▲ 116%
ESPRESSO MARTINI	1.3%	▲ 17%
COLADA	4.2%	▲ 11%
RUM PUNCH	5.7%	▲ 10%
OLD FASHIONED	1.9%	▲ 4.6%
PAINKILLER	3.3%	▲ 4.4%
BLUE HAWAIIAN	2.8%	▲ 1.7%

*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% to 11.0%), not that it gained 10 percentage points.

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

GIN

MENU PERFORMANCE

INDEPENDENT NATIONAL ACCOUNTS

Q3 2026

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

Q3 26

For example: Aviation is the 9th-ranked Gin brand on independent National cocktail menus, appearing on 2.7% of cocktail menus that have at least one Gin cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
1	HENDRICK'S	William Grant & Sons	13%
2	EMPRESS 1908	Milestone	9.0%
3	BOMBAY	Bacardí	8.7%
4	TANQUERAY	Diageo	8.3%
5	BEEFEATER	Pernod Ricard	4.1%
6	THE BOTANIST	Rémy Cointreau	3.8%
7	ROKU	Suntory	3.6%
8	FORDS GIN	Brown-Forman	3.5%

RANK	BRAND	SUPPLIER	MENU SHARE
9	AVIATION	Diageo	2.7%
10	GRAY WHALE	Deutsch Family Wine & Spirits	2.1%
11	NOLET'S	Nolet's Finest Gins	1.5%
12	MALFY	Pernod Ricard	1.3%
13 ▲28	STRATUSPHERE		1.3%
14 ▼1	BULLDOG	Campari	1.2%
15 ▼1	CITADELLE	Maison Ferrand	1.2%
16	MONKEY 47	Pernod Ricard	1.0%

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 16 Gin brands with at least 1% Menu Share nationally.)

Gin Nationally: Trending Up
Q3 2026 QoQ

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
STRATUSPHERE		1.3%	▲ 1622%
CITADELLE	MAISON FERRAND	1.2%	▲ 12%
MONKEY 47	Pernod Ricard	1.0%	▲ 6.4%
GRAY WHALE	DEUTSCH FAMILY WINE & SPIRITS	2.1%	▲ 6.0%
HENDRICK'S	WILLIAM GRANT & SONS	13%	▲ 2.3%
BOMBAY	BACARDÍ	8.7%	▲ 2.0%
ROKU	SUNTORY	3.6%	▲ 1.8%
THE BOTANIST	RÉMY COINTREAU	3.8%	▲ 1.5%

Gin Nationally: Trending Down
Q3 2026 QoQ

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
EMPRESS 1908	MILESTONE	9.0%	▼ 0.5%
MALFY	Pernod Ricard	1.3%	▼ 1.1%
NOLET'S	NOLET'S FINEST GINS	1.5%	▼ 1.4%
TANQUERAY	DIAGEO	8.3%	▼ 2.5%
AVIATION	DIAGEO	2.7%	▼ 4.5%

*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% to 11.0%), not that it gained 10 percentage points.

Negroni is the most popular Gin cocktail in independent accounts nationally, appearing on 17.7% of menus with at least one Gin cocktail. Dirty Martini grew the most, gaining 14.5% Menu Share.

Top Gin Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
NEGRONI	18%	▼ 0.6%
MARTINI	16%	▲ 0.9%
FRENCH 75	8.6%	▲ 0.8%
GIMLET	6.4%	▲ 2.5%
LONG ISLAND ICED TEA	6.3%	▲ 3.7%
GIN & TONIC	5.2%	▲ 1.8%
BEE'S KNEES	4.8%	▲ 1.4%

Trending Gin Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
DIRTY MARTINI	1.8%	▲ 14%
BRAMBLE	2.0%	▲ 7.3%
SPRITZ	4.5%	▲ 7.0%
MARGARITA	1.0%	▲ 4.5%
MULE	2.1%	▲ 4.2%
LONG ISLAND ICED TEA	6.3%	▲ 3.7%
WHITE NEGRONI	1.1%	▲ 2.8%

*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% to 11.0%), not that it gained 10 percentage points.

