overproof

ESPRESSO MARTINI

COCKTAIL REPORT

DECEMBER 2023



PHOTO CREDIT: KRISTS LUHAERS

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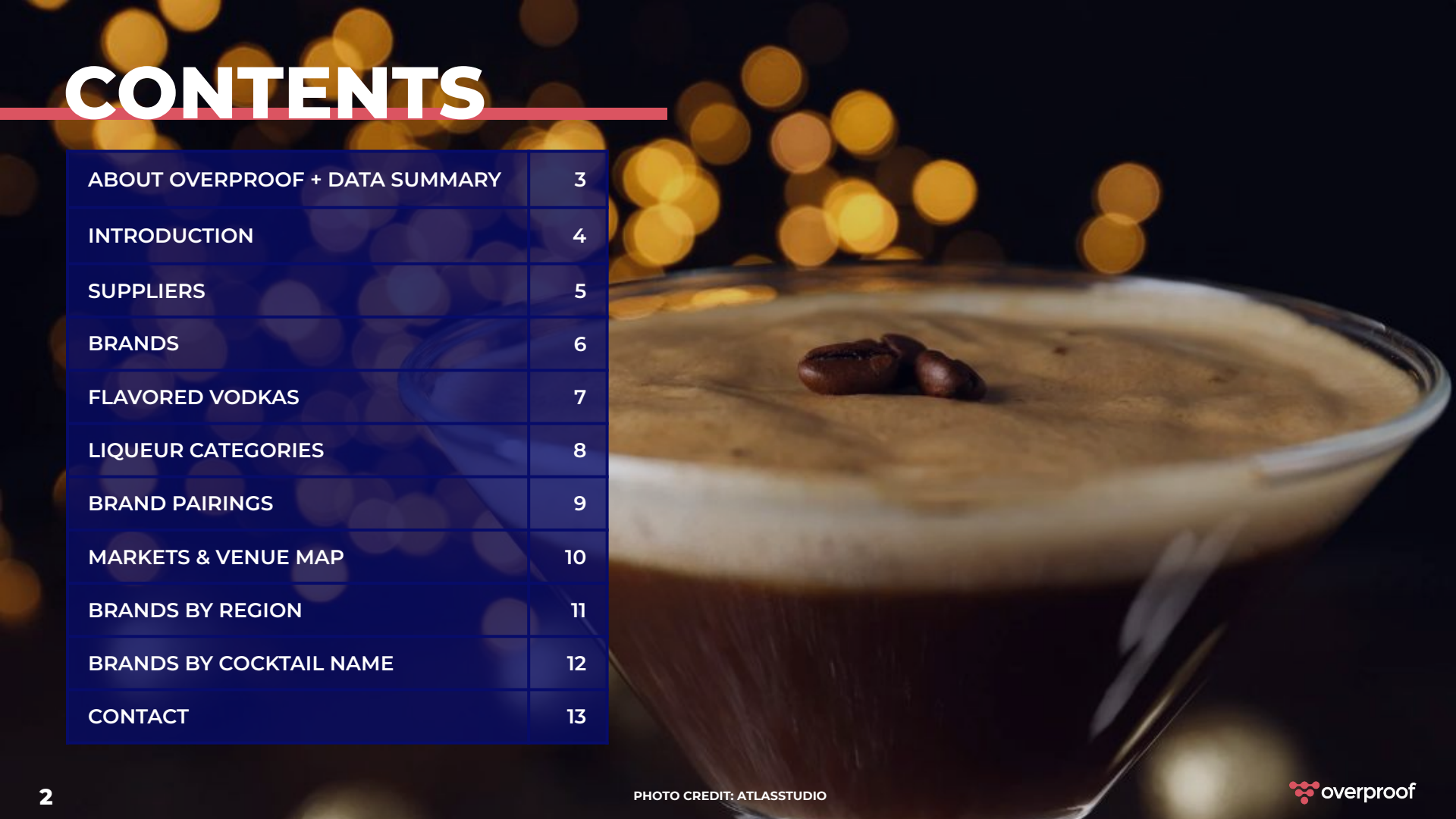


PHOTO CREDIT: ATLASSTUDIO

DATA SUMMARY

As the leading business intelligence platform for global alcohol brands, Overproof uses **AI and Machine Learning** to analyze and understand beverage menus at scale. With our technology, we can identify the brands, products, suppliers, cocktails and cocktail styles listed on a menu, which enables our customers to benchmark performance and prioritize sales efforts based on factors like venue type, product category, market, cocktail or competitor presence and price point.

