



OCTOBER DEEP DIVE

Independent Cocktail Menus
Q3 2026 Review

GROUND SIGNAL



MANIFESTO OF NONSENSE.

APERIRE / APERITIVO COCKTAILS.

MELAVISTA / LIKE YOUR FAVORITE **APPLE** SODA WITH A VIEW /16

LITTLE TONI.CO / BASICALLY A DIRTY MARTINI BUT MAKE IT A HIGHBALL /16

EXCITING / DYNAMIC COCKTAILS.

ZIGZAG / MEXICO MEETS AN ESPRESSO MARTINI /17

SGROPPINO / LIKE A **LEMON** ON VACATION /18

APHRODISIAC / SPICY COCKTAILS.

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PARTHENOPE / A MARGARITA AND A PALOMA FELL IN LOVE ON THE SHORE /18

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DIGESTIVO / DIGESTIF COCKTAILS.

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SBAGLIATO /18

BOULEVARDIER /18

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VICEVERSA C/MOCKTAIL /12

SPIRITS / SPIRITS.

VERMOUTHS, SHERRY & AMARI



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 120K+ 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.

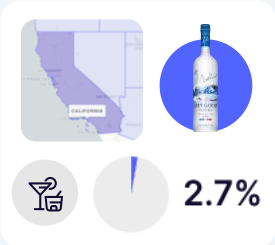


COCKTAIL SHARE

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%.

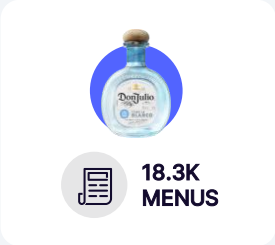


MENU COUNT

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.

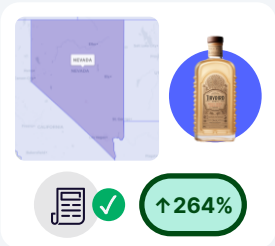


MENU FEATURE SALES LIFT

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%.

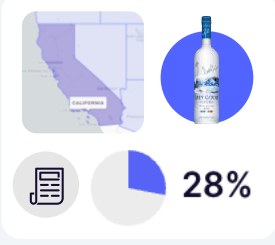


MENU SHARE

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%.

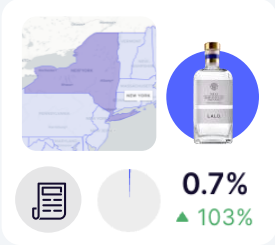


MENU / COCKTAIL SHARE CHANGE

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.



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

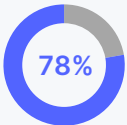


\$13.23
Average
Cocktail Price

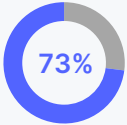
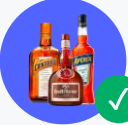
Breakdown by Spirits Category



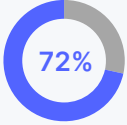
61.8K
Menus w/
Vodka Cocktail



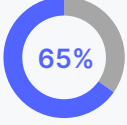
58.0K
Menus w/
Tequila Cocktail



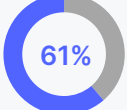
56.9K
Menus w/
Liqueur Cocktail



51.9K
Menus w/
Whiskey Cocktail



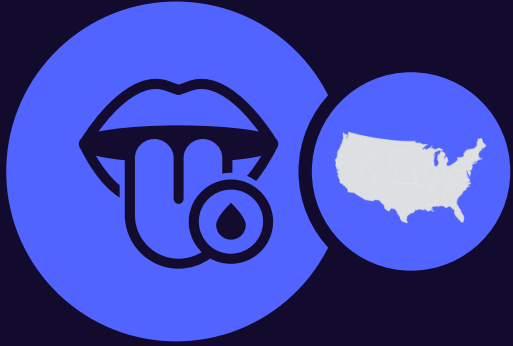
48.7K
Menus w/
Rum Cocktail



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

Lime is the most popular flavor in bespoke Tequila cocktails on 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

Lemon is the most popular flavor used in bespoke Vodka cocktails 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

Lemon is the most popular flavor used in bespoke Whiskey cocktails 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%	▲ 1.5%
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

Pineapple is the most popular flavor used in bespoke Rum cocktails 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

Lemon is the most popular flavor used in bespoke Gin cocktails 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