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

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

Q3 26

For example: Aviation is the 9th-ranked Gin brand on independent National cocktail menus, appearing on 2.7% of cocktail menus that have at least one Gin cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
1	HENDRICK'S	William Grant & Sons	13%
2 ▲2	EMPRESS 1908	Milestone	9.0%
3 ▼1	BOMBAY	Bacardí	8.7%
4 ▼1	TANQUERAY	Diageo	8.3%
5	BEEFEATER	Pernod Ricard	4.1%
6 ▲1	THE BOTANIST	Rémy Cointreau	3.8%
7 ▼1	ROKU	Suntory	3.6%
8	FORDS GIN	Brown-Forman	3.5%

RANK	BRAND	SUPPLIER	MENU SHARE
9	AVIATION	Diageo	2.7%
10	GRAY WHALE	Deutsch Family Wine & Spirits	2.1%
11 ▲1	NOLET'S	Nolet's Finest Gins	1.5%
12 ▼1	MALFY	Pernod Ricard	1.3%
13 ▲3 4	STRATUSPHERE		1.3%
14 ▼1	BULLDOG	Campari	1.2%
15	CITADELLE	Maison Ferrand	1.2%
16	MONKEY 47	Pernod Ricard	1.0%

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 16 Gin brands with at least 1% Menu Share nationally.)

Gin Nationally: Trending Up

Q3 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
STRATUSPHERE		1.3%	▲ 2212%
AVIATION	DIAGEO	2.7%	▲ 53%
GRAY WHALE	Deutsch Family Wine & Spirits	2.1%	▲ 29%
MONKEY 47	Pernod Ricard	1.0%	▲ 19%
EMPRESS 1908	Milestone Beverage	9.0%	▲ 19%
THE BOTANIST	Rémy Cointreau	3.8%	▲ 13%
CITADELLE	Maison Ferrand	1.2%	▲ 9.6%
FORDS GIN	Brown-Forman	3.5%	▲ 8.4%

Gin Nationally: Trending Down

Q3 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
BULLDOG	Campari	1.2%	▼ 8.7%
MALFY	Pernod Ricard	1.3%	▼ 10%

*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% to 11.0%), not that it gained 10 percentage points.

Negroni is the most popular Gin cocktail in independent accounts nationally, appearing on 17.7% of menus with at least one Gin cocktail. Vesper Martini grew the most, gaining 369.8% Menu Share.

Top Gin Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
NEGRONI	18%	▲ 5.1%
MARTINI	16%	▲ 2.0%
FRENCH 75	8.6%	▲ 3.4%
GIMLET	6.4%	▲ 7.3%
LONG ISLAND ICED TEA	6.3%	▲ 114%
GIN & TONIC	5.2%	▼ 4.4%
BEE'S KNEES	4.8%	▼ 2.7%

Trending Gin Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
VESPER MARTINI	2.8%	▲ 370%
LONG ISLAND ICED TEA	6.3%	▲ 114%
DIRTY MARTINI	1.8%	▲ 38%
SPRITZ	4.5%	▲ 22%
BRAMBLE	2.0%	▲ 16%
WHITE NEGRONI	1.1%	▲ 15%
SMASH	1.4%	▲ 12%

*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% to 11.0%), not that it gained 10 percentage points.

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

CORDIALS

MENU PERFORMANCE

INDEPENDENT NATIONAL ACCOUNTS

Q3 2026

Ground Signal calculates menu share for each Cordials 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 Cordials cocktail.