In our database, 9.4k venues feature the espresso martini. This snapshot report covers its presence in more than 4.7k independent bars and restaurants with branded menu mentions from May to October 2023.

	BRANDED	BRANDED + UNBRANDED
VENUES	4.7K	9.4K
MENUS	9.8K	22K
COCKTAILS	10.1K	25.4K
MENU MENTIONS	16.9K	
SUPPLIERS	172	
BRANDS	368	

PHOTO CREDIT: KRISTS LUHAERS

INTRODUCTION

We're thrilled to present our latest Overproof Market Report, focusing on the world of **espresso martini cocktails**. This report dives deep into the intricacies and nuances of how these cocktails are represented in the market, particularly through their **textual presence on menus.**

For instance, the margarita cocktail appears in more than 300 different instances on U.S. cocktail menus! This variety isn't just about different names – it's a treasure trove of **actionable insights,** especially when we start to explore preferences from the classic margarita to the cadillac, frozen and an array of spicy or flavored varieties, each variation offers a unique lens into consumer tastes and market trends.

The **espresso martini** is listed in over 100 different versions on menus, each highlighting unique variations and trends that speak volumes about both brand preferences and market dynamics. For example, the **chocolate espresso martini**, much to my (not-so-surprised) surprise, ranks in the top three for menu mentions, largely driven by premium brands like Godiva.

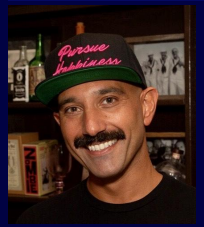
Another intriguing find is the **cold brew espresso martini**, where we see Jameson Whiskey's "cold brew" product make its mark.

Further down the list, **Grey Goose emerges with its nitro espresso martini variant**. Meanwhile, Stoli Vanilla maintains its status as the leading flavored vodka in this ever-evolving category.

This report is **just a snapshot** of the extensive data we have at our disposal, covering this and numerous other cocktail categories. The real power lies in how we can distill these insights **down to the account level,** equipping you with the tools to thrive in the competitive world of beverage alcohol supply.

As a data lover, I find immense joy in diving into these numbers and uncovering the stories they tell. This report is a testament to our commitment to empowering brands with the data-driven insights needed to succeed.

If you share this passion for data and are keen on exploring how it can drive winning strategies, I'm just a conversation away. Let's talk data, cocktails, and success with Overproof!

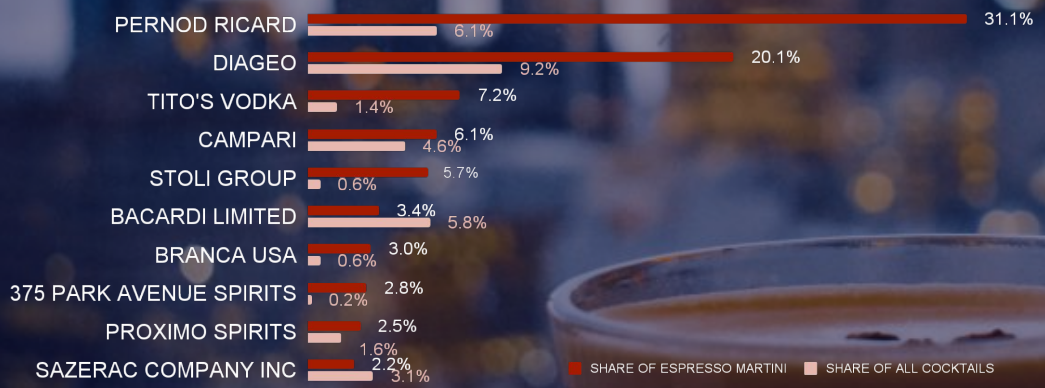


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TOP SUPPLIERS

TOP ESPRESSO MARTINI SUPPLIERS



TOP ESPRESSO MARTINI VODKA SUPPLIERS	
TITO'S VODKA	19.6%
DIAGEO	17.2%
PERNOD RICARD	12.0%
BACARDI LIMITED	10.4%
STOLI GROUP	6.8%
HEAVEN HILL	4.9%