RANK	BRAND	SUPPLIER	MENU SHARE
1	PATRÓN	BACARDÍ	12%
2	DON JULIO	DIAGEO	8.0%
Same slide as slide 15? This is QoQ slide 15 is YoY			
8	MILAGRO	WILLIAM GRANT & SONS <small>INDEPENDENT FAMILY DISTILLERS SINCE 1881</small>	4.0%

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
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	  LALO	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 INDEPENDENT FAMILY DISTILLERS SINCE 1867	4.0%	▼ 1.1%
HORNITOS	 SUNTORY	4.8%	▼ 1.1%
TEREMANA	 TEREMANA REAL 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		12%
2	DON JULIO		
3	CASAMIGOS		
4	JOSE CUERVO		
5 ▲1	ESPOLÓN		
6 ▼1	1800		
7 ▼1	HORNITOS	SUNTORY	4.8%
8 ▲1	MILAGRO	WILLIAM GRANT & SONS <small>INDEPENDENT FAMILY DISTILLERS SINCE 1881</small>	4.0%

Same slide as slide 12?
This is supposed to be different although the data appears to be identical – I may pull these later

RANK	BRAND	SUPPLIER	MENU SHARE
9	HERRADURA	BROWN-FORMAN	4.0%
10	BACARDÍ	BACARDÍ	3.9%
11	SAZERAC	SAZERAC	3.4%
12	BROWN-FORMAN	BROWN-FORMAN	3.4%
13	HEAVEN HILL BRANDS	HEAVEN HILL BRANDS	3.3%
14	SUNTORY	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	 	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 <small>INDEPENDENT FAMILY DISTILLERS SINCE 1867</small>	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

RANK	BRAND	SUPPLIER	MENU SHARE
1	TITO'S	 	29%
2	KETEL ONE		12%
3 	GREY GOOSE		11%
4 	ABSOLUT		11%
5	STOLI		7.1%
6	DEEP EDDY		6.5%
7	SMIRNOFF		4.8%
8	WHEATLEY		3.2%

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
9	NEW AMSTERDAM		2.2%
10	BELVEDERE		2.0%
11	SKYY		2.0%
12	THREE OLIVES		1.9%
13	HAKU		1.8%
14 	PEARL		1.4%
14 	EFFEN		1.4%
16 	CÎROC		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	CONCECUH 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 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.

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 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 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

RANK	BRAND	SUPPLIER	MENU SHARE
1	TITO'S	 	29%
2	KETEL ONE		12%
3 	GREY GOOSE		11%
4 	ABSOLUT		11%
5	STOLI		7.1%
6	DEEP EDDY		6.5%
7	SMIRNOFF		4.8%
8	WHEATLEY		3.2%

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
9	NEW AMSTERDAM		2.2%
10 	BELVEDERE		2.0%
11	SKYY		2.0%
12 	THREE OLIVES		1.9%
13 	HAKU		1.8%
14 	PEARL		1.4%
14 	EFFEN		1.4%
16 	CÎROC		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	 	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 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.

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 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



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

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%

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
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 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.

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 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 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

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%

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
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 <small>IMPORTS, INC.</small>	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	<small>WILLIAM GRANT & SONS</small> <small>INDEPENDENT FAMILY DISTILLERS SINCE 1847</small>	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 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.

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 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



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

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	SERRAVALLO'S	2.8%

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
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	 SERRAVALLO	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 <small>INDEPENDENT FAMILY DISTILLERS SINCE 1807</small>	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 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.

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 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 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

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	SERRAVALLO	2.8%

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
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 <small>INDEPENDENT FAMILY DISTILLERS SINCE 1867</small>	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 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.