Cordials Cocktail Menu Share

Q3 26

For example: Licor 43 is the 9th-ranked Cordials brand on independent National cocktail menus, appearing on 7.6% of cocktail menus that have at least one Cordials cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
1	APEROL	CAMPARI	33%
2	COINTREAU	RÉMY COINTREAU	22%
3	KAHLUA	Pernod Ricard	21%
4	ST. GERMAIN	BACARDÍ	21%
5	GRAND MARNIER	CAMPARI	18%
6	CAMPARI	CAMPARI	18%
7	BAILEYS	DIAGEO	16%
8	CHAMBORD	BROWN-FORMAN	8.8%

RANK	BRAND	SUPPLIER	MENU SHARE
9	LICOR 43	Zamora company	7.6%
10 ▲1	LILLET	Pernod Ricard	7.0%
11 ▼1	LUXARDO	HOTALING & CO. IMPORTER–DISTILLER	6.9%
12	FRANGELICO	CAMPARI	6.6%
13	CHARTREUSE	IMPORTERS FREDERICK WILDMAN AND SONS, LTD. WINE MERCHANTS	6.0%
14	MR BLACK	DIAGEO	5.4%
15	ANCHO REYES	CAMPARI	5.4%
16	DE KUYPER	SUNTORY	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 50 Cordials brands with at least 1% Menu Share nationally.)

Cordials Nationally: Trending Up

Q3 2026 QoQ

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
CHINOLA	CHINOLA	2.4%	▲ 15%
CHAREAU	chareau	1.2%	▲ 7.3%
LICOR 43	Zamora company	7.6%	▲ 6.7%
SUZE	Pernod Ricard	1.6%	▲ 5.5%
GIFFARD	BACK BAR PROJECT	4.5%	▲ 4.2%
LILLET	Pernod Ricard	7.0%	▲ 4.2%
COMBIER	CNI BRANDS	1.9%	▲ 3.8%
NONINO	TERLATO ALWAYS EXCEPTIONAL	4.8%	▲ 3.7%

Cordials Nationally: Trending Down

Q3 2026 QoQ

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
CHAMBORD	BROWN-FORMAN	8.8%	▼ 0.1%
STREGA	SHAW-ROSS	1.2%	▼ 0.3%
GRAND MARNIER	CAMPARI	18%	▼ 0.3%
CAMPARI	CAMPARI	18%	▼ 0.5%
KAHLUA	Pernod Ricard	21%	▼ 0.7%
HEERING	SUNTORY	1.1%	▼ 0.7%
SOLERNO	WILLIAM GRANT & SONS	1.2%	▼ 0.7%
DE KUYPER	SUNTORY	5.2%	▼ 0.8%

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

CORDIALS COCKTAILS OVERVIEW

Margarita is the most popular Cordials cocktail in independent accounts nationally, appearing on 39.2% of menus with at least one Cordials cocktail. Hugo Spritz grew the most, gaining 22.0% Menu Share.

Top Cordials Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MARGARITA	39%	▲ 0.6%
ESPRESSO MARTINI	27%	▲ 1.3%
MARTINI	22%	▼ 0.7%
APERITIF SPRITZ	15%	▲ 2.4%
SPRITZ	13%	▲ 7.4%
COSMOPOLITAN	12%	▼ 0.7%
NEGRONI	11%	▼ 0.7%

Trending Cordials Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
HUGO SPRITZ	5.4%	▲ 22%
LIMONCELLO SPRITZ	2.4%	▲ 18%
COLADA	1.0%	▲ 11%
ORANGE CRUSH	1.3%	▲ 8.0%
LYCHEE MARTINI	1.8%	▲ 7.8%
SPRITZ	13%	▲ 7.4%
GIMLET	1.2%	▲ 6.6%

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

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

MOST POPULAR CORDIALS BRANDS

Ground Signal calculates menu share for each Cordials 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 Cordials cocktail.