TOP ESPRESSO MARTINI COFFEE LIQUEUR SUPPLIERS	
PERNOD RICARD	78.4%
DIAGEO	7.2%
BRANCA USA	4.3%
DISARONNO	3.3%
BACARDI LIMITED	1.9%
ST. GEORGE SPIRITS	1.8%

Pernod Ricard and **Diageo** lead the espresso martini market share, with 31.1% and 20.1%, respectively. **Pernod Ricard's** lead is driven by **Kahlúa,** while **Diageo's** market share is bolstered by a more diverse portfolio, with brands like **Baileys, Mr. Black** and **Ketel One** contributing to a balanced representation across different product categories used to make espresso martinis.

Tito's Vodka stands out as the top vodka supplier in espresso martinis at 19.6%, notable compared to its overall cocktail share of 7.2%.

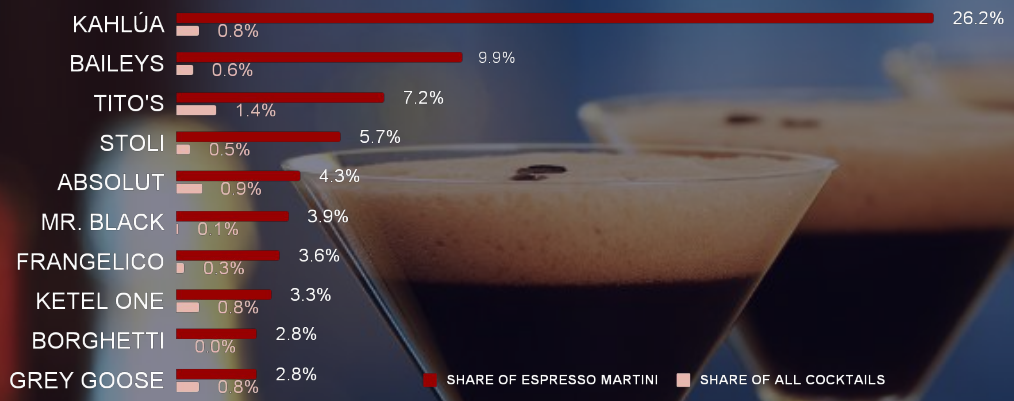
The close competition among top vodka suppliers like **Tito's Vodka, Diageo, Pernod Ricard** and **Bacardi Limited** indicates a highly competitive market, with no single vodka brand dominating.

In the coffee liqueur category, **Pernod Ricard** holds a commanding 78.4% share, showing a strong preference for their coffee liqueur products in espresso martinis.

PHOTO CREDIT: AGATHE

TOP BRANDS

TOP ESPRESSO MARTINI BRANDS



TOP ESPRESSO MARTINI VODKA BRANDS	
TITO'S	19.6%
ABSOLUT	12.0%
KETEL ONE	10.5%
GREY GOOSE	10.4%
STOLI	6.8%
SMIRNOFF	5.0%

TOP ESPRESSO MARTINI COFFEE LIQUEUR BRANDS	
KAHLÚA	78.3%
MR. BLACK	7.0%
BORGHETTI	4.3%
TIA MARIA	3.3%
PATRÓN	1.9%
ST. GEORGE SPIRITS	1.8%

Kahlúa leads the espresso martini market with a notable 26.2% share, significantly higher than its 0.8% in the overall cocktail market, demonstrating its strong association with this specific cocktail.

Top brands like **Mr. Black** and **Frangelico** have a marked presence in espresso martinis, despite smaller overall market shares, indicating their specialized appeal.