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 115.9% 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 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



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

RANK	BRAND	SUPPLIER	MENU SHARE
1	HENDRICK'S	WILLIAM GRANT & SONS <small>INDEPENDENT FAMILY DISTILLERS SINCE 1847</small>	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%

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
9	AVIATION	DIAGEO	2.7%
10	GRAY WHALE	DEUTSCH FAMILY <small>WINE & SPIRITS</small>	2.1%
11	NOLET'S	NOLET'S <small>FINEST GINS</small>	1.5%
12	MALFY	Pernod Ricard	1.3%
13 ▲28	STRATUSPHERE		1.3%
14 ▼1	BULLDOG	CAMPARI	1.2%
15 ▼1	CITADELLE	MAISON FERRAND <small>PRODUCTION INDÉPENDANTE DE SPIRITUEUX ARTISANALE</small>	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		1.2%	▲ 12%
MONKEY 47		1.0%	▲ 6.4%
GRAY WHALE		2.1%	▲ 6.0%
HENDRICK'S		13%	▲ 2.3%
BOMBAY		8.7%	▲ 2.0%
ROKU		3.6%	▲ 1.8%
THE BOTANIST		3.8%	▲ 1.5%

 Gin Nationally: Trending Down
Q3 2026 QoQ

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
EMPRESS 1908		9.0%	▼ 0.5%
MALFY		1.3%	▼ 1.1%
NOLET'S		1.5%	▼ 1.4%
TANQUERAY		8.3%	▼ 2.5%
AVIATION		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 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.

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 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 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

RANK	BRAND	SUPPLIER	MENU SHARE
1	HENDRICK'S	WILLIAM GRANT & SONS <small>INDEPENDENT FAMILY DISTILLERS SINCE 1847</small>	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%

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
9	AVIATION	DIAGEO	2.7%
10	GRAY WHALE	DEUTSCH FAMILY <small>WINE & SPIRITS</small>	2.1%
11 ▲1	NOLET'S	NOLET'S <small>FINEST GINS</small>	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 <small>MAISON FERRAND DISTILLERS OF FINEST GINS</small>	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		2.1%	▲ 29%
MONKEY 47		1.0%	▲ 19%
EMPRESS 1908		9.0%	▲ 19%
THE BOTANIST		3.8%	▲ 13%
CITADELLE		1.2%	▲ 9.6%
FORDS GIN		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 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.

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 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



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

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%

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
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 & SONS, LTD. WINE & SPIRITS	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		2.4%	▲ 15%
CHAREAU	chareau	1.2%	▲ 7.3%
LICOR 43		7.6%	▲ 6.7%
SUZE		1.6%	▲ 5.5%
GIFFARD		4.5%	▲ 4.2%
LILLET		7.0%	▲ 4.2%
COMBIER		1.9%	▲ 3.8%
NONINO		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 <small>INDEPENDENT FAMILY DISTILLERS SINCE 1840</small>	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 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 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 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 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

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%

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
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 & SONS, LTD. WINE & SPIRITS	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 49 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%
PIMMS	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 INDEPENDENT FAMILY DISTILLERS SINCE 1847	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 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 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 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



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

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%

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
9 ▲1	MAISON ROUGE	 HARDY MAISON FONDÉE EN 1863	0.6%
10 ▼1	HARDY	 SPIRIBAM FINE SPIRITS FAMILY	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 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.

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.

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

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%

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
9	MAISON ROUGE	 HARDY MAISON FONDÉE EN 1863	0.6%
10	HARDY	 SPIRIBAM FINE SPIRITS FAMILY	0.4%
11 ▲6	ALIZE	 QUINTESSENTIAL BRANDS GROUP	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%

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'USSE	 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.

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 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

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.

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

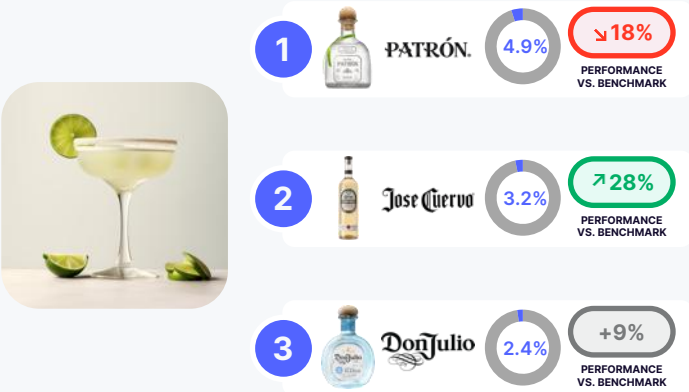
Venue Profile

Example: Top 3 Whiskey Brands in Independent Steak Houses



Cocktails

Example: Top 3 Tequila Brands Used in Margaritas Nationwide



Chains vs. Independent Accounts

Example:
Top Brands in Chain Accts Top Brands in Independent Accts



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