Cordials Cocktail Menu Share

Q3 26

For example: Licor 43 is the 9th-ranked Cordials brand on independent National cocktail menus, appearing on 7.6% of cocktail menus that have at least one Cordials cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
1	APEROL	CAMPARI	33%
2	COINTREAU	RÉMY COINTREAU	22%
3	KAHLUA	Pernod Ricard	21%
4	ST. GERMAIN	BACARDÍ	21%
5	GRAND MARNIER	CAMPARI	18%
6	CAMPARI	CAMPARI	18%
7	BAILEYS	DIAGEO	16%
8	CHAMBORD	BROWN-FORMAN	8.8%

RANK	BRAND	SUPPLIER	MENU SHARE
9 ▲3	LICOR 43	Zamora company	7.6%
10 ▲1	LILLET	Pernod Ricard	7.0%
11 ▼1	LUXARDO	HOTALING & CO. IMPORTER–DISTILLER	6.9%
12 ▼3	FRANGELICO	CAMPARI	6.6%
13	CHARTREUSE	IMPORTERS FREDERICK WILDMAN AND SONS, LTD. WINE MERCHANTS	6.0%
14 ▲3	MR BLACK	DIAGEO	5.4%
15 ▲1	ANCHO REYES	CAMPARI	5.4%
16 ▼2	DE KUYPER	SUNTORY	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 50 Cordials brands with at least 1% Menu Share nationally.)

Cordials Nationally: Trending Up

Q3 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
NONINO	TERLATO ALWAYS EXCEPTIONAL	4.8%	▲ 25%
LICOR 43	Zamora company	7.6%	▲ 22%
BORGHETTI	BRANCA	3.2%	▲ 19%
PIMM'S	DIAGEO	2.5%	▲ 16%
ST. ELDER	ST. ELDER	1.1%	▲ 12%
CHAREAU	chareau	1.2%	▲ 11%
STREGA	SHAW-ROSS	1.2%	▲ 11%
MR BLACK	DIAGEO	5.4%	▲ 11%

Cordials Nationally: Trending Down

Q3 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
DRAMBUIE	WILLIAM GRANT & SONS	1.2%	▼ 0.1%
COINTREAU	RÉMY COINTREAU	22%	▼ 0.2%
GRAN GALA	SAZERAC	2.5%	▼ 0.7%
BAILEYS	DIAGEO	16%	▼ 0.9%
FRANGELICO	CAMPARI	6.6%	▼ 2.1%
FERNET BRANCA	BRANCA	1.7%	▼ 2.1%
MIDORI	SUNTORY	5.1%	▼ 2.4%
TIA MARIA	ILLVA SARONNO	1.2%	▼ 2.6%

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

Margarita is the most popular Cordials cocktail in independent accounts nationally, appearing on 39.2% of menus with at least one Cordials cocktail. Vesper Martini grew the most, gaining 399.3% Menu Share.

Top Cordials Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MARGARITA	39%	▲ 0.1%
ESPRESSO MARTINI	27%	▲ 15%
MARTINI	22%	▼ 7.4%
APERITIF SPRITZ	15%	▲ 6.6%
SPRITZ	13%	▲ 18%
COSMOPOLITAN	12%	▲ 9.4%
NEGRONI	11%	▲ 3.3%

Trending Cordials Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
VESPER MARTINI	1.6%	▲ 399%
LONG ISLAND ICED TEA	4.4%	▲ 106%
APPLETINI	2.1%	▲ 87%
HUGO SPRITZ	5.4%	▲ 60%
FRUIT-FLAVORED MARGARITA	2.0%	▲ 57%
BLUE MARGARITA	1.4%	▲ 55%
LIMONCELLO SPRITZ	2.4%	▲ 43%

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

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

COGNAC

MENU PERFORMANCE

INDEPENDENT NATIONAL ACCOUNTS

Q3 2026

Ground Signal calculates menu share for each Cognac 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 Cognac cocktail.