In terms of leading vodka brands, **Tito's** leads with 19.6%, followed by **Grey Goose, Stoli** and **Smirnoff,** reflecting diverse consumer preferences and opportunities for vodka brands to appeal to and capture more espresso martini market share.

Kahlúa also dominates the coffee liqueur segment with a 78.3% share, while brands like **Mr. Black** and **Borghetti**, though trailing, indicate growing market interest and potential.

PHOTO CREDIT: CANVA PRO

TOP FLAVORED VODKAS

OVERALL	
STOLI VANIL VODKA	34.9%
ABSOLUT VANILIA VODKA	17.9%
VAN GOGH ESPRESSO VODKA	8.6%
THREE OLIVES TRIPLE SHOT VODKA	8.2%
SMIRNOFF VANILLA VODKA	7.0%
VAN GOGH DOUBLE ESPRESSO VODKA	4.8%
THREE OLIVES VANILLA VODKA	3.5%
FLEISCHMANN'S VANILLA VODKA	1.6%
360 MADAGASCAR VANILLA VODKA	1.6%
SOBIESKI ESPRESSO VODKA	0.9%
VAN GOGH VANILLA VODKA	0.9%

NORTHEAST	
STOLI VANIL VODKA	40.2%
ABSOLUT VANILIA VODKA	12.9%
THREE OLIVES TRIPLE SHOT VODKA	9.3%
VAN GOGH ESPRESSO VODKA	8.7%
SMIRNOFF VANILLA VODKA	8.0%

CENTRAL	
STOLI VANIL VODKA	33.6%
ABSOLUT VANILIA VODKA	24.8%
THREE OLIVES TRIPLE SHOT VODKA	9.5%
VAN GOGH ESPRESSO VODKA	7.3%
SMIRNOFF VANILLA VODKA	5.8%

SOUTH	
STOLI VANIL VODKA	25.9%
ABSOLUT VANILIA VODKA	21.8%
VAN GOGH ESPRESSO VODKA	12.4%
SMIRNOFF VANILLA VODKA	6.8%
VAN GOGH DOUBLE ESPRESSO VODKA	5.5%

WEST	
STOLI VANIL VODKA	25.8%
ABSOLUT VANILIA VODKA	25.5%
THREE OLIVES TRIPLE SHOT VODKA	7.0%
BRECKENRIDGE ESPRESSO VODKA	4.8%
SMIRNOFF VANILLA VODKA & VAN GOGH DOUBLE ESPRESSO VODKA & VAN GOGH ESPRESSO VODKA	4.5%

The top flavored vodka choices in espresso martinis nationally, **Stoli Vanil** and **Absolut Vanilia**, dominate the market, complemented by the popularity of coffee-flavored vodkas like **Van Gogh Espresso** and **Three Olives Triple Shot.**

Regionally, variations emerge: In the Northeast, **Stoli Vanil's** lead is pronounced, suggesting a strong regional preference for this brand. The West and South show a more balanced distribution between **Stoli Vanil** and **Absolut Vanilia**.

Notably, the West's preference for **Breckenridge Espresso Vodka**, a Colorado-based brand, illustrates regional brand penetration and loyalty. The Central region distinctively leans more towards **Absolut Vanilia**, alongside a strong presence of coffee-flavored vodkas.

PHOTO CREDIT: ABBIE TURNER

TOP LIQUEUR CATEGORIES (EXCLUDING COFFEE LIQUEUR)

TOP ESPRESSO MARTINI LIQUEUR BRANDS	
BAILEYS	44.3%
FRANGELICO	16.3%
LICOR 43	7.8%
GODIVA	5.7%
AVERNA	5.5%
TIRAMISU	1.2%
GIFFARD	1.1%
GRAND MARNIER	1.0%
MR. BOSTON	0.9%



- CREAM LIQUEUR (45.9%)
- HAZELNUT LIQUEUR (16.5%)
- AMARO (11.0%)
- MULTIPLE HERBS LIQ. (8.3%)
- CHOCOLATE LIQUEUR (6.7%)
- OTHER LIQUEUR (1.8%)
- ORANGE LIQUEUR (1.8%)
- RASPBERRY LIQUEUR (1.6%)
- OTHER BOTANICAL LIQ. (1.4%)

Excluding coffee liqueur, the top liqueur brands in espresso martinis showcase a range of preferences. **Baileys** leads significantly with a 44.3% share, reflecting its widespread appeal in the cream liqueur category.

Frangelico, capturing 16.3%, shows a strong consumer inclination towards distinct hazelnut flavor.

Licor 43 and **Averna**, with respective shares of 7.8% and 5.5%, highlight a preference for complex, herbal flavors. **Godiva,** at 5.7%, indicates the popularity of chocolate-infused liqueurs.

The presence of other brands like **Tiramisu, Giffard** and **Grand Marnier**, though holding smaller shares, points to an interest in a variety of specialized and diverse flavors. This array of popular brands, beyond coffee liqueur, underscores the eclectic and varied tastes in the espresso martini market.

PHOTO CREDIT: CANVA PRO

TOP BRAND PAIRINGS

KAHLÚA	
BAILEYS	23.8%
STOLI	12.9%
TITO'S	10.7%
ABSOLUT	7.8%
FRANGELICO	7.3%
VAN GOGH	4.0%
KETEL ONE	3.7%
GREY GOOSE	2.9%
THREE OLIVES	2.6%
SMIRNOFF	2.4%

BAILEYS	
KAHLÚA	42.6%
STOLI	13.3%
FRANGELICO	8.9%
VAN GOGH	6.7%
ABSOLUT	4.6%
TITO'S	2.8%
THREE OLIVES	2.4%
SMIRNOFF	2.4%
GODIVA	2.0%
KETEL ONE	1.4%

GODIVA LIQUEUR	
KAHLÚA	31.1%
BAILEYS	19.6%
TITO'S	8.9%
STOLI	7.0%
ABSOLUT	6.3%
THREE OLIVES	5.2%
VAN GOGH	4.4%
FRANGELICO	3.0%
MR. BLACK	3.0%
GREY GOOSE	2.6%

MR. BLACK	
KETEL ONE	16.7%
TITO'S	12.3%
KAHLÚA	7.6%
LICOR 43	6.6%
GREY GOOSE	4.9%
ABSOLUT	3.5%
THREE OLIVES	3.2%
FRANGELICO	2.9%
BAILEYS	2.4%
HANSON OF SONOMA	2.4%

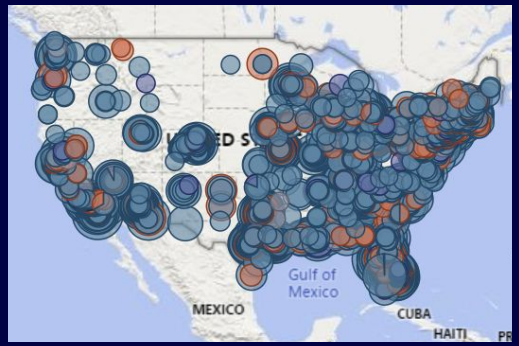
In espresso martini brand pairings, **Baileys** cream liqueur often follows **Kahlúa** in popularity, making it a natural choice for those looking to soften or add richness to their espresso martini.

Godiva Chocolate Liqueur often pairs with **Baileys** highlighting a preference for indulgent combinations. **Diageo's Mr. Black** and **Ketel One** are predominantly paired together. Notably, cream-based liqueurs are less commonly paired with it; **Baileys** accounts for only 2.4%, suggesting a lower preference for combining **Mr. Black** with creamy flavors and a favoring of botanical notes with distinct liqueurs like **Licor 43** and **Frangelico**.