Cognac Cocktail Menu Share

Q3 26

For example: Maison Rouge is the 9th-ranked Cognac brand on independent National cocktail menus, appearing on 0.6% of cocktail menus that have at least one Cognac cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
1	HENNESSY	LVMH	22%
2	RÉMY MARTIN	Rémy Cointreau	12%
3	COURVOISIER	Campari	5.1%
4	PIERRE FERRAND	Maison Ferrand	4.9%
5	D'USSÉ	Bacardí	3.9%
6	BRANSON		2.2%
7	MARTELL	Pernod Ricard	1.8%
8	HINE	Hotaling & Co. Importer–Distiller	0.9%

RANK	BRAND	SUPPLIER	MENU SHARE
9 ▲1	MAISON ROUGE	Hardy Maison Fondée en 1863	0.6%
10 ▼1	HARDY	Spiribam	0.4%
11 ▲2	ALIZE	Quintessential Brands Group	0.3%
12 ▼1	ANSAC	Heaven Hill Brands	0.3%
13 ▼1	GAUTIER		0.2%
13	CAMUS COGNAC	Camus Wines & Spirits	0.2%
15 ▲1	SALIGNAC	Suntory	0.2%
15	MARTINGALE	Luxury Spirits International	0.2%

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 7 Cognac brands with at least 1% Menu Share nationally.)

Cognac Nationally: Trending Up

Q3 2026 QoQ

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
HENNESSY	LVMH	22%	▲ 3.6%

Cognac Nationally: Trending Down

Q3 2026 QoQ

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
RÉMY MARTIN	Rémy Cointreau	12%	▼ 0.7%
PIERRE FERRAND	Maison Ferrand	4.9%	▼ 0.8%
COURVOISIER	Campari	5.1%	▼ 1.4%
D'USSÉ	Bacardí	3.9%	▼ 2.5%
MARTELL	Pernod Ricard	1.8%	▼ 11%
BRANSON		2.2%	▼ 11%

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

Sidecar is the most popular Cognac cocktail in independent accounts nationally, appearing on 20.5% of menus with at least one Cognac cocktail. Martini grew the most, gaining 12.6% Menu Share.

Top Cognac Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
SIDECAR	21%	▼ 1.6%
VIEUX CARRÉ	8.5%	▼ 3.7%
MARGARITA	4.0%	▲ 2.5%
OLD FASHIONED	3.3%	▲ 1.2%
FRENCH 75	3.2%	▲ 4.0%
SANGRIA	2.9%	▼ 4.7%
BRANDY ALEXANDER	2.2%	▼ 3.2%

Trending Cognac Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MARTINI	2.1%	▲ 13%
FRENCH CONNECTION	1.8%	▲ 8.0%
FRENCH 75	3.2%	▲ 4.0%
MARGARITA	4.0%	▲ 2.5%
OLD FASHIONED	3.3%	▲ 1.2%

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 Cognac cocktail.
**For example, a 10% would mean that cocktail's Menu Share grew by 10% (e.g., went from 10% to 11.0%), not that it gained 10 percentage points.

MOST POPULAR COGNAC BRANDS

Ground Signal calculates menu share for each Cognac 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 Cognac cocktail.

Cognac Cocktail Menu Share

Q3 26

For example: Maison Rouge is the 9th-ranked Cognac brand on independent National cocktail menus, appearing on 0.6% of cocktail menus that have at least one Cognac cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
1	HENNESSY	LVMH	22%
2	RÉMY MARTIN	RÉMY COINTREAU	12%
3 ▲1	COURVOISIER	CAMPARI	5.1%
4 ▼1	PIERRE FERRAND	MAISON FERRAND	4.9%
5	D'USSÉ	BACARDÍ	3.9%
6 ▲1	BRANSON	§	2.2%
7 ▼1	MARTELL	Pernod Ricard	1.8%
8	HINE	HOTALING & CO. IMPORTER–DISTILLER	0.9%

RANK	BRAND	SUPPLIER	MENU SHARE
9	MAISON ROUGE	HARDY MAISON FONDÉE EN 1863	0.6%
10	HARDY	SPIRIBAM FINE SPIRITS FAMILY	0.4%
11 ▲6	ALIZE	QUINTESSENTIAL BRANDS GROUP Q	0.3%
12	ANSAC	HEAVEN HILL BRANDS	0.3%
13	GAUTIER		0.2%
13 ▼3	CAMUS COGNAC	CAMUS WINES & SPIRITS	0.2%
15 ▲1	SALIGNAC	SUNTORY	0.2%
15 ▲9	MARTINGALE	LUXURY SPIRITS INTERNATIONAL	0.2%

TRENDS AMONG COGNAC 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 7 Cognac brands with at least 1% Menu Share nationally.)

Cognac Nationally: Trending Up

Q3 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
HENNESSY	LVMH	22%	▲ 13%
RÉMY MARTIN	RÉMY COINTREAU	12%	▲ 5.3%
D'USSÉ	BACARDÍ	3.9%	▲ 3.6%

Cognac Nationally: Trending Down

Q3 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
COURVOISIER	CAMPARI	5.1%	▼ 2.7%
BRANSON	§	2.2%	▼ 4.3%
PIERRE FERRAND	MAISON FERRAND	4.9%	▼ 17%
MARTELL	Pernod Ricard	1.8%	▼ 25%

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

COGNAC COCKTAILS OVERVIEW

Sidecar is the most popular Cognac cocktail in independent accounts nationally, appearing on 20.5% of menus with at least one Cognac cocktail. Sazerac grew the most, gaining 1469.1% Menu Share.

Top Cognac Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
SIDECAR	21%	▼ 1.8%
VIEUX CARRÉ	8.5%	▼ 3.7%
MARGARITA	4.0%	▼ 3.9%
OLD FASHIONED	3.3%	▼ 4.3%
FRENCH 75	3.2%	▼ 1.0%
SANGRIA	2.9%	▼ 0.7%
BRANDY ALEXANDER	2.2%	▲ 0.6%

Trending Cognac Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
SAZERAC	1.4%	▲ 1469%
FRENCH CONNECTION	1.8%	▲ 15%
BRANDY ALEXANDER	2.2%	▲ 0.6%

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

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

SUMMARY

Category leaders held their positions in Q3, while gradual erosion sits just below them. Growth is coming from smaller brands, newer variations and emerging flavors, with Espresso Martini the one major serve still gaining.

Brand performance: leaders hold, challengers build from a small base

Top brands are mostly flat. The #1 brand is unchanged YoY in 6 of 7 categories, and only **Grey Goose**, **Buffalo Trace**, **Hennessy** and **Empress 1908** are clearly growing among the leaders.

The fastest-growing brands are small. The median holds about 2% menu share. Examples are **Gran Centenario** (+76%, 1.1% share), **Lalo** (+43%, 2.4%), **Planteray** (+43%, 4.1%) and **Aviation** (+53%, 2.7%).

Several large incumbents are losing share YoY: **Jameson** (−5.5%), **1800** (−6.6%), **Smirnoff** (−5.4%), **Hornitos** (−5.7%) and **Gosling's** (−7.9%).

Cocktail trends: growth is concentrated in a few serves

Margarita (51% of menus), **Old Fashioned** (33%), **Martini** (30%) and **Espresso Martini** (27%) lead nationally.

Espresso Martini is growing across categories. It's on 32% of vodka menus (+14% YoY) and 27% of cordials menus (+15% YoY).

Spritz is up 17–22% YoY in tequila, vodka, gin and cordials, with **Hugo Spritz** up 60% in cordials.

Margarita variants are outgrowing the classic. **Spicy Margarita** is up 14% YoY.

Flavor dynamics: citrus anchors, growth is at the edges

Citrus is the backbone. **Lime** is on 62% of tequila menus with a bespoke cocktail, **lemon** on 54% of gin and **pineapple** on 51% of rum. Most are flat to slightly down YoY.

Exotic fruit is growing: **lychee** (+19% vodka, +25% gin) and **guava** (+15% rum).

Sweet and dessert notes are growing: **chocolate** (+14%) and **peach** (+12%) in tequila, **cream** (+19%) in gin, and **blackberry** (+15%) in whiskey.

ADDITIONAL MENU CAPABILITIES

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

Venue Profile

Example: Top 3 Whiskey Brands in Independent 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. Independent Accounts

Example:

Top Brands in Chain Accts

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

Top Brands in Independent 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