TOP MARKETS & VENUE MAP

BY MENU MENTIONS	
TEXAS	15.1%
FLORIDA	10.7%
CALIFORNIA	8.2%
NEW YORK	5.4%
ILLINOIS	4.7%
MASSACHUSETTS	4.0%
NEW JERSEY	3.7%
ARIZONA	3.6%
OHIO	3.1%
TENNESSEE	2.9%
NORTH CAROLINA	2.6%
VIRGINIA	2.5%
GEORGIA	2.3%
MARYLAND	2.3%
COLORADO	2.3%

VENUE MAP OF ESPRESSO MARTINI MENU MENTIONS



Texas, Florida and California lead the U.S. in espresso martini menu mentions, indicating strong regional preferences for the cocktail, despite being warmer states compared to the next three: New York, Illinois and Massachusetts.



PHOTO CREDIT: CANVA PRO

TOP BRANDS BY REGION

TOP BRANDS - NORTHEAST	
KAHLÚA	27.6%
BAILEYS	11.5%
STOLI	7.9%
TITO'S	6.8%
ABSOLUT	3.8%
FRANGELICO	3.3%
VAN GOGH	3.2%
MR. BLACK	3.1%
KETEL ONE	2.9%
BORGHETTI	2.6%

TOP BRANDS - SOUTH	
KAHLÚA	25.9%
BAILEYS	9.7%
TITO'S	7.1%
FRANGELICO	5.9%
ABSOLUT	4.7%
STOLI	4.4%
BORGHETTI	3.9%
KETEL ONE	3.3%
GREY GOOSE	2.8%
VAN GOGH	2.7%

TOP BRANDS - CENTRAL	
KAHLÚA	25.3%
TITO'S	8.0%
BAILEYS	6.9%
MR. BLACK	5.2%
GREY GOOSE	5.1%
LICOR 43	5.0%
ABSOLUT	4.5%
STOLI	4.3%
KETEL ONE	3.8%
FRANGELICO	2.5%

TOP BRANDS - WEST	
KAHLÚA	24.3%
BAILEYS	9.4%
TITO'S	7.2%
MR. BLACK	6.1%
ABSOLUT	4.6%
KETEL ONE	3.7%
BORGHETTI	3.6%
FRANGELICO	3.4%
GREY GOOSE	3.1%
STOLI	3.1%

The espresso martini menu data reveals consistency in brand preferences: including **Kahlúa's** dominance in four U.S. regions, with **Baileys** and **Tito's** ranking in the top 3 in three regions and **Tito's** only trailing **Stoli** in the northeast.

Notable regional differences include **Mr. Black's** prominence in the Central and West, and varied rankings of other brands like **Frangelico** and **Grey Goose**. The lower rankings (positions 4 to 10) show greater variability across regions. This suggests a more fragmented market with no single brand dominating these spots, indicating opportunities for market penetration by lesser-known or emerging brands focusing on an espresso martini cocktail strategy.

PHOTO CREDIT: YESMORE CONTENT

TOP BRANDS BY COCKTAIL NAME

COLD BREW MARTINI	ESPRESSOTINI	CHOCOLATE ESPRESSO MARTINI
KAHLÚA	KAHLÚA	GODIVA
TITO'S	BAILEYS	BAILEYS & KAHLÚA
BAILEYS	STOLI	THREE OLIVES
JAMESON	MR. BLACK & SKYY	STOLI & VAN GOGH
FRANGELICO & MR. BLACK	TITO'S & VAN GOGH	ABSOLUT

The top brands in the top 3 espresso martini cocktail name variations show distinct preferences and consistencies. **Kahlúa** and **Baileys** are consistently popular across all variations, highlighting their versatility and strong market presence. The cold brew martini sees a unique combination of coffee flavors with whiskey, as seen with **Jameson,** alongside traditional coffee liqueurs like **Kahlúa** and nutty flavors like **Frangelico**. The chocolate espresso martini is led by **Godiva,** reflecting a preference for chocolate infusion.

These trends highlight specific brand affinities and flavor profiles across different espresso martini styles, indicating a diverse yet distinct market preference.



PHOTO CREDIT: DUSHAWN JOVIC

HOW DOES YOUR BRAND PERFORM ON THE MENU?

Overproof is the leading data services provider for alcohol brands of all sizes. Empower your business with Overproof's evidence-backed solutions.

SERVICES
SYNDICATED DATA LICENSING
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CUSTOM AI/SOFTWARE DEVELOPMENT